



Department of Administration
Purchasing Division
2019 Washington Street East
Post Office Box 50130
Charleston, WV 25305-0130

State of West Virginia Delivery Order

Order Date: 07-23-2025

CORRECT ORDER NUMBER MUST APPEAR
ON ALL PACKAGES, INVOICES, AND
SHIPPING PAPERS. QUESTIONS
CONCERNING THIS ORDER SHOULD BE
DIRECTED TO THE DEPARTMENT
CONTACT.

Order Number:	CDO 0511 2680 BMS2600000002 1	Change Order No:	Procurement Folder:	1743749
Document Name:	Home and Community-Based Service Quality Initiative Project		Reason for Modification:	
Document Description:	Home and Community-Based Service Quality Initiative Project			
Procurement Type:	Central Delivery Order			
Buyer Name:	Crystal G Hustead			
Telephone:	(304) 558-2402			
Email:	crystal.g.hustead@wv.gov			
Shipping Method:	Best Way		Master Agreement Number: CMA 0511 HHR2100000003 1	
Free on Board:	FOB Dest, Freight Prepaid			

VENDOR	DEPARTMENT CONTACT																				
Vendor Customer Code: 000000100150 BERRY DUNN MCNEIL & PARKER LLC 2211 CONGRESS ST PORTLAND ME 04102 US Vendor Contact Phone: 6813138905 Extension: Discount Details: <table><thead><tr><th></th><th>Discount Allowed</th><th>Discount Percentage</th><th>Discount Days</th></tr></thead><tbody><tr><td>#1</td><td>No</td><td>0.0000</td><td>0</td></tr><tr><td>#2</td><td>No</td><td></td><td></td></tr><tr><td>#3</td><td>No</td><td></td><td></td></tr><tr><td>#4</td><td>No</td><td></td><td></td></tr></tbody></table>		Discount Allowed	Discount Percentage	Discount Days	#1	No	0.0000	0	#2	No			#3	No			#4	No			Requestor Name: Kelly (Jimmy) Dowden Requestor Phone: (304) 356-4861 Requestor Email: jimmy.k.dowden@wv.gov 2026 FILE LOCATION
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

INVOICE TO	SHIP TO
PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US	PROCUREMENT OFFICER: 304-352-4286 HEALTH AND HUMAN RESOURCES BUREAU FOR MEDICAL SERVICES 350 CAPITOL ST, RM 251 CHARLESTON WV 25301-3709 US

Purchasing Division's File Copy

Total Order Amount: \$927,125.00

CH 8/11/25
PURCHASING DIVISION AUTHORIZATION
DATE: 8/11/2025
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 8-11-25
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Home and Community-Based Service Quality Initiative Project

Service Period: 08/14/2025-12/31/2025

Total: \$927,125.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$25,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-08-14	2025-12-31				

Commodity Line Description: Lead Project Manager: Optional Renewal Year Two**Extended Description:**

Lead Project Manager: Optional Renewal Year Two

Hourly Rate: \$215.00

120 Hours @ \$215 = \$25,800.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$810.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-08-14	2025-12-31				

Commodity Line Description: Engagement Manager: Optional Renewal Year Two**Extended Description:**

Engagement Manager: Optional Year Two

Hourly Rate: \$270.00

3 Hours @ \$270 = \$810.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$1,025.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-08-14	2025-12-31				

Commodity Line Description: Lead MMIS Project Manager: Optional Renewal Year Two**Extended Description:**

Lead MMIS Project Manager: Optional Renewal Year Two

Hourly Rate: \$205.00

5 Hours @ \$205 = \$1,025.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$803,890.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-08-14	2025-12-31				

Commodity Line Description: General Project Manager: Optional Renewal Year Two

Extended Description:
General Project Manager: Optional Renewal Year Two

Hourly Rate: \$190.00

4,231 Hours @ \$190 = \$803,890.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$95,600.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-08-14	2025-12-31				

Commodity Line Description: Project Management Support Staff: Optional Renewal Year Two

Extended Description:
Project Management Support Staff: Optional Renewal Year Two

Hourly Rate: \$80.00

1,195 Hours @ \$80 = \$95,600.00



July 17, 2025

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the Department of Human Services (DoHS), Bureau for Medical Services (BMS) by providing support for the Home and Community Based Services Quality Initiative Project under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 5 months. BerryDunn agrees to a SOW start date effective August 14, 2025.

Assuming a start date of August 14, 2025, the work would then conclude on December 31, 2025.

Please let me know if you have any questions or if you would like to discuss the content in this SOW. We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:

2DAAA4ADB3A477...
Peter Alfrey
Principal
Berry, Dunn, McNeil & Parker, LLC
207-541-2242

Ok




West Virginia Department of Human Services, Bureau for Medical Services

Home and Community-Based Services Quality Initiative Project

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement (CMA) HHR 21*03



Submitted by:

Berry, Dunn, McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
681-313-8905

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Peter Alfrey, PMP®, Principal
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Submitted On:

July 17, 2025



**Staffing Plan and Scope of Work (SOW) for the West Virginia Department of Human Services (DoHS),
Bureau for Medical Services (BMS) Home and Community-Based Services (HCBS)
Quality Initiative (QI) Project**

This scope of work (SOW) describes the tasks Berry, Dunn, McNeil & Parker, LLC (BerryDunn) will perform to assist the West Virginia (State, WV) Department of Human Services (DoHS), Bureau for Medical Services (BMS) by providing project management and subject matter expertise to support the State with the implementation of Ensuring Access to Medical Services final rule (Access Rule), finalizing the Quality Management Plan (QMP) for long-term services and supports (LTSS), and aligning home and community-based services (HCBS) to necessary programmatic and policy updates. The work completed under the HCBS Quality Initiative Project will be done so in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21*03 BMS Project Management Services contract between Berry, Dunn, McNeil & Parker, LLC and WV BMS.

1.0 Introduction

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Staffing Plan and SOW. BerryDunn considered the following information in preparing this SOW.

1.1 Key Information

The objective of this project is to support HCBS quality initiatives, 1915(c) waiver administration, and compliance with the Ensuring Access to Medical Services Final Rule (Access Rule). The HCBS Waiver Quality Initiative Project builds on prior American Rescue Plan (ARP) efforts to enhance HCBS services and comply with the Centers for Medicare & Medicaid Services (CMS) HCBS Quality Management System (QMS) long-term services and supports performance measure reporting. These efforts align with Medicaid Information Technology Architecture (MITA) principles, particularly improving data standardization, interoperability, and modular system integration to enhance reporting and program oversight.

The HCBS QI Project is supported by six goals which define how the plan for HCBS Quality Initiative will occur:

1. **Access Rule Provisions:** Conduct a thorough review of the current HCBS program structure against the Access Rule requirements, to pinpoint gaps and provide actionable recommendations for implementation.
2. **Waivers Cohesion Plan:** Collaborate with HCBS program managers to develop recommendations to unify and optimize waiver functions, ultimately enhancing efficiency, easing provider burden, and increasing participant satisfaction.
3. **Aged and Disabled Waiver (ADW) Eligibility Functional and Medical Assessment:** Analyze the assessment to explore the feasibility of a single assessment, administered by one staff member, rather than the administration of multiple assessments by multiple personnel. Validate the assessment to determine it is within range of functional assessment criteria.



4. **Intellectual and Developmental Disabilities Waiver (IDDW) Payment Redesign:** Support BMS with an IDDW redesign plan, including payment methodology redesign, and stakeholder engagement.
5. **HCBS Waiver Amendments:** Support the development of waiver amendments based on program changes, Access Rule requirements, and waiver program cohesion and efficiency strategies. Support BMS with waiver amendment submissions to CMS, completing public comment, updating provider manuals.
6. **HCBS Quality Initiative (QI):** Support the Take Me Home West Virginia (TMH-WV)-HCBS quality initiative by strengthening data collection and reporting for LTSS individuals, aligning the SFY 2026 priorities with CMS' mandatory LTSS Quality Measures while rolling these efforts into three focus areas: advancing the QMP; refining the LTSS Measures; and addressing broader HCBS measurement priorities, including assessment, planning, and participant experience.

The HCBS QI Project will also aid the State in meeting its identified MITA-specific goals, such as:

- Align resources with core business functions.
 - Strategically distribute and manage resources to support and optimize most essential objectives.
- Support MMIS Roadmap to support future business needs.
 - Help to ensure WV's MMIS is continuously developed and adapted to meet the evolving needs of Medicaid programs.
- Improve and expand performance management and measurement principles.
 - Enhance how goals are set, progress is tracked, performance is evaluated, and data are utilized to drive continuous improvement.
 - Build a robust system that helps to ensure accountability and fosters a culture of high performance.
- Maintain a team and process for accessing compliance with new laws and regulations and provides input on proposed laws and regulations.
- Maintain a team and process for implementation of changes necessary to comply with new laws and regulations.
 - Establish and maintain a team with expertise in relevant legislation and regulation implementation to provide ongoing support to implement compliance changes.
 - Develop a proactive approach to regulatory management by placing an emphasis on the importance of staying ahead of legal and regulatory changes.
 - Help to ensure timely and effective compliance with new laws and regulations and minimize legal and financial risks associated with non-compliance.



- Verify and monitor MMIS and Fiscal Agent operations to help ensure transactions are processed in accordance with all relevant federal laws and regulations.
 - Maintain integrity of financial transactions and help ensure adherence to legal requirements.
- Develop and execute a QMP.
 - Develop a plan that identifies opportunities for strengthening data collection, improving participant-reported outcomes, and helping to ensure BMS is well-prepared to meet CMS LTSS reporting requirements.
- Design and configure systems and processes to support the QMP.
 - Create an environment where quality is systematically monitored, measured, and improved by focusing on building the infrastructure necessary to implement and sustain a comprehensive QMP.
- Enhance ability to measure compliance with quality indicators.
 - Help improve BMS' capacity to accurately and effectively assess how well it adheres to established quality standards.
 - Strengthen the processes and tools used to track and evaluate performance against defined quality benchmarks.
- Establish access to data from sister-agencies and programs within DoHS.
 - Create seamless and efficient flow of information between related entities with an aim to remove data silos and foster collaboration through improved data sharing across agencies.
- Improve access to clinical and encounter data.
 - Enhance the availability, usability, and timeliness of healthcare-related information and empower stakeholders with the necessary data to make informed decisions and improve patient care.
- Enhance ability to measure quality of healthcare outcomes for members
 - Improve BMS' capacity to assess the impact of healthcare services on the health of its members to strengthen the processes and tools used to track and evaluate the effectiveness of care.
- Simplify and streamline determination to enhance access to care.
 - Simplify the process of determining eligibility for healthcare services more efficiently and less burdensome by removing obstacles that prevent individuals from receiving timely and appropriate care.
- Improve provider enrollment and administrative processes.



- Enhance the efficiency and effectiveness of systems and procedures related to bringing providers into a network and managing their ongoing administrative interactions with the aim to reduce administrative burdens and improve overall provider experience.
- Enhance cost avoidance capability by improving access to accurate other third-party payer information.
 - Reduce healthcare expenditures by helping ensure that claims are correctly billed to the primary responsible party and maximize the use of other insurance coverage.
- Establish integration with other entities to further reduce the potential for redundancy of service and payment.
 - Create interconnected systems and processes with external organizations to prevent duplicate services and payments, ultimately leading to cost savings and improved efficiency.
- MITA Business Areas: Care Management (CM), Eligibility and Enrollment (EE), Financial Management (FM).
 - Interoperability Condition

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- Commissioner Cynthia Beane and Deputy Commissioner Sarah Young will act as co-sponsors. The State leadership team will consist of Cynthia Parsons, MA, Director- Behavioral Health and Long-Term Care Services and Brian Holstein, LSW, Director- Take Me Home West Virginia.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Peter Alfrey as engagement manager, Ethan Wiley as lead project manager, Susan Chugha as portfolio manager, Sarah Renner as the program manager, and BreAnn Teague as project manager.
- This work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for 5 months.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State designated site and will be brought to the attention of the BMS project sponsor.
- Deliverables will be provided in an agreed-upon format.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories and leverage any needed tools and procedures when applicable.



1.3 Project Funding

The State intends to utilize the Medicaid Management Information System (MMIS) Implementation Advance Planning Document (IAPD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) has previously approved the MMIS IAPD-U on June 18, 2025, under project identifier WV-2025-01-08-MMIS-IAPDU-MITA-FFY2025-2027. The estimated cost of the services delivered under this SOW is \$927,125 (included in the approved advanced planning document (APD)). Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its MMIS IAPD to allocate additional funds for project management.



2.0 Project Scope and Staffing Plan

The table below describes the service approach, deliverables, and acceptance criteria for BerryDunn's work; identifies the BerryDunn team members responsible for this work; and lists the estimated hours for completion of each key task.

Table 1: Project Deliverable/Service Approach, Responsibility, and Hours Estimate

Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	<p>Engagement Oversight</p> <p><i>Service Approach</i></p> <p>BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables.</p> <p>BerryDunn's project leadership will meet with the BerryDunn project lead and other key team members on a regular basis to discuss project status and issues impacting timely completion of the project work, and oversee BerryDunn staff, services, and review of deliverables.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D01: Commissioner Briefing <p><i>Completion Criteria</i></p> <p>All parties will deem Engagement Oversight complete upon completion of project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.</p>	<p>Peter Alfrey</p> <p>Ethan Wiley</p> <p>Emily McCoy</p> <p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Dawn Webb</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p>	193
2.0	<p>Project Execution and Control</p> <p><i>Service Approach</i></p> <p>Upon project initiation, BerryDunn will host a project kickoff meeting. In support of Project Execution and Control, BerryDunn's leadership will meet with the project sponsor on a regular basis to discuss project status and issues affecting timely completion of the work, and will oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include:</p> <ul style="list-style-type: none"> Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings Preparing monthly project status updates, risks, issues, and briefings for the State leadership team 	<p>Peter Alfrey</p> <p>Ethan Wiley</p> <p>Emily McCoy</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Ashley Pannell</p> <p>Julie DuPuis</p> <p>Jonathan Watkins</p> <p>Patricia Nisbet</p> <p>Sandra Manzo</p> <p>Sophie Kaye</p> <p>AJ Mong</p> <p>Priya Periakaruppan</p>	900



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> Managing project logs (action item, decision, issue, and risk tracking) Storing project documentation repository in an agreed-upon SharePoint location Facilitating a Project Closeout Meeting prior to the end of the project. Reporting the project closeout activities in the final monthly status report (MSR). <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D02: Monthly Status Report D03: Project Schedule D04: Action item, risk, issue, and decision logs <p><i>Completion Criteria</i></p> <p>All parties will deem Project Execution and Control complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Zach Simon Mia Bittner Carole Ann Guay Jon Williams Jordan Ramsey Megan Hamilton KD Dobyne Grace Min Alycia Minshall Cate Poling Kourtney Kirk Shandia Benke Sam Kessler Hailey Holden Hope Connard Caitlin Cabral</p>	
3.0	<p>Implementation of Access Rule Provisions</p> <p><i>Service Approach</i></p> <p>Our team will review BMS' current HCBS program structure to identify gaps between current programmatic structure and functions necessary to implement all areas of the Access Rule. In our review of the HCBS structure, we will work to identify how BMS can implement the Access Rule requirements, what work is in progress and establish uniformity and efficiency where applicable.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D05: ADW Access Rule Provisions Gap Analysis D06: IDDW Access Rule Provisions Gap Analysis D07: TBIW Access Rule Provisions Gap Analysis <p><i>Completion Criteria</i></p> <p>All parties will deem Implementation of Access Rule Provisions complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p> <p><i>Artifact(s)</i></p> <p>A01: ADW Access Rule Provision Implementation Plan A02: IDDW Access Rule Provision Implementation Plan</p>	<p>Ethan Wiley Susan Chugha Sarah Renner BreAnn Teague Ashely Pannell Julie DuPuis Karri Henager Renee Gayhart Jonathan Watkins Robyn Hoffmann Kellee Nash Sandra Manzo AJ Mong Priya Periakaruppan</p>	930



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	A03: TBIW Access Rule Provision Implementation Plan		
4.0	<p>HCBS Waivers Cohesion Plan</p> <p><i>Service Approach</i></p> <p>Our team will partner with BMS waiver program managers to identify and implement improvements that streamline waiver operations, leading to greater efficiency, reduced provider burden, and higher participant satisfaction.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D08: Waivers Functions Crosswalk and Gap Analysis D09: BMS 1915(c) Waiver Development and Management Manual D10: Provider Manual Revisions <p><i>Completion Criteria</i></p> <p>All parties will deem HCBS Waivers Cohesion Plan complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Ashely Pannell</p> <p>Karri Henager</p> <p>Renee Gayhart</p> <p>Jonathan Watkins</p> <p>Angie Phifer</p> <p>Kellee Nash</p> <p>Patricia Nisbet</p> <p>Sandra Manzo</p> <p>AJ Mong</p>	600
5.0	<p>ADW Eligibility Functional and Medical Assessment</p> <p><i>Service Approach</i></p> <p>BerryDunn will review the care manager and nursing assessments to determine if one assessment may be administered and if one staff role, such as care manager, may administer the assessment.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D11: ADW Crosswalk of Assessments D12: ADW Validation of New Assessment <p><i>Completion Criteria</i></p> <p>All parties will deem ADW Eligibility Functional and Medical Assessment complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Julie DuPuis</p> <p>Renee Gayhart</p> <p>Jonathan Watkins</p> <p>Angie Phifer</p> <p>Kellee Nash</p> <p>Robyn Hoffmann</p> <p>Patricia Nisbet</p> <p>AJ Mong</p>	530
6.0	<p>IDDW Redesign</p> <p><i>Service Approach</i></p> <p>Support BMS with an IDDW redesign plan, including payment methodology redesign, and stakeholder engagement.</p> <p><i>Deliverable(s)</i></p>	<p>Ethan Wiley</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Ashley Pannell</p> <p>Karri Henager</p>	730



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<ul style="list-style-type: none"> D13: IDDW Redesign Analysis D14: IDDW Redesign Plan <p><i>Completion Criteria</i> All parties will deem IDDW Payment Redesign complete upon project completion and acceptance of the final monthly status report. All parties will deem IDDW Redesign complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p> <p><i>Artifact(s)</i> A04: IDDW Stakeholder Engagement Plan and Facilitation</p>	<p>Renee Gayhart Jonathan Watkins Kellee Nash Patricia Nisbet AJ Mong Mia Bittner</p>	
7.0	<p>Waiver Amendment Implementation and Monitoring</p> <p><i>Service Approach</i> Support the development of waiver amendments based on program changes, Access Rule requirements, and waiver program cohesion and efficiency strategies. Support BMS with waiver amendment submissions to CMS, completing public comment, updating provider manuals based on renewals/amendments, and CMS' request for additional information processes, and revising/updating waiver amendments.</p> <p>Develop monitoring strategies to help ensure waiver modifications are implemented in a timely and effective manner.</p> <p><i>Deliverable(s)</i></p> <ul style="list-style-type: none"> D15: Waiver Amendment Plan D16: ADW Waiver Amendment D17: IDDW Waiver Amendment D18: TBIW Waiver Amendment <p><i>Completion Criteria</i> All parties will deem Waiver Amendment Implementation and Monitoring complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p> <p><i>Artifact(s)</i> A05: Public Comment Process Support A06: CMS Review Support</p>	<p>Ethan Wiley Susan Chugha Sarah Renner BreAnn Teague Ashley Pannell Karri Henager Renee Gayhart Jonathan Watkins Angie Phifer Sandra Manzo Kellee Nash Patricia Nisbet AJ Mong Priya Periakaruppan</p>	640
8.0	<p>HCBS Quality Initiative</p>	<p>Ethan Wiley</p>	700



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>Service Approach</p> <p>Provide ongoing support to BMS for the design of its Quality Management Plan and ongoing efforts to meet CMS LTSS mandatory measures reporting requirements. Support sustainable process for conducting Consumer Assessment of Healthcare Providers and Systems Home and Community-Based (HCBS CAHPS®) surveys biennially while aligning with CMS's evolving expectations for quality measurement.</p> <p>Deliverable(s)</p> <ul style="list-style-type: none"> D19: Quality Management Plan <p>Completion Criteria</p> <p>All parties will deem HCBS Quality Initiative complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p> <p>Artifacts:</p> <p>A07: LTSS Aggregate Report</p> <p>A08: HCBS CAHPS® Reporting Plan</p>	<p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Ashley Pannell</p> <p>Julie DuPuis</p> <p>Karri Henager</p> <p>Robyn Hoffman</p> <p>Renee Gayhart</p> <p>Jonathan Watkins</p> <p>Kourtney Ester</p> <p>Dina Nash</p> <p>AJ Mong</p> <p>Jordan Ramsey</p>	
9.0	<p>APD Support</p> <p>Service Approach</p> <p>BerryDunn will develop and assist in facilitating the approval of APDs to help ensure that the project continues to maintain buy-in and financial backing from the relevant federal partners.</p> <p>Additionally, BerryDunn will prioritize several key MITA objectives to help ensure program quality, enhance outreach and communications, and improve health outcomes through increased use of home and community-based services and supports.</p> <p>Deliverable</p> <ul style="list-style-type: none"> D20: Implementation Advance Planning Document (IAPD) <p>Completion Criteria</p> <p>All parties will deem APD Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Peter Alfrey</p> <p>Ethan Wiley</p> <p>Emily McCoy</p> <p>Eduardo Daranyi</p> <p>Nicole Becnel</p> <p>Susan Chugha</p> <p>Sarah Renner</p> <p>BreAnn Teague</p> <p>Ashley Pannell</p> <p>Julie DuPuis</p> <p>Jonathan Watkins</p> <p>Kourtney Ester</p> <p>AJ Mong</p>	180
10.0	<p>Phase Three Project Planning</p> <p>BerryDunn will analyze remaining HCBS programmatic needs to meet Access Rule requirements across all WV HCBS with a focus on establishing a comprehensive</p>	<p>Ethan Wiley</p> <p>Dawn Webb</p> <p>Susan Chugha</p>	151



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<p>framework that ensures compliance and enhances service delivery. BerryDunn will use this data to collaborate with BMS and design a scope of work for necessary support. By conducting a project review, BerryDunn will evaluate performance to project objectives, document lessons learned and identify challenges to aid in the development of next steps for HCBS support.</p> <p><i>Completion Criteria</i></p> <p>All parties will deem Phase Three Project Planning complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.</p>	<p>Sarah Renner BreAnn Teague Carole Ann Guay Jon Williams Megan Hamilton Hailey Holden</p>	
Total Hours			5,554
Total Not-To-Exceed Cost Estimate			\$927,125



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 2 in CMA HHR 21*03.

The following rates were used to compute the costs in the table:

- Commodity Line 15: Engagement Manager (EM) (\$270/hour)
- Commodity Line 14: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 16: Lead Medicaid Management Information System (MMIS) Project Manager (LMPM) (\$205/hour)
- Commodity Line 19: Lead Child Welfare Project Manager (LCWPM) (\$205/hour)
- Commodity Line 17: General Project Manager (GPM) (\$190/hour)
- Commodity Line 18: Project Management Support Staff (SS) (\$80/hour)

Table 2: Project Resources – with Estimated Hours and Total Cost

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
15	EM	\$270	Peter Alfrey	3.00	\$810.00
14	LPM	\$215	Ethan Wiley	120.00	\$25,800.00
16	LMPM	\$205	Emily McCoy	5.00	\$1,025.00
17	GPM	\$190	Eduardo Daranyi	2.00	\$380.00
17	GPM	\$190	Nicole Becnel	2.00	\$380.00
17	GPM	\$190	Dawn Webb	5.00	\$950.00
17	GPM	\$190	Susan Chugha	60.00	\$11,400.00
17	GPM	\$190	Sarah Renner	570.00	\$108,300.00
17	GPM	\$190	BreAnn Teague	600.00	\$114,000.00
17	GPM	\$190	Ashley Pannell	75.00	\$14,250.00
17	GPM	\$190	Julie DuPuis	325.00	\$61,750.00
17	GPM	\$190	Karri Henager	360.00	\$68,400.00
17	GPM	\$190	Renee Gayhart	360.00	\$68,400.00
17	GPM	\$190	Jonathan Watkins	300.00	\$57,000.00
17	GPM	\$190	Angie Phifer	300.00	\$57,000.00
17	GPM	\$190	Kellee Nash	360.00	\$68,400.00
17	GPM	\$190	Kortney Ester	300.00	\$57,000.00
17	GPM	\$190	Robyn Hoffman	300.00	\$57,000.00
17	GPM	\$190	Patricia Nisbet	10.00	\$1,900.00
17	GPM	\$190	Dina Nash	2.00	\$380.00
17	GPM	\$190	Sandra Manzo	300.00	\$57,000.00



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
18	SS	\$80	AJ Mong	360.00	\$28,800.00
18	SS	\$80	Sophie Kaye	50.00	\$4,000.00
18	SS	\$80	Priya Periakaruppan	250.00	\$20,000.00
18	SS	\$80	Zach Simon	300.00	\$24,000.00
18	SS	\$80	Mia Bittner	150.00	\$12,000.00
18	SS	\$80	Carole Ann Guay	5.00	\$400.00
18	SS	\$80	Jon Williams	5.00	\$400.00
18	SS	\$80	Jordan Ramsey	5.00	\$400.00
18	SS	\$80	Megan Hamilton	5.00	\$400.00
18	SS	\$80	KD Dobyne	5.00	\$400.00
18	SS	\$80	Grace Min	5.00	\$400.00
18	SS	\$80	Alysha Minshall	5.00	\$400.00
18	SS	\$80	Cate Poling	5.00	\$400.00
18	SS	\$80	Kourtney Kirk	10.00	\$800.00
18	SS	\$80	Shandia Benke	10.00	\$800.00
18	SS	\$80	Hope Connard	5.00	\$400.00
18	SS	\$80	Sam Kessler	10.00	\$800.00
18	SS	\$80	Halley Holden	5.00	\$400.00
18	SS	\$80	Caitlin Cabral	5.00	\$400.00
Total				5,554.00	\$927,125.00



4.0 Project Hours and Costs Per Month

The table below displays an overview of the project hours and estimated costs per month over the lifetime of the project.

Table 3: Estimated Project Costs by Month

Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	1	25	1	844	239	1110	\$185,330.00
Month 2	0	25	1	846	239	1111	\$185,440.00
Month 3	1	25	1	846	239	1112	\$185,710.00
Month 4	0	25	1	846	239	1111	\$185,440.00
Month 5	1	20	1	849	239	1110	\$185,205.00
Total	3	120	5	4231	1195	5554	\$927,125.00



5.0 High-Level Timeline

The following figure illustrates the proposed high-level timeline for planning activities.

Figure 1: Proposed High-Level Timeline

Task	Month				
	1	2	3	4	5
1.0 Engagement Oversight					
2.0 Project Execution and Control					
3.0 Implementation of Access Rule Provisions					
4.0 HCBS Waivers Cohesion Plan					
5.0 Aged and Disabled Waiver (ADW) Eligibility Functional and Medical Assessment					
6.0 IDDW Redesign					
7.0 Waiver Amendment Implementation and Monitoring					
8.0 HCBS Quality Initiative					
9.0 APD Support					
10.0 Project Phase 3 Planning					



Berry, Dunn, McNeil & Parker, LLC Authorized Signature

As a principal of this firm in our Consulting Team, I have reviewed this SOW and am legally authorized to commit Berry, Dunn, McNeil & Parker, LLC to the work as described herein. The work and level of effort is a not-to-exceed cost. Work to be invoiced to DoHS will be for actual hours expended, which may or may not equal the projected level of effort but will not exceed the projected level of effort.

DocuSigned by:

Peter Alfrey
70A4444D1B3A477

7/17/2025

Signature

Date

Bureau for Medical Services Approval of Approach, Staffing, and Not-to-Exceed Cost

A handwritten signature in black ink, appearing to be 'Jm', written over a horizontal line.

Signature

7/21/25

Date



Appendix A: Resumes

Peter Alfrey, MBA, MA, PMP®, LSSGB, Prosci® CCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, Organizational
Management, Husson
University

MA, History, Providence
College

BA, Journalism and
Communication, Spanish
Minor, University of
Oregon

Certified Project
Management
Professional® (PMP®)

Lean Six Sigma Green
Belt (LSSGB)

Prosci® Certified Change
Practitioner

PROPOSED PROJECT ROLE

Engagement Manager

MEDICAID EXPERIENCE

11 years

Peter Alfrey is an experienced project manager and healthcare operations professional with an extensive record of leading successful projects, providing portfolio and program management oversight, and managing healthcare operations and process improvement initiatives. From his work establishing a data governance council at the Vermont Green Mountain Board in 2014 to leading various projects and serving as a General Project Manager (GPM) for the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS), Peter brings detailed knowledge about health plan operations, process improvement, procurements and vendor management, along with best practices that support Medicaid and health and human services (HHS) client initiatives. He has a proven record of leading and collaborating with large, cross-functional teams to support system implementations, data management initiatives, and policy initiatives.

KEY QUALIFICATIONS

- Certified Project Management Professional® with over 17 years of project management experience
- Over 17 years of healthcare operations experience; 10 years of Medicaid experience
- Over 9 years of government HHS consulting experience
- Experience leading Medicaid system implementations, data management initiatives, and program Medicaid enterprise systems implementations in states such as Washington, Maryland, Vermont, New Jersey, and West Virginia

PROJECT EXPERIENCE

BerryDunn (03/2014 to present)

Peter is a principal and project manager supporting WV DoHS and BMS, performing duties that include, but are not limited to coordinating communications across the BerryDunn portfolio management office, helping ensure resolution of project-related



issues, and disseminating necessary information to the project team(s) and escalating appropriately to the engagement's portfolio manager, and/or program managers.

– West Virginia DoHS, BMS, and West Virginia Children's Health Insurance Program (WVCHIP) BerryDunn Project Management Office (10/2014 to present)

Peter provides strategic direction for BerryDunn's West Virginia engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include, but are not limited to:

- *Programmatic Managed Care Support (06/2024 to present)*
- *Partnership Management Support Project (06/2024 to present)*
- *People's Access to Help (PATH) DDI Project Management (08/2018 to 11/2019; 06/2023 to present)*
- *Substance Use Disorder Waiver Initiative Project (07/2017 to 03/2019; 06/2023 to present)*
- *Medicaid Enterprise System Modernization Strategy and Procurement Phases I, II, and III (10/2020 to present)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (09/2020 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases I, II, III and IV (09/2019 to present)*
- *Mountain Health Trust MCO Procurement Assistance Project 06/2019 to 06/2021; 12/2023 to 06/2024)*
- *Incident and Case Management System Procurement Assistance (02/2023 to 06/2024)*
- *Public Health Emergency (PHE) Support Project (12/2021 to 06/2024)*
- *Data Improvement Project Phases I, II, III and IV (09/2019 to 06/2024)*
- *Coordinated Care Management Project Management and Procurement Assistance / Mountain Health Promise Implementation Project Management Support and Operational Readiness Review (02/2019 to 06/2020) and MHP Re-Procurement (10/2021 to 09/2022)*
- *Mental Health Parity Compliance Analysis (05/2020 to 09/2022)*
- *Contact Tracing (04/2020 to 09/2022)*
- *WVCHIP Out-of-Pocket Maximum Project (05/2021 to 06/2022)*
- *MCO Encounter Data Quality Phases I and II (06/2020 to 02/2022)*
- *WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 06/2021)*
- *WVCHIP Operational Readiness Review (09/2020 to 01/2021)*
- *Asset Verification System Project Management Services and Procurement Assistance (04/2017 to 02/2018)*
- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 to 12/2016)*

– Washington Health Care Authority (HCA)

Public Health Emergency Unwind Project (03/2023 to 12/2023)

Peter served as engagement manager for the project helping support HCA, Washington's single state Medicaid agency, with PHE unwind efforts by overseeing the BerryDunn project team's project deliverables and reporting; coordination of Washington inter-agency meetings and information sharing; and stakeholder management.



– New Jersey Division of Medical Assistance and Health Services (DMAHS)

MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 08/2017)

Peter supported DMAHS, New Jersey's single state Medicaid agency, with testing efforts for New Jersey MMIS implementation in areas such as system integration testing (SIT) test case and results review, SIT test case analysis, user acceptance testing (UAT) support, and UAT defect management. Such testing support leveraged and reused best practices and documentation from the West Virginia MMIS procurement in 2015.

– Vermont Green Mountain Care Board (GMCB)

Vermont Health Care Uniform Reporting and Evaluation System (VHCURES) Independent Review, Procurement Assistance, and Project Management (05/2014 to 09/2014)

Peter led the efforts to help the GMCB build a data governance council in less than four months, helping develop the data governance council charter and structure as well as policies and procedures, and facilitating the data governance council's first public-facing meetings. He also supported the review and refinement of the existing business case, oversight of business requirements development, and identification of optimal collaboration points between the selected implementation vendors.

– Maryland Health Benefit Exchange (HBE)

Independent Verification & Validation (IV&V) for Maryland's HBE Implementation (03/2014 to 04/2014)

As a business analyst, Peter worked with Maryland's Project Management Office and its strategic partners to coordinate projects. He monitored risks and issues across key assessment areas—such as project management; operations and maintenance; training; quality management and testing; requirements management; architecture; software development tools and release management; software product development, operations, and maintenance; and security.

Martin's Point Health Care (12/2008 to 03/2014)

As the operations manager, Peter provided performance monitoring, process improvement support, project management, data management, and operational efficiency and effectiveness support for Martin's Point's Medical Management group. He managed cross-functional teams to implement complex projects, managed vendor relationships and contract negotiations, and served as client contact for external care management vendors.

Health Dialog (01/2006 to 11/2008)

As implementation project manager, Peter oversaw operational planning, execution, and reporting of multi-faceted projects for new and existing clients (health plans, large employers, and government care management programs), including BlueCross BlueShield (various regions), Capital Health Plan, and the Centers for Medicare & Medicaid Services (CMS). He also managed cross-functional implementation teams, maintained communication with clients, set expectations regarding scope, and managed implementation schedules while managing multiple, concurrent implementations. He also served as project management office lead for company's smoking cessation nicotine replacement solution and initiative, overseeing product development work and collaboration with a third-party vendor.

Ernst & Young (12/2002 to 12/2005)

As the communications and pursuit strategist, Peter managed internal activity and coordination for strategic new business pursuits that offered tax and audit services to Ernst & Young's existing internal audit clients and managed the creative services team on production of all press, client, and internal materials.

Cisco Systems, Inc. (11/2000 to 04/2001)

Peter served as the public relations manager for the Customer Contact Business Unit



(CCBU)/Internet Communications Software Group (ICSG), during which time he managed CCBU on press and analyst activities, including product launches, customer and partner announcements, and other CCBU-related programs. He also managed a public relations agency in execution of press and analyst activity, creation of written materials, industry event coordination, and all CCBU public relations initiatives. He created product and business unit messaging and positioning, drove CCBU public relations strategy, and worked with Cisco marketing teams, CCBU/ICSG executives, and corporate public relations on all public relations initiatives.

Text 100 Corporation (01/1998 to 11/2000)

While working as an account manager, Peter helped to ensure the execution of approved public relations strategic plans and initiatives, as well as core public relations activities. He counseled clients on messaging and positioning, drove account strategy and tactics, including all press and analyst activity, creation of all client materials, industry event coordination, and all client global public relations initiatives, and co-developed all annual and quarterly strategic plans and initiatives.

Davé and Bairey Communications (03/1997 to 12/1998)

While working as an account executive/account manager, Peter oversaw the execution of public relations plan activities and initiatives for a technology client base of Netmosphere Inc., Intergraph Computer Systems, eCommerce, and Warp Drive Networks. He developed relationships with top-tier media and analysts through client product launches, customer and partner announcements, and other client initiatives.

Copithorne and Bellows Public Relations (05/1995 to 03/1997)

Peter worked as an account coordinator, where he supported day-to-day account administration, provision of information for the collation of reports for client base of Hewlett-Packard Company (corporate desktop and notebook PCs), and EIZO Nanao Technologies.

PUBLICATIONS AND PRESENTATIONS

- Facilitator, Session, *Organization Excellence: A Key Ingredient for a Successful Effort to Modernize the Medicaid Enterprise*, representatives from Iowa and West Virginia, New England States Consortium System Organization (NESCSO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024
- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCSO MESC in Denver, Colorado, featuring representatives from Hawaii, New Jersey, Oregon, and West Virginia (08/2023)
- Facilitator, Workshop: *Outcomes Based Certification*, MESC, Boston, Massachusetts, 08/2021
- The 2020 Final Rule—Understanding new flexibilities to control costs and deliver care, a BerryDunn blog, 11/2020
- Podcast, *Medicaid and Children's Insurance Program (CHIP) Managed Care Monitoring and Oversight Tools*, 11/2020
- Podcast, *Resumption of Normal Operations: PHE Considerations for States*, 09/2020
- COVID-19 and Opportunities to Reboot Managed Care, a BerryDunn blog, 09/2020
- The Case for Data Governance in the Modular Medicaid Enterprise, a BerryDunn blog, MESC, 09/2016
- Session abstract, *State Roundtable on Section 1115: Substance Use Disorder (SUD) Demonstrations; Updates from states who are implementing Section 1115 Waivers to combat the opioid crisis. Focus on opportunities and challenges in each state, opportunities for*



partnership and collaboration, leverage and reuse selected by NESCSO organizers for the MESC conference in Portland, Oregon, featuring representatives from West Virginia, Virginia, and Massachusetts, 09/2016

- *Innovation in a Digital Era: Using Data to Pivot to "the New"* presentation for MESC 2016, co-presented with a BerryDunn colleague and professionals from Accenture plc (Accenture), 09/2016.



EDUCATION AND CERTIFICATIONS

MPPM, Concentration on Policy Analysis, University of Southern Maine
Edmund S. Muskie School of Public Service

Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis

BA, Political Science and History, University of Maine at Farmington

Certified Project Management Professional® (PMP®)

Prosci® Certified Change Practitioner

Certified Lean Six Sigma Green Belt (LSSGB)

PROPOSED PROJECT ROLE

Lead Project Manager

MEDICAID EXPERIENCE

12 years

Ethan Wiley, MPPM, LSSGB, PMP®, Prosci® CCP

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

Ethan Wiley is a senior manager for BerryDunn's Consulting Services Team with innovative Medicaid project and program experience across the range of the Medicaid enterprise. His specialties include negotiating Medicaid policy on behalf of states with their federal partners, program development, and team leadership. A practiced project manager in both Medicaid IT and policy projects, Ethan has engaged in key leadership roles in projects designed to evaluate federal compliance, design innovative 1115 and 1915(c) waivers, and implement health IT systems. He has a proven record of successfully managing both short-term projects and complex, multiyear initiatives. Most recently, he has led the Medicaid Innovation Program as part of the West Virginia Enterprise Portfolio Management Office (EPMO) where he oversaw a team of project managers, collectively leading multiple concurrent Medicaid projects.

KEY QUALIFICATIONS

- 11 years' experience successfully assisting eight state Medicaid agencies with critical initiatives such as the federal Centers for Medicare & Medicaid Services (CMS) negotiations of 1115 waivers, 1915(c) HCBS waivers, and a multitude of State Plan Amendments (SPAs)
- Eight years' experience as a program and portfolio manager, at times overseeing over a dozen successful Medicaid Enterprise projects and initiatives concurrently
- Seven years as a Certified PMP® overseeing multiple multiyear Medicaid Enterprise projects to successful completion with project budgets ranging from \$15k to \$3.4mm

PROJECT EXPERIENCE

BerryDunn (07/2014 to present)

– West Virginia Bureau for Medical Services
Take Me Home (TMH) HCBS Quality Initiative (10/2024 to present)
As the portfolio manager, Ethan works alongside the project management team to help ensure the deliverables and time frames are being met. He provides overall reviews, program oversight, and project health monitoring.



Programmatic Managed Care Support (06/2024 to present)

Serving as portfolio manager, Ethan supports the program manager with project oversight, monitors decisions, action items, risks and issues. Additionally, he oversaw tasks for the implementation of Senate Bill 820 provisions, helps to facilitate advisory committee workgroups, and research on new regulations for Dual Special Needs Program as noted in the Medicare Part D Final Rule.

Certified Community Behavioral Health Clinics (CCBHC) SPA Phase III (11/2023 to present)

Ethan serves as the portfolio manager where he oversees the project team project management, budgeting, and monitoring decisions, action items, risks and issues. He has assisted the client and team with a variety of activities, such as SPA submission and approval, and policy and provider application development including oversight of the public comment process.

American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (05/2021 to present)

Serving as program manager and lead, Ethan oversees this project and provides subject matter expertise and support for the design, development, and implementation (DDI) of a Spending Plan and Narrative for the ARPA. The March 2021 ARPA allowed enhanced federal funding for state Medicaid spending on HCBS. The increased FMAP allowable by the ARPA allows a wide array of allowable opportunities for HCBS improvements. Providing stakeholder management and technical expertise to the State, Ethan led the writing of the initial spending plan which unlocked an estimated \$558 million in increased funds for West Virginia. The project continues in the implementation stage where Ethan leads workgroups and planning discussions, and monitors controls execution of the implementation schedule.

State Plan Review and Support (SPRS) Project (03/2020 to present)

In order to help the State achieve federal compliance, Ethan oversee a BerryDunn team of eight that compiled over 2,000 existing Medicaid State Plan pages and documents. These documents are inclusive of the State Plan sections, attachments, supplements, and amendments from both digital (state and federal) as well as physical repositories. Ethan also provided subject matter knowledge on advanced workflow designs to assist BMS in remediating compliance issues in the State Plan; developing a process flow for State Plan development, approval, and maintenance; and training state stakeholders on the new process flow.

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (06/2019 to present)

Ethan oversees a team of nine that assists the Department of Human Services (DoHS) in meeting compliance with the 88 requirements of the MITA 3.0 SS-A as prescribed by CMS. The objective of this project is to assist the DoHS with MITA life cycle maintenance activities, including preparation of the MITA 3.0, SS-A Annual Update, enterprise-wide MITA support for ongoing system and business process improvement projects, and training efforts to support activities related to the annual update. BerryDunn's assistance with over a dozen Advance Planning Document (APD) submissions has provided millions of dollars in value to the State.

Technical Assistance and Program Support Project (TAPS) (11/2018 to present)

Ethan oversees this project and provides project management, subject matter expertise, and support for the DDI of multiple Medicaid business initiatives and activities that BMS may undertake—such as Third-Party Liability (TPL) procurement support, interim support for Payment Error Rate Measurement (PERM) audits, and mental health parity analysis. Ethan and his team provide critical project support such as program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development. To date, this team has helped BMS achieve its objectives on projects such as the development of



Section 1135 Disaster SPAs, managed care organization (MCO) readiness reviews, and Minimum Acceptable Risk Controls for Exchanges (MARS-E) Security and Privacy Assessments.

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (09/2018 to present)

As program manager, Ethan planned and executed the design, successful negotiation, and implementation of a CSED waiver program. The CSED waiver provides services that are additions to Medicaid State Plan coverage for those enrolled in the CSED waiver program. The CSED waiver permits West Virginia to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In addition, it is anticipated that this waiver will reduce the number of children housed both in state and out-of-state in psychiatric residential treatment facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs. Ethan continues to support the state with ongoing research, facilitation and implementation tasks in support of the CSED Waiver Program.

EPMO (07/2018 to present)

As program manager of the Medicaid Innovations Program for the West Virginia BMS EPMO, Ethan leads a team of three project managers executing six Medicaid policy and program development projects. In this role, he is responsible for aligning project outcomes with the organization's overarching goals and master strategy for its Medicaid and human services enterprise.

Substance Use Disorder (SUD) Waiver Initiative Project (02/2016 to present)

To support the success of phases 3 and 4 of this important project, Ethan oversees the project manager and deputy project leads. Ethan and the project team are working to help ensure a quality program design that will meet the needs of West Virginia and those receiving vital support from this program by completing four quarterly reports to CMS, annual reports, and retrospective reviews of metrics for the state. In addition to overseeing ongoing implementation of managed care services, reporting requirements, and data analysis to support decision-making, Ethan oversees network adequacy assessments and other efforts to help ensure quality program design.

As the data management lead for phase 2 of the project, Ethan designed tools to assist in performance management and measurement, including executive dashboards and quality metrics. In addition, Ethan led reporting efforts and designed processes to conduct actuarial analysis of required budget neutrality components of West Virginia's program.

Working as the lead policy analyst and subject matter expert for phase 1 of the SUD project, Ethan assisted in the development and successful negotiation of a Section 1115 Demonstration Project to undertake SUD delivery system transformation efforts in West Virginia. Through this Section 1115 waiver, West Virginia has the opportunity to test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

ARPA Section 9813: Mobile Crisis Grant Project (07/2021 to 12/2022)

Serving as program manager, Ethan oversaw this project and provided subject matter expertise and support for the DDI of an SPA to add a Mobile Crisis Program to the West Virginia Medicaid Program. As part of this, Ethan participated in writing and planning assistance for the ARPA State Option to Provide Qualifying Community-Based Mobile Crisis Intervention Services. In organizing the response, writing the application, and assisting BMS with communications to CMS, our team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services.

TPL Options Analysis and Procurement Assistance Project (07/2018 to 12/2018)

As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. This included leading the project team through the investigation of both



the solution and financing alternatives for the State. This research helped West Virginia save money in recoupments and system costs as well as conduct its Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)

As project manager, Ethan planned and led the execution of a large-scale ACA compliance effort across West Virginia's Medicaid Enterprise. He provided stakeholders with detailed policy analysis and research deliverables during the project, and oversaw the design and inauguration of seven subprojects created under GAPMS.

Adult Quality Measures Grant Project (06/2016 to 12/2016; 06/2017 to 12/2017)

As project manager, Ethan oversaw a team that collected and reported on the Medicaid Adult Core Set Measures to help BMS successfully transition from a grant-funded Quality Unit to a state-supported Quality Unit. As a result of this transition, the State can now report on the 33 measures of the Adult Core Set across six domains.

ICD-10 Transition Planning, Implementation, and Policy Remediation (07/2014 to 02/2016)

As policy analyst and project coordinator, Ethan analyzed and remediated 78 distinct policies and overhauled the Provider Manual and Medicaid policy for the agency. He oversaw testing design, system integration testing, and user acceptance testing, along with client acceptance. In addition, he designed, researched, and constructed ICD-10 training modules for BMS staff; designed and built training segments for Medicaid providers and assisted with outreach and engagement; and performed analysis of Medicaid claim data processed through the MMIS to determine financial health and parity in claim operations.

Utilization Management and Prior Authorization Services Request for Proposal (RFP) Development Project (09/2015 to 12/2015)

As business analyst, Ethan organized and completed the final development of a state Medicaid agency project to develop a major RFP to select a utilization management vendor. The project resulted in the successful award of the contract to Kepro.

– Minnesota Department of Human Services

Research Studies for Contingency Management (CM) Services (04/2024 to present)

Ethan is the engagement manager on this project, which is helping Minnesota in a two-phase research project to understand the feasibility, potential design, and federal authorities needed to cover CM services within the State's Medical Assistance program. The resulting product will position the State to move forward with informed policy proposals including a potential Medicaid 1115 waiver. Ethan brings his experience with 1115 waivers provider oversight and serve as the primary point of contact with the DHS project manager.

1115 Waiver for Justice-Involved Individuals (02/2024 to present)

Ethan is the engagement manager on this project, which is helping Minnesota support incarcerated individuals through the transition to the community by leveraging options under a potential Section 1115 waiver. Ethan serves as the primary point of contact with the DHS project manager.

Program Analysis of Implementation of a PACE Program (09/2023 to 06/2024)

Ethan served as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversaw the development of project deliverables, and directed project work for a team of five. In addition, Ethan served as primary point of contact with DHS and provided responsibility for quality of all final project deliverables.



– **New England States Consortium Systems Organization (NESCO) Training & Leadership Development Rhode Island Office of Health and Human Services (OHHS) and Maine Office of MaineCare Services (OMS)**

Training and Leadership Development (03/2024 to present)

Serving as the engagement manager, Ethan oversees a team focused on training and development services for managers in OHHS's Medicaid agency as well as OMS' Senior Leadership team. The overarching project approach centered on adopting and fortifying a matrix-style team to empower team members to enhance collaboration, boost operational efficiency, and drive sustained improvements in project performance.

– **Delaware Department of Health and Social Services (DHSS), Division of Medicaid and Medical Assistance (DMMA)**

APD Consulting Services (05/2021 to present)

As engagement manager, Ethan leads a team focused on helping Delaware continue to transform their Medicaid Enterprise Systems through the design and development of innovative APDs. As part of this, he oversees analysts, financial modeling, cost allocation, and project management tasks in support of a portfolio of over a dozen APDs annually.

– **Iowa Department of Human Services (DHS)**

HOME Gap Analysis Project (05/2024 to 08/2024)

Serving as a subject matter expert, Ethan assisted Iowa DHS in a community-based services redesign project intended to significantly change the current LTSS landscape. The HOME Gap Analysis Project aims to improve Medicaid mental health and disability services as well as the existing HCBS structure.

– **Puerto Rico Medicaid Program (PRMP)**

SPAs and Compliance (12/2020 to 10/2021)

In order to support PRMP, Ethan served as a subject matter expert for BerryDunn's state plan work. In this role, Ethan researched and analyzed the Medicaid State Plan, drafted amendments, and reviewed state plan materials. Ethan's work included analyzing state plan provisions related to Hospital-Based Presumptive Eligibility, Modified Adjusted Gross Income, and other major eligibility provisions of the State Plan.

– **Nebraska Department of Motor Vehicles**

Consulting Services to Assist in the Modernization of a Vehicle and Title Registration System (11/2015 to 02/2017)

As a business analyst, Ethan facilitated stakeholder outreach and engagement, conducted a current state assessment and gap analysis, led requirements definition and planning sessions, and designed, wrote, and revised an RFP for a new Vehicle Title and Registration System.

– **Michigan Department of Education**

Early Childhood Data Governance Structure (03/2016 to 06/2016)

As a business analyst for the Department's data governance project, Ethan developed and drafted initial versions of key deliverables including the data governance manual and data governance policy. He also mapped and developed workflows to outline the progression and flow of data throughout the Department, and outlined critical data questions and paths through which these could be resolved.

– **West Virginia Bureau for Children and Families**

Project Management for Enterprise Content Management (ECM) Project (08/2015 to 02/2016)

Ethan served as project manager on a quality assurance project to oversee the implementation of an ECM solution. He participated in joint application design sessions, coordinated state MMIS and eligibility and enrollment vendors, served as a liaison with four state agencies, and helped



facilitate a successful implementation.

– Colorado Department of Human Services (DHS)

Child Care Tracking System (CHATS) Needs Assessment and RFP Development (07/2014 to 10/2014)

Ethan supported BerryDunn's team in conducting a needs assessment and options analysis for a new child care tracking system for the Colorado Department of Human Services. As part of this project, he researched and analyzed state policy and vendor solutions and supported analysis of future system costs and impacts.

University of Southern Maine, Edmund S. Muskie School of Public Service (09/2013 to 05/2014)

As a graduate assistant, Ethan made use of SPSS and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis, and performed literature reviews and analysis.

Maine Mental Health Partners – CareFirst Program (06/2013 to 09/2013)

As an intern, Ethan launched a program to map 59 different service line workflows using Microsoft Visio, adapted those workflows into an electronic health interface to serve a network of providers, and plotted services from five different agencies for adaptation into a digital interface.

The Cutler Institute for Health and Social Policy (11/2012 to 01/2013)

Ethan served as a research assistant for the Institute, primarily helping to determine the breadth and effectiveness of Medicaid waivers, studying expansion programs and SPAs, performing literature reviews, and assisting with general research.



Emily E. McCoy, RN, BSN, PMP®

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC



Emily McCoy is an experienced project manager and registered nurse with deep expertise in healthcare consulting, including long-term care (LTC) and Medicaid/Medicaid Management Information Systems (MMIS). Her clinical experience includes direct care for individuals requiring skilled and LTC services, inpatient behavioral health services, and neurological care. Emily also has over 25 years of combined program management, project management, and leadership experience for both private and public sectors, including hospitals and state health and human services (HHS) agencies, of which over 13 years was spent working in Medicaid and MMIS as an employee of the West Virginia Department of Human Services (DoHS).

EDUCATION AND CERTIFICATIONS

BS, Nursing, Marshall University

Registered Nurse

Certified Project Management Professional® (PMP®)

Executive Coaching Certification

PROPOSED PROJECT ROLE

Lead MMIS Project Manager

MEDICAID EXPERIENCE

22 years

KEY QUALIFICATIONS

- More than 13 years supporting and leading Medicaid projects within the WV MMIS, with the last two and a half years as the WV Director of MMIS Operations
- More than four years supporting and leading Medicaid policy for LTC, Pre-Admission Screening and Resident Review (PASRR), hospice, and home health programs as an employee of the West Virginia Bureau for Medical Services (BMS)
- Over two years of experience leading the Transformed Medicaid Statistical Information System (T-MSIS) efforts as the WV state representative, working in collaboration with the Centers for Medicare & Medicaid Services (CMS), various technical assistance groups (TAG), and the MMIS vendor
- Design, development, and implementation (DDI) experience with four large-scale MMIS implementations, in various roles, such as LTC subject matter expert (SME), User Acceptance Testing (UAT) lead, and project manager (WV and New Jersey)
- Nearly three years of project management experience with a large-scale integrated eligibility system in WV, known as People's Access to Help (PATH)
- Over 20 years of experience interacting and collaborating with federal agencies, such as CMS
- Experience leading enterprise-wide portfolio management



- Over 15 years of experience with Minimum Data Set (MDS) coordination, including the use of MDS assessments and Resource Utilization Groups (RUGs) in Medicaid rate setting and claims processing.
- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the Private Sector Technology Group (PSTG)

PROJECT EXPERIENCE

BerryDunn (07/2016 to present)

Emily serves as a senior manager in BerryDunn's Medicaid Practice Group, bringing her years of experience to state Medicaid agency clients, particularly in the MMIS area. Throughout her role, Emily has provided support to BMS, WV's single state Medicaid agency.

– West Virginia Department of Health Facilities (DHF)

Contract Labor Management Services (CLMS) Request for Proposal (RFP) Development (07/2024 to present)

– West Virginia Department of Human Services (DoHS)

Portfolio Manager and Deputy Engagement Lead – WV Engagement: Portfolio Management Office (11/2023 to present)

Emily provides strategic direction for BerryDunn's WV engagement team and for specific DoHS/BMS/WVCHIP projects. Portfolios, programs, and projects include:

- *Organizational Development Phase II (07/2024 to present)*
- *IT Control Environment Review (07/2024 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases IV and V (11/2023 to present)*
- *System Development Lifecycle (SDLC) Coordination Project Phase I (06/2024 to present)*
- *Medicaid and WVCHIP Enterprise System (MCES) Procurement Assistance Project Phase II (06/2024 to present)*
- *Medicaid Information Technology Architecture (MITA) SS-A Maintenance and Annual Update Assistance Project (06/2024 to present)*
- *Advance Planning Document (APD) Assistance Phase II (06/2024 to present)*
- *Partnership Management Support Project Phase II (06/2024 to present)*
- *Payment Error Rate Measurement (PERM) Project Reporting Year (RY) 2026 (06/2024 to present)*
- *Technical and Program Support Project (TAPS) Phases V and VI (11/2023 to present)*
- *PATH Project Management Phase III (06/2024 to present)*
- *Child Welfare Initiatives Project Management Services Phase V (06/2024 to present)*
- *State Plan Review and Support Project Phase II (06/2024 to present)*
- *ARPA Section 9817: Home and Community Services (HCBS) Implementation Project Phase II (06/2024 to present)*
- *Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Phase III (06/2024 to present)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase V (06/2024 to present)*



- *1115 Demonstration Behavioral Health Project (06/2024 to present)*
- *Programmatic Managed Care Support (06/2024 to present)*
- *Justice-Involved Program Support Phase I (06/2024 to present)*
- *Mental Health Parity (MHP) and Behavioral Health Support (BHS) Project Phase III (06/2024 to present)*
- *Women, Infants, and Children Nutrition Program (WIC) Product Management Office (PMO) Phase III (11/2023 to present)*

Eligibility and Enrollment Implementation Assistance (01/2018 to 12/2022)

Emily was the deputy project manager within the State PMO, leading and providing oversight to various teams within the project, including requirements and design, deliverables, testing, organizational change management (OCM), and certification and compliance. Emily was able to combine her experience and knowledge of State policy and system implementations with this unique opportunity to integrate three separate systems to improve service delivery to State citizens.

Public Health Emergency (PHE) Support Project (10/2021 to 07/2022)

Emily served as a SME for the PHE "Unwinding" project. Emily's State government employment and eligibility experience allowed her the opportunity to work with the State to create a strategic plan to help with the unwinding efforts and get the policies and eligibility processes back to a pre-COVID state once CMS determined that these PHE flexibilities will end.

Portfolio Coordination and Management (PCM) (11/2020 to 10/2021)

Emily served as the project manager for the PCM project, leading a team providing project management and support services to assist with the continued establishment of PCM processes and templates to help DoHS align and manage its projects across the enterprise. Emily's State government employment experience, coupled with her knowledge of project and portfolio management, provided a valuable perspective and ability to help the State obtain its desired outcomes.

Enterprise Program Management Office (EPMO) Project (11/2019 to 10/2020)

Emily served as the project manager for the EPMO project, leading and providing oversight to a team of individuals assisting the State in the establishment of its own PMO. This project focused on leveraging and developing tools, templates, processes, and plans for the State to utilize as they begin to establish the PMO and focus on gaining adoption within the organization. Beginning in March 2020, the EPMO project began identifying projects across WV DoHS that were impacted by the COVID-19 outbreak and started utilizing some of the project artifacts to navigate through project and program management during a PHE. This work included building upon existing vendor relationships with Optum and DXC to apply system modifications to accommodate necessary PHE actions.

– New Jersey Department of Human Services (DHS)

MMIS Modernization (07/2022 to 12/2023)

Emily served as the engagement manager for the PMO in collaboration with the Implementation Team Office (ITO). The MMIS Modernization was the opportunity for DHS, NJ's single state Medicaid agency, to update their monolithic legacy MMIS with a modular approach within the CMS guidelines. Emily led a team of experts in areas of project management, documentation support, deliverable review, certification support, testing support, APD support, MITA support, and change control.

– New Jersey Division of Medical Assistance and Health Services (DMAHS)



MMIS Implementation and Certification Leverage and Reuse Project (04/2017 to 01/2018)

Emily led the BerryDunn Medicaid testing team, in collaboration with the New Jersey ITO, for the Replacement MMIS (R-MMIS). She applied her WV MMIS testing experience to the implementation of the New Jersey R-MMIS.

– Henrico County, VA

Henrico Area Mental Health and Development Services (HAMHDS) Electronic Health Record (EHR) System Consulting (08/2016 to 04/2017)

Emily was a key resource on BerryDunn's team to provide Henrico with planning and procurement support for its EHR system, which incorporates behavioral and mental health, and substance abuse services. The work included requirements development, RFP development, and system selection.

WV Department of Health and Human Services (DHHR) [DoHS], Office of Management Information Services (OMIS) (11/2013 to 06/2016)

Emily served as the Director of the MMIS for WV with overall duties involving the oversight and management of the MMIS and the contracted Fiscal Agent. In this role, she was responsible for managing several projects that would be integrated into the MMIS. Specific duties as the Director of MMIS included:

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement
- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.O, ICD-10, MITA, and Transformed Medicaid Statistical Information System (TMSIS)
- Participating in CMS Pilot Certification gate level reviews with CMS representatives, including presenting system evidence to meet MITA 3.0 requirements
- Participating in the development and review of the MMIS RFP
- Participating in the development and updates of various APDs, as well as seeing these documents through to approved status with CMS
- Oversight and management of the Adult Medicaid Quality Grant
- Management of and participation in an MMIS implementation from RFP development through implementation, as well as post-implementation monitoring and defect resolution

WV Bureau for Medical Services (BMS) (01/2003 to 10/2013)

During her 10 years with BMS, WV's single state Medicaid agency, Emily held multiple positions, as described below.

– MMIS (01/2007 to 10/2013)

Emily served as the manager of operations with the MMIS with overall duties involving multiple areas of the system, including claims processing, member, and provider. She also acted as a SME in various areas of Medicaid systems, including LTC and hospice services.

– Office of Behavioral and Alternative Health Care (01/2005 to 12/2006)

Emily served as program manager of the State Medicaid LTC Program with overall duties involving the development, implementation, and supervision of the following programs: nursing facilities, hospice, hospice in nursing facilities, home health, PASRR Level II), and Nurse Aide Training and Competency Evaluation (NATCEP). Specific duties involved with the above-mentioned programs included interpreting regulatory policy for reimbursement, monitoring provider compliance with Medicaid policies for reimbursement, and providing formal and informal education to providers



regarding State Medicaid policies and reimbursement.

– **Office of Behavioral and Alternative Health Care (01/2003 to 12/2004)**

Emily served as a health and human resource specialist in the State Medicaid LTC Program with overall duties involving the supervision and oversight of claims processing for nursing facility reimbursement. Her duties included providing direct communication with the nursing facility provider network regarding reimbursement issues related to the MDS, billing, and medical eligibility.

Charleston Area Medical Center (07/1996 to 12/2002)

– **Transitional Care Unit (05/1999 to 12/2002)**

Clinical Management Coordinator. Emily served in a hospital-based skilled nursing unit with overall duties involving the management of nursing and ancillary staff, as well as assisting in program administration to maintain compliance with federal LTC regulations.

MDS Coordinator. Emily served in a hospital-based skilled nursing unit with overall duties involving the coordination of the federally mandated Resident Assessment Instrument (RAI) process.

Clinical Nurse II. Emily served on a 19-bed skilled nursing unit with overall duties involving the advocacy of residents while providing direct resident care. The focus was to provide quality, holistic skilled care to residents while complying with federal LTC certification requirements.

– **Neuroscience Unit (01/1998 to 05/1999)**

As a Clinical Nurse II, Emily served on a neuroscience unit with overall duties involving the advocacy of patients while providing direct patient care to individuals with neurological conditions. Specific duties included:

- Performing various nursing duties including, but not limited to, preventing and/or managing altered skin integrity with patients experiencing compromised mobility as well as providing tracheostomy, gastric tube, central line, and ventilator care
- Performing duties of temporary charge nurse, including the supervision of staff providing direct patient care and monitoring staffing patterns based on the Medicus system recommendations
- Serving as a representative on the Standards and Practice Council and Procedures sub-committee
- Providing formal and informal education as the unit Continuous Analgesia Device (CAD) Pump instructor and RN preceptor
- Serving as the study coordinator for Nursing Process Quality Improvement with an additional focus placed on the study of pain management in neurological patients

– **Behavioral Health Unit (07/1996 to 01/1998)**

Emily began her nursing career in the Behavioral Health Unit. Overall duties involved the advocacy of patients while providing direct patient care to individuals with mental illness.



Eduardo "Ed" Daranyi, M.Ed., PMP®

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

M.Ed., Education,
Lesley College

BS, Physics,
Mathematics,
Business
Administration,
Hillsdale College

Certified Project
Management
Professional®
(PMP®)

PROPOSED PROJECT ROLE

General Project
Manager

MEDICAID EXPERIENCE

24 years

Ed Daranyi is a principal and leads BerryDunn's Medicaid Practice Group (MPG) Consulting Team. He has provided executive leadership for Medicaid agencies across the country for over 20 years. Ed offers expertise in managing large-scale technology initiatives, quality assurance, strategic planning, business process improvement, procurement, vendor negotiations, and engagement oversight. He brings successful teams together with experience managing large-scale technology initiatives and policy implementations, utilizing project management best practices on all of his engagements, helping to ensure clients benefit from the breadth of deep expertise BerryDunn has to provide.

KEY QUALIFICATIONS

- Senior project management professional, providing principal oversight in over 100 Medicaid projects, leading BerryDunn's MPG with a management team of 34 and over 134 full-time consultants
- 25 years of project manager experience, including 17 years as a Certified PMP®
- Nearly 20 years of health and human services (HHS) and Medicaid consulting experience on small and large projects, some impacting up to 60% of a state's population
- Over 10 years' experience working as a consultant, engagement manager and project manager for West Virginia Medicaid-related engagements/projects
- Six years working for a Medicaid solution vendor in pharmacy benefits management, preferred drug list management, prior authorization systems, drug rebate negotiations, long term care plan development, and medical claims management capacity

PROJECT EXPERIENCE

BerryDunn (09/2005 to present)

Principal – MPG Lead (2014 to present)

As the leader of BerryDunn's MPG, Ed works with seven other principals to oversee all Medicaid projects, including managing risks, staffing/hiring, workload balance, strategy, pricing, contract negotiation, staff development, and business development. Ed's leadership has led to the growth of the Medicaid practice from two consultants in 2005 to over 135 team members in 2024.



His role as the MPG lead involves oversight for the preparation and implementation of an annual business plan, hiring of new resources, coordination of those resources across a national practice, development of staff, and client engagement support. He helps ensure that all projects are successful and client-focused, and that project resources are allocated to the appropriate interests of the client.

Under his guidance, the practice responds to emerging trends and helps Medicaid agencies respond to policy changes such as the American Recovery and Reinvestment Act (ARRA), the Affordable Care Act (ACA), Substance Use Disorder (SUD) waivers, and Public Health emergencies, as well as state policies.

Ed leads various initiatives internal to BerryDunn, including founding the Learning & Development (L&D) Department and serving as its chairperson. He led the search for the Director and worked with her to establish the program and reinforce good staff development, which ultimately benefits BerryDunn's clients. With the L&D Director and the L&D committee, they developed behavioral competencies which are used as a firm-wide guide for performance feedback and individual development planning.

Ed has developed deep relationships with the Center for Medicare & Medicaid Services (CMS). He serves with other MPG leaders as a trusted partner to CMS, providing quarterly reporting on system modernization efforts, ongoing projects, and any changes to certifications. He has overseen several pilot programs with CMS related to certification of states' systems.

– **West Virginia Department of Human Services (DoHS)**

Engagement Manager (2012 to 2021), Contributing Principal (2021 to present)

In his role as engagement manager, Ed provided oversight of BerryDunn's contract with the Bureau for Medical Services (BMS) to provide project management services for multiple projects, including the eligibility and enrollment system modernization, Molina Health PAS Medicaid Management Information Services (MMIS) implementation; Medicaid DW/DSS implementation; SUD 1115 Waiver development and implementation; ACA planning, analysis, and advisory services; procurement projects; ICD-10 implementation; Adult Quality Measures; CMS advance planning development (APD); CHIP claims system planning, implementation, and stabilization; access to care planning and monitoring; provider re-enrollment; state self-assessments (SS-As); and other related initiatives.

Since Ed joined the WV project on a full-time basis in 2012, he has held many roles including engagement manager, lead project manager and general project manager. In 2012, he took responsibility for stabilizing and growing the local Charleston office to now employ over 25 local staff. Ed has overseen over 100 projects for WV, several of which are described below. He now contributes to WV as a contributing principal, assisting in oversight of the many ongoing projects in that engagement.

SUD Waiver Initiative Project (02/2016 to present)

As engagement manager, Ed and the BerryDunn team of specialists developed and successfully negotiated a Section 1115 Waiver Demonstration Project to undertake SUD delivery system transformation efforts in WV. The SUD waiver strengthened the State's SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and the introduction of new programs to improve the quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV has the opportunity to test innovative policy and delivery approaches to reform systems of care for



individuals with SUD.

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to present)

Ed has been the engagement manager overseeing several of the State's MITA SS-As (2.0 and 3.0) and roadmap over the past eight years. Ed helped the State develop their Medicaid modernization strategy and determine the path of their future system direction and investments. He worked to understand their priorities and help ensure prioritization and resources were aligned. The team is currently creating a roadmap and schedule to help the State assess areas for improvement and change specific to departmental and bureau(s) structure, operational improvements, talent development, and training. Organization development for the project will take the findings of the MITA SSA and focus on DoHS goals and objectives for its MMIS, the technical architecture assessment of the maturity levels of the State's Medicaid modules, and business area assessments of the State's Medicaid system modules. These activities clarify BMS' short-term and long-term strategic goals and help BMS request enhanced federal funding to achieve those goals.

Data Visioning and Warehouse Development and Procurement Assistance Project (2012 to present)

The State has engaged in two major data warehouse procurements and implementations. Ed has formed teams to assist with data visioning activities, facilitate the integration of data sources with the Data Warehouse/Decision Support System (DW/DSS), develop two Requests for Proposals (RFP), and provide procurement support for a new DW/DSS. The team identified, consolidated, and subsequently retired duplicative DoHS databases and systems. In the current procurement effort, the team developed a charter and mission with the State, collaborating with stakeholders, developing standardized project artifacts, and developing an overlap map. After completing this Enterprise Data Integration and Consolidation Initiative, the team is now focused on assisting DoHS in the development of a Medicaid Enterprise DW RFP, as well as the subsequent evaluation and award of a solution to support the data warehousing, analytics, and reporting needs of DoHS.

WVCHIP Operational Readiness Review (ORR) (2019 to 2022)

Ed was the engagement manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide more seamless care between the two programs and offer greater efficiency and opportunities for innovation. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each of the MCOs and will prepare an ongoing performance monitoring transition plan and facilitate a virtual MCO systems review to assist WVCHIP in assessing MCO readiness.

WVCHIP MCO Transition Planning Project Phases I and II (Q3/2019 to 2022)

Ed provided engagement management oversight to help the State transition members from an FFS model to managed care. BerryDunn provides project management and support services; systems transition and readiness planning; facilitation of MCO, MMIS, and Enrollment Broker file testing; facilitation of weekly Out-of-Pocket (OOP) Maximum workgroup discussions with the fiscal agent, MCOs, WVCHIP, and other key stakeholders; and development of the WVCHIP managed care contract. BerryDunn supports technical implementation activities for WVCHIP in advance of the January 1, 2021, go-live date.

People's Access to Help (PATH) DDI Project Management (10/2017 to 2021)

Ed, alongside other principals engaged in work for the State, provided strategic direction and



oversight to the project team implementing the largest information technology transformation project that WV has ever undertaken, the Medicaid enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's human services programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Ed provided executive leadership working with the internal team, the State, and all vendors, helping ensure that all project deliverables were met and risks and issues were appropriately escalated and addressed.

Quality Assurance (QA) Oversight of MMIS and Pharmacy POS Implementation (10/2005 to 03/2008)

Ed provided quality assurance services for WV's MMIS implementation. In addition, Ed worked with the State to oversee several new initiatives that needed to be implemented while the new MMIS was becoming operational, including Medicare Part D and the HIPAA National Provider Identifier (NPI). Ed also focused on establishing and assisting in the management of change management processes, and participated in the certification process and report process development. The project was delivered on time, with no change request, and on budget.

Additionally, Ed has overseen the following projects as the WV Engagement Manager under the current contract and past contracts:

- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *SUD Waiver Initiative Project (03/2019 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *MCO Transition Phase II (03/2020 to 02/2021)*
- *WVCHIP MCO ORR Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
- *Mountain Health Promise (MHP) Implementation Project Management Support (03/2020 to 06/2020)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase II (10/2019 to 05/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
- *Electronic Visit Verification (EVV) Solution Implementation Project (06/2018 to 12/2019)*
- *Medicaid Enterprise Integrated Eligibility (EIE) Solution (10/2017 to 09/2019)*
- *Data Visioning and Warehouse Development and Procurement Assistance Project (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning Project (01/2019 to 07/2019)*



- *Provider Enrollment Application (PEA) Project (2012 to 2015; 03/2017 to 02/2018; 05/2018 to 05/2019)*
- *WVCHIP Data Warehouse / Decision Support System (DW/DSS) Historical Data Testing and Implementation (2012 to 2015; 10/2017 to 04/2019)*
- *Third Party Liability Options Analysis and Procurement Assistance Project (08/2018 to 11/2018)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical and Information Enterprise Project Management Services (TEPMS) Project (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Asset Verification System (AVS) Project Management Services and Procurement Assistance (04/2017 to 01/2018)*
- *WV/New Jersey MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual Update Project (09/2016 to 09/2017)*
- *Updates to WV Health IT (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *Safe at Home APD Update (08/2015 to 11/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
- *Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *ePrescribing Helpdesk and Support (2012)*

– **Ohio Department of Medicaid (ODM)**

Ohio Medicaid Enterprise System (OMES) Independent Validation & Verification (IV&V) Services (12/2016 to 06/2018)

BerryDunn provided IV&V support for ODM in implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise System project. As project principal, Ed was responsible for the forming of the project team and initiating the project. Ed met with the Ohio sponsor monthly to review the project status and review identified risks, issues, and recommendations to mitigate those risks and issues. He oversaw the BerryDunn team helping ODM ensure a modular approach and



implementation that will work for Ohioans and support ODM's modular certification process, including applying to Outcomes-Based Certification (OBC) approach. Ed monitored risks and mitigated exposure to the client, project, and firm. He managed the project and teamwork and facilitated appropriate stakeholder discussions, implementing smart practices. Ed helped ensure that all reporting was submitted accurately and timely to CMS. Ed transitioned from this project in 2018 to allow a new principal to establish and grow the relationship with the client.

– **Maine Department of Health and Human Services (DHHS)**

IV&V, QA, and Technical Assistance (TA) Services (04/2008 to 06/2012)

Working with DHHS, Maine's single state Medicaid agency, BerryDunn provided IV&V, QA, and TA services for the Molina MMIS and Fiscal Agent Solution (MMIS/FAS) development, implementation, and certification project. In addition, BerryDunn provided project management for the CMS certification of Maine's MMIS. As BerryDunn's project manager, Ed served as the primary liaison with DHHS, providing and managing a project management structure, developing and maintaining project management tools, managing the development of all deliverables, leading and overseeing the work of our team, evaluating project risks and issues, recommending strategies to address risks and issues, and communicating project status to DHHS.

Ed served as project manager for a point-in-time readiness assessment for several Pharmacy system initiatives for Maine DHHS, including a HIPAA 5010 transaction set readiness assessment and a pharmacy-related provider portal.

– **North Carolina Office of the State Auditor**

Independent Audit of the State IT Services EPMO (04/2007 to 06/2007)

Ed was the lead analyst for the North Carolina Office of the State Auditor in charge of conducting an independent evaluation of IT projects managed by the North Carolina Office of IT Services' EPMO. The objective of our evaluation was to determine whether the EPMO's policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of the Medicaid North Carolina Families Accessing Services through Technologies, a program designed to improve the way North Carolina DHHS and county departments of social services do business. The Auditor's Office utilized the evaluation report to adjust their teams and processes, developing a plan based on the outcomes of our reporting.

– **Martin's Point Health Care**

HIPAA Compliance Planning and Implementation (2005 to 2007)

Ed led a project management effort for Martin's Point Project Management for HIPAA Compliance initiative. He performed an organizational assessment and worked with executive leadership to develop a governance model, which then in turn directed the development of policies and procedures aimed at keeping the organization in compliance with the HIPAA Rule. Ed facilitated meetings with departments across the organization to create the policies and procedures, presented them to the HIPAA oversight board for approval, and then assisted with the training and implementation of the new procedures.

– **Goold Health Systems (GHS) (now known as Change Healthcare) (1999 to 2005)**

GHS is a leading provider of services to Medicaid agencies across the nation. Ed served as strategic project manager, technical writer, office manager, and training coordinator, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. As a result of the growth experienced while working as a strategic project manager, and in his office



manager role, Ed oversaw a move of over 200 employees from one office into a larger office complex. His training role included developing trainings for systems such as prior authorization processes and customer service and human resources related trainings for the pharmacies affiliated with GHS.

– Iowa Department of Human Services (DHS)

Pharmacy Benefit Management Implementation Project Manager (06/2004 to 08/2005)

Ed served as technical project manager for the implementation of the Iowa Preferred Drug List/Prior Authorization project, working with DHS, Iowa's single state Medicaid agency. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

From December 2004 to August 2005, Ed served as strategic project manager for Iowa's MMIS Pharmacy POS implementation. In this role, Ed managed implementation activities; prepared project status reports; developed work plans; and conducted research and analysis of programs, projects, and operational procedures.

– Maine DHHS

Implementation Project Manager (05/2001 to 01/2002)

While employed by GHS, Ed served as technical project coordinator for Maine's MMIS Pharmacy Preferred Drug List and Supplemental Rebate implementation, working with DHHS, Maine's single state Medicaid agency. In this role, Ed coordinated implementation activities; prepared reports for senior management; developed and monitored work plans; and performed research, analysis, and evaluation of programs, projects, and operational procedures.

Electronic Data Systems (1985 to 1988)

Ed served as systems engineer and systems manager, with responsibility for maintaining the operating system for a cluster of mainframe computers, troubleshooting hardware and software problems, and overseeing security and access to software on the mainframe computers controlling a General Motors full-size pickup truck assembly plant. As a part of this work, he was on a team that implemented a new manufacturing and assembly system for the truck assembly plant.

PUBLICATIONS AND PRESENTATIONS

- *Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014
- *Project Management/Testing*, Presentation for NESCSO workshop (2017)
- Moderator, MESC Conference sessions (2015-2019)
- *People and processes: Planning health and human services IT systems modernization to improve outcomes*, 11/23/2020 Blog

Published Insights on www.berrydunn.com include but are not limited to: *NAMD 2020 reflections: Together towards the future* and *MESC 2020, 2021, 2022, and 2023 reflections*



Nicole Becnel, PMP®, ECCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Speech and Hearing
Science, University of
South Florida

Certified Project
Management
Professional® (PMP®)

Executive Coaching
Certification®

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

23.5 years

Nicole Becnel has steered a career track for over 22 years leading to her current role as Principal at BerryDunn. Throughout her career, she has consistently demonstrated a deep grasp of processes, policies, analysis, and industry knowledge, earning a brand as an influential leader whose distinction interlaces a broader view of business needs to connect the dots between people, data, technology, and business strategy. This unique strength has enabled a different and fresh perspective in building and leading a Medicaid practice—reaching beyond the traditional role to help clients deliver transformations in their health and human services (HHS) programs. Nicole delivers results with a passion for building and motivating top-performing teams. The combination of Nicole's experience, drive, business savvy, and emotional intelligence has influenced her transformational leadership style. She has shaped a credible executive presence and is credited with playing an instrumental role in BerryDunn's evolution to its now prominent standing as a national leader in the HHS industry. Nicole's talents are exemplified through the partnership with WV Medicaid leadership she championed to initiate a multi-state collaborative where states can share information and brainstorm solutions; Nicole leads the WV project team with this initiative, and since its inception, WV has increased membership to 14 state partners that participate monthly.

KEY QUALIFICATIONS

- 22 years' HHS portfolio, program, and project management experience for single state Medicaid and other HHS agencies
- Large-scale IT and Medicaid Enterprise technical implementation and certification experience
- Currently leading the West Virginia project management (PM) team to support the State with the implementation of a fully integrated eligibility and enrollment solution—one of the first in the nation
- Proven project management track record of over 100 short and long-term projects delivered on time and within budget
- Led the project team that supported the State to secure over \$750M federal dollars for West Virginia's transformation initiatives for their state programs.
- Private Sector Technology Group (PSTG) Past Vice-Chair



- Led the WV PM team, who became one of the first in the nation to help the State successfully implement a Medicaid Management Information System (MMIS) solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers

PROJECT EXPERIENCE

BerryDunn (06/2010 to present)

Nicole works with BerryDunn's Medicaid Practice Group. Nicole has been expertly providing valuable project oversight and coordination while helping to establish and maintain engaging and productive client and vendor relationships for WV projects and initiatives for over a decade. Project highlights include:

- **West Virginia Department of Human Services (DoHS) Engagement Manager (2012 to present)**
- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
- *Substance Use Disorder (SUD) Waiver Initiative Project Phases III and IV (03/2019 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *Managed Care Organization (MCO) Transition Planning Project Phase II (03/2020 to 02/2021)*
- *MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
- *Mountain Health Promise (MHP) Implementation Project Management Support (Coordinated Care Management) (03/2020 to 06/2020)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase II (10/2019 to 05/2020)*
- *Coordinated Care Management Project Management and Procurement Assistance Project (02/2019 to 01/2020)*
- *Electronic Visit Verification (WVV) Solution Implementation Project (06/2018 to 12/2019)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning (01/2019 to 07/2019)*
- *Provider Enrollment Application (PEA) Year 2 (05/2018 to 05/2019)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*
- *MITA State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical Information and Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*



- *Provider Re-enrollment Application Project (03/2017 to 02/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual (IMM) Update Project (09/2016 to 09/2017)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Updates to Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) APD Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 12/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *Provider Enrollment Application (PEA) Project (2012 to 2015)*
- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*

Additional project details are provided below:

APD Assistance (07/2020 to present)

Nicole is the lead project manager overseeing the development and approval of APDs to help the State obtain federal funding for Medicaid Enterprise System (MES) modernization initiatives such as the Medicaid performance management and quality assurance, third-party liability (TPL) planning, adding CHIP data to the Medicaid DW, PERM, and the PATH implementation. Nicole's guidance within the APD process has helped WV secure and maintain millions of dollars in federal funding.

MCO Encounter Data Quality (EDQ) Project (07/2020 to present)

Nicole is the lead project manager for the EDQ Assistance Project to support initiatives to optimize MCO encounter data processes for BMS's risk-based managed care programs. Nicole leads the project team that is assisting the State with the retirement of a historical file submission process between the MCOs and the DW/DSS vendor and implementation of a fully compliant 837 encounter data process with the State's fiscal agent MMIS vendor. BerryDunn provides ongoing project management support; diagnoses and assesses necessary modifications to the MMIS as it relates to encounter data; supports the development, deployment, and implementation of applicable MMIS edits and enhancements to support compliance encounter data processes; and supports, monitors, and troubleshoots MCO testing and deployment of 837 files.

PATH DDI Project Management (10/2015 to present)

Nicole is the lead project manager for WV's largest information technology transformation project, the Medicaid Enterprise IES, known as PATH. PATH supports the eligibility, enrollment, and administration of the DoHS's programs, including Medicaid, CHIP, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. Nicole provides executive leadership working with the internal team, the State, and all vendors. She reviews, coordinates, and oversees statements of work (SOWs), deliverables, and risk and issue management.



EVV Solution Implementation Project (03/2018 to 06/2023)

Nicole led the project team implementing the overall EVV solution. Her work included strategic planning, organizational change management, requirement development, RFP draft narratives and supporting documentation efforts, certification planning and assistance, APD development and updates, evaluation and scoring support/facilitation, vendor onboarding, vendor deliverable review, and User Acceptance Testing (UAT) planning and support.

Provider Management Support (07/2019 to 01/2021)

Nicole served as the Lead Project Manager assisting WV with its leverage and reuse initiatives demonstrating the Leverage Condition established by Centers for Medicare & Medicaid Services (CMS) in the MITA Seven Standards and Conditions. The team also supported WV Medicaid leadership to execute a multi-state collaborative where states can collaborate, share information, and brainstorm solutions. Nicole led the project team that has supported WV with this initiative. Since its inception, WV has increased membership to 12 state partners that participate monthly.

WVCHIP Operational Readiness Review (ORR) (12/2019 to 10/2020)

Nicole was the lead project manager overseeing the State's transition of the WVCHIP program from fee-for-service (FFS) to managed care to provide seamless care between the two programs and offer greater efficiency and innovation opportunities. The team performed desktop audits of policies and procedures and on-site systems demonstrations of three MCOs selected to provide services to WVCHIP members. The team developed a framework and approach to performing the review; developed a comprehensive readiness assessment tool; facilitated ORR entrance conferences with the MCOs; and performed an evaluation of more than 1,000 MCO policies and procedures to complete the desk-level assessment for the WVCHIP transition to managed care. The team developed unique and tailored findings reports for each MCO and prepared an ongoing performance monitoring transition plan and facilitate a virtual MCO systems review to assist WVCHIP in assessing MCO readiness.

COVID-19 Contact Tracing and Testing Initiative (04/2020 to 09/2020)

Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.

MHT MCO Procurement Assistance Project Phases I II (07/2019 to 09/2020)

Nicole was the lead project manager overseeing BerryDunn's procurement assistance and project management support for managed care and readiness review services for the MHT program, the State's risk-based managed care program. The team assisted in population expansion under the current comprehensive MCO contract to add CHIP to the program. BerryDunn assisted the State with developing an RFP to procure vendors to administer Medicaid and CHIP services on behalf of the State through the MHT. The competitive re-procurement of the MHT program was valued at over \$5 billion and promoted increased quality of care and health outcomes as well as data quality and efficiency for the State's managed care populations.

MHP Implementation Project Management Support (03/2020 to 06/2020)



Nicole was the lead project manager overseeing the team, assisting the State to help ensure a successful implementation and smooth operational transition of the MHP program. The program was administered by a specialized MCO serving children in the child welfare populations, including foster care and adoption assistance, as well as those enrolled in the CSED 1915(c) waiver.

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (08/2015 to 01/2020)

Nicole was the lead project manager for BMS's MITA SS-A efforts, including the annual maintenance of SS-A activities and Data Management Strategy (DMS). She led the organization development planning to support WV's MITA maturity and modernization efforts. The team created a road map and schedule to help the State assess areas for improvement and change specific to departmental and Bureau structure, operational improvements, talent development, and training. Organization development for the project took the MITA SS-A findings and focused on the DoHS goals and objectives for its MMIS, the technical architecture assessment of the State's Medicaid modules' maturity levels, and business area assessments of the State's Medicaid system modules. These activities clarified BMS's short-term and long-term strategic goals and helped BMS request enhanced federal funding to achieve those goals.

SUD Waiver Initiative Project (07/2016 to 06/2017)

Nicole was the lead MMIS project manager overseeing the SUD waiver initiative "Creating a Continuum of Care for Medicaid Enrollees with Substance Use Disorders" Section 1115 waiver demonstration. The waiver allows the State to strengthen its SUD delivery system to improve the care and health outcomes for State beneficiaries with SUD through expanded SUD service coverage and new programs to improve quality of care. The team provides annual and quarterly reporting to CMS and financial reporting requirements for budget-neutrality, future technology procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

Project Management of MMIS Procurement, DDI, and Certification (12/2012 to 09/2013)

Nicole served as a project manager for the DDI of the Molina HealthPAS MMIS. Her work on the project included oversight of contract start-up activities and system design sessions.

5010 Refresh Project (10/2011 to 08/2013)

Nicole served as project manager for the successful implementation of the 5010/D.O standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of Health Insurance Portability and Accountability Act (HIPAA) Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.O. This work included project management of deliverable review, subject matter expert (SME) advisory services, UAT planning assistance, operational readiness assessment assistance, and post implementation project management and monitoring.

Provider Enrollment (PEA) Project (07/2011 to 12/2012)

Nicole supported the Bureau with her project, program and portfolio management, and subject matter expertise as it implemented healthcare reform. This work included implementation of provider enrollment screening requirements for various provider classifications to reduce potential fraud and abuse. Nicole also assisted with provider outreach activities, including presentations and training at Provider Workshops held throughout the State.

Data Warehouse / Decision Support System (DW/DSS) Project Management (06/2010 to 06/2011)

Nicole served as the project manager to assist the State with the development of procurement documentation for the DW/DSS re-procurement. In this role, Nicole was responsible for managing the project team, serving as liaison with the Bureau, reviewing project deliverables, and providing



subject matter knowledge and support.

– New Jersey Division of Medical Assistance and Health Services (DMAHS)

MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 01/2018)

As engagement manager working with DMAHS, New Jersey's single state Medicaid agency, Nicole oversaw the BerryDunn team working in collaboration with the New Jersey Implementation Team Organization (ITO) for the Replacement MMIS (R-MMIS). In her role, she was responsible for the oversight of the leverage and reuse, testing, and certification project activities.

Molina (formerly Unisys MMIS Operations) (09/2001 to 06/2010)

– Project Manager for MIHMS Provider Enrollment

Nicole served as project manager and SME for the Maine Department of Health and Human Services (DHHS), Maine's single state Medicaid agency, provider re-enrollment and maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.

– WV MMIS

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all budget, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the NPI initiative in an accelerated time frame, successfully provided on-site support to BMS during the CMS certification evaluation, facilitated best practice cross communication, and met customer expectations by monitoring, evaluating, and assigning corrective actions.

– Contract Configuration and Reports Lead for WV MMIS

Nicole developed, implemented, and documented processes and standards to help ensure successful completion of reports. Additionally, she analyzed business processes to transition the configuration to meet the current application. Working with the client, Nicole identified required changes and helped to ensure issues were identified, tracked, reported and resolved in a timely manner. She was also responsible for creating a MITA Report Card and Trending Analysis Report tracking deliverables and report progress.

– Project Management Support

Nicole served in a project management support services role for State Medicaid initiatives, including the Kentucky MMIS DDI project. Her work involved schedule management, action item management, training support, provider development, and UAT planning. She also helped ensure the appropriate project organization processes were closely followed.

PRESENTATIONS

- "Modularity GPS: Defining the Road map and Understanding the Landscape," Presentation for MESC 2016, Co-presented with Lisa Alger (CSG Government Solutions) and Andrea Danes (CSG Government Solutions), 08/16/2016
- "Managing in a Modular MMIS Implementation," Presentation for MESC 2014, 08/21/2014



EDUCATION AND CERTIFICATIONS

BS, Healthcare Leadership, Wheeling Jesuit University

AAS, Office Administration, West Virginia University at Parkersburg

Certified Project Management Professional® (PMP®)

Certified Professional Coder (CPC), American Academy of Professional Coders

Certified Outpatient Coder (COC), American Academy of Professional Coders

Prosci® Certified Change Practitioner

Lean Six Sigma Green Belt Certification (LSSGB)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

21 years

Dawn Webb, PMP®, CPC, COC, Prosci® CCP, LSSGB

MANAGER

Berry, Dunn, McNeil & Parker, LLC

Dawn Webb is a manager in BerryDunn's Medicaid Practice Group (MPG), providing leadership and project management to West Virginia's Medicaid Information Management System (MMIS) and policy unit projects. She has 30 years of experience in medical claims processing and revenue cycle management, including nine years of experience in MMIS, state Medicaid programs and policies, and requests for federal funding, such as the development of Advance Planning Documents (APDs). Dawn's 15 years of project management experience, coupled with her certifications as a Certified Professional Coder, a Certified Outpatient Coder, and a Prosci® Certified Change Practitioner, provides a unique perspective to clients across the Medicaid enterprise.

KEY QUALIFICATIONS

- 30 years of experience in Current Procedural Terminology (CPT) coding, Current Dental Terminology (CDT), Healthcare Common Procedure Coding System (HCPCS) coding, Internal Classification of Diseases Ninth Revision (ICD-9) coding, ICD Tenth Revision (ICD-10), Diagnosis Related Grouping (DRG) calculations, National Correct Coding Initiative (NCCI) editing, and Electronic Data Interchange (EDI) transactions
- 30 years of experience applying medical and dental coding reimbursement methodologies
- 15 years of project management experience for government and private entities
- 12 years of experience working within WV's MMIS, including system configuration, system analysis, and MMIS configuration validation against Medicaid policies
- Seven years of experience leading and supporting West Virginia Payment Error Rate Measurement (PERM) cycles
- 12 years of experience analyzing the MMIS for potential cost savings



PROJECT EXPERIENCE

BerryDunn (08/2017 to present)

– Detroit Wayne Integrated Health Network (DWIHN)

Medicaid Claims Audits (10/2024 to present)

Dawn serves as an engagement manager overseeing the auditing services of DWIHN's Medicaid claims. She coordinates BerryDunn resources to help ensure work is completed in an efficient manner as well as coordinating the auditing activities with DWIHN leadership.

– West Virginia Bureau for Medical Services (BMS)

Client and Engagement Operations Program Manager (01/2024 to present)

As client and engagement operations manager, Dawn provides engagement support in process improvement, best practices, staffing allocations, and project managers for the WV Engagement. Dawn provides project oversight for the following projects:

Partnership Management Support Project (12/2023 to present)

Dawn serves as the program manager for the Partnership Management Support project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations.

APD Assistance (05/2023 to present)

Dawn currently manages the BerryDunn team for the WV Engagement, providing support with facilitating the development and approval of APDs for the Department of Human Services (DoHS) Medicaid enterprise. This involves coordinating the appropriate staff to gather necessary information for the development of APDs, to write APD narratives, and to establish budget tables for the funding request via the Medicaid Detail Budget Tables (MDBTs). This project also includes preparing complete APDs for review, approval, and submission by BMS for delivery to the Centers for Medicare & Medicaid Services (CMS). These activities occur with the development of new APDs and annual and as-needed updates to 10 established APDs.

Quality Improvement Initiatives Portfolio Manager (05/2019 to present)

As quality improvement initiatives portfolio manager, Dawn provided project support in the areas of process improvement, best practices, and staffing allocations for the Fee Schedule and Edit Quality Review, PERM, and Third-Party Liability Procurement projects. Dawn also provides support to other engagement projects, including:

- IT Control Environment Review (07/2024 to present)
- Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2024 to present)
- System Development Life Cycle (SDLC) Coordination Project (06/2024 to present)
- Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (04/2024 to present)
- Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2021 to present)
- State Plan Review and Support (SPRS) Project (02/2020 to present)
- MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 to present)
- Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to present)
- Public Health Emergency (PHE) Support Project (12/2021 to 12/2024)
- Data Improvement Project (09/2019 to 06/2024)



- Provider Management Support Project (11/2019 to 10/2023)
- Third-Party Liability (TPL) Options Analysis and Procurement Assistance Project (05/2019 to 03/2022)
- Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022)

PERM Project (05/2018 to present)

Dawn serves as the program manager for the PERM project, managing budgets and project deliverables and collaborating closely with the client to help ensure the team fully meets the project requirements and expectations. This project includes validating claims payment or eligibility errors, researching error remedies, and providing oversight for resolution of PERM errors cited for WV.

Under Dawn's leadership, the project team developed and submitted a recovery package for the PERM Review Year (RY) 2016 cycle. CMS agreed with the State's recovery package and overturned 71 errors, saving the State \$151,369. The project team reviewed 37 eligibility errors, three of which were overturned based on additional information provided to the reviewers. The project team reviewed 23 medical record errors, 10 of which were overturned. The State saved \$81,022 due to overturned errors.

MMIS Fee Schedule and Edit Quality Review (09/2017 to 04/2023)

Dawn served first as project subject matter expert (SME) before beginning her tenure as project manager. She collaborated closely with the client to evaluate the MMIS fee schedules and claim edits to help ensure MMIS setup followed Medicaid policy and to provide analysis of cost savings opportunities for BMS.

– **Colorado Office of State Auditor (OSA)**

Medicaid Recovery Audit Contractor (RAC) Program Evaluation (09/2023 to 01/2025)

As the Medicaid manager for the RAC project, Dawn provides oversight to the Medicaid teams research of State Medicaid Agencies (SMAs) RAC program to assist BerryDunn's Government Assurance Practice Group in evaluating the Colorado Medicaid RAC program. Dawn collaborated directly with members of the OSA, the Colorado Department of Health Care Policy & Financing (HCPF)—the Colorado SMA—and the HCPF RAC vendor to gather information and address the findings of the evaluation.

– **United States Virgin Islands (USVI) Department of Human Services**

Enterprise Portfolio Management Office Project (10/2022 to 10/2024)

Dawn supported USVI with the development and approval of APDs to support key program initiatives. Dawn also provided project management support for key initiatives to support and enhance the USVI Medicaid program.

– **Hawai'i Department of Human Services Med-QUEST Division (MQD)**

Organizational and Business Process Redesign (11/2021 to 06/2022)

Dawn supported the MQD in PERM corrective action planning and response.

– **Alaska Division of Legislative Audit (DLA)**

NCCI Compliance Evaluation (07/2019 to 09/2019)

Dawn supported the DLA in the development of an NCCI questionnaire to help assess Alaska Medicaid's compliance with the NCCI technical guidelines. The results of the assessment provided the DLA with confidence that the Alaska MMIS complies with the NCCI technical guidelines.

Valley Health Systems, Inc. (12/2009 to 07/2017)

Dawn served as the revenue cycle administrator for a group of over 30 Federally Qualified Health Centers (FQHCs). In this role, Dawn was responsible for the organization's accounts receivables. This included providing oversight of each health center's frontline staff, providing communications



to medical, dental, and behavioral health providers on billing and reimbursement issues. Her responsibilities included training over 400 doctors, dentists, and other health care providers and employees on the revenue cycle. Dawn worked with insurance payers such as Medicare, Medicaid—including WV, Ohio, and Kentucky—Public Employee's Insurance Agency (PEIA), and CHIP to help secure payment for services rendered by the FQHC providers. Dawn managed the on-site implementation of a new electronic medical record and billing system, Intergy. Under Dawn's leadership and guidance, at the end of her first year of service to Valley Health Systems, Inc., the accounts receivable had increased 5% over the prior year.

Unisys (06/2004 to 11/2009)

As a domain services analyst, Dawn served as the configuration team leader and a medical coder for the WV Medicaid line of business. Dawn was a liaison for the MMIS configuration team and the WV BMS leadership.

Charleston Area Medical Center (08/2004 to 09/2004)

As a contracted medical coder, Dawn worked primarily with Charleston Area Medical Center's compliance department to perform billing audits of patient medical records.

West Virginia University (WVU) Physicians of Charleston (06/2001 to 06/2004)

While with WVU, Dawn worked as a senior billing specialist and a billing manager, serving the Department of Internal Medicine and the Department of Obstetrics and Gynecology.

Garnet Career Center (02/1999 to 01/2000)

Dawn worked as a medical coding instructor for the career center.

University Health Associates (09/1996 to 07/2001)

Dawn served in several roles with University Health, including a billing analyst, billing specialist, billing supervisor, and billing manager. She worked primarily with the Department of Obstetrics and Gynecology and the Family Medicine Center of Charleston.

Acordia National (12/1994 to 05/1996)

Dawn began her career as a medical claims examiner.

PUBLICATIONS AND PRESENTATIONS

- *Keeping the PERM Manual Update in focus during the PHE*, a BerryDunn blog, September 2020



Susan Chugha, Prosci® CCP

MANAGER

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Business
Management, Belmont
Abbey College

Prosci® Certified Change
Practitioner

Medicaid Learning Center
(MLC) Certified Medicaid
Professional (HIT + MCMP
II)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

10 years



Susan Chugha is a manager in BerryDunn's Medicaid Practice Group who brings over 20 years of project management experience. During the past nine years, Susan has honed her expertise on policy and Medicaid program efforts in various roles, including program manager, project manager, business analyst, and project coordinator. She focuses her time supporting clients with waiver demonstrations, policy and program design, development, and implementation, as well as ongoing support and analysis for managed care services. Additionally, she has multiple years of experience with the Medicaid Information Technology Architecture (MITA) State-Self Assessment (SS-A) Annual Update report and roadmap activities, business process improvement, data quality initiatives, MMIS claim edit processes, project, and program management.

In addition to her technical skills, Susan has strong interpersonal skills and utilizes her emotional intelligence in everyday situations. These skills help her understand, diagnose, propose, and implement solutions for clients. She is committed to developing and cultivating meaningful partnerships with clients, stakeholders, and providers.

KEY QUALIFICATIONS

- Expert 1115 waiver professional with experience assisting clients with all stages of the waiver process, including waiver development, federal negotiation, approval, implementation of services (with a Managed Care Organization [MCO] carve-in) and program oversight
- Experience with the successful implementation of the Medicaid Certified Community Behavioral Health Clinic (CCBHC) program
- Ten years of experience with the MITA SS-A life cycle, report, and roadmap activities and completion
- Effective in driving efforts for policy and program design, development, and implementation (DDI)
- Strong program and project management proficiencies



PROJECT EXPERIENCE

BerryDunn (10/2015 to present)

– West Virginia Bureau for Medical Services (BMS)

Take Me Home (TMH) Home and Community-Based Services (HCBS) Quality Initiative (10/2024 to present)

As the deputy portfolio manager, Susan works alongside the project management team to help ensure the deliverables and time frames are being met. She assists in peer reviews, program oversight, and monitoring the health of the project.

Programmatic Managed Care Support (06/2024 to present)

Susan serves in a dual role as the deputy portfolio manager and as a business analyst for the Programmatic Managed Care support project. Susan supports the program manager with project oversight, and monitors decisions, action items, risks, and issues. Additionally, she performs tasks for the implementation of Senate Bill 820 provisions, helps to facilitate advisory committee workgroups, and researches new regulations for Dual Special Needs Program as noted in the Medicare Part D Final Rule.

1115 Demonstration Behavioral Health Project (06/2024 to present)

As program manager for the 1115 Behavioral Health Demonstration project, Susan oversees the project team through oversight, project management, technical assistance, and risk and issue monitoring. She also shares her historical knowledge of past waiver development and implementation activities. Susan assists the project manager with ad hoc assignments, meeting facilitation as needed, and peer review all deliverables and priority communications.

CCBHC State Plan Amendment (SPA) (09/2022 to 08/2023; 11/2023 to present)

Susan serves as the project manager, where she oversees the project team through project management, budgeting, and monitoring decisions, action items, risks, and issues. She has assisted the client and team with a variety of activities, such as SPA submission and approval, policy and provider application development including oversight of the public comment process. Susan also helped create a service code matrix that provides an overview of all allowable and required program services. She has also been instrumental in coordinating a data workgroup that focuses on CCBHC state and clinic measures for reporting requirements. On a regular basis, she facilitates client, provider, and vendor meetings. She assists the client with MMIS system configuration edits and provides technical assistance with provider billing and Medicaid and/or Medicare reimbursement scenarios.

Previously, as the program manager, she supported the prior project manager with meeting facilitation duties and client relations, assisted in the development of the provisional certification status application, and contributed to the reviews and scoring sessions of the provider provisional certification applications to help identify providers that would be awarded provisional certification as a CCBHC provider type.

ARPA Section 9817: HCBS Implementation Project Phases I and II (05/2022 to present)

Susan served as the project lead before transitioning to program manager, Susan oversaw the day-to-day operations for this project, conducted research, and monitored the successful completion and submission of project and federal deliverables.

Technical Assistance and Program Support Project (TAPS) Phase IV (05/2022 to present)

Serving as program manager for the TAPS project, Susan oversees the project team monitoring activities and the requests of incoming sub-projects for ongoing technical support and assistance activities for new initiatives.



State Plan Review and Support (SPRS) Project (03/2020 to present)

As program manager, Susan oversees the project and project team that handles updates to State Plan sections, attachments, and supplements, and develops amendments.

Prior to becoming the program manager, Susan served as an analyst for the SPRS project, where she reviewed an end-to-end version of the State Plan and documented missing or inconsistent details to help the State have more confidence in the plan. She also reviewed and analyzed sections of the State Plan to help ensure that the pages were in compliance, compared service descriptions to federal and State guidance, and analyzed pages for overall accuracy.

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase V (09/2018 to present)

As program manager for the CSED Phase V project, Susan oversees the project team through project management, technical assistance, and monitoring risks and issues. Prior to Phase V of the project, Susan helped monitor progress on the preparation of the CSED waiver renewal application.

In 2018 Susan served as the project coordinator for the CSED project. Susan was responsible for project coordination, which included client outreach, scheduling, notetaking, document review, research, and business analysis. Susan also coordinated and executed multiple public forum events throughout the State.

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to present)

Currently, Susan serves as a deputy project lead supporting the project manager with MITA activities and deliverable review and shares historical MITA knowledge. Previously, Susan served as the project manager for the MITA 3.0 SS-A Maintenance and Annual Update Assistance project. She assisted with MITA life cycle maintenance activities, including developing new business process improvement flows and updating MITA related reports. Susan managed nine consultants and two subcontractors. Her responsibilities included oversight of the team, budget, and time management, and peer review and delivery of required deliverables. She assisted with the development of the update of the health information technology (HIT) report, data management strategy (DMS) report, and the technical management strategy (TMS) report. Additionally, during 2021 Susan monitored a team of subject matter experts to draft and deliver an organizational development (OD) plan and road map. She facilitated meetings and oversaw the development of the revised aged and disabled waiver (ADW) business process flow workgroups.

Susan moved into the project manager role in November 2019. She provides oversight to the project team and manages the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that stores and tracks all of the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

Data Improvement Project (DIP) Phases I through IV (12/2019 to 06/2024)

Susan was the project manager for the DIP project Phases I through IV. Susan was responsible for providing oversight to the project team on the day-to-day activities, handled meeting facilitation and peer review, and monitored progress with all deliverables tracked against the agreed-upon schedule that addressed data quality and usability issues identified within the Medicaid program.

Substance Use Disorder (SUD) Waiver Initiative Project Phases I through V (10/2016 to 06/2024)

Susan managed the SUD waiver initiative project with responsibilities that included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducted deliverable review on all documents. She performed research on SUD services, Centers for Medicare & Medicaid Services (CMS)



requirements, and State policies and procedures to support waiver activities. She drafted monitoring reports and oversaw the on-time completion of assignments for federal submission. During the most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during the public hearings, and oversaw all communications with federal partners and actuarial vendors.

Prior to moving into the project manager role during the implementation phase of the project, Susan was the project coordinator for waiver development, negotiation, and approval. She performed client outreach, managed communications with federal partners, scheduled meetings, captured meeting notes, tracked action items and decisions, conducted research, and business analysis. Also, during the waiver implementation phase, Susan managed the development of a peer recovery support specialist webinar and was involved in policy development, public comment tracking, and policy approval. Under the waiver development phase, Susan assisted the client with developing a continuum of care for Medicaid enrollees with SUD by overseeing waiver negotiations with CMS. She facilitated meetings, performed research analysis, assisted in draft policy development, assisted with writing the waiver application, and created and maintained a work plan to track required tasks. Susan also scheduled and organized public hearings to promote the waiver application.

OD Project (05/2022 to 11/2023)

As a business analyst on the OD project, Susan assisted with client relations, retreat planning and coordination, research, and writing assignments that helped to inform strategic planning documents, in addition to other identified deliverables per the agreed-upon SOW.

ARPA Section 9813: Mobile Crisis Grant Project (07/2021 to 11/2023)

Serving as program manager, Susan oversaw this project and provided subject matter expertise and support for DDI of an SPA to add a Mobile Crisis Program to the WV Medicaid Program. As part of this, Susan participated in writing and planning assistance for the "State Planning Grant for Qualifying Community-Based Mobile Crisis Intervention Services" planning grant application. In organizing the response, writing the application, and assisting BMS in communications to CMS, the team helped BMS in the successful award from CMS to the State of an \$847,527 grant to implement qualifying community-based mobile crisis intervention services. Susan's project oversight helped contribute to the successful approval of the Mobile Crisis SPA approval from CMS on September 5, 2023.

Provider Enrollment Application (PEA) Project (02/2017 to 11/2017)

Susan provided project coordination assistance by maintaining all of the meeting management duties, which included scheduling meetings, creating agendas, capturing meeting notes, and tracking action items, risks, and decisions. Susan developed project timelines, managed the document repository, conducted research, and updated necessary documents that were critical to the success of the project, which was to enhance the current PEA process.

ICD-10 Transition Planning, Implementation, and Policy Remediation (10/2015 to 02/2016)

Susan was responsible for meeting management, as well as maintenance of the document repository for the project. In addition, she attended policy review and workgroup meetings.

– Minnesota Department of Human Services, Behavioral Health Division (BHD)

1115 Waiver for Justice-Involved Individuals (03/2024 to 03/2025)

Serving as the project manager, Susan was responsible for oversight of the project team, helping to ensure project deliverables were completed on time, tracking the project budget, project decisions, and monitoring for any risks and/or issues. She also communicated with the client and facilitated regular status meetings, assisted with research, and created deliverable expectations.



Independent Consultant (08/2010 to 10/2014)

Susan worked with her clients to help with event planning, property management, maintaining calendars and contact lists, managing correspondence as well as service provider relationships, scheduling of both professional and personal appointments, and making travel arrangements.

Columbia Management (09/2012 to 10/2013)

Susan worked as a scheduling coordinator and administrative assistant, Susan partnered with five regional wholesalers within the U.S. to manage territory rotation for external wholesalers, schedule daily financial advisor meetings and handle reschedules, coordinate local client events, process monthly expense and activity reports, and complete as-needed ad hoc assignments.

Evergreen Investments (06/2004 to 05/2009)

Susan worked as a project manager, assisting the Vice President in the Sales and Initiatives Department and served in multiple roles over her duration at the firm. Susan's responsibilities included the following:

- Lead Project Specialist for semi-annual Global Distribution Summits.
- Coordinated all logistics for Asset Management Distribution Group to participate in the Wachovia Championship.
- Lead Project Specialist for annual client event that hosted over 1,600 Industry leaders and their families. ~\$1.5 trillion dollars in assets under management were represented in the client base at this event.
- Partnered with Training and Development team to coordinate internal training programs (on-boarding, sales training, negotiation skills, product training) all around the U.S. and assisted with follow-up after each program to track successes and determine where improvement was needed.
- Managed the relationship between the portfolio managers/specialists and wholesalers to coordinate communication inquiries and field travel opportunities.
- Partnered with broker-dealer national sales managers to coordinate divisional meetings and drive sales efforts.
- Managed special projects and events assigned by the President of Evergreen Investments Services Inc. (EISI) and other members of the executive leadership team.

As a communications coordinator, Susan created quarterly newsletters and other publications that were distributed internally. She also coordinated the Mutual Funds, Sales, and Operations (MFSO) program for wholesalers; managed the valued-add and continuing education curriculums that were available to field wholesalers; and partnered with learning and development managers to assist in coordination of training programs and on-boarding for new internal and external wholesalers.

Bank of America Capital Management (formerly Nations Funds) (04/2001 to 05/2004)

Susan served as an executive administrative assistance and office manager, supporting both the Managing Director of Global Distribution and the Director of Internal Sales. Her administrative duties included answering phone calls, scheduling meetings, making travel arrangements, processing expense reports, taking and distributing minutes, and coordinating meetings and conferences for office professionals. In addition, she created PowerPoint presentations, monthly reports, territory maps, emergency contact lists, etc.; organized and scheduled internal trainings and maintained relationships with business partners; and maintained office and office equipment that supported over 50 associates.



Sarah Renner, MPH, MBA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Sarah Renner is a senior consultant in the Medicaid Practice Group with over 20 years of state government management and consensus building experience. She has a talent for rapidly learning and mapping new and complicated information and has a drive for results. Sarah has a natural ability to listen, communicate, and collaborate. She leads and participates in improving health equity and oversees sensitive and confidential information with respect and perceptiveness.

EDUCATION AND CERTIFICATIONS

MBA, University of Indianapolis

MPH, Indiana University
BA, Hanover College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

9.5 years

KEY QUALIFICATIONS

- Over 20 years of state government management
- Over seven years of experience with Home and Community-Based Services (HCBS) waivers
- Skilled in organizational leadership, financial planning, data analysis, consensus building, decision-making, and policy development

PROJECT EXPERIENCE

BerryDunn (08/2022 to present)

– West Virginia Bureau for Medical Services (BMS)

Take Me Home (TMH) HCBS Quality Initiative (10/2024 to present)

As program manager, Sarah provides project leadership and subject matter expert (SME) support for the implementation of Long Term Services and Supports (LTSS) quality measures implementation and HCBS Quality Management Plan. Sarah also leads planning discussions and monitors controls execution of the implementation schedule.

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (08/2022 to present)

Sarah provides program management oversight focusing on HCBS waiver cohesion, HCBS quality measurement, and managed care HCBS requirements.

American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (08/2022 to present)

Serving as project manager, Sarah oversees this project and provides subject matter expertise for the updating of the ARP HCBS Spending Plan. Sarah also leads planning discussions and monitors controls execution of the implementation schedule.



As program manager, Sarah provides project leadership and SME support to the Aged and Disabled Waiver (ADW), Traumatic Brain Injury Waiver (TBIW), and Intellectual and Development Disabilities Waiver (IDWW) renewal and amendment applications, waiver redesign, provider manual updating, HCBS Quality Management System, and Centers for Medicare & Medicaid Services (CMS) Ensuring Access to Medicaid Services Final Rule compliance.

1115 Demonstration Behavioral Health Project (08/2022 to 06/2024)

As a policy analyst and SME Sarah worked to update the substance use disorder (SUD) implementation plan, researched, and developed new service definitions and supported the development of the Serious Mental Illness (SMI) implementation plan for Phase 1.

– Minnesota Department of Human Services (DHS)

Research Studies to Cover Contingency Management (CM) Services (05/2024 to present)

Sarah is the project manager overseeing the deliverables, interested parties feedback, and contributing as a SME for the CM research studies. The research studies inform DHS how CM services may be incorporated into the 1115 SUD waiver and Indian Health Services system.

Program Analysis of Implementation of a Program of All Inclusive Care for the Elderly (PACE) Program (09/2023 to 07/2024)

Sarah was a SME for a project that helped DHS analyze options for the implementation of PACE. Sarah designed an analysis of existing programs, contributed to interested parties feedback sessions, and assisted with the development of policy and administrative requirements.

Indiana Family and Social Services Administration (FSSA) (02/2018 to 08/2022)

Sarah served as the Director of Division of Aging to co-chair FSSA LTSS reform workgroup to increase the number of people living in an HCBS, supported by an integrated data environment, and focusing on caregiver training and supports. She participated in developing a Managed Long Term Services and Supports (MLTSS) design book, responses for information (RFIs), and requests for proposals (RFPs), and expedited eligibility process and consumer engagement forums. She designed and implemented Indiana's first caregiver survey to assess caregiver awareness, supports needed, financial hardships, and health status, and also led COVID-19 response efforts for the Division which included development of the Essential Family Caregiver long-term care facility guidance, Area Agency on Aging (AAA) vaccine registration project, Homebound Hoosier Project, high-risk participant emergency planning project, Admission, Discharge, and Transfer (ADT) data sharing project between dual special needs health plans (DSNP) and AAAs, and caregiver supports awareness campaign. She oversaw the ADWs and TBIWs specifically focusing on rate methodology and rate setting, healthcare integration services, and structured family caregiving to enhance HCBS for older adults, persons with physical disabilities, and TBIs. She helped to ensure Indiana's State Unit on Aging follows the Older Americans Act, the HCBS Settings Rule and collaborates with the Indiana Department of Health Long-Term Care Division while focusing on long-term care options that enhance choice, equity, and quality of life. Sarah optimized the Adult Protective Services Program (APS) by focusing on improving the case management system, reducing burdensome financial approvals, and designing collaboration opportunities for APS units and social service programs. She also supported the Division's leadership in developing the Indiana Dementia Task Force focusing on workforce training, healthcare integration, and caregiver supports.

Myers and Stauffer, LC (10/2015 to 02/2018)

Sarah served as a Senior Manager in Consulting to lead internal team working on the Idaho Department of Health and Welfare (DOHW) Patient Centered Medical Home Incentive Payment Accounting System (PCMH IPAS), which required information system, dashboard, progress measure, incentive payment, and recoupment design development. She managed project budget,



invoicing, and financial reconciliation, and also led the New Jersey Department of Health (DOH) implementation of the Delivery System Reform Incentive Payment (DSRIP) program, a demonstration program designed to result in better care for individuals and populations and lower costs by transitioning payment to incentive outcome attainment. She also managed staff, budget, and contract deliverables, and oversaw Databook updating, payment generation, performance measure results reporting, learning collaborative presentations, progress report reviews, and client relationships. She participated in the New Hampshire DOHW implementation of the DSRIP Independent Assessor and Learning Collaborative projects which included designing technical assistance and training tools for Independent Delivery Networks (IDNs), developing project plan evaluation tools, evaluating project plans, and providing training and technical assistance to IDNs during the project plan development phase.

Indiana Department of Health (IDOH) (07/2005 to 10/2015)

– Director, Women, Infants and Children (WIC) (02/2010 to 10/2015)

Sarah optimized \$150 million in supplemental food and nutrition services serving 280,000 women, infants, and children through 140 clinics and 700 grocery stores and pharmacies. She implemented policy changes balanced by cost containment and nutritional need for WIC's food package revisions for prenatal, postpartum, and breastfeeding women, infants, and children. She provided leadership to WIC's transition to a new information system that provides Electronic Benefits Transfer (EBT) instead of checks; enhanced WIC clinic staff performance optimization by developing outreach and business development training targeting relationship-building with medical offices and hospitals; and developed WIC's first quarterly benchmarking system for local agencies administering WIC services. She consensus-built with clinic staff to implement the Loving Support Model to increase lactation rates and improve health status of WIC participants, and managed The Emergency Food Program (TEFAP), provided strategic and financial planning for Indiana's infant mortality media campaign, and led stakeholders through budget reductions due to sequestration and federal government shutdown.

– Director, HIV/STD/Adult Hepatitis (09/2008 to 02/2010)

Sarah managed \$26 million state and federal dollars to build linkages between HIV/AIDS prevention, services and surveillance with STD, Hepatitis, Tuberculosis (TB), Immunization and Substance Use strategies. She collaborated with Indiana State Department of Health (ISDH) Laboratory to help ensure infection disease test results were transmitted to local health departments, community-based organizations, and Department of Corrections.

– Deputy Assistant Commissioner (07/2005 to 09/2008)

Sarah supervised and provided leadership to the following Divisions: Primary Care Office, Healthy Homes, HIV/STD/Hepatitis, Chronic Disease, Immunization, and TB. She developed and implemented operational policies and business processes for the Commission, coordinated Commission budget, legislative proposals, and performance metric projects, and served as flood relief coordinator for ISDH during 2008 disaster.



BreAnn Teague, JD, PMP®

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



BreAnn Teague is a senior consultant in BerryDunn's Medicaid Practice Group (MPG), providing Medicaid policy subject matter expertise and project management support. Her experience includes government program consultancy, collaboration with interested and invested parties to help ensure successful implementation of Medicaid programs and policies, legislative implementation, and project management.

EDUCATION AND CERTIFICATIONS

JD, Indiana University,
William H. McKinney
School of Law

BA, Human Services,
William Peace University

Certified Project
Management
Professional® (PMP®)

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4 years

KEY QUALIFICATIONS

- Over seven years of experience in the public healthcare sector
- Experience providing support to federal and state healthcare agencies to implement legislation
- Experience in the planning and coordination of Home and Community Based Services (HCBS) waiver programs, including timeline and milestone development, and communication with federal partners and interested parties
- Experience during the public health emergency in helping to ensure Indiana Medicaid programs flexibilities were obtained in a timely manner, through coordinated efforts between program department leaders and Centers for Medicare & Medicaid Services (CMS)
- Has held multiple leadership roles within state government
- Experience providing Medicaid policy support to single state Medicaid agencies

PROJECT EXPERIENCE

BerryDunn (04/2024 to present)

– West Virginia Bureau for Medical Services (BMS)

1915(c) HCBS Waiver Amendments (12/2024 to present)

BreAnn is currently leading a team of three workgroups to assist BMS with the renewal of three HCBS waiver programs: Traumatic Brain Injury Waiver (TBIW), Aged and Disabled Waiver (ADW), and Intellectual/Developmental Disabilities Waiver (IDDW). Her work includes development of project milestones and an overall timeline, leading team stand-up meetings, and regular client engagement to help ensure workgroups are operating efficiently.



Ensuring Access to Medicaid Services (Access Rule) Implementation (11/2024 to present)

BreAnn is currently developing a project plan to assist BMS with its implementation of the multiple provisions within the Access rule. This complex project includes multiple timelines to accommodate each of the rule provisions and to meet each of the CMS deadlines.

Money Follows the Person (MFP) Quality Initiative Requirements (09/2024 to present)

BreAnn provides project management support to help ensure BMS's MFP projects meet new CMS requirements for quality measure tracking and reporting. This work involves regular client engagement and working with her team to help BMS identify the most efficient way to adopt and implement a standardized quality management plan.

Section 1115 Reentry Waiver Support (06/2024 to present)

BreAnn provides ad hoc policy support to the project manager as needed. Her work with this project includes policy and legislative research, implementation plan drafting, and attending client meetings.

– Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (04/2024 to January 2025)

BreAnn assisted the Medicaid Policy Team supporting PR's single State Medicaid agency and performs legislative analysis and recommendations for required legislative implementation. BreAnn also assists with Puerto Rico State Plan policy. BreAnn also provided support to PRMP in its development of an Internal Operational Plan per the requirements of Section 5121 of the Consolidated Appropriations Act of 2023.

Aptive Resources, LLC (12/2021 to 03/2024)

While at Aptive, BreAnn worked as a consultant with Veterans Affairs on various healthcare projects. She provided regulatory, administrative, and project-relevant legislative consultation. She successfully assisted the Office of Healthcare Transformation with programmatic changes and pilot implementations in response to multiple Federal Final Rules. Additionally, she drafted project artifacts such as training and implementation materials, project charters, project action plans and collaborated in the development of Memoranda of Understanding (MOU) between participating federal agencies.

Indiana Family Social Services Administration (FSSA), Office of Medicaid Policy and Planning (OMPP) (01/2019 to 12/2021)

BreAnn served in multiple roles during her tenure with Indiana's Office of Medicaid and Policy Planning.

– Medicaid HCBS Program Director

In her HCBS Program Director role, BreAnn helped ensure HCBS waiver documents met CMS compliance requirements and adhered to state HCBS directives. She planned waiver submission projects and was responsible for submitting 19815(c) waivers to CMS via the WMS portal.

– Senior Manager of Program Administration

BreAnn collaborated directly with CMS in the development of State Plan Amendments and HCBS Waiver programs and oversaw the team of HCBS program directors.

– Director of Government Affairs

While BreAnn served as Director of Government Affairs, she worked with other Medicaid section leaders to address programmatic changes that impacted areas such as eligibility, pharmacy, and prior authorization. BreAnn worked with leadership when the public health emergency was declared to help ensure emergency waivers were sent to CMS in a timely manner. She also researched additional flexibilities to benefit Indiana Medicaid recipients.

Indiana Office of Attorney General (06/2016 to 01/2019)



BreAnn worked as an investigator with the Indiana Office of Attorney General in the Consumer Protection Unit. As an investigator, she drafted the bases for administrative litigation pursuant to her findings. BreAnn also supported deputy attorneys general in legal proceedings by presenting evidence and serving as the state's witness.



Ashley Pannell, EMBA, MS

SENIOR CONSULTANT

Berry, Dunn, McNeill & Parker, LLC



Ashley Pannell is a skilled subject matter expert and human service professional with 15+ years of experience in managing healthcare programs, specializing in state waivers, eligibility, case management, managed care, policy, gap analysis, and program development at local and state levels. She is a strategic advisor with the proven ability to analyze data, identify risks, execute compliance requirements, and expand Medicaid services.

EDUCATION AND CERTIFICATIONS

Executive MBA,
Specializations: Business
Communications,
Advance Finance,
Strategic Thinking,
Quantic School of
Business and Technology
MS, Psychology, Applied
Behavioral Analysis,
Purdue University

BFA, Theater and History
Education, Shenandoah
University

Product Management,
Aha!

Business Analyst,
Microsoft

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

9 years

KEY QUALIFICATIONS

- Over 15 years in management of healthcare programs, specializing in state waivers, eligibility, case management, and policy development at local and state levels
- Conducted over 700 hours of training on healthcare regulations and operations for various state/local agencies and providers
- Skilled in analyzing data to identify gaps, trends, risks, and service utilization to enhance compliance
- Effective communicator and can engage stakeholders through training and collaboration

PROJECT EXPERIENCE

BerryDunn (04/2024 to present)

Ashley is a senior consultant with BerryDunn's Medicaid Practice Group (MPG), lending her extensive knowledge base within the Medicaid and health and human services realm to support the West Virginia Children with Serious Emotional Disorders (CSED) Waiver Project.

– West Virginia Bureau for Medical Services (BMS)

Justice Involved Program Support Project (07/2024 to present)

Ashley provides program support that assists BMS with the increasing needs for policy integration related to members who are being released from carceral settings. In this role, Ashley analyzes program eligibility, efficiency, and health outcomes, and develops strategies for process improvement.



1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (05/2024 to present)

Ashley provides subject matter expertise as the project manager on the planning, design, and implementation of a Medicaid Home and Community-Based Services (HCBS) waiver program. The CSED Waiver provides an array of community-based services that support children and young adults who would otherwise require institutionalization to remain in their homes and communities. In this role, Ashley has developed policy and training tools for provider development and gives input and guidance on best practices. She also facilitates communication and collaboration between the Managed Care Organization (MCO), administrative service organizations, and providers, while monitoring performance measures, tracking key indicators, and managing data reporting.

– **West Virginia Bureau for Social Services (BSS)**

Child Welfare Initiatives Project (05/2024 to present)

As a subject matter expert, Ashley provides detailed analysis of funding mechanisms available to youth, develops policy for Medicaid providers, and contributes to stakeholder engagement efforts, focusing on residential and community-based supports to help ensure service delivery quality and compliance with regulations, including the Department of Justice Settlement Agreement.

Commonwealth of Virginia (VA) (12/2016 to 04/2024)

As a service authorization consultant, Ashley worked with the Virginia Department of Medical Assistance Services (DMAS), which is the Single State Medicaid Agency for the Commonwealth of Virginia, and the Department of Behavioral Health and Developmental Services (DBHDS). DBHDS and DMAS work directly together to manage and implement Virginia's Medicaid programs. DMAS is primarily responsible for the financing and overall administration of Medicaid services, including policy development and regulatory oversight.

In this role, Ashley helped ensure that DBHDS waivers' service authorization system met all performance metrics within 10 business days, delivered high-quality service to users, and optimized the allocation of finances to members receiving Medicaid-funded services in Virginia. Ashley consulted with 1,300 providers, stakeholders, and all 41 community services boards, helping to ensure compliance with VA Medicaid and Centers for Medicare & Medicaid Services (CMS) requirements using the VA Medicaid Management Information System (MMIS). Additionally, she served as a SME on waiver and HCBS services for Medicaid within DBHDS, using analytical data from the Virginia Waiver Management System, DMAS, and CMS regulations.

Highlights of Ashley's work with DMAS included:

- Working directly with DMAS on eligibility, enrollment, provider claims, and customized rate analysis, engaging in technical deep dives to help ensure accurate and efficient processing and policy interpretation.
- Working directly with DMAS in creating policy and guidance tools for stakeholders regarding service provision of Medicaid waiver services, in adherence to the Department of Justice (DOJ) Settlement Agreement and HCBS.
- Working directly with DMAS on the Supports Intensity Scale (SIS) project with the Human Services Research Institute to reform the SIS assessment tool, which includes analyzing data on service utilization and costs to improve resource allocation and tier structures.
- Working directly with DMAS, conducting compliance reviews of HCBS providers via documentation and on-site visits, and advising and collaborating with senior leadership on statewide policy development, implementation, and monitoring.



Guillory Health (07/2015 to 01/2017)

As a program administrator, Ashley improved program operations efficiency by 31% in seven months, using data analytics and market trends; responded to statewide healthcare reform and initiative by driving cost savings of 15% through quantitative analysis; and developed and implemented new strategic initiatives resulting in 40% revenue increase in nine months. She consulted on program design and expansion by managing client expectations through qualitative analysis; provided technical guidance as a strategic problem solver for five healthcare programs through subject matter expertise; successfully increased staffing by 30% in six months through utilization of electronic visit verification and employee incentive program; streamlined healthcare reform compliance processes, resulting in 35% increase in operational efficiency and 30% lower administrative costs; and developed training for staff and management team on Medicaid waiver and CMS requirements.

Fairfax County Government (05/2011 to 05/2015)

As a support coordinator, Ashley improved program operations and compliance for large state healthcare agencies in three months, resulting in 35% expansion in services; led multiple interdisciplinary teams by consulting, coordinating, implementing, and monitoring delivery of timely and satisfactory services to clients; and collaborated in the development of innovative HCBS and behavioral health payment system design for state Medicaid agencies, resulting in improved reimbursement in 55 weeks and increased stakeholder satisfaction. She developed and reviewed strategic plans monthly and quarterly, provided crisis intervention, and determined Medicaid eligibility for 100+ clients; managed multiple teams to identify and mitigate projects risks around scope, schedule, and quality, resulting in successful completion of deliverables within timeline and budget goals in 24 months; and led the implementation of healthcare reform initiatives across 10 counties in Virginia and six different states, resulting in a 35% efficiency improvement in six months.

ServiceSource, Inc. (03/2011 to 05/2011)

Ashley was a program manager, who increased state healthcare reimbursement approval rate by 40% in two months via HCBS/behavioral health expertise; managed professionals providing Medicaid and HCBS services to over 200+ people ensuring that short-term and long-term outcomes were achieved; increased Medicaid behavioral health services access by 15% in two months by partnering with community businesses and stakeholders to develop and implement creative solutions; and identified areas for improvement, prioritization, and quality by conducting data-driven reviews of utilization and research analysis.



Julie DuPuis, MPA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MPA, Health Care Administration, Western Michigan University

BA, General University Studies, Western Michigan University

Fundamentals in Project Management

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

13 years

Julie is a State Medicaid Program subject matter expert (SME) with 30 years of state government experience, working on programs providing comprehensive health coverage to a broad range of individuals, leading and executing Medicaid and related programs, and improving various reporting processes through system initiatives and quality data monitoring. She has a strong foundation in managed care health delivery systems, including encounter data submissions, data quality and improvement initiatives, rate setting, program integrity controls, and automated systems development.

KEY QUALIFICATIONS

- Former state employee with over 30 years' experience in state government
- Over 25 years of Medicaid program knowledge, including policy, financing, and delivery including waiver and state plan process
- Strong foundation in managed care health delivery systems
- Adept at migrating Medicaid Management Information Systems (MMIS) from legacy to an enterprise environment
- Experience in health plan rate setting, encounter data collection and quality, and financial analysis
- Led projects with multifaceted teams of statisticians in describing data interpretation and presenting key findings to various audiences

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

– West Virginia Bureau for Medical Services (BMS)

Take Me Home (TMH) Home and Community-Based Services (HCBS)

Quality Initiative Project (08/2024 to present)

Julie serves as a project manager supporting the creation of a Quality Management Plan required by Centers for Medicare & Medicaid Services (CMS) Money Follow the Person (MFP) and HCBS Long Term Services and Supports (LTSS) mandatory requirements.



Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (03/2024 to present)
Julie serves as a SME supporting the program through supporting the Department with policy research, development, quality, reporting, and curriculum development.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2024 to present)

Julie serves as a SME supporting the program with the planning activities for an MES modernization procurement.

– **West Virginia Department of Human Services (DoHS)**

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (05/2024 to present)

Julie serves the MCES project as a SME supporting requirements gathering and research support.

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (07/2022 to present)

Julie serves the EDS project as a SME supporting data profiling, testing, and requirements gathering.

Incident and Case Management System (ICMS) Procurement Assistance (07/2022 to 04/2024)

Julie served the ICMS project as a SME supporting requirements gathering and research support.

– **Minnesota Department of Human Services, Managed Care Contracting and Rates Division**
Program Analysis of Implementation of a Program of All-Inclusive Care for the Elderly (PACE) Program (10/2023 to 06/2024)

Julie served as a SME by assisting with actuarial findings, researching PACE programs in other states, and supporting the analysis team.

Michigan State University (MSU), College of Human Medicine, Institute for Health Policy (IHP) (12/2016 to 07/2022)

Julie served as a data resource analyst and Medicaid specialist for MSU where she supported Michigan's single state Medicaid agency, the Department of Health and Human Services (DHHS). Julie helped ensure effective management of IHP activities on policy analysis, health services research, Medicaid data, and Medicaid program evaluation activities, as well as Medicaid affiliated health programs, from start to finish. This position supported Michigan DHHS programs, university researchers, and other community stakeholders. Julie cultivated collaborative relationships with program officials, demonstrated exceptional programmatic expertise, and initiated new projects and topics centered around national best practices, supported by literature reviews. She consulted State staff with compliance and data quality findings. She acquired and analyzed Medicaid data from multiple sources, acting as an honest broker for MSU on behalf of the Michigan DHHS Health Services Data warehouse. She was helpful in formulating responses to CMS questions relating to independent Medicaid program evaluations, structuring data flows, documentation, and instruction relating to Medicaid eligibility and claims. She provided high-level assistance to MSU research faculty and staff in project management, planning and carrying out health service research, reporting on compliance and quality issues, provided potential data resources, interpreting data findings and trained staff on Medicaid resources, system software, and interpreting Medicaid data. Julie contributed to program evaluations, developed proposals/manuscripts with the aim of improving proposal structure, led projects with multifaceted teams of statisticians in describing data interpretation, and presented key findings to audiences in various presentations.

Michigan DHHS, Medical Services Administration, Bureau of Medicaid Policy and Actuarial Services, Actuarial Division, Rates and Encounter Data Section (09/2012 to 12/2016)

Julie served as a section manager for Michigan DHHS, Michigan's single state Medicaid agency.



She was responsible for making capitation payments for 1.8M Medicaid members with annual expenditures exceeding \$8B. She oversaw the Medicaid expansion population (Healthy Michigan) rate structure, MMIS changes and health plan system capabilities for 600,000 new members in the first year. She migrated the Children's Special Health Care Services, Foster Care and MI Choice (HCBS) populations from fee-for-service (FFS) environments into capitated arrangements. Acting as the Bureau's system liaison, she interacted with multiple vendors overseeing and setting priorities for system enhancements and data flows between internal state departments and external vendors. She supervised professional staff, supporting state plan services, including 1915(b), 1115 waiver services, and other related healthcare programs, serving 1.8 million members with annual expenditures over \$6 billion. She assisted the managed care plan division in Request for Proposal (RFP) contract language relating to MMIS data flows and encounter data. She delegated and trained personnel in loading rates, calculating health plan related compliance and quality performance withholds, and monitored state budget development. Often this position led projects; defined, and enforced standard operating procedures; and interacted with CMS on waiver design, contract language, evaluation reports, and capitation rate thresholds. Using literature reviews and data findings, her team recommended best approaches to health plan rate setting and financial analysis, encounter data flow and quality, program change proposals, implemented value-based purchasing initiatives, and legislative bill analysis. Julie oversaw Michigan's Encounter Data Quality initiative through monitoring of complete, accurate, and timely encounter data submissions. She managed the health plan data improvement sessions in face-to-face health plan meetings and other data stakeholders. She consulted and coordinated with CMS, internal and external auditors, state agencies, health plans, providers, county health departments, health professional associations and other community stakeholders. She introduced using encounter data for the Healthy Michigan Plan Population Explanation of Benefits. She helped formulate the algorithm for calculating member premiums for members that were over 135% federal poverty level (FPL). She interacted with the actuary team almost daily and other consultants to define rates, initiate system changes, policy, and contract terms.

Michigan Department of Community Health, Medical Services Administration, Bureau of Financial Services, Actuarial Division, Rates and Financial Analysis Section (12/1998 to 09/2012)

Julie served as a departmental specialist and senior analyst/lead for Michigan DHHS, Michigan's single state Medicaid agency. She developed professionally into a recognized resource serving as the agency expert in several substantial departmental programs. Julie assumed a pivotal role in creating, testing, and implementing the Medicaid Health Plan and other capitated program rates in the Community Health Automated Medicaid Payment System (CHAMPS). Julie developed her position as the lead, responsible in loading and maintaining Michigan's Medicaid managed care programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting, consulting on policy, research and respond to auditor findings, and train new staff. Julie was responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research and calculated preliminary and year-end accrual estimates.

She was responsible in loading and maintaining Michigan's Medicaid programs capitation rates, calculating managed care plan quality withholds, year-end accruals, portions of CMS-64 reporting and other federal compliance initiatives, consulting on policy, research and respond to auditor findings, and train new staff. She was also responsible for performing complex analysis of claims and eligibility data from multiple sources; economic research, calculated preliminary and year-end accrual estimates. Julia served as the Department's key data analyst of the Michigan Adult Home Help (AHH) and Freedom to Work (FTW) Programs and was instrumental in presenting information



to the Governor's Long Term Care (LTC) Task Force, other advocate groups, and upper Department management on aging and care demographics, educating audiences holding down LTC costs. She assisted in forming, writing and implementing policy changes as well as responding to auditor findings. As the Data Analyst for FTW Program, she conducted studies involving demographic and expenditure information on enrollees as well as complete national annual reporting. This work led to an increase in the Medicaid Infrastructure Grant (MIG) awards from 2005, \$500,000 original award to 2010's, \$1.3 million award.

Julia was a key organizer and developer of annual budget slide presentation for the Medicaid Director to the Michigan Legislature and other outside organizations. Involved in presentations to Health Maintenance Organization (HMO) executives, Governor's LTC Task Force, advocate groups, as well as the Department's upper management.

Program duties for the Medicaid HMOs involving rate setting and research. She was responsible in loading and maintaining Michigan's Medicaid rates including Michigan's Comprehensive Health Plan Rates, Children Special Health Services rates, Adult Benefits Waiver, PACE, MICHild rates, MI Child Dental, and Healthy Kids Dental rates. She was also responsible for performing complex analysis of claims data and eligibility data; and implementing capitation rates for the Medicaid managed care health plans, calculated preliminary, and year-end accrual estimates. Her position expanded responsibilities in 2007 to include the start of post-payment work in terms of providing technical guidance to the HMOs involving over \$800 million in new federal matching funds.



Karri Henager, J.D.

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

Juris Doctorate,
Pepperdine University
School of Law

BA, Psychology, University
of Texas at Austin

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

14 years



Karri Henager is an experienced health and human services (HHS) professional, with in-depth experience across various Medicaid program and waiver areas and extensive familiarity working with single state Medicaid agencies. She presents with detailed knowledge in complex problem-solving, systems innovations, data analytics, client outcomes and relationship building, and project management.

KEY QUALIFICATIONS

- 15 years of experience working with state Medicaid agencies, including New Hampshire Department of Health and Human Services, and Texas Health and Human Services Commission
- Over seven years of experience in quality assurance and improvement

PROJECT EXPERIENCE

BerryDunn (01/2025 to present)

Karri is a consultant in BerryDunn's Medicaid Practice Group (MPG), providing support to West Virginia Engagement projects including Children with Serious Emotional Disorders (CSED), ARPA Home and Community-Based Services (HCBS) Phase II, and Take Me Home (TMH) HCBS Quality Initiative projects.

West Virginia Bureau for Medical Services (BMS) (01/09/2025 to present)

- Supported BMS in preparing 1915c waiver renewal applications for the Intellectual and Developmental Disabilities (IDDW), Traumatic Brain Injury Waiver (TBIW), and the Aged and Disabled Waiver (ADW)
 - Provided subject matter expertise to help ensure accurate and timely submission to CMS in an abbreviated timeframe.
 - Prepared reference and resource documentation to support BMS in completing renewal applications
-
- Lead effort to research and respond to public comment on waiver renewal applications to



help ensure alignment with BMS vision and values.

New Hampshire Department of Health and Human Services (DHHS) (01/2022 to 07/2024)

– Long Term Services and Supports (LTSS) Director (01/2023 to 07/2024)

Karri developed the Operational Protocol for a new Money Follows the Person (MFP) demonstration expansion grant for DHHS, NH's single state Medicaid agency. She conducted complex quantitative and qualitative data analyses to assess population needs and design a robust service array with extensive stakeholder engagement and input. Karri led efforts to modernize the Medicaid Management Information System (MMIS) to increase data sharing and cross-collaboration between siloed departments. She successfully helped integrate behavioral health services and supports into existing HCBS and LTSS to address unmet systemic needs and spearheaded strategic planning for implementation of Access Rule and Quality Measure Set across all impacted programs operated by DHHS. In her role, she partnered with national associations and research organizations to identify opportunities to refine best practices and improve outcomes and partnered with Centers for Medicare & Medicaid Services (CMS) and consultants to identify opportunities to expand existing Medicaid authorities (e.g., 1915c, 1915i, and 1115). She also effectively engaged and recruited diverse providers and partners to increase geographic reach of integrated services and supports..

– Community Mental Health Agreement Coordinator (01/2022 to 01/2023)

Karri led efforts to achieve compliance with Department of Justice (DOJ) Settlement Agreement regarding access to and quality of community-based services and supports for individuals with acute behavioral health needs. She prepared highly technical reports, including data visualizations, to track, monitor and report outcomes and served as subject matter expert (SME) in system evaluation for implementation of the Certified Community Behavioral Health Clinic (CCBHC) model statewide. In partnerships with consultants and stakeholders, Karri identified opportunities to braid and leverage multiple funding sources to help ensure sustainability of high impact programs. She served as a project lead in effort to overhaul targeted case management practices statewide in partnership with university research teams. Also, she spearheaded stakeholder engagement for implementation of a closed-loop referral system.

Texas Health and Human Services Commission (HHSC) (10/2011 to 12/2021)

– Quality Improvement Director, State Supported Living Center System (03/2020 to 12/2021)

Karri led the team responsible for obtaining compliance with DOJ Settlement Agreement across all 13 State Supported Living Centers (ICF-ID) operated by HHSC, TX's single state Medicaid agency. She developed internal quality metrics and data reporting systems to evaluate performance and effectiveness of system changes and was responsible for ongoing coordination and communication with DOJ review team. She helped achieve substantial compliance resulting in stepped-down DOJ oversight.

– Quality Assurance Lead, Youth Empowerment Services (YES) Waiver (04/2017 to 03/2020)

Karri developed quality assurance and improvement monitoring systems for a new 1915c Medicaid waiver program providing services and supports to youth with intensive behavioral health needs. She provided routine technical assistance and support to program vendors, contractors, and consultants. She fostered dynamic relationships with Community Mental Health Center (CMHC) leadership statewide to create opportunities to enhance Center revenue and integrate high-fidelity wraparound principles across the children's mental health system and facilitated routine stakeholder presentations. She also led quarterly best practices meetings for program providers across the state.

– Quality Assurance Lead, Intellectual/Developmental Disabilities (I/DD) 1915c Waivers (09/2013 to 04/2017)

Karri created and led a new quality assurance unit responsible for overseeing compliance with state



and federal regulations for the state's two largest 1915c waivers supporting individuals with I/DD. She established and implemented new processes to streamline critical incident investigations, aggregate data, and proactively identify compliance concerns and trends.

– Contract Specialist, I/DD 1915c Waivers (10/2011 to 09/2013)

Karri reviewed and monitored compliance for over 2,000 contracted providers statewide. She led review teams in on-site evaluations of program provider performance, developed detailed reports and tracked provider compliance, created the monitoring schedule, and delegated staff responsibilities. She also developed and delivered status reports to leadership regarding program operations and deliverables.

Arc of the Capital Area (08/2009 to 10/2011)

– Program Manager, I/DD Case Management

Karri directed case management operations for over 700 clients and 30 case managers. She trained and supported case managers in day-to-day functions. She monitored and reported on compliance with state and federal rules and regulations, developed and delivered routine and ad hoc presentations to the executive board, and was responsible for all communications and interactions with the state oversight agency.



Renee Gayhart, MA

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MA, International
Relations and Financial
Management, School for
International Training

Double BA, Science,
International Business,
Marketing and Political
Science, Fort Lewis
College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

Renee Gayhart is a senior manager at BerryDunn, presenting with a diverse background in the healthcare industry and experience which includes the development, implementation, operationalization, and quality assurance of multi-million-dollar contracts. Renee is a proven leader with a track record of completing projects on time and on budget. She has managed capital, Tribal infrastructure, and reclaiming projects and initiatives, as well as improvements in healthcare delivery, as a compassionate and respectful leader capable of building and supporting successful relationships both inter- and intra-departmentally.

PROJECT EXPERIENCE

BerryDunn (01/2025 to present)

Renee is a senior manager in BerryDunn's Medicaid Practice Group (MPG).

-West Virginia Bureau of Medical Services (BMS)

West Virginia Bureau of Medical Services (BMS) 1915(c) HCBS Waiver Amendments and Renewal reviews. Renee is currently providing Subject Matter Expertise (SME) advisory services to assist Project Managers with technical assistance on certain specific sections of the following waiver program: Traumatic Brain Injury Waiver (TBIW), Aged and Disabled Waiver (ADW), and Intellectual/Developmental Disabilities Waiver (IDDW) and Children with Severe Emotional Disabilities (CSEDW). Her work includes technical editing of waiver application, templates, and recommending operational changes to existing MCO, ASO and vendor contracts, provider manuals, and waiver processes as requested.

Provide SME advisory services as requested on Access to Medicaid Services (Access Rule) and HCBS setting rules, to assist Project Managers working with BMS on implementation of multiple provisions within the Access rule. This includes review of Money Follows the Person (MFP) Quality Initiative Requirements and Quality Management Plan to help ensure BMS meets CMS requirements for quality measure tracking and reporting.

Providing 1115 SME advisory services for Reentry Waiver Monitoring Protocol and State Plan Service. Renee provides ad hoc policy support to the Project Manager as requested. Her work with this



project includes policy and legislative research.

Provide SME advisory services and project support on CCBHC billing and data reporting tasks as requested. This includes reviewing various reporting tools that may be used for CCBHC quality bonus payment calculations in the coming years.

-Minnesota Department of Human Services (DHS)

Provide SME advisory services for specific Minnesota contingency management services being considered in the state plan amendment. Completed analysis of DED 1 and 2 to propose what decision points to be made for DED 3 and 4 project continuation.

-Guam Department of Public Health and Social Services (DPHSS)

Providing project support to the Guam Medicaid Program contract with SME advisory services on the HCSS Setting Rule, Pharmacy SPA, and Rate methodology request. Renee provides support to the project manager on the tasks outlined in the statement of work

Alaska Department of Health and Social Services

– Director, Health Care Services (05/2019 to 08/2024)

Renee served as Director of Healthcare Services for Alaska's single state Medicaid agency, the Department of Health and Social Services, where she oversaw Operations, Quality Assurance, Systems, Accounting, Reclamations and Recoveries, Pharmacy, Medicaid Medical Director, Tribal Programs, Residential Licensing, Health Facilities Certification and Licensing, Background Check unit, and Administration Operations. She oversaw the \$45-50M weekly check write to 30,000 Medicaid providers to help ensure balance with the fiscal agent and the Treasury. She also oversaw the licensing section of 135 health facilities and over 800 residential settings, as well as 30,000 background checks annually. In addition, Renee oversaw the collection of over \$680M in Medicaid recoveries, rebates, and general fund reclaiming. She analyzed, tracked, and projected healthcare delivery and Medicaid expenditures up to \$2B flowing through the Medicaid Management Information System (MMIS). Renee testified at the House and Senate legislatures on dozens of health care bills each year and worked with stakeholder groups and provider associations to gather input for cost containment and budget cuts. She held an executive branch seat on the Medical Care Advisory Committee, participated in the Executive Leadership team at Department of Health and Social Services, and acted as Liaison to the State Tribal Medicaid Task Force for Tribal consultation.

– Commissioner's Office of Medicaid and Healthcare Policy Tribal Health Program Manager (04/2004 to 05/2019)

Renee implemented the State Health Official (SHO) February 26, 2016 guidance letter to develop a process to do Tribal refinancing, supporting the first state in the nation to successfully operationalize at high dollar value. Since implementation of the SHO in State Fiscal Year (SFY) 2017, she saved the Department \$105M in general funds, while being on task to save \$94M in SFY19 as requested by the Legislature. She also assisted with infrastructure development and capital projects to support new facilities; i.e., Kotzebue and Bethel 18-bed Long Term Care facilities, ANMC 200-bed residential housing, and clinic remodel projects in various regions. Renee provided technical expertise to the Department's eight Division Directors and their Health Administrators on Tribal Medicaid policy, Medicaid billing and navigation of the Alaska Tribal Healthcare System. In addition, she analyzed, tracked, and projected Tribal healthcare delivery and Medicaid billing volume of approximately one million claims at just over \$253M annually generated from 16(+) regional Tribal health



organizations. Renee monitored Tribal claim activity and assisted with quality assurance in the form of extrapolated and/or void/adjust payback scenarios with Tribal facilities. She developed good working relations between the Department and the Alaska Tribal Health Consortium to promote development and implementation of new service categories to address healthcare disparities in the Alaska Native population, such as Tribal targeted case management and tobacco cessation. Renee provided on-site technical assistance to promote the settlement of total cost to programs delivering Early and Periodic Screening, Diagnostic, and Treatment (EPSDT) services to American Indian/Alaska Native (AI/AN) Medicaid children under age 21 through Continuing Care Provider Agreements at five Tribal facilities at approximately \$20M annually. She also oversaw the Department's capital expenditure of approximately \$15M toward construction of eight facilities related to the "Bring the Kids Home" initiative in partnership with Denali Commission, MH Trust, and Rasmusson Foundation. At direction of the Deputy Commissioner, she acted as Tribal Medicaid Liaison for Medicaid Reform activities intended to develop/implement Medicaid sustainability, as well as revise state legislation, regulations and policy to realize approximately \$80M reduction of state general fund expenditures.

– Developmental Disabilities (DD) Program Specialist III/Statewide Special Projects Coordinator (07/1999 to 04/2004)

Renee was responsible for the statewide fiscal and program management of the Home and Community Based Medicaid Waiver Program(s) at \$50M, the DD Community Grants at \$16M, OBRA Services at \$150K, and the refinancing of existing services to maximize utilization of Federal Match. She ensured waiver practices were in compliance with Centers for Medicare & Medicaid Services (CMS), formerly Health Care Finance Administration (HCFA), guidelines for waiver implementation. She also supervised DD Program Specialist I, Project Assistant, and Administrative Clerk III and acted as team leader for regional program specialists statewide. In addition, Renee provided technical assistance to 36 grantees and tracked all individualized service cost plans for 700(+) consumers receiving HCBW services. She provided programmatic and technical assistance to DD Service Coordinators. She also coordinated and participated in special projects associated with Medicaid regulations, certification packets, national employment leadership projects, family support projects, MMIS development projects, recruitment and retention projects and others as assigned. She acted as liaison with Departments within the State of Alaska; contractors outside of Alaska; employment; nongovernmental entities; and national organizations such as National Association of State Developmental Disability Services (NASDDDS), President's Committee on Mental Retardation (PCMR), Association of the Mentally Retarded (AAMR), The Association of Severely Handicapped (TASH) and others as assigned.

Reach Inc. (09/1995 to 07/1999)

As a family services coordinator, Renee provided case management of 35 consumers residing in group homes, receiving in home supports, supported living, respite, supported employment, day habilitation, and intensive active treatment services. She supervised 15(+) employees providing services to caseload. She also secured funding for special projects such as internet classes for DD consumers, Special Olympics and recreational activities, leadership programs for young adults (age 16-22) in transition, and People First.



Alaska Department of Administration (04/1997 to 07/1998)

Renee served as a public guardian associate, where she provided guardian and conservator services to 110(+) court-appointed Southeast Alaska consumers, including but not limited to financial planning, secured housing, committing consumers to institutions or nursing homes, accompanying consumers to court cases, transitioning consumers from jail or mental health units to their community of choice, etc. Her direct contact population included adults with chronic mental illness, dementia, Alzheimer's, substance abuse issues, developmental disabilities, and homelessness.



Jonathan “Jon” Watkins

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Criminal Justice, West
Virginia University at
Parkersburg

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3 years



Jon Watkins is a consultant with BerryDunn, presenting with a history of working in high pressure, fast-paced roles that require diligence, precise communication, and organization. His consistent and dependable skills in account management and customer service have allowed him to successfully serve clients and companies in the public and private sectors, building strong relationships and successful project outcomes.

KEY QUALIFICATIONS

- Three years' experience supporting a single state Medicaid agency, including experience in procurement, Managed Care Organization (MCO) onboarding, Medicaid Enterprise System (MES) modernization, Home and Community Based Services (HCBS), and risk assessment and management
- More than 10 years' experience with coordination, organization, and management
- Expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership

PROJECT EXPERIENCE

BerryDunn (11/2021 to present)

– West Virginia Department of Human Services (DoHS)

Purchasing Support (11/2024 to present)

Jon provides project coordination and monitors project risks and issues in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Medicaid and Children's Health Insurance Program (WVCHIP)

Enterprise System (MCES) Procurement Assistance Project (11/2021 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation of the MCES Project, working closely with Bureau for Medical Services, WV's single state Medicaid agency. Jon helps to keep the client informed and helps ensure the project meets its goals and objectives.



People's Access to Help (PATH) DDI Project Management (11/2023 to 02/2024)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the WV PATH Project when needed. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

Incident and Case Management System (ICMS) Procurement Project (09/2022 to 06/2023)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of the ICMS procurement. Jon's work helped to ensure the State has a detailed Request for Proposal (RFP) and a successful procurement for ICMS services.

Mental Health Parity and Behavioral Health Support Project (01/2022 to 06/2022)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for the Mental Health Parity and Behavioral Health Support Project. Jon helped to keep the client informed and helped ensure the project met its goals and objectives.

- West Virginia Bureau for Medical Services (BMS)

ARPA Section 9817: HCBS Implementation Project (09/2024 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the ARPA HCBS Implementation Plan Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Programmatic Managed Care Support (06/2024 to present)

Jon provides project coordination and monitors project risks and issues to assist the client with management and facilitation for the Programmatic Managed Care Support Project when needed. Jon's work helps to keep the client informed and helps ensure the project meets its goals and objectives.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (07/2022 to 06/2023; 11/2023 to 08/2024)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of MCO procurement and onboarding activities for MHT. Jon's work helped to ensure the State has a detailed RFP and a successful procurement for MCO services, along with onboarding support for the chosen vendor.

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (11/2023 to 12/2023)

Jon provided project coordination assistance and monitored project risks and issues to assist the client with management and facilitation for the CCBHC Project when needed. Jon's work helped to keep the client informed and helped ensure the project meets its goals and objectives.

Legislative Implementation Assistance Project (LIAP) (09/2023 to 10/2023)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation for BMS and the LIAP Project. Jon helped to keep the client informed and helped ensure the project met its goals and objectives.

Public Health Emergency (PHE) Support Project (12/2021 to 12/2022)

Jon provided project coordination and monitored project risks and issues to assist the State with temporary flexibility that provides services to different beneficiaries during PHE. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

Mountain Health Promise (MHP) Implementation Project Management Support (11/2021 to 11/2022)

Jon provided project coordination and monitored project risks and issues to assist the client with management and facilitation of procurement activities for MHP. Jon's work helped to ensure the



State had a detailed RFP and a successful procurement, along with onboarding support for the chosen vendor.

CAMC Hospital (1/2021 to 11/2021)

Jon worked as an admitting clerk to schedule and coordinate both inpatient and outpatient cases which included registering patients, verifying insurance, billing, and customer service. In addition, he organized the day-to-day needs of the unit and performed basic bookkeeping duties.

Greenhills Country Club (05/2012 to 12/2020)

Jon worked in administration to schedule and organize golf tournaments for the country club. This included coordination with the PGA Professional and all parties involved with the tournament. He was also responsible for organizing, taking minutes, and processing documents related to Board Meetings. His duties also included recruiting new members and employees, training new hires, day-to-day bookkeeping duties, and invoicing.

Jackson County 911 (01/2020 to 12/2020)

Jon worked as a dispatcher to receive and dispatch all emergency and non-emergency calls for EMS, law enforcement and fire for the County. This role required the multitasking of multiple calls per minute, operating both radio and telephone console, and heavy documentation of the recording per call.



Angie Phifer

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Political Science, Minor in Women's and Gender Studies, *Magna Cum Laude*, Denison University

Member of Phi Beta Kappa and Pi Sigma Alpha Honor Societies

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3 years

Angie Phifer is skilled in public policy research, development, and coalition outreach to advance legislative goals, particularly in the health and human service (HHS) field. She is practiced in state budgetary processes, including managing two state budget cycles and one state capital budget cycle in legislative offices. She has provided support to state Medicaid agencies through Independent Verification and Validation (IV&V) reporting, Medicaid Demonstration research and planning, State Plan Amendment (SPA) research and drafting, and Medicaid policy research.

KEY QUALIFICATIONS

- Over three years' of Medicaid experience including experience collaborating with state Medicaid agencies (SMAs)
- Six years' experience in policy analysis and research, including over two years of legislative affairs experience
- Over three years' experience providing business analysis work pertaining to Streamlined Modular Certification (SMC), strategic planning, and policy support
- Over two years' experience with SPAs and Medicaid demonstration projects

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

– Minnesota Department of Human Services

Research Studies for Contingency Management (CM) Services (05/2024 to present)

Angie serves as a consultant on the CM Services demonstration research project. She conducts policy research and project coordination for the State's initiative to research CM services for a potential Medicaid demonstration waiver in the future.

– West Virginia Bureau for Medical Services (BMS)

Certified Community Behavioral Health Clinics (CCBHC) SPA (01/2024 to present)

Angie serves as a consultant on the CCBHC Medicaid demonstration project. She conducts policy research for the State's initiative and contributes to the creation and revision of deliverables such as program criteria and policy manuals.



- Ohio Department of Medicaid (ODM)

Ohio Medicaid Enterprise System (OMES) IV&V Services (09/2021 to present)

Angie serves as a consultant and supporting Ohio's single state Medicaid agency, the Ohio Department of Medicaid. She is supporting the implementation of the State's vision for a modular Medicaid Management Information System (MMIS) in the OMES project. Angie collaborates with OMES stakeholders, observing client meetings, contributing to biweekly, monthly, and quarterly reports, and reviewing project artifacts.

- Puerto Rico Medicaid Program (PRMP)

Angie served as a consultant and supported Puerto Rico's Medicaid Program.

SPAs and Compliance (12/2022 to 03/2024)

Angie worked on the SPA support project. She contributed to the research and drafting of SPAs and performed analysis of gaps in PRMP's current state plan. She also delivered a monthly synopsis of SPA guidance released by the federal government and related news.

Money Follows the Person (MFP) Grant Application and Assessment (10/2022 to 11/2023)

Angie worked on the MFP Needs Assessment project. She contributed to the research and drafting of the MFP Needs Assessment including stakeholder communication planning, data collection, and research analysis.

Ohio House of Representatives, Legislative Aide to Representative Monique Smith (01/2021 to 09/2021)

Angie drafted, managed, and tracked legislation, including three primary sponsored bills and bills in the House Commerce & Labor, Economic & Workforce Development, and Technology & Innovation Committees. She worked with local leaders, constituents, and organizations to resolve individual and community issues; and managed the daily operations of the office including scheduling, intern management, and communications.

Ohio House of Representatives, Legislative Aide to Representative Randi Clites (01/2019 to 12/2020)

Angie drafted, managed, and tracked legislation, including 12 primary sponsored bills and bills in the House Aging & Long-Term Care, Agriculture & Rural Development, and Health Committees. She worked with local leaders, constituents, and organizations to resolve individual and community issues; and managed the daily operations of the office including scheduling, intern management, and communications.

Randi Clites for Ohio State Representative (06/2018 to 11/2018)

As the campaign manager, Angie directed field, fundraising, and communications for Randi Clites' successful campaign for Ohio HD75. She oversaw and ran a field operation that made over 54,000 contacts with voters through canvassing and phone calls; directed candidate in raising over \$70,000 and managed the campaign spending and budgeting; and managed candidate's schedule, planned campaign events, and directed the campaign's social media.

College Democrats at Denison University (05/2017 to 05/2018)

Angie guided the Executive Board and managed a \$30,000 budget; organized, planned, and advertised meetings and events with speakers including Howard Dean and Joe Lieberman; and coordinated club efforts with political campaigns and candidates including Hillary Clinton, Ted Strickland, and local Licking County candidates.

U.S. Senator Sherrod Brown (05/2017 to 08/2017)

Angie spoke to constituents and logged their concerns from calls, voicemails, faxes, and letters;



and managed casework and requests for assistance.

Scottish Parliament, Intern to Gail Ross (01/2017 to 05/2017)

Angie wrote policy briefs and motions, conducted background research, and compiled contact lists. She completed an extensive research project on women's political representation in the Scottish Highlands.

Ohio Together (09/2016 to 11/2016)

As a campus fellow, Angie recruited volunteers at Denison University to canvas and register over 500 new voters. She planned and organized events featuring campaign surrogates, canvassing, and meetings.

Strickland for Senate (05/2016 to 07/2016)

As a policy and finance intern, Angie wrote policy briefs, conducted research, and managed policy projects including Governor Strickland's "Women and Working Families" Platform. She fundraised via phone calls, creating mailers, and staffing events.



Kellee Nash, MPA

CONSULTANT

Berry, Dunn McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MPA, National University

BA, Sociology, San Diego State University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

Kellee Nash is a motivated and committed human services professional with over 15 years of experience driving outcomes in government and non-profit sectors within health and human services. She brings demonstrated expertise in Medicaid Home and Community-Based (HCBS) waivers, particularly in quality monitoring and improvement. Her experience includes budget and finance management, child welfare services, Medicaid, policy analysis, research methodologies, social support policies, grants management, and capacity building.

PROJECT EXPERIENCE

BerryDunn (01/2025 to present)

Kellee is a consultant in BerryDunn's Medicaid practice Group.

Nevada Aging and Disability Services Division (03/2020 to 11/2021; 07/2023 to 01/2025)

– Money Follows the Person (MFP) Grant Services (07/2023 to 01/2025)

As a project director Kellee managed the \$5M MFP Rebalancing Demonstration Grant from Centers for Medicare & Medicaid Services (CMS), helping ensure compliance with federal guidelines and achieving program benchmarks after transition to the Nevada Aging and Disability Services Division. She led strategic initiatives to optimize Medicaid's long-term care systems, reducing costs and improving service delivery. In addition, she conducted Medicaid HCBS data-driven analysis, such as the HCBS Quality Measure Set and National Core Indicators, to support healthcare delivery improvements and enhance patient outcomes.

This work included collaborating with stakeholders to design and execute healthcare programs aligned with policy objectives, developing Nevada CMS MFP program manuals such as the Operational Protocol and Work Plan, and completing all MFP data and budget reports including the Semi-Annual Report (SAR), ABCD Report, and T-MSIS Report. Kellee used data analytic sources to analyze data related to caseloads and projections, such as Children's Medicaid and Children's Health Insurance Program (CHIP), expenditures for Managed Care Organizations (MCOs), and Medicaid eligibility and Federal Medical Assistance Percentages (FMAP) and state share.



– **1915(c) HCBS Waiver Program Reviews (03/2020 to 11/2021)**

Kellee conducted quality reviews of 1915(c) HCBS waiver programs using a continuous quality improvement process applied to the waiver assurances. This included Medicaid certification reviews, helping to ensure compliance with state and federal regulations; Health and Welfare Assessments of Medicaid beneficiaries, addressing health and safety concerns; National Core Indicator surveys to Medicaid beneficiaries receiving HCBS services in Nevada; and technical guidance to agency staff and/or contractors regarding quality assurance/improvement activities and requirements.

Nevada Division of Health Care Financing and Policy (DHCFP) (11/2021 to 07/2023)

As a project director working under DHCFP, Nevada's single state Medicaid agency, Kellee managed the \$5M MFP Rebalancing Demonstration Grant from CMS, helping to ensure compliance with federal guidelines and achieving program benchmarks. She led strategic initiatives to optimize Medicaid's long-term care systems, reducing costs and improving service delivery. In addition, she conducted Medicaid HCBS data-driven analysis, such as the HCBS Quality Measure Set and National Core Indicators, to support healthcare delivery improvements and enhance patient outcomes.

This work included collaborating with stakeholders to design and execute healthcare programs aligned with policy objectives, developing Nevada CMS MFP program manuals such as the Operational Protocol and Work Plan, and completing all MFP data and budget reports including the SAR, ABCD Report, and T-MSIS Report. Kellee used data analytic sources to analyze data related to caseloads and projections, including Children's Medicaid and CHIP, expenditures for MCOs, and Medicaid eligibility and FMAP and state share.

City of Las Vegas, NV Office of Community Services (03/2018 to 01/2020)

Kellee managed a \$500k community engagement grant, helping ensure funding compliance and program effectiveness. She led research and policy development initiatives for social and behavioral health issues; led the City of Las Vegas Veterans Services Initiative, driving improvements in veteran and spouse employment services, behavioral health support, and addressing opioid addiction, displaying leadership and project management skills; and developed and maintained project plans, helping ensure timely delivery of objectives.

Nevada Division of Children & Family Services (01/2016 to 02/2018)

Kellee managed data tracking systems for child welfare services, ensuring accurate operations. This included conducting comprehensive statewide Medicaid and Child and Family Services Reviews (CFSR), providing technical assistance to counties in Nevada in alignment with Administration for Children and Families (ACF) Children's Bureau guidelines, displaying expertise in program evaluation and regulatory compliance. She also evaluated child welfare programs, enhancing service quality and regulatory adherence, and developed performance reports, providing data-driven insights for statewide use.

Nevada Aging and Disability Services Division/Easter Seals of Southern Nevada (10/2014 to 12/2015)

As a development specialist, Kellee developed individualized and person-centered family service plans for families receiving Medicaid HCBS services, helping ensure program eligibility, and optimizing service delivery. She conducted comprehensive assessments of children's cognitive, physical, social, and language development, providing tailored recommendations to promote holistic growth and development, highlighting proficiency in child development and assessment. This included analyzing and applying federal, state, and division regulations to help ensure stringent program compliance and Medicaid quality assurance, contributing to program integrity



and regulatory adherence, demonstrating expertise in regulatory compliance and quality assurance.

Clark County, NV Government Department of Finance (11/2013 to 03/2014)

As financial analyst, Kellee managed agency budgets exceeding \$90M, helping to ensure fiscal responsibility and compliance. She tracked revenues and expenditures for grants, ensuring accurate financial reporting, reviewed department purchase requests, optimizing resource allocation, and analyzed labor data, providing insights on salaries and benefits to support workforce management.

AVID Center (11/2007 to 11/2013)

Kellee managed the Center's Eastern Division budget, helping to ensure fiscal responsibility and regulatory compliance. She also trained and supervised administrative staff, enhancing team performance and efficiency; processed new-hire paperwork, helping to ensure compliance with laws and regulations; and managed contracts for school districts, helping to ensure seamless service delivery and compliance.

Arizona Department of Economic Security (11/2005 to 10/2007)

As a policy analyst, Kellee managed contracts for school districts, helping ensure seamless service delivery and compliance. She developed and implemented health and human services policies and procedures, significantly enhancing program effectiveness, and helping to ensure compliance with regulatory standards, demonstrating expertise in policy development and implementation. She also conducted comprehensive policy and legislative analysis, evaluating budgetary impact, and providing insights to inform strategic decision-making, displaying proficiency in data analysis and strategic planning.

Arizona Governor's Office Strategic Planning & Budgeting (06/2005 to 10/2005)

Kellee analyzed and tracked state agency budget requests exceeding \$2M, developing comprehensive financial analysis to support the Executive Budget Recommendation, displaying proficiency in budget analysis and financial planning. She managed budgets for the Arizona Department of Tourism and three major universities (University of Arizona, Northern Arizona University, and Arizona State University), helping to ensure fiscal responsibility and compliance with state regulations, highlighting expertise in budget management and regulatory compliance. In addition, she reviewed legislation for fiscal policy implications, advising legislative members on budgetary impacts, demonstrating proficiency in policy analysis and strategic advisory roles.

County of San Diego Child Welfare Services (10/2002 to 01/2004)

Kellee managed health-related budgets for child welfare programs, helping to ensure efficient allocation of resources and adherence to financial guidelines, demonstrating expertise in financial management and program oversight. She conducted audits to meticulously help ensure financial compliance with health programs, identifying areas for improvement and implementing corrective actions to enhance program integrity and regulatory adherence. In addition, she provided comprehensive health-related financial training within CFSR processes, enhancing staff competency, and helping ensure adherence to financial protocols, highlighting proficiency in training and compliance; as well as analyzed health program costs and financial reports, providing valuable insights to inform strategic decision-making and optimize resource allocation, demonstrating strong analytical skills and financial acumen.



Kortney Ester, MBA, CSM

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, Organizational Management, Mount Vernon Nazarene University

BA, Sociology, Central State University

Certified Scrum Master

PROPOSED PROJECT ROLE

General Project Manager (GPM)

MEDICAID EXPERIENCE

3 years

Kortney Ester is a Certified Scrum Master with more than seven years of Eligibility and Enrollment and Medicaid experience. She brings excellent communication and presentation skills, which have contributed to successfully coordinating external testing between a state-level Medicaid clients and the Centers for Medicare & Medicaid Services (CMS).

KEY QUALIFICATIONS

- 11+ years of Medicaid experience, including three years contracting with single state Medicaid agencies
- 3 + years of experience with project management and procurement
- 9+ years of experience with CMS-state systems testing

PROJECT EXPERIENCE

BerryDunn (03/2023 To present)

– West Virginia Bureau for Medical Services (BMS)
ARPA Section 9817: HCBS Implementation Project (02/2025 to present)
As a subject matter expert (SME), Kortney researches state and federal Medicaid policies, and assists with performance measurement services, waiver applications, and renewals.

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (01/2025 to present)

Kortney serves as a SME performing tasks that involve data transmission and quality assurance.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2023 to present)

As a GPM, Kortney oversees sub-projects, develops and edits contract requirements, conducts research, and helps ensure the quality of deliverables, including the request for proposal (RFP).

Mountain Health Trust (MHT) MCO Procurement Assistance Project (12/2023 to 03/2024)

Kortney served as a GPM, overseeing project tasks through completion, conducting research on client inquiries, developing deliverables, and explaining project responsibilities to other SMEs.

MES Incident and Case Management System (ICMS) Procurement Project (03/2023 to 03/2024)

As a SME, Kortney conducted peer reviews and research.



– Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (11/2023 to 02/2024)

Kortney served as a GPM for PRMP, Puerto Rico's Single State Medicaid Agency, providing interface testing assistance among CMS, Puerto Rico, and CMS's testing vendor. She helped ensure that testing requests and responses were accurate and up to CMS's requirements standards. She also developed testing reports and testing tracking deliverables.

KPMG, LLP (03/2021 to 03/2023)

– TennCare, Tennessee Department of Finance & Administration

Kortney worked as a senior associate (SA) in Advisory and contracted with the Tennessee Department of Finance and Administration, Tennessee's State Medicaid Agency, on the TennCare program. Kortney consistently maintained 100% utilization, accurate timesheets, and schedules. She recorded and edited client-facing meeting minutes, capturing key decisions and action items, provided feedback and next steps to associate-level team members on their work as an engagement transition coach and SA, and managed project plan development, project artifacts, performance reporting and tracking, and communication, including testing and procurement items. She also researched, compiled, and analyzed data on other states and entities related to active/potential procurements. Kortney provided ongoing procurement support to a state Medicaid client and participated in daily standup and client-facing meetings as a contributor and observer. She assessed processes and procedures to help ensure the implementation of lean practices, successfully coordinated external testing with a state-level client and CMS, and oversaw a Managed Care Organization's (MCO's) test data on behalf of a state-level client. Kortney led CMS Interoperability data exchange transformation testing for a state-level Medicaid client while she also coordinated and facilitated meetings with CMS, clients, and vendors, providing current project updates.

Franklin County Job & Family Services (08/2015 to 04/2021)

Kortney served as a case manager who determined eligibility for the Supplemental Nutrition Assistance Program (SNAP) (food assistance), Temporary Assistance for Needy Families (TANF) (cash), and various categories of Medicaid, including waiver services, CHIP, pregnant mothers, and Skilled Nursing Facilities. She worked as a front-end SME with vendors on two major state integration and transformation projects, including Ohio Benefits and state telephony enrollment. She utilized various federal and state data systems to verify the information and determine eligibility, interpreted, explained, and applied policy (Ohio Revised Code) to determine applicant eligibility, and complied with all federal and state security and privacy-related laws. Kortney worked independently at the Ohio State University Wexner Medical Center to determine eligibility and coordinate benefits with hospital billing and resources. She analyzed complex back-end eligibility system user issues to quickly find long-term solutions, provided detailed front-end feedback on flawed or inefficient business processes, and worked with Buckeye, Aetna, United HealthCare, and Molina to assist enrollees and help coordinate benefits.

Walls Wiring (10/2012 to 11/2017)

Kortney worked as project manager to review RFPs to find new contracts for the company, promote business and services by creating marketing campaigns, and facilitate daily scrum meetings with project teams. She managed projects, evaluated quality and progress, and updated stakeholders. Kortney also mapped business processes and regularly improved them using lean practices.

Ohio Public Employee Retirement System (12/2013 to 02/2015)

Kortney served as a member service representative who provided retirement counseling services to members, enrolled members and their families into healthcare plans with Aetna and other



MCOs, and maintained retirement accounts and determined retirement eligibility. She liaised with managed care plan organizations, members, and nursing facilities. She created retirement estimates for members, computed members' retirement payments and healthcare costs, and interpreted and applied policy to determine accurate payment amounts and health benefits eligibility.

Tennessee Department of Human Services (07/2011 to 08/2012)

Kortney served as eligibility counselor and unit lead, who interpreted and applied state policy to determine eligibility for Medicaid, SNAP, and TANF. She independently managed a large caseload of individuals and families, used multiple state systems to perform tasks and verify information, and helped implement a new state eligibility system. As a lead, she trained newly hired staff with on-the-job training and provided ongoing support and corresponded with clients through mail, email, phone, and in-person interviews.



Robyn Hoffmann, CHC, RN, MSN

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MS, Nursing, Community Health Concentration, Yale University

BS, Nursing, *cum laude*, University of Louisville

AS, Nursing, *summa cum laude*, University of Louisville

CHC certification, Health Care Compliance Association

PROPOSED PROJECT ROLE

General Project Manager

RELEVANT EXPERIENCE

35 years

AFFILIATIONS AND MEMBERSHIPS

- Healthcare Financial Management Association (HFMA) member
- Health Care Compliance



Robyn Hoffmann is a senior manager in BerryDunn's Healthcare Practice Group. She offers multi-faceted experience in healthcare compliance, Health Insurance Portability and Accountability Act (HIPAA) privacy, quality improvement in ambulatory healthcare and Medicaid managed care environments, policy development, and regulatory compliance and risk management in accountable care organizations (ACOs), federally qualified health centers (FQHCs), and skilled nursing facilities (SNFs). Robyn co-produces BerryDunn's *Compliance + Ethics = Integrity* podcast series, which offers solutions for emerging and perennial healthcare compliance, revenue integrity, and risk management topics.

Robyn has extensive clinical and administrative experience in ambulatory care settings, including FQHCs and academic health centers. Prior to BerryDunn, she most recently initiated and led the Corporate Compliance Program at a CT-based FQHC, orchestrated its preparations for ongoing ambulatory health re-accreditation by The Joint Commission (TJC) in 2014 and 2017, and its initial PCMH certification by The Joint Commission in 2015.

Additionally, for over nine years, Robyn worked with an entity that provided consultation to a State Medicaid agency where she offered subject matter expertise focusing on quality improvement, Pay-for-Performance, and Medicaid program integrity in the managed care and FFS delivery systems. Robyn's inputs were instrumental as the state Medicaid agency updated its quality strategy for CMS and the EPSDT Periodicity Schedule.

Robyn brings a unique perspective to each engagement, as she draws on her diverse experience as a community health clinical nurse specialist to help organizations advance healthcare quality, regulatory compliance, and patient safety/risk management.

PROJECT EXPERIENCE

Robyn helps clients with a variety of challenges, including:

- Healthcare compliance program development
- Developing enhanced operational policies and procedures in ACOs, FQHCs, and SNFs



<ul style="list-style-type: none"> Association (HCCA) member National Association of Community Health Centers (NACHC) individual member Member, Compliance Committee, HFMA, MA/RI Chapter 	<ul style="list-style-type: none"> FQHC preparations for operational site visits from Health Resources and Services Administration (HRSA) HIPAA privacy "Continuous Readiness" with Ambulatory Health Standards from TJC Patient safety/risk management in ambulatory healthcare Quality improvement in Medicaid Program integrity in Medicaid managed care systems
<p>COMMUNITY SERVICE</p> <ul style="list-style-type: none"> Wood River Health, Patient Advisory Committee Wood River Health, Quality Improvement Committee Member of the Board of Trustees, Bill Memorial Library, Groton, CT Member, Friends of Fort Griswold, Groton, CT Graduating Class Ambassador, Assumption High School, Louisville, KY Member, English Speaking Union, Greenwich, CT Chapter 	<p>BerryDunn (07/2022 to present)</p> <p>Robyn is a senior manager with BerryDunn's Healthcare Practice Group, where she offers multi-faceted experience in healthcare compliance, HIPAA privacy, quality improvement in ambulatory healthcare and Medicaid managed care environments, and regulatory compliance and risk management in FQHCs.</p> <p>Robyn has supported organization service reviews and audits for many independent clients on projects such as:</p> <p><i>Subject Matter Expert (SME) (10/2024 to present)</i></p> <p>Robyn provides subject matter expertise to the Take Me Home-WV-Home and Community-based Services (HCBS) Quality Initiative Project. Robyn analyzed external assessment tools for Long-Term Services and Supports (LTSS) Quality Measure-1, Core Elements 4, 5, and 6 and LTSS-1, Supplemental Elements 3, 5, and 14. Robyn presented these findings to the WV Bureau for Medical Services in January 2025. Robyn is participating in the development of the Data Reporting Gap Analysis deliverable.</p> <p><i>Analysis of SNF Compliance and Privacy Programming (04/2024 to present)</i></p> <p>Robyn serves as the compliance SME for the Analysis of Skilled Nursing Facility Compliance and Privacy. In this role, Robyn produced a document request for SNFs, analyzed the materials submitted by the SNFs, developed an interview guide, and led the interviews with SNF administrators and managers, developed a set of compliance-related policies and procedures, and created a compliance and privacy training slide deck.</p> <p><i>Targeted Business Development Services (03/2023 to present)</i></p> <p>Robyn serves as project lead for targeted business development services for a woman- and veteran-owned advance practice registered nurse (APRN) telephonic medical support entity. Robyn provides recommendations for website enhancement, identifies opportunities for speaking engagements with state and regional Primary Care Associations, and documents the status of outreach to FQHCs.</p>



Independent Review Organization (IRO) Services (03/2023 to present)

Robyn supports IRO Services in her role as a claim reviewer. In the most recent IRO engagement, Robyn developed the claim review tool, served as first reviewer for the sampled records, compiled relevant state regulations, and participated in the development of the report to the client.

Outsourced Compliance and Privacy Officer Services (12/2023 to 09/2024)

Robyn provides compliance specialist support for Outsourced Compliance and Privacy Officer Services. In this role, Robyn prepares compliance-related reports for the Board of Managers (BOM) and the BOM's Audit Committee, responds to incoming calls on the compliance hotline, develops compliance-related policies and procedures for endorsement by the compliance committee and the BOM's Audit Committee, develops the agenda for the compliance committee, prepares the quarterly program integrity report, and collaborates with the Chief Compliance and Privacy Officer and the privacy specialist in developing the proposed annual compliance work plan and compliance committee charter.

Review of the Colorado Department of Health Care Policy & Financing Recovery Audit Contractor (RAC) Program (08/2023 to 04/2024)

Robyn provided compliance support during the review of the Colorado Department of Health Care Policy & Financing Program. In this role, Robyn led the development of a stratified sample of 100 RAC claims, developed the claim review tool, and served as first reviewer for the sampled records.

Good Faith Estimate (GFE) Special Project (07/2023 to 08/2023)

Robyn participated in the GFE special project as a regulatory compliance SME. In this role, Robyn developed an interview guide and conducted the interviews with ambulatory administrators and managers, produced a document request focusing on federal GFE requirements, analyzed the materials submitted by the client, and developed and presented six recommendations to the client's ambulatory care leadership.

Compliance Program Effectiveness Assessment (01/2023 to 04/2023)

Robyn served as the compliance SME for a health system's compliance program effectiveness assessment, which was conducted under attorney/client privilege. Robyn developed a document request, analyzed the materials submitted by the client, created an interview guide, and led on-site interviews with health system administrators, prepared discussion points for three focus groups, and facilitated the groups. She served as principal author of a summary report and co-presented the findings to the health system's leadership.

Fair Haven Community Health Care (FHCHC) (09/2016 to 07/2022; 08/2004 to 01/2016)

Robyn served as a member of the Health Center's executive management team as a corporate compliance officer and quality improvement liaison and reported directly to FHCHC's Chief Executive Officer, with direct reporting to the Board of Directors for any compliance issues. Her responsibilities included helping to ensure enterprise-wide compliance with standards issued by two accrediting organizations (TJC and the National Committee for Quality Assurance), with Section 330 requirements for FQHCs, which are issued by the HRSA, Bureau of Primary Health Care (BPHC), with state licensure requirements, and with federal and state privacy regulations. Robyn served as the senior administrator responsible for FHCHC's successful virtual operational site visit by HRSA in December 2020 and its Ambulatory Health Care and PCMH Re-accreditation by TJC in June 2021. She directly supervised the work of FHCHC's Director of Practice Management and Accreditation and the Director of Risk Management and Safety.

Robyn chaired FHCHC's corporate compliance committee and served as a member of the Health



Center's quality improvement council, its risk management committee, its infection prevention and control committee, and its accreditation committee. She was also responsible for the development of FHCHC's annual corporate compliance work plan, its presentation to FHCHC's Board of Directors (BOD) for approval, and ongoing oversight and monitoring of the plan's implementation. She provided monthly corporate compliance and HIPAA privacy dashboard reporting to FHCHC's Board and participated in a non-voting capacity as a senior administrator in monthly meetings of the Health Center's BOD as well as the Board's finance, governance, capital development, and QI/QA committees. Robyn served as the inter-departmental project liaison with the external vendor (The Crossroads Group) that conducted FHCHC's bi-annual employee satisfaction survey in 2017 and 2019. She facilitated FHCHC's development of its three-year 2018-2021 Strategic Plan in conjunction with John Snow, Incorporated (JSI), which was approved by the BOD and by the BPHC in 2018. Robyn participated in the Health Center's 2021-2024 strategic planning initiative with JSI, which was approved by the BOD and the BPHC in 2022.

Xerox State Healthcare, LLC (10/2005 to 08/2014; 01/2016 to 09/2016)

– Rhode Island Executive Office of Health and Human Services (EOHHS)

Senior Medical Services Consultant (01/2016 to 09/2016)

Robyn supported EOHHS (RI's Single State Medicaid Agency) in the State's implementation of the Accountable Entity (AE) Coordinated Care Pilot Initiative and the Health System Transformation Program (HSTP). She co-facilitated the AE leadership team and the HSTP steering committee and developed the proposed quality scorecard for Phase One of the AE Initiative. She also participated in the development of Phase One AE certification standards and incentive program and prepared AE-related public education materials and participated in AE-related presentations to stakeholder groups. She served as one of the senior authors of a complement of Medicaid managed care re-procurement materials (including the Model Contract and the Letter of Intent) for the State and provided technical expertise in preparation for the 2016 the Centers for Medicare & Medicaid Services (CMS) Medicaid Managed Care Program Integrity Audit.

– Quality Improvement Consulting Manager (10/2005 to 08/2014)

Robyn collaborated in the oversight of RI Medicaid's participating managed health plans, with functional responsibility for compliance, Medicaid program integrity, and quality improvement. She served as an author of the compliance and fraud/waste/abuse sections of the State's Medicaid Managed Care Services Contract (September 2010) and related contract amendments. She developed the State's managed care modules for its successful 2012 and 2009 program integrity site visits by the CMS Medicaid Integrity Group. She facilitated quarterly meetings between the RI EOHHS, the State's Medicaid-participating health plans, and the RI Department of the Attorney General's Medicaid Fraud Control Unit (MFCU). She established the requirements for the State's Medicaid-participating health plans' quarterly reporting of the status of their Medicaid fraud and abuse investigations and for the processing of managed care enrollees' informal complaints, as well as the template for the compliance dashboard. From 2006–2014, Robyn led RI's annual pay-for-performance (P4P) program for the State's Medicaid managed care plans and served as the EOHHS liaison to the State's external quality review organization. She chaired the quality improvement committee for the EOHHS' Center for Child & Family Health and the EOHHS' quality and evaluation work group for its Section 1115 waiver.

Hospital of Saint Raphael (11/2002 to 10/2005)

Robyn served as the Hospital's Director of Ambulatory Services and administered daily operations of the Department, which provided over 66,000 visits annually. She developed the Department's component of the Saint Raphael Hospital Corporate Compliance Plan and participated in



multidisciplinary quality improvement initiatives. Robyn revised the Department's encounter forms/superbills and trained clinicians about compliant billing procedures. She represented the Hospital as a member of state, local, and regional community health initiatives, including the Connecticut General Assembly's Medicaid Managed Care Council, the New Haven Health Department's Immunization Committee and the City's Fetal and Infant Mortality Review (FIMR) Team. Robyn served as a member of the Hospital's Health Information Management and Joint Commission Readiness committees. She led the implementation of the Dentrix operating system for the Smiles 2 Go Dental Van. Her span of administrative control included the Family Health Center and Ambulatory Specialty Clinics, Smiles 2 Go Dental Van, the Department of Oral and Maxillo-Facial Surgery, the Ambulatory Care Medical Records Department, and the Women, Infants, and Children (WIC) Program. Robyn collaborated with the Hospital's health information technology (HIT) director in providing HIPAA privacy training for all staff in the Ambulatory Services Department.

– **Community Health Center, Incorporated (07/2000 to 11/2002)**

Robyn worked as a site director with Community Health Center, Incorporated, where she administered daily operations, as well as planning and development of all programs for multiple sites within CT's largest FQHC. She helped to ensure each site's compliance with all state and federal licensure and workplace regulations. In 2002, Robyn served as a member of the FQHC's steering committee guiding the successful implementation of a new practice management software system, participated in CHC's Joint Commission Readiness Committee, and organized Joint Commission site visit preparations. She facilitated public education sessions for members of the CT General Assembly and local elected public officials representing Middletown and Clinton, CT.

PUBLICATIONS AND PRESENTATIONS

- *Emergency Preparedness for FQHCs and RHCs, Post-pandemic*, Compliance Today, January 2025.
- *What You Need to Know about EPSDT Requirements*, BerryDunn, January 3, 2025. (Co-author.)
- *Resident Safety, Billing Integrity, & Quality of Care*, Maine HealthCare Association, October 15 – 17, 2024, Rockland, ME. (Co-presenter.)
- *A Recipe to Invigorate Your Organization's Corporate Compliance & Ethics Week (CCEW)® Celebration*, Health Care Compliance Association's Virtual Clinical Practice Compliance Conference, 10/15/24 – 10/16/24.
- *Activate Your Health Center's Compliance Committee*, Pennsylvania Association for Community Health Centers, Oct. 8 – 10, 2024, Lancaster, PA.
- *Do the Right Thing! Promoting an FQHC's Culture of Compliance*, Virginia Community Healthcare Association, Sept. 18 – 20, 2024, Falls Church, VA.
- *Emergency Preparedness: Isn't It Time to Update Your EP Plan, Post-Pandemic?* Virginia Community Healthcare Association, Sept. 18 – 20, 2024, Falls Church, VA.
- *Prepare Your FQHC's Board for a Successful Operational Site Visit*, Compliance Today, August 2024.
- *Do the Right Thing: Emergency Preparedness in the Post-pandemic World (4/17/24)*, Health Care Compliance Association, Compliance Institute 2024, April 14 – 17, 2024, Nashville, TN.



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- *Service Animals in Healthcare Settings: Complying with Laws and Regulations*, Compliance Today, March 2024.
 - *Compliant Good Faith Estimates for Uninsured Ambulatory Care Patients*, Compliance Today, October 2023.
 - *Assuring Medicare Compliance for Behavioral Health Services*, Health Care Compliance Association, Virtual Clinical Practice Compliance Conference, October 10 - 11, 2023 (Co-presenter).
 - *Complying with Financial Eligibility Requirements in the Title X Program*, Compliance Today, August 2023.
 - *Don't Be Surprised! How Ambulatory Care Providers Can Streamline Compliance with the No Surprises Act and Its Good Faith Estimate Requirements While Increasing Patient Engagement and Maintaining Revenue Integrity*, Health Care Compliance Association's Compliance Institute, April 2023, Anaheim, CA. (Co-presenter).



Patricia Nisbet

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Patricia Nisbet is an experienced Medicaid professional with over 10 years of working with the West Virginia Bureau for Medical Services, the state's single Medicaid agency. She has experience in leadership, waiver applications, and project oversight.

EDUCATION AND CERTIFICATIONS

MA, Special Education,
Specializations in Severe
and Profound Handicaps
and Early Intervention,
West Virginia University

BA, Psychology, West
Virginia University, *Magna
cum Laude*

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

13 years

PROJECT EXPERIENCE

BerryDunn (04/2025 to Present)

- West Virginia (WV) Bureau for Medical Services (BMS)

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase V

Patricia supports the project by providing subject matter expertise for Home and Community Based Services (HCBS) American Rescue Plan (ARP) Waiver Renewal finalization efforts. She provides extensive expertise in creating the original waiver application, policy manual and training materials for this program as well as hiring and training the CSED administrative staff for the Bureau for Medical Services.

WV BMS (10/2010 to 04/2023)

Patricia served as an Office Director III supervising the Office Director II of the Home and Community Based Services Unit and the Office Director II of the Behavioral Health and Long-Term Services Unit.

Her job duties included supervising staff in their creation of waiver applications for the I/DD Waiver, Aged and Disabled Waiver, Traumatic Brain Injury Waiver, and the Children with Serious Emotional Disorder Waiver prior to submission to the Centers for Medicare & Medicaid Services (CMS). Upon submission, she was responsible for receiving any questions from CMS regarding the applications and responding with answers that were acceptable to CMS. Upon CMS approval, she was responsible for overseeing the program managers' posting of the waiver applications prior to approval for 30-day public comment and receiving the questions from the public and making revisions to application if necessary. Upon approval from CMS, she was responsible for overseeing the revisions to the policy manuals by the program managers and posting those manuals for 30-day public comment and reviewing and responding to comments from the public.





Dina Nash, MPH

MANAGER

Berry, Dunn, McNeil & Parker, LLC



Dina Nash is a manager with BerryDunn's Health Analytics Practice Group (HAPG) who specializes in policy analysis, as well as healthcare data analysis using claims and clinical data. She has worked extensively with SAS, Excel, and Tableau to derive analytic insights that inform and drive decision-making. Her interests and experience also extend to engagement and diversity and inclusion initiatives. Dina is a member of BerryDunn's Diversity, Equity, Inclusion, Belonging, and Access (DEIBA) Advisory Council.

EDUCATION AND CERTIFICATIONS

MPH, Epidemiology and Biostatistics, Boston University School of Public Health

BA, Psychology, Harvard University

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

7.5 years

KEY QUALIFICATIONS

- Over seven years' experience in healthcare data analysis and data visualization
- Experienced in SAS, Excel, and Tableau

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

Dina serves as a health policy and analytics manager, working with clients on data analysis, claims analysis, and clinical data projects. Dina also works on mandated benefit reviews (estimating the financial impact of pending mandated benefit legislation), and health policy and regulatory analyses. She writes SAS code to create analytic datasets using a variety of data sources, including All-Payer Claims Databases (APCD), and assists with conducting statutory review and medical efficacy research. Dina develops data visualizations that inform, and drive decision-making, and collaborates on population health analyses of utilization and outcomes.

– New Hampshire Insurance Department (NHID)

Health Cost Transparency Initiative (07/2023 to present)

Dina supports the Health Cost transparency initiative with the creation of interactive Tableau dashboards. She also supports project management, helping to ensure smooth coordination with the client and associated vendors.



– **West Virginia Department of Human Services (DoHS)**

Mental Health Parity Compliance Analysis (01/2022 to present)

Dina provides essential support for writing and research in mental health parity reports for West Virginia Medicaid Managed Care and WV Children's Health Insurance Program (WVCHIP). She has also developed interactive and informative dashboards for Medicaid Managed Care and WVCHIP leadership, along with trend charts, to visually present complex data from Medicaid Managed Care Organizations (MCOs) and Bureau for Medical Services (BMS) Pharmacy related to mental health parity.

Child Welfare Initiatives Project Management Services (09/2021 to present)

Dina supports the project management of a team of analysts working with Medicaid state agencies, including the DoHS Office of Quality Assurance for Children's Programs (OQA), BMS, Bureau for Behavioral Health (BBH), Bureau for Family Assistance (BFA), Bureaus of Social Services (BSS), and DoHS vendors. She consistently organizes core team efforts and maintains regular communication with OQA, BMS, BFA, BSS, and DoHS vendors, helping to ensure alignment with reporting and Continuous Quality Improvement (CQI) program needs. Dina's responsibilities include generating visualizations for monthly, quarterly, semi-annual, prototype, and ad hoc/stop-gap reports to meet OQA's operational requirements. She also regularly reviews team members' work and verifies consistency and accuracy. Dina is also involved in prototyping new actionable and insightful visuals to enhance the clarity and effectiveness of the team's deliverables.

– **Massachusetts Center for Health Information and Analysis**

Mandated Benefit Reviews (MBRs) (09/2021 to present)

Dina works on MBRs, for which she writes SAS code to query the Massachusetts APCD, creates diagrams and visuals, and also supports medical efficacy research and writing of the report. More recently she led the Biomarker Testing MBR. MBRs include a medical efficacy analysis and an estimate on health insurance costs, typically over five years. MBRs Dina has worked on include:

- An Act to Increase Access to Nurse-Midwifery Services (H1069/S607): July 2024
- An Act Improving Access to Breast Pumps (H967/S600): July 2024
- An Act Relative to Patient Access to (Cancer) Biomarker Testing (H1074/S689): April 2024
- An Act Relative to LGBTQ Family Building (S622): August 2023
- An Act Relative to Applied Behavioral Analysis Therapy (H1084/S617): August 2023
- An Act Relative to Newborn Screenings for Congenital Cytomegalovirus (H2338/S1471): March 2023
- An Act Providing Access to Full Spectrum Addiction Treatment Services (H2116/S1292): March 2023
- An Act Relative to Human Donor Milk Coverage (H1106/S717): November 2022
- An Act Relative to Breast Cancer Equity and Early Detection (H4748/S2856): November 2022
- An Act Relative to Dual Diagnosis Treatment Coverage (H1147/S685): July 2022
- An Act to Update Mental Health Parity (H2065): July 2022
- An Act Relative to Collaborative Care (S769): March 2022

– **Wisconsin Office of the Commissioner of Insurance**

Wisconsin Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy Reports (03/2022 to 10/2023)

Dina played a crucial role in supporting research, writing, and data analysis for the Wisconsin



Individual Health Insurance Market Analysis, Short-Term Limited Duration Plans, and Network Adequacy reports. Her contributions encompassed conducting in-depth research, synthesizing complex data, and crafting insightful analyses. Dina's expertise extended to developing visually engaging and informative visualizations to facilitate understanding and decision-making in these critical areas of health insurance evaluation.

Mass General Brigham Enterprise Analytics (06/2018 to 09/2021)

Dina worked as a healthcare data analyst to develop SAS and SQL codes for metrics for a complex care program dashboard used by program and hospital leadership and for the Massachusetts Medicaid agency report submission. The complex care program was comprised of a diverse patient population. Dina conducted analyses on patients with Medicaid, Medicare, and commercial insurance. She also supported the patient centered medical home program with creation of advanced primary care strategy metrics, logic, and visuals, and assisted manager with supporting new analysts. She reviewed code written by other analysts. Dina conducted a Deferred Care Analysis due to COVID-19 epidemic that informed state and system wide decision-making and led to publication in American Journal of Managed Care. This Deferred Care Analysis was stratified by commercial payers, Medicaid, and Medicare, as well as by select social determinant of health variables.

Partners HealthCare Enterprise Analytics (08/2017 to 05/2018)

Dina worked as a program analytics intern covering system level population health program areas.

Center for Population Health (06/2017 to 08/2017)

Dina worked as a financial and clinical analytics intern to support the quality team by updating dashboard and exception reports using SAS and MS Excel. She conducted an analysis in SAS on Generalized Anxiety Disorder Screening Measure and created pharmaceutical cost trend driver visuals. Dina also collaborated on a healthcare services cost equivalency visual in PowerBI.



Sandra Manzo, MSW

MANAGER

Berry, Dunn McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MSW, University of Oklahoma

BS, University of Central Oklahoma

AFFILIATIONS AND MEMBERSHIPS

- Board Member, Oklahoma Association for Infant Mental Health
- Milbank Emerging Leaders Program
- National Association of Social Workers
- National Family Planning and Reproductive Health Association
- Behavioral Health Advisory Council
- Oklahoma Turning Point Council

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

17 year(s)

Sandra Manzo is a seasoned Medicaid professional with years of experience working with State Medicaid agencies. She brings expertise in leadership, health care administration, program management, policy analysis, research, and social work and social justice. Sandra is bilingual, fluent in both English and Spanish.

KEY QUALIFICATIONS

- 3 years as Deputy State Medicaid Director, with over 15 years of experience working with Medicaid programs
- Experience with state plan and SPA process, including public notice and advisory group stakeholder involvement
- Experience with 1115 demonstration waivers, including the application and negotiation processes
- Experience with managed care authorities and procedures, including Requests for Proposal (RFP) process and MCO Implementation / post implementation processes

PROJECT EXPERIENCE

BerryDunn (05/2025 to present)

- West Virginia Bureau for Medical Services (BMS)

Children with Serious Emotional Disorders Waiver (CSEDW) (05/2025 to present)

Sandra supports BMS in the management of CSEDW activities and 1915(c) waiver amendments. Prepared reference and resource documentation to support BMS in completion of project tasks.

Oklahoma Health Care Authority (2015 to 05/2025)

Sandra acted in several roles for Oklahoma's State Medicaid Agency the Oklahoma Health Care Authority.

- Deputy State Medicaid Director (06/2022 to 05/2025)

Sandra provided direction, coordination, management, and oversight of all phases of SoonerSelect (Oklahoma's managed care) program design and implementation. She served as the primary leadership contact to managed care contracted entities and to the Centers for Medicare & Medicaid Services (CMS) regarding attainment and management of managed care authority, program implementation, proposed policy, and contract submission and management for Oklahoma's SoonerSelect programs.



Her responsibilities included collaborating with various inter-agency departments, sister agencies, and managed care contracted entities for the successful implementation of SoonerSelect; representing OHCA as needed in multiple public forums at local, state, and national levels; and directing the work of 21 professional and technical employees.

– **Federal and State Authority Senior Director (10/2019 to 06/2022)**

In this role, Sandra provided direction, coordination, and management of all phases of the Federal & State Authorities, including the development of federal and state policies for the operation of Medicaid programs and services. She conducted studies and investigations of complicated federal mandates and presented findings about relevant programs or issues to various levels of management; made recommendations to executive leadership regarding pertinent federal and state policies for statewide implementation of the Medicaid program, based on sound research and evidence-based practices; and collaborated with other agencies regarding policy intent and interpretation. She served as a primary contact with CMS in regard to proposed policy changes that affect Oklahoma's Medicaid program. Sandra also acted as Agency liaison during legislative interim studies; responsible for the presentation of proposed rule changes to the Governor and legislative bodies; and acted as an Agency liaison to the Secretary of State's Office. She represented OHCA as needed in multiple public forums at local, state, and national levels.

– **Federal Authorities Manager (2015 to 2019)**

Sandra researched, analyzed, and interpreted federal and state health care policy implications affecting populations served under Medicaid. Identified problem areas in policy and provided solutions that advocated members' wellbeing. This included facilitating efforts for improvement of Medicaid programs, providing direction and coordination in the planning and development of State Plan Amendment (SPA) submissions, and developing statistical reports for SPA proposals/submissions to CMS.

Bethany Behavioral Health Hospital (2014 to 2018)

As a therapist, Sandra provided a variety of therapeutic interventions to adult individuals living with severe mental illness. She provided advocacy for underserved and underrepresented populations and was required to remain knowledgeable in behavioral health state policy to maintain license and successful provision of quality mental health services.

Oklahoma Health Care Authority (2008 to 2015)

Sandra served as a Policy Specialist and Child Health Specialist for the Oklahoma HealthCare Authority, Oklahoma's single state Medicaid agency.

– **Policy Specialist and Senior Policy Specialist (2009 to 2015)**

Sandra served as a technical writer in policy development promulgated under the Oklahoma Administrative Procedures Act (APA). She worked within the confines and process of state government for final approval of developed policy; conducted extensive and complex research, planning, and coordination of activities for the purpose of evaluating the effectiveness of programs and public health policy; and made recommendations of needed changes to the state's Medicaid program policy to executive level staff.

– **Child Health Specialist (2008 to 2009)**

Sandra developed and piloted strategies to increase members' knowledge on utilization of services. She educated participants regarding availability of child health preventive services and applicable state and federal regulations for the program.



Adam "AJ" Mong, M.Ed.

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



AJ Mong is a flexible and forward-thinking professional with 18 years of combined experience in the mental health, education, and customer service fields. He has developed expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership.

EDUCATION AND CERTIFICATIONS

M. Ed., Lancaster Bible College & Graduate School

BS, Lancaster Bible College & Graduate School

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2.5 years

KEY QUALIFICATIONS

- 18 years of combined experience in the mental health, education, and customer service fields
- Expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

– West Virginia Bureau for Medical Services (BMS)
Take Me Home (TMH) Home and Community-Based Services (HCBS) Quality Initiative (QI) Project (08/2024 to present)

AJ serves the TMH HCBS QI Project by providing business analysis and project coordination support. AJ provides support in areas including data analysis and deliverable creation, budget tracking, and documentation support.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (07/2022 to 06/2024)

AJ served the MES MSP project by providing business analysis and project coordination support.

Mountain Health Promise (MHP) Implementation Project Management Support (07/2022 to 09/2023)

AJ served the MHP implementation project by providing business analysis and project coordination support.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (09/2022 to 06/2023)

AJ served the MHT procurement project by providing business analysis and project coordination support.



– West Virginia Department of Human Services

Medicaid and Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (02/2024 to present)

AJ serves the MCES project by providing business analysis and project coordination support. AJ provides support to the MCES team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. AJ assists in the development of deliverables for contractual obligations such as monthly status reports, statements of work, and project closeout summaries. He also assists in the development, organization, and process flow of requirements for Joint Requirement Planning (JRP) sessions with the state.

Lingle Avenue Elementary School (08/2021 to 07/2022)

AJ served as an elementary school counselor to provide character education curriculum to students while serving as the school assessment coordinator for statewide standardized testing. He delivered staff training for security compliances and worked with stakeholders to remove barriers to student learning.

Frederick Douglass Elementary School (FDES) (09/2013 to 06/2020)

AJ served as an elementary school counselor with the school leadership team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that would lead to measurable system-wide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

Elizabethtown Area School District (12/2012 to 06/2013)

AJ served as long-term substitute for an elementary school counselor to provide individual and small group counseling, conducted gifted academic screening, and partnered with other counselors to implement a holiday giving program to provide families with meals during the holiday seasons.

Union School District (02/2012 to 05/2012)

AJ served as a long-term substitute for an elementary school counselor to conduct classroom guidance lessons and facilitated a peer partnership program for elementary students.

Hershey Entertainment Complex (05/2005 to 08/2013)

AJ served as supervisor to lead over 200 employees, including other supervisors, to help operate and maintain the daily procedures and staffing for over a dozen facilities in the Hershey Park Food and Beverage Department. He provided staff training and evaluation, maintained daily inventory and ordering, and tracked labor to help offset cost deficits. AJ also developed individual inspection manuals for all locations, addressed customer service issues and complaints, and resolved them in a manner consistent with the company's values.



Sophie Kaye, JD

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

JD, General Practice Program, Vermont Law School

BS, Brain and Cognitive Science, Minor in Psychology, University of Rochester

BA, Philosophy, University of Rochester

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

3 years



Sophie Kaye is an experienced and highly skilled professional with extensive experience in Certified Community Behavioral Health Clinic (CCBHC) grant implementation, Child & Family Services Reviews (CFSRs), and Family First Prevention Services Act (FFPSA): Title IV-E Prevention Plan writing and implementation. Sophie is well-versed in federal and state compliance, policy development, analysis, and implementation, as well as strategic planning, engagement, and development. Sophie brings to projects and initiatives extensive subject matter expertise across multiple subject areas, including child welfare, youth justice policy, truancy, family-centered case planning, trauma-informed practice, practice models, and lived experience. Sophie has a deep familiarity with juvenile justice, Youthful Offender practice, transitional age youth, youth mental health, and substance use, as well as extensive knowledge of family law, Family Court system reform efforts, Qualified Residential Treatment Programs (QRTPs), congregate care, and aftercare. Her passion, dedication, and experience allow Sophie to be an effective collaborator, skilled at building relationships and supporting successful project outcomes.

KEY QUALIFICATIONS

- Three years' experience supporting single state Medicaid agencies with grant and project management expertise
- Experience directing the implementation of a CCBHC
- Developed and wrote Vermont's Title IV-E Prevention Plan for the FFPSA
- Over five years' experience in direct service with various populations within child welfare, youth justice, mental health, and substance use

PROJECT EXPERIENCE

BerryDunn (10/2024 to present)

– West Virginia Bureau for Medicaid Services (BMS)

CCBHC State Plan Amendment (SPA) Phase III Project (10/2024 to present)



Sophie supports the project by providing subject matter expertise, reviewing client deliverables, project planning, project engagement, and research.

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (10/2024 to present)

Sophie supports the project by providing subject matter expertise, reviewing client deliverables, project planning, project engagement, and research.

Justice-Involved Program Support (JIPS) Project (10/2024 to present)

Sophie supports the project by providing subject matter expertise, reviewing client deliverables, project planning, project engagement, and research.

Northeast Kingdom Human Services (02/2024 to 10/2024)

As the CCBHC project director, Sophie led the implementation of the CCBHC grant, which included numerous standards and regulations governed by Substance Abuse and Mental Health Services Administration (SAMHSA). Sophie was responsible for understanding and executing the CCBHC grant's various requirements, standards of practice, and nuances. In this role, Sophie worked directly with leaders of Department of Vermont Health Access (DVHA), beneath the Agency of Human Services, VT's single state Medicaid agency, as Northeast Kingdom Human Services is a designated agency contracted by DVHA. Sophie regularly worked to help ensure compliance and supported the development of provider agreements, as well as identifying the service codes to be included within CCBHC and billed to Medicaid. She also collaborated with state and federal government representatives to submit reports and data on a regular basis and to discuss grant implementation successes and challenges. Sophie facilitated workgroups to create and modify internal workflows to achieve the standards outlined in the CCBHC grant, including Clinical Quality Measures, Continuous Quality Improvement (CQI), strategies to support staff retention, and more. Sophie collaborated with statewide partners to foster positive relationships to better support the community, including partnering with hospitals to complete a regional community needs assessment.

In this role, Sophie supervised two positions: a project evaluator and a data manager. Her support included supervision, coaching, advocating, and guiding professional development. Additionally, Sophie oversaw a large grant budget and its allocation to various parts of the organization, such as hiring, program support, grant implementation, and technology.

Chapin Hall at the University of Chicago (05/2022 to 02/2024)

Within her role as a policy analyst, Sophie worked with state child welfare agencies to develop robust Title IV-E Prevention Plans, incorporate evidence-based practices (EBPs), and prepare for Family First implementation. She worked directly with leaders of the Los Angeles, California Medicaid Agency, Department of Public Social Services (DPSS) and child welfare agencies, as well as the South Carolina Medicaid Agency, Department of Health and Human Services (DHS) and child welfare agencies to develop and implement Title IV-E Prevention Plans, including identifying candidacy groups and EBPs, as well as supported leaders in their meetings with the Children's Bureau. Sophie collaborated with court personnel and partners to incorporate strengths-based and trauma-informed practices within the court process to generate positive outcomes for children and families. She garnered significant experience in family-centered, trauma-informed practice, as well as supporting older youth in state custody, incorporating youth voice in case planning, and developing discharge and aftercare plans for youth to safely return to their communities from congregate care. Detailed obligations included supporting jurisdictions with varying levels of FFPSA implementation by organizing and facilitating workgroups and workstreams, collaborating with



partners and interested/invested parties, and analyzing policies. Sophie took the lead on drafting and finalizing various deliverables, including large reports, tools for agency staff, public-facing guides, visuals, and surveys. Sophie created and managed work plans for projects to track deadlines, collaboration, allocation, and deliverables. She also supported CQI efforts within various jurisdictions through EBP implementation meetings, data collection tools, and creating data tables to help ensure programs were delivered to fidelity.

Vermont Department of Children and Families (05/2016 to 05/2022)

– Policy and Planning Advisor/FFPSA Prevention Specialist (06/2021 to 05/2022)

As the policy and planning advisor/FFPSA prevention specialist, Sophie's role was to lead Vermont in the development and implementation of its Title IV-E Prevention Plan. Sophie worked directly with leaders of DVHA, as well as other partner agencies, a variety of staff, and community stakeholders, to help ensure the various components of the prevention plan were implemented in a way that builds relationships among agencies, provides valuable support and training to staff and providers, and revitalizes the child welfare work in Vermont to focus on prevention efforts and that is inclusive of those with lived experience. More specifically, Sophie worked both individually and within teams to develop, analyze, and draft policies for the field. She also developed and drafted reports to align with federal and Medicaid requirements. She provided consultation to various levels of staff, both managerial and non-managerial, as well as to various interested/invested parties and external agencies.

Sophie facilitated various statewide workgroups pertaining to prevention and various other topics, such as the Family Support Worker Workgroup and the Prevention Implementation Workgroup (including related sub-groups), and actively contributed or helped to facilitate several other statewide workgroups, such as the FFPSA Workforce Preparation Workgroup, QRTP/Congregate Care Implementation Workgroup, CQI Workgroup, and Kin Navigation Workgroup. Sophie developed and drafted Vermont's Title IV-E Prevention Plan, coordinated contributions from subject matter experts, responded to feedback from the Children's Bureau by making relevant edits to the plan, and kept the Division informed of the plan's progress. Sophie worked closely with partners from the Center for States in building Vermont's capacity to implement all components of its prevention plan, including data collection and analysis, workforce and provider preparation/training, and communication with a variety of target audiences.

Sophie provided FFPSA and prevention plan consultation, information and support to central office, district offices and staff of various levels, including supervisors, district directors, and managers. She also developed work plans to guide the implementation work for Vermont's prevention plan and developed charges and charters for various workgroups within Vermont, in partnership with staff and interested/invested parties.

Sophie supervised a college-level intern by educating her around FFPSA, Medicaid Vermont's prevention plan and Vermont's child welfare work, as well as created opportunities for her to contribute and gain valuable experience. In this role, Sophie continued to coach and mentor family services workers, as well as participate in statewide and local workgroups, including the Youth Justice Workgroup, CQI Workgroup, and Safety Culture Workgroup. She also completed Supervising in State Government, an intensive training course for supervisors in Vermont state agencies.

– Family Services Worker (05/2016 to 06/2021)

Sophie provided social services and assistance to children, youth, and their families, with a focus on maximizing family well-being. She was tasked with work that went above and beyond the family services worker level, including supervising, mentoring, and coaching staff, reviewing case plans,



and leading safety culture within the office. Sophie provided case management to youth in state custody, assisted parents and relatives in accessing Medicaid and other services, provided courts with case plans and reports containing assessments and recommendations, worked with foster homes and residential programs, and collaborated with state and private agencies, judges, law enforcement, and community providers. Sophie valued collaboration and acted as a leader on her team. She nurtured individual talents and encouraged direct, transparent communication. Sophie responded to reports of abuse and neglect, assessed strengths and needs of families and youth, wrote affidavits, and developed case plans to support reunification and completion of juvenile and Youthful Offender probation, as well as out-of-home permanency. She used structured decision-making (SDM) tools to guide case decisions, conducted thorough assessments of risks and needs, obtained collateral information to inform Youthful Offender Consideration Reports and Disposition case plans, and supported youths' completion of probation under the Risk-Need-Responsivity Model. Sophie is certified to administer the Youth Assessment Screening Instrument (YASI) for at-risk youth.

Sophie supervised aides assigned to casework teams, provided training and mentoring to two family services workers and onboarding support to new staff. She supported children and youth in foster care and residential programs, as well as foster parents and families, by providing referrals and connection to appropriate services. Sophie collaborated continually with casework team and community providers to determine the most effective responses and support for clients, such as Medicaid, mental health providers, substance use counselors, balanced and restorative justice programs, law enforcement, Department of Corrections, Children's Integrated Services, attorneys, guardians ad litem, school staff, medical providers, residential program staff, and the Youth Development Program.

Sophie participated in statewide and local workgroups, including the Youth Justice Workgroup, Diligent Recruitment Sub-Committee, Restart VT Workgroup, CQI Workgroup, Safety Culture Workgroup, Juvenile Justice Collaboration Group, and Williamstown Child Protection Resource Team. Sophie engaged in regular coaching with a specialist through the University of Vermont Child Welfare Training Partnership to develop her leadership skills. She graduated in January 2021 from VT LEAD, a 12-month state program for current and high-potential leaders.

Lamolle Family Center (10/2015 to 05/2016)

As a case manager, Sophie provided case management through the VT Coalition for Runaway and Homeless Youth Programs to youth ages 13-22 who were homeless or at risk of becoming homeless. She connected youth to Medicaid and other services to help prevent them from taking part in high-risk activities and to help them engage in pro-social behavior, education, and employment.

Office of the Defender General – Juvenile Defender's Office (12/2014)

As a legal intern, Sophie participated, represented, and guided juveniles in case plan review meetings, researched and reported on isolation standards in a VT juvenile detention facility, investigated records of detained juveniles for habeas corpus petitions, and researched and drafted a section for a Vermont Supreme Court brief.

Olson & Associates (08/2014)

As a law clerk, Sophie worked under supervision of two attorneys in private practice researching and writing memos for civil and criminal cases, drafted deeds and writs of possession, and assisted paralegal and office staff.

Office of the VT Attorney General, Medicaid Fraud & Residential Abuse Unit, Montpelier Response (05/2013 to 09/2013)



As a law clerk, Sophie conducted legal research and wrote memos pertaining to alleged Medicaid fraud and residential abuse. She led a case meeting presenting research findings with a proposed course of action, reorganized the unit's filing system, and helped organize the annual VT Health Care Fraud Enforcement Task Force meeting.

Natural Resources Defense Council (08/2011)

As a legal intern, Sophie conducted research and wrote a report on toxicity of an oil dispersant in the Gulf of Mexico.

Veterans Affairs Medical Center (Summer 2010; 05/2011 to 08/2011)

– Study Coordinator (05/2011 to 08/2011)

Sophie worked with psychiatrists and patients on clinical studies of Alzheimer's and dementia patients, gathered data and reported on neuropsychological studies, and assisted with injections and measuring patient vitals.

– Volunteer Intern (Summer 2010)

Sophie edited scientific articles for publication, wrote reports, and helped with administrative work and budget planning.

Jacobs Computational Cognition and Perception Lab (09/2010 to 05/2011)

As a research assistant, Sophie analyzed experiments using the Matlab computer program, scheduled subjects, and participated in and led weekly lab meetings.

University of California Los Angeles (UCLA) Auditory Lab (05/2010 to 08/2010)

As a research assistant, Sophie assisted experiments with autistic children and adolescents, worked with EEG recordings and auditory measurements, conducted tests and compiled data on cognitive ability, and performed administrative work.



Priya Periakaruppan, CAPM®

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Priya Periakaruppan is a consultant in BerryDunn's Medicaid Practice Group with a background in public health and health policy, expertise in project management, and experience in Medicaid-related research. Priya excels at analyzing Medicaid systems, recommending improvements, and supporting Medicaid modernization initiatives. Her passion for the field of healthcare, in addition to exceptional written and verbal communication skills, allows her to work collaboratively with cross-functional teams and deliver impactful results.

EDUCATION AND CERTIFICATIONS

BS, Public Health, Ohio State University

Certified Associate in Project Management® (CAPM®)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

< 1 year

KEY QUALIFICATIONS

- Microsoft Office Suite proficiency
- Formal and technical writing expertise
- Project Coordination expertise
- R Programming Language knowledge

PROJECT EXPERIENCE

BerryDunn (07/2024 to present)

– **West Virginia Bureau for Medical Services (BMS)**

Programmatic Managed Care Support (07/2024 to Present)

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (07/2024 to Present)

Take Me Home (TMH) Home and Community-Based Services (HCBS) Quality Initiative (07/2024 to Present)

Priya supports the above BMS projects by serving as a project coordinator, helping the projects meet its objectives by managing administrative tasks, such as agendas, meeting notes, and service level agreements (SLAs), as well as facilitating communication, including organizing meetings and coordinating between internal and State project teams. Priya carefully monitors deadlines, creates informative visuals, and helps ensure the project's organization to effectively meet its goals.

– **Ohio Department of Medicaid (ODM)**

Ohio Medicaid Enterprise System (OMES) Independent Verification and Validation (IV&V) Services (07/2024 to present)

Priya serves ODM, Ohio's State Medicaid Agency, as a module lead for the IV&V engagement.



She provides recommendations to improve quality standards, resource management, system testing, and project artifacts. Additionally, she contributes to the organization of her team by coordinating meeting agendas and notes. Priya also facilitates clear and concise client-facing communication to help ensure alignment of project expectations and goals.

Ohio State University Department of Epidemiology (05/2021 to 06/2024)

As a research assistant, Priya reviewed thousands of survey responses for Ohio Medicare and Medicaid surveys regarding the effects of COVID-19 on daily life, vaccine hesitancy, as well as labor and delivery experiences of mothers on Medicaid. She collected sources and reviewed data for literature reviews on the impacts of COVID-19 on food insecurity, job insecurity, and rural areas of the United States. She also contacted county auditors to gather data on alcohol and tobacco licensing, and refined data to inform policy research.



Zachary “Zach” Simon

PROJECT COORDINATOR

Berry, Dunn McNeil & Parker, LLC Subcontractor



EDUCATION AND CERTIFICATIONS

BA, International Affairs,
Minor in Arabic, Religious
Studies, West Virginia
University

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

5 years

Zachary Simon brings a strong record of accomplishment in developing and implementing governance policies, managing training programs, and leading cross-functional teams to achieve operational excellence. He is an expert in managing Agile processes, including OKRs, PI readouts, and monthly business reviews, to align projects with business goals and drive continuous improvement. He is skilled in coaching and developing associates, optimizing team performance, and managing knowledge databases, resulting in enhanced productivity, reduced risks, and achievement of Key Performance Indicators (KPIs).

RELEVANT EXPERIENCE

Capital One (09/2022 to Present)

Zachary served as a senior process manager for Credit Bureau Disputes. He created training governance policy, standardizing training practices, streamlining training agendas, and established a training archive and request system, which improved operational efficiency and reduced costs. He also managed the delivery of four rounds of first-touch training at the Panama site over 3.5 months, enhancing management of additional work types, which increased resiliency of Credit Bureau Disputes' operations and reduced queue urgency. In addition, he performed scrum duties on an Agile team, including managing OKRs, conducting PI Readouts, and leading Monthly Business Reviews (MBRs), driving project alignment with business goals and driving continuous improvement.

Mission Lane (01/2020 to 12/2022)

– Operations Lead (01/2021 to 12/2022)

As an operations lead, Zachary developed a tracking system with spreadsheet logic and Tableau to monitor production metrics for call center associates in Recoveries, enabling Senior Leadership to gain clear insights into expected production hours. He coached and trained associates in advanced training sessions, enhancing their skills and expertise, resulting in improved productivity, higher quality work, and a stronger, more capable team. He also facilitated initiatives from Senior Management across Recoveries department, ensuring implementation and cross-team collaboration, which aligned departmental efforts with broader organizational goals and drove impactful improvements.



– **Process Coordinator (01/2020 to 12/2020)**

Zachary managed 10+ associates, consistently meeting and exceeding Key Performance Indicators (KPIs) by optimizing team performance and ensuring high levels of productivity and accuracy. He oversaw Line of Business (LoB) knowledge management, policy creation, risk mitigation, and settlement processes, effectively managing these areas to reduce risks, ensure compliance, and enhance operational efficiency. He also managed training modules for 30+ associates, resulting in reduced training time, fewer regulatory and intent errors post-training, and a shorter ramp time to full production, improving team readiness and performance.



Mia Bittner

CONSULTANT

Berry, Dunn, McNeill & Parker, LLC



Mia Bittner is a consultant with a passion for public health and health policy. She has expertise in various aspects of project management, including building and managing collaborative relationships, providing process flow and functionality recommendations, and supporting strategy improvements. Her varied experiences in health policy and research have honed her policy analysis and technical writing skills.

EDUCATION AND CERTIFICATIONS

BS, Public Health,
University of Michigan
BA, Environmental
Studies, University of
Michigan

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

2 years

KEY QUALIFICATIONS

- Two years of public health and health policy research experience

RELEVANT EXPERIENCE

BerryDunn (06/2024 to present)

– West Virginia Department of Human Services (DoHS)
Peoples Access to Help (PATH) DDI Project Management (06/2024 to present)

Mia serves as the certification and compliance business analyst on the PATH project, supporting the certification and compliance activities for the State's eligibility and enrollment module; PATH Family Assistance (FA), the comprehensive child welfare information system (CCWIS), PATH Child Welfare (CW); and the State's automated system for child support enforcement, PATH Child Support (CS).

For PATH FA, Mia developed a tracker to coordinate the delivery of required evidence from the solution vendor and facilitate State reviews. She also prepares materials and status updates for State and federal partner meetings.

Mia led the development of the State's annual CCWIS Data Quality Plan and Biennial Review Results Report by collaborating with State leadership, summarizing updates, and defining new goals and metrics for the next fiscal year. Additionally, she drafted an As-Needed Advance Planning Document (APD) to address federal partners' CCWIS compliance concerns.

Mia is also coordinating planning efforts for the upcoming PATH CS system certification. She has reviewed certification guidance to understand functional objectives and system requirements while developing a process overview, project schedule, and documentation tracker for the State.

As an intern June to August 2024, Mia supported PATH's testing



efforts by validating system integration testing (SIT) results for the PATH CS release. She worked closely with the PATH certification and compliance team to research outstanding system compliance issues and relevant federal regulations, drafting requests for technical assistance on behalf of DoHS to federal partner agencies.

United States Agency for International Development (USAID) (05/2023 to 12/2023)

As a pathways intern with the Office of HIV/AIDS in the Bureau for Global Health, Mia managed a research project on adolescent sexual and reproductive health program adaptations in 20 countries during the COVID-19 pandemic. This culminated in a manuscript proposing integration for standard programming. She collaborated on landscape review of telemedicine policies in over 25 USAID supported countries to produce multiple deliverables, including a presentation and toolkit for country teams looking to expand telemedicine for HIV care, and conducted research on the use of electronic medical records for HIV treatment to understand barriers to creation and implementation. Additionally, Mia issued recommendations on patient portal functionality and design.

University of Michigan School for Environment and Sustainability (10/2022 to 12/2023)

Mia served as a research assistant for the Western Forest and Fire Initiative. She explored qualitative and demographic data on multiple case sites to develop community profiles for publication. She transcribed 30+ interviews with research participants and interested parties, including elected officials and local government employees, to understand wildfire prevention and management workforce capacity issues, and analyzed numerical and spatial data on historic wildfires, smoke exposure, and power shut-offs, and present-day wildfire risk, air quality, socio-demographics, and social vulnerability to support case site selection. Mia also produced a literature review of over 20 articles on household responses to smoke and perspectives on smoke management to inform the design of a study on behavioral adaptations to wildfire, smoke, and power disruption.

University of Michigan School of Public Health (09/2020 to 04/2022)

Mia researched strategies and proposed solutions for conducting virtual health interventions for this program to reduce parent and adolescent racial stress, promote familial bonding, and improve mental health. Additionally, she updated the clinician and participant program and outreach materials with new instructions, procedures, and guidance to help ease the program's transition to virtual format during the COVID-19 pandemic.



Carole Ann Guay

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Accounting,
University of
Southern Maine

PROPOSED PROJECT ROLE

Project
Management
Support Staff

RELEVANT EXPERIENCE

9 years

Carole Ann Guay is a senior consultant for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator, technical analyst and workflow developer. She has provided support services such as workflow and dataflow diagrams, document requests, status reports, meeting requests, and data management. She has also worked to help ensure business assessments are compliant with federal regulations and provided documentation and deliverable assistance on numerous projects.

PROJECT EXPERIENCE

BerryDunn (10/2014 to present)

– Puerto Rico Medicaid Program

Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)

Carole Ann assists with review and updates of deliverables.

– Maine Department of Corrections (DOC)

Offender Management System (OMS) Consulting Services (11/2021 to present)

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing a Request for Proposal (RFP), and assisting the DOC with its selection of a new OMS.

– Ellis County, TX

Computer-Aided Dispatch/Records Management System (CAD/RMS) and Jail Management System (JMS) Replacement (06/2021 to present)

Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

– Vermont Department of Vermont Health Access

Vermont Health Connect Financial and Programmatic Audit (01/2016 to present)

BerryDunn has performed the State's financial and programmatic audit of its health insurance exchange since 2016. Carole Ann currently serves as the project coordinator on this audit to determine whether the Exchange is in material compliance with 45 CFR 155.



– **Minnesota Health Benefit Exchange (MNSure)**

Programmatic Audit (10/2015 to present)

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.

– **Monroe County, FL**

Clerk and Court Business Process Review (02/2023 to 02/2024)

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

– **City of St. Charles, MO**

Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

– **Arizona Department of Agriculture (AZDA)**

Assessment of Current Licensing System and Development of a Transition Scope of Work (12/2022 to 07/2023)

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

– **Montana Department of Corrections (MDOC)**

OMS Procurement (01/2023 to 07/2023)

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

– **Metropolitan Government of Nashville and Davidson County (Metro), TN**

Information Security Program Development (05/2016 to 04/2021)

For Metro's development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

– **New Mexico Corrections Department (NMCD)**

Commercial Off-the-Shelf (COTS) OMS Replacement (11/2016 to 06/2020)

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition



services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

– **Oregon Enterprise Technology Services (OR ETS)**

Integrated IT Service Management (ITSM) (03/2018 to 03/2019)

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

– **Colorado Office of the State Auditor**

IT Evaluation (09/2017 to 02/2019)

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

– **Sacramento Municipal Utility District (SMUD)**

Information Security Audit (08/2016 to 12/2017)

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

– **West Virginia Department of Human Services**

Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for West Virginia E&E Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.

– **Massachusetts State Ethics Commission**

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

– **Washington State Auditor's Office (SAO)**

Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of



previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service, helping ensure new customer satisfaction, and directly assisted the branch manager in all daily office operations.



Jonathan “Jon” Williams, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Jon Williams is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before it is submitted to clients.

EDUCATION AND CERTIFICATIONS

BA, English, Bowling
Green State University

Lean Six Sigma Green
Belt (LSSGB)

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

20 years

PROJECT EXPERIENCE

BerryDunn (02/2019 to present)

Jon serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting client deliverables, meeting notes, memos, and PowerPoint presentations for various government entities.

Freelance Proofreader and Copyeditor (11/2010 to present)

Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit children's books, novels, and various other local publications.

Midwest Tape (11/2004 to present)

Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog (mwtnewsandviews.com), social media, and other projects. He serves on a committee that established the company's brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

Mitchell Equipment Corporation (02/2002 to 11/2004)

First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly and met with current and potential vendors. He scheduled service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

Spring Hill Nurseries (02/2001 to 06/2001)

Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spelling, and wrote copy for planting guides included with shipments.



Jordan Ramsey, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MA, English, Professional Writing, Southeast Missouri State University

BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign

Lean Six Sigma Green Belt

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

14 years



Jordan Ramsey is a Consulting Services Support Manager in BerryDunn's Government Consulting Group and manager of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor and Lean Six Sigma Green Belt, and holds a MA in English: Professional Writing.

PROJECT EXPERIENCE

BerryDunn (07/2019 to present)

Jordan leads a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He was responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations. He also led an effort for the entire Consulting Team (approximately 350 people at the time) to install and utilize the PerfectIt software, an application that checks for consistency in documents.

Jordan supports BerryDunn's consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content.

Portland Adult Education (2019)

Jordan delivered writing instruction to international students and taught Level 100 and 200 English courses. In addition, he was responsible for assessments and level placement for students.

Pearson Smarthinking Writing Lab (2017)

Jordan revised and edited a variety of essays, working under strict deadlines and providing personalized feedback to help students strengthen their technical writing, creative writing, career writing, and English-as-a-Second Language skills.



Southeast Missouri State University (2015 to 2017)

As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the *Big Muddy*, an online journal published by the Southeast Missouri State University Press.

As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

As publications assistant, Jordan proofread and edited copy for campus-wide publications and wrote copy for advertising documents.

The Southern Illinoisan (2014 to 2015)

As copyeditor, proofreader, and sports clerk, Jordan wrote and edited articles and prepared them for publications. In addition, he wrote headlines and subheads for articles and reviewed content to help ensure it was published error-free.

Other Teaching Experience (2006 to 2010)

– **Lanier Technical College**

As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

– **Hardin County, IL**

Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

– **NOVA Group of Japan**

Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



Megan Hamilton, MA

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC



Megan Hamilton is an experienced editor with experience in corporate, research, and academic settings. She has a strong understanding of various citation styles as well as technical, journalistic, and academic editing.

EDUCATION AND CERTIFICATIONS

MA, Literary and Cultural Studies, Carnegie Mellon University

BA, English, Kent State University

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

6 years

PROJECT EXPERIENCE

BerryDunn (12/2022 to present)

Megan works with in Consulting Support Services to provide documentation support. Megan reviews and copyedits deliverables and service level agreements for BerryDunn clients.

Fiverr (05/2022 to 12/2022)

Megan served as a freelance editor and proofreader on professional documents for clients.

Institute of Reading Development (05/2021 to 08/2021; 05/2022 to 12/2022)

Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

Carnegie Mellon University (08/2021 to 05/2022)

Megan served as a research assistant to gather and articulate research findings for a range of academic projects.

Brainchild Literary Magazine (08/2020 to 05/2021)

Megan served as editor in chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

Academic Success Center (08/2018 to 05/2021)

Megan served as a tutor and as program assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.

Seglian Manufacturing Group (01/2012 to 01/2022 [seasonal])

Megan served as an administrative assistant, directly under Finance Director, to edit and update pertinent documents for ISO auditing and



company records. She created MS Excel report to support General Ledger and maintained company records and documents to meet tax guidelines.



KD Dobyne

PROJECT COORDINATOR

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Linguistics, University
of Texas at Arlington

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

3 years

KD Dobyne is an experienced project coordinator, bringing administrative support and project assistance experience. She brings excellent time management skills and attention to detail that she applies to her project work.

PROJECT EXPERIENCE

BerryDunn (09/2023 to present)

KD serves as a project coordinator for BerryDunn's consulting teams, working with government and quasi-government clients. She assists in the compilation of deliverables, creation of visual aids, and project tracking.

Qualtek Wireless (08/2022 to 09/2023)

As a project coordinator, KD was responsible for responding to client needs to help ensure successful receipt of project deliverables, including spreadsheets, PowerPoints, and closeout packages. She created and delivered purchase orders and also managed materials through Salesforce. She took responsibility for all administrative tasks and managed Verizon's Software Project Management (SPM) Tracker. KD also identified and communicated potential hurdles and areas for improvement within multiple project timelines.

University of Texas at Arlington (08/2018 to 05/2019)

As president of the Asian Student Association, KD managed multiple projects at once to plan and execute a successful year for the organization. She acted as the "face" of the organization by attending presidential roundtables and meeting with the President of the University to track progress and identify any issues. KD led and oversaw the planning and execution of fundraising and events, while staying on schedule and within the organization's budget.

Joliet Junior College (08/2016 to 05/2017)

KD worked as the admissions office assistant and led prospective students through the admissions process and provided exemplary customer service to meet admissions percentage goals. She completed data entry tasks, such as the entering of standardized testing scores, as well as the organization of student admission packets.



Grace Min

DOCUMENTATION SPECIALIST
Berry, Dunn, McNeil & Parker, LLC



Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

PROJECT EXPERIENCE

BerryDunn (11/2024 to present)

Grace supports the consulting services group, working on the Editorial/Quality Assurance team. Grace reviews, formats and copyedits client deliverables, as well as service level agreements.

Freelance Technical Writer (01/2020 to present)

Grace performs thorough research into subjects requested by clients to write clear and accurate articles, manuals, proposals, standard operating procedures (SOP), and research reports. She collaborates with subject matter experts (SME) and refines information to create clear documentation, cross-checks sources and information to help ensure accuracy, and helps to ensure all content is optimized for SEO purposes.

Contract Copy Editor/Proofreader (06/2017 to present)

Grace reviews and edits a variety of manuscripts including academic articles, books, essays, and informational material. She proofreads and refine material for grammar, syntax, and style; verifies the validity of all content through meticulous fact-checking; and maintains style guide requirements.

Oral Roberts University Graduate School of Theology and Ministry (08/2016 to 05/2017)

As a graduate research assistant, Grace conducted academic research for the dean of the College of Theology and Ministry and professors. She assisted professors with grading and presentations, maintained confidential student records and updated information, and answered student and visitor inquiries.

Oral Roberts University History, Humanities, and Government Department (08/2015 to 05/2016)

Grace assisted professors in grading and attendance, updated computer log of student petitions, and designed and maintained department bulletin boards.

EDUCATION AND CERTIFICATIONS

BA, English
Literature, *summa cum laude*, Oral Roberts University

PROPOSED PROJECT ROLE

Project Management Support Staff

RELATED EXPERIENCE

8 years



Private SAT Tutor (05/2015 to 08/2015)

Grace developed individualized SAT study plans for the reading, writing and essay sections. She conducted tutoring sessions, administered regular practice tests, and monitored student progress.

ORU Writing Center (08/2015 to 12/2015)

As a writing tutor, Grace provided personalized feedback to students on their essays, focusing on clarity, coherence, grammatical accuracy, and adherence to style guides. She guided students through grammar and writing tutorials, and conducted one-on-one tutoring sessions to address individual writing challenges to enhance overall writing skills.

Oral Roberts University (08/2014 to 05/2015)

As an academic peer advisor, Grace provided individualized tutoring to students for various subjects. She edited student papers and worked with student leadership in dormitories.

Private Dental Practice (2012 to 2016)

As an office assistant, Grace checked in patients, verified insurance information, and processed payments. She also answered phone calls and responded to patient inquiries, scheduled and confirmed patient appointments, and updated patient records.



Alycia Minshall, MA

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Alycia Minshall is an editing and communications professional with more than 15 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables.

PROJECT EXPERIENCE

BerryDunn (08/2022 to Present)

Alycia works with the BerryDunn team in West Virginia to offer documentation support, including copyediting, proofreading, and formatting services for deliverables. She also develops and delivers presentations on various writing topics such as creating accessible documents; integrating diversity, equity, and inclusion principles into writing; and using PerfectIt to self-edit.

Alycia Minshall Editing Services (03/2014 to Present)

Alycia provides editing services to clients across a variety of assignments, including poetry books, master's theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping to ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (04/2017 to 8/2021)

– Senior Editor (06/2020 to 08/2021)

As senior editor, Alycia wrote copy for various mediums, including websites, social media, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; meeting notes; and more. She helped ensure consistency in voice, brand, and tone across messaging channels and that all materials are well written, accurate, properly researched, objective, and concise. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

EDUCATION AND CERTIFICATIONS

MA, English
Language and
Literature, Central
Michigan University

BA, English, Alma
College

Poynter ACES
Certificate in Editing

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

16 years



– **Editor (04/2017 to 06/2020)**

As an editor, Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; and meeting notes. She helped ensure materials were accurate, objective, concise, and consistent in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (09/2015 to 06/2016)

Alycia served as a learning support writing coach, working collaboratively with graduate students on a variety of writing topics and assignments, including research papers, theses, and dissertations. She taught biweekly seminars on mastering APA style, writing with clarity, conducting research, and organizing writing assignments.

Central Michigan University Writing Center (08/2013 to 06/2014)

Alycia served as the Writing Across the Curriculum coordinator to develop and schedule more than 100 writing center orientations, writing workshops, and presentations across campus; topics covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (01/2012 to 06/2014)

Alycia served as a graduate assistant to collaborate with students, staff, and faculty on writing assignments to improve clarity and organization. She conducted more than 1,000 writing sessions for undergraduates, graduates, and faculty, and served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (08/2008 to 12/2011)

– **Student Director (08/2010 to 12/2011)**

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.

– **Writing Center Tutor (08/2008 to 12/2011)**

Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



Cate Poling

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, emphasis in English Literature, Marshall University

Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

3.5 years



Cate Poling is a knowledgeable researcher and writer with extensive experience researching and documenting detailed and concise information in the insurance, clinical practice, and project management settings, with a latter focus on documenting, understanding, and articulating compliance needs throughout both systems development and project lifecycles. Cate transitioned from clinical practice work to working with single state Medicaid agencies in support of health and human services projects and initiatives, and her attention to detail allows her to be an invaluable resource for drafting and interpretation of federally mandated documentation and funding requests, deliverables, Requests for Proposals (RFPs), meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as relates to Medicaid Enterprise system privacy and security architecture and standard security frameworks, such as National Institute of Standards and Technology (NIST) 800-53 and Minimum Acceptable Risk Standards for Exchanges (MARS-E). She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Additionally, Cate works to promote quality and inclusivity in language, communication, and the workspace as a Poynter ACES certified editor and co-chair of one of the firm's Employee Resource Groups (ERGs).

KEY QUALIFICATIONS

- Extensive experience with drafting, preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and RFPs
- Over three years of experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

PROJECT EXPERIENCE

BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical West Virginia and Iowa state Medicaid agency projects and initiatives across various realms, such as project management, project coordination, subject



matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the West Virginia Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to West Virginia's needs and deliverables.

– Iowa Health and Human Services (HHS)

Eligibility Integration Application Solution (ELIAS) (01/2025 to present)

As the schedule management lead, Cate supports the project team and State throughout the enhancement of its eligibility system change management and System Development Life Cycle (SDLC) processes and procedures.

– West Virginia Bureau for Medical Services (BMS)

SDLC Coordination Project (06/2024 to present)

As project manager, Cate supports the transition of the Data Improvement Project (DIP) body of work, working with the technical advisory and change management team subject matter experts (SMEs) to help align SDLC activities across all BMS vendors and data suppliers. Cate facilitates meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to Transformed Medicaid Statistical Information System (T-MSIS) needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helps draft and refine project deliverables. Cate manages the project team working together to support the State's use of an integrated change management tracking tool and to help promote efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes.

DIP Phase IV (06/2023 to 06/2024)

As a project manager, Cate assisted with refining, expanding, and initiating the DIP SDLC body of work and preparing for the transfer of the work to the SDLC Coordination project. She oversaw the successful closure of the project, for which she had oversight responsibilities including organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviewed meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate also assisted with WV engagement hours and resource planning oversight within this role.

– West Virginia Department of Human Services (DoHS) (06/2021 to present)

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES)

Procurement Assistance Project (06/2023 to present)

Cate provides subject matter expertise to assist in development and refinement of technical requirements to support the State in defining desired outcomes for MCES module procurement(s), including specifications related to systems privacy and security compliance and technical and organizational processes.

People's Access to Help (PATH) DDI Project Management (06/2021 to present)

As a consultant for the PATH project, Cate has a variety of responsibilities, which include providing project coordination support, researching and developing process flows, following up on action items, assisting with change management processes and procedures, scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).



Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 to present)

As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract SLAs. As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address security-related items and workflows per CMS Streamlined Modular Certification (SMC) guidance.

Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 to 10/2023)

As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project time frame and documentation needs.

Jackson County Solid Waste Authority (SWA) (09/2024 to present)

As a County-Commission elected appointee, Cate sits on the Jackson County, WV SWA board, established by WV Code §22C-4-3 to help protect public health and welfare by establishing a comprehensive program of solid waste collection, processing, recycling, and disposal. Cate works alongside SWA board members to evaluate key County SWA issues, outreach needs, and project initiatives, including those related to staffing sourcing and maintenance, community engagement, and grant program funding evaluation and application, especially as relates to the County's recycling program management and community waste collection initiatives.

Mountain State Eye Associates (04/2017 to 06/2021)

Cate was a certified ophthalmic assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide in-office minor surgical procedures, and provide pre- and post-op care for cataract surgery patients. She performed extensive, thorough patient histories. This position involved heavy documentation/note-taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure, and administering ophthalmic medications to patients.

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through e-prescribing and via telephone and fax; arranged pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required time frames. Cate provided scheduling support and patient flow management; helped ensure all patients had updated, accurate HIPAA-compliant registration forms on file; and helped ensure all electronic medical record (EMR) systems reflected correct patient information. She assisted with administrative, clerical, patient service, and operational support duties daily.

PacificSource Health Plans (09/2015 to 11/2015)

As a provider support technician, Cate assisted provider support representatives in accurately entering and maintaining all provider data in the PacificSource database, including performing heavy documentation, note-taking, and frequent client-facing duties. Cate investigated issues by obtaining and/or coordinating information from other PacificSource departments or external sources. She maintained provider updates received from returned provider mail, provider OnBase queues, and Provider Network Support email queue daily; recorded, maintain, and changed



provider tax identification records, and coordinated efforts with the Finance Department related to annual 1099 filing.

Wal-Mart Supercenter (08/2014 to 09/2015; 05/2009 to 01/2012)

Cate was an associate providing remarkable customer service in a fast-paced working environment. She promptly answered customer inquiries in person and via telephone and followed proper procedure for handling claims. Cate was knowledgeable about all departments of the store and products within each department; helped ensure that merchandise was properly labeled and priced and replenished as necessary; and traveled to assist in new store and existing store remodeling efforts.

From 2009 to 2012 as a cashier, Cate provided excellent customer service by ringing up purchases, assisting customers in locating/learning about merchandise, processing returns/exchanges, cashing government and payroll checks, and keeping front end clean, well-stocked, and free of hazards. Cate assisted other departments in working freight and coordinated special projects, including a sustainability plan to implement proper recycling procedures.

Highmark WV Blue Cross Blue Shield (BCBS) (10/2012 to 07/2014)

As a member services representative—Senior Markets, Cate provided quality customer care for Medicare Advantage Plans (MAPDs) and Prescription Drug Plans (PDPs) in accordance with HIPAA regulations and managed a high-volume workload by handling live-call member inquiries related to medical, prescription, vision and dental claims, enrollment and billing, benefits, and providers.

This position included heavy documentation/note-taking. Cate processed premium payment transactions; worked with providers and claims processors to help ensure claims processed correctly according to member benefits for direct pay and dedicated employer group members; and helped identify issues with benefit tools/resources. She appropriately handled or transferred members in need of assistance outside her area or to file complaints and handled general correspondence and internet inquiries in a timely, efficient manner.

In this position, Cate gained knowledge of insurance processes, claim filing, Medicare systems, first call resolution measures, and Microsoft Office programs. She assisted in developing scripts for representatives to follow during live member calls and assisted in taking meeting minutes and helping to organize information to be delivered to associates involved with special projects.

Brass Pineapple Bed & Breakfast (01/2012 to 10/2012)

As a part-time innkeeper, Cate assisted the owner in running a successful and hospitable bed and breakfast in Charleston, WV by greeting local and international guests and processing transactions, organizing events, preparing food daily, marketing, and keeping the historic home well-maintained and clean.



Kourtney Kirk

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Business
Administration –
Marketing, Glenville State
University

Medicaid Learning Center
(MLC) Certified Medicaid
Professional (HIT + MCMP
II)

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

3 years

Kourtney Kirk is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems (MES) development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of Statements of Work (SOWs) and project budgets. She has a proficiency in customer resource management systems, such as the Microsoft and Atlassian Suites. Kourtney has a history of working in data analysis, graphic design and advertising, event planning, and communication and sales. She has strong leadership skills, the ability to work under pressure and deadlines, and confidence in speaking, working on a team, and understanding new concepts.

KEY QUALIFICATIONS

- Extensive experience with preparation, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, SOWs, Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Three years expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

PROJECT EXPERIENCE

BerryDunn (10/2022 to present)

Kourtney is a senior consultant with BerryDunn's Medicaid Practice Group. Kourtney provides support to the Bureau for Medical Services, West Virginia's single state Medicaid agency, as well as other State departments and agencies that work closely with Medicaid and Integrated Eligibility Services.

– **West Virginia Department of Health Facilities (DHF)**
Contract Labor Management Services (CLMS) RFP Development
(01/2025 to present)



– West Virginia Department of Human Services (DoHS)

Business Intelligence (BI) and Enterprise Data Solution (EDS) Independent Security Assessment Project (05/2023 to 10/2023; 11/2024 to present)

As the lead coordinating consultant, Kourtney assists with facilitating meetings between Project Management Office (PMO), State, and vendors, and develops and distributes meeting materials. Additionally, she is responsible for creating monthly status reports and project deliverables, tracking action items and decisions, and helps ensure adherence to the project timeline and sensitive documentation and communication needs.

People's Access to Help (PATH) DDI Project Management (10/2022 to present)

Medicaid EDS Implementation and CMS Certification Project (08/2020 to 01/2022; 10/2022 to present)

As a project coordinator and business analyst supporting DoHS, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (08/2020 to 01/2022)

As a project coordinator for PATH, EDS, and MCES projects, Kourtney has a wide range of project duties. She creates agendas and maintains meeting schedules and provides quality control for meeting materials to satisfy contract SLAs. She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

– West Virginia Bureau for Medical Services (BMS)

Systems Development Life Cycle (SDLC) Coordination Project (06/2024 to present)

Tek Systems (03/2021 to 01/2022)

As a subcontractor through Tek Systems with BerryDunn, Kourtney created agendas and maintained meeting schedules for WV DoHS, IBM® Watson Health, and BerryDunn. She created agendas and maintained meeting schedules and provided quality control for meeting materials to satisfy contract SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

N3 (03/2018 to 11/2018; 08/2019 to 08/2020)

– Business Development Representative and Scheduling Coordinator (08/2019 to 08/2020)

Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft account executives and clients, scheduled meetings between clients and Microsoft to upgrade their software products and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the account executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

– Business Development Representative (03/2018 to 11/2018)

Kourtney worked directly with Microsoft as an inside sales account executive for Unified Support



Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward client and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of a potential lead, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and also managed client relationships.

Total Quality Logistics (11/2018 to 08/2019)

Kourtney served as a logistics account manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily shipments and confirmed pick-up and delivery of shipments. She communicated proactively with customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glennville State College (GSC) (08/2017 to 12/2017)

Kourtney served as the student intern, responsible for filing any donations made to the college. She used Razor's Edge and BlackBaud technology systems, communicated directly with GSC alumni to request donations to the GSC Foundation, and prepared presentations and marketing advertisements for the Foundation. She served as executive assistant to Call Stars program and assisted in the hiring process, entered contact information into contact management systems, and maintained tracking reports of public relations activity. Kourtney also performed analysis of donations made by alumni and businesses and represented the goodwill of GSC.



Shandia Benke, IIBA™ ECBA™

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, History, Columbia College

Entry Certificate in Business Analysis™ (ECBA™), International Institute of Business Analysis (IIBA™)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

7 years

Shandia Benke is a certified consultant with over 14 years of experience successfully supporting and leading projects across a multitude of industries, including financial services, education, and government health programs. Shandia specializes in instructional design, e-learning development, business analysis, process improvement, creative problem-solving, and gap identification. With her strong background in education and training, Shandia delivers solutions and provides valuable expertise, making her a trusted resource among clients.

KEY QUALIFICATIONS

- Over 20 years in education
- Over 14 years of project support across a range of industries
- Over seven years' experience developing and leading training and onboarding
- Over six years' experience working with single state Medicaid agencies
- Over six years of office management
- Over five years of SharePoint document management
- Over four years certification support for Missouri Department of Social Services
- One year experience creating e-learning courses in Articulate products
- One year experience working in a learning management system (LMS)
- Proficient in Camtasia
- Skilled in facilitating meetings, researching, synthesizing data, tracking, and reporting
- Excellent written and verbal communication skills
- Accomplished in all Microsoft Office products

PROJECT EXPERIENCE

BerryDunn (04/2018 to present)

– Iowa Department of Health and Human Services (IA HHS)
Quality Management System (QMS) (01/2025 to present)

Shandia is providing business analysis support and subject matter expertise.



– **West Virginia Bureau for Medical Services (BMS)**

Engagement Coordination Support (01/2025 to present)

Shandia provides review and tracking support for the engagement's statements of work (SOW).

Organizational Development (OD) Project Phase II (07/2024 to present)

Shandia is leading and executing the creation of four e-learning onboarding and training courses for the client.

Programmatic Managed Care (MC) Support (06/2024 to present)

Shandia completed the design and creation of four e-learning training courses and is providing coordination support for the project.

Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (02/2024 to 06/2024)

Shandia led and executed the design and creation of four e-learning training courses.

– **West Virginia Department of Human Services (DoHS)**

People's Access to Help (PATH) DDI Project Management (05/2023 to 06/2024)

Shandia provided project coordination support and onboarding/training expertise.

– **Missouri Department of Social Services**

Missouri Medicaid Enterprise (MME) Project Management Office (PMO) Engagement EVV

Aggregator Solution RFP Development (01/2021 to 05/2023)

MME PMO Program Integrity (02/2019 to 01/2021)

MME PMO Business Intelligence Solution – Data Warehouse Enterprise (04/2018 to 02/2019)

Shandia supported the MME PMO through three implementation projects from start-up to certification and project closure. She not only provided document management, meeting facilitation, analysis, and metrics, but she improved client process and structures, led JAD sessions, and conducted User Acceptance Testing (UAT).

– **Internal Projects**

Medicaid Learning Center (05/2024 to present)

Shandia is leading and executing the redesign of dozens of Medicaid e-learning courses.

West Virginia Engagement Operations Improvement Team (09/2023 to present)

Shandia co-led the build out of the engagement's internal SharePoint Resource Library.

Editorial/Quality Assurance (EQA) Champions (09/2023 to 09/2024)

Shandia played a key role in modifying and improving EQA processes.

Business Analysis Community of Practice (BACOP)

Shandia is co-leading the practice group and its initiatives.

Jefferson City, MO Chamber of Commerce (2017 to 04/2018)

As the membership and special events coordinator, Shandia provided administrative support through document and database management and event planning and coordination.

United Landscape Design (2017)

As an office administrator, Shandia led the design and implementation of organizational and systematic process and structure change within the company to increase efficiency, promote efficacy, and support the goals and visions of the business.

Lighthouse Preparatory Academy

– **Office Manager (2015 to 2017)**

As an office manager, Shandia assisted in establishing systems and structures to help the office and organization run more effectively. In addition, Shandia oversaw daily accounting activities for the general ledger; assisted in the preparation of the annual budget; helped resolve accounting,



payroll, and financial issues; maintained office records; and conducted meetings with Academy staff.

– **Teacher (2012 to 2016)**

In her role as an educator at Lighthouse Preparatory Academy, a university-model school, Shandia developed course curriculum, created class lessons, and taught subject matter for classes in literature, language, and logic; English composition; and psychology, among others.

– **Dean (2012 to 2015)**

In her role as a Dean at Lighthouse Preparatory Academy, she developed and provided training and onboarding for all families and teachers — new and existing.



Hope Connard, PHR, SHRM-CP

MANAGER

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Human Resource Management, University of Arizona

Professional in Human Resources (PHR)

Society for Human Resource Management – Certified Professional (SHRM-CP)

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1 year

AFFILIATIONS AND MEMBERSHIPS

- SHRM Member
- Global Organization Network (GIODN) Member

Hope Connard is a consulting manager with 30 years of strategic Human Resource (HR) leadership experience, supporting a wide range of industries in compliance, operations, organizational transformation, and change management. Hope works closely with clients to align HR strategies with business goals, driving growth and enhancing operational efficiencies. She specializes in cultivating organizational culture and leading initiatives with a focus on coaching and development, helping leaders navigate challenges and achieve sustainable success through tailored guidance and support.

KEY QUALIFICATIONS

- 30 years' experience strategic HR leadership
- Over 20 years of HR risk management and payroll compliance experience
- 10 years of HR consulting in a Professional Employer's Organization (PEO) environment for a variety of industries

PROJECT EXPERIENCE

BerryDunn (12/2019 to present)

– **West Virginia Bureau for Medical Services (BMS) Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Reporting Project (07/2024 to present)**

Serving as part of the project leadership team, Hope provides guidance and direction to support the team in the assessment and analysis activities, ensuring successful execution of the SS-A update under MITA.

Organization Development Project (06/2024 to present)

Serving as a subject matter expert (SME) and part of the project leadership team, Hope provides guidance and support in the development of the BMS Onboarding Training Modules and BMS branded Learning Management platform. This project supports the workforce development needs as identified in OD Phase 1, and will result in a more effective and consistent approach to onboarding newly hired employees.



Engagement Support (05/2024 to present)

Hope supports BMS engagements by collaborating with the engagement leadership to help ensure project goals and deadlines are met within West Virginia's single state Medicaid agency. She performs a variety of overflow engagement coordination duties, such as documentation/deliverable reviews and other project management activities.

– Reset IV

HR Consulting and Advisory Services (04/2024 to 08/2024)

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project.

– Hawai'i Department of Human Services Med-QUEST Division (MQD)

Organizational and Business Process Redesign (12/2023 to 07/2024)

As co-lead, Hope provided organizational change management expertise that supported the Organization Transformation Project for Hawai'i's single state Medicaid agency, the Department of Human Services.

– CareOregon

HR Job Family Review and Consolidation (10/2023 to 01/2024)

Hope served as the project lead in an extensive assessment of the organization's job family structure. Working with the client's HR department, Hope's support encompassed providing expert analysis and crafting strategic recommendations to streamline job roles through consolidation and redesign in alignment with CareOregon's strategic vision to improve operational efficiencies.

Employers' Innovative Network (03/2010 to 12/2019)

Hope served in an executive-level capacity, spearheading corporate and client HR initiatives. Overseeing HR operations, consulting, and outsourcing services, she garnered extensive knowledge across various industries, including union and non-union environments spanning multiple states. Providing guidance to internal and external stakeholders, she offered expertise in employment relations and risk management. She played a pivotal role in developing an online training platform and championed initiatives to create valuable and relevant training content. Collaborating on various projects, she innovatively designed employee benefit programs tailored to meet the needs of both employees and client employers. Additionally, she collaborated with fellow leaders to identify and implement a multi-client Human Resources Information System (HRIS) platform, while maintaining a focus on initiatives aimed at enhancing organizational effectiveness.

NGK Sparkplugs (04/2007 to 03/2010)

In her role as an HR administrator for a global manufacturer, Hope managed recruitment efforts and payroll administration, and drove enhancements in HR processes. She played an active role in employee engagement initiatives and supported training and development programs in West Virginia operations. Engaging with Kaizen groups, she focused on improving organizational effectiveness. Notably, her pivotal involvement in relocating import operations from Detroit to Charleston underscored her ability to liaise effectively between U.S. and Japan operations. Additionally, she conducted meticulous audits and data analysis, and aided in implementing a new inventory platform. Hope's unwavering dedication to continuous improvement, particularly through her engagement with Kaizen programs, epitomized her commitment to operational excellence.

IT Alliance of Appalachian Ohio (04/2003 to 04/2007)

Hope worked as an executive assistant and HR generalist for a non-profit focused on improving IT awareness for the southeastern Ohio region. She managed staff and independent contractors for special events tied to IT initiatives. She was responsible for managing HR and payroll responsibilities and grant management.



Samuel "Sam" Kessler

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Samuel Kessler is an experienced customer service professional, bringing seven years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

EDUCATION AND CERTIFICATIONS

BS, Marketing, West
Virginia Wesleyan College

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

4 years

PROJECT EXPERIENCE

BerryDunn (08/2020 to present)

– **West Virginia Department of Human Services (DoHS)**
People's Access to Help (PATH) DDI Project Management (08/2020 to present)

As deliverables lead, Samuel manages contract deliverables from the training, testing, functional, technical, certification, and operations areas. As such, he manages the production of the design, development, and implementation (DDI) and maintenance and operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to help ensure that the documents reflect functionality within the system and works with the vendor and the client to address any gaps.

– **West Virginia Bureau for Medical Services (BMS)**
1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (08/2020 to 12/2022)

Samuel acted as a project coordinator and performed a variety of responsibilities for the project which included organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracked decisions, interfaced with vendors, assisted with the drafting of reports, and supported the project team in a variety of functions.

N3 LLC (05/2018 to 08/2020)

Working alongside IBM, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM, this was focused on DB2 and VMware adoption.



For Magento and Adobe, this was focused on eCommerce Management Platforms. For Microsoft, Samuel assisted Azure customers with billing and technical issues in an account management position. After Azure, he drove Teams adoption and utilization as part of the Modern Workplace Team as an I-CSM.

Target (06/2017 to 01/2018)

As an electronics sales floor associate, Samuel helped guests with education on devices and products, answering questions, and helped ensure that each guest's needs were taken care of.

Trojan Landing LLC (05/2013 to 08/2016)

As a marine salesperson for Trojan Landing LLC, Samuel assisted customers with their personal recreational vehicle needs, helping to match each customer with the right product for them. He took them through purchase, title, and financing, and assisted with maintenance and storage needs afterwards. As marketing director, he handled all online sales, digital and print marketing, and event planning and marketing.



Hailey Holden

STAFF CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Hailey Holden is a leadership-driven professional with more than 10 years of experience creating solution-focused and collaborative partnerships in large volume and high stress situations. She is an excellent communicator with a passion for positive change and brings a variety of skills such as timeline management, schedule deconflicting, client-contractor coordination, personnel and resource management, data and project management, event planning and marketing, recruitment, and process improvement.

EDUCATION AND CERTIFICATIONS

BA, Psychology, Purdue University

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2 years

KEY QUALIFICATIONS

- Over 10 years of experience providing solution-focused coordination
- Over five years of successful development, design, and implementation of business processes, education, and training

PROJECT EXPERIENCE

BerryDunn (07/2022 to present)

Hailey is a consultant for BerryDunn's Medicaid Practice Group. Hailey supports a variety of practice group initiatives, including supporting the BerryDunn Medicaid Learning Center, West Virginia Operations Improvement Team, and Medicaid Practice Group Resource Library.

– West Virginia Bureau for Medical Services (BMS)

West Virginia Engagement Coordinator (07/2022 to present)

As the engagement coordinator, Hailey has supported BerryDunn leadership in creating change across the varied projects within the engagement and provided a fresh perspective for improving internal and client processes emphasizing quality and consistency. Hailey has led the engagement in process automation, assisting with the design and implementation and corresponding training for several enterprise applications, to increase ease of access and productivity. She has designed and maintains a variety of trackers, budgets, and data stores for use across the engagement, promoting an organized and efficient approach for enterprise management. Hailey manages and processes staffing requests and service level agreements for the engagement, helping ensure data quality and accurate reporting.

Organizational Development (OD) Project Phase II (06/2024 to present)

Hailey provides subject matter expertise in instructional design and training. She supports the development of onboarding and training eLearning courses for BMS.



Advanced Planning Document (APD) Assistance (05/2023 to present)

Hailey assists in compiling, tracking, and reviewing a variety of APDs.

Partnership Management Support Project (12/2023 to 06/2024)

Hailey assisted with leverage and reuse initiatives and provided project management support.

Provider Management Support Project (01/2023 to 10/2023)

Hailey worked on leverage and reuse initiatives for West Virginia and the United States Virgin Islands, including support with compiling and reviewing APDs.

El Paso County Department of Human Services (04/2021 to 07/2022)

Hailey served as an adolescent lead social caseworker IV to provide intensive casework services to families and children. She developed productive working relationships with reluctant clients, establishing positive rapport and creating collaborative partnerships between all involved parties. Hailey successfully identified clients' needs to create and implement solution-focused plans of action to meet and exceed those needs. Additionally, Hailey helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress toward client goals. She conducted research, investigation, and strategic decision-making to help ensure proper reporting, prosecution, and handling of child abuse and neglect reports. Hailey also performed assessments of new cases, referred clients to appropriate resources, and provided accurate updates and testimony in court hearings and mediations. Her efforts resulted in a substantial decrease in repeat infractions. During her tenure, Hailey acted in a supervisory role to members of the casework team, providing feedback, continuous education, and training to other caseworkers.

Lake County Court Appointed Special Advocate (CASA) Program (04/2016 to 04/2021)

Hailey served as a Lake County CASA who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. Hailey played an integral in the development of the organization. She worked alongside program leadership for annual goal setting and tracked the completion of milestones, facilitating the organization's strategic goals. Hailey pioneered creative strategies for the recruitment, training, and management of over 100 community volunteers. Hailey conducted an extensive analysis of program training content and protocols and transformed an outdated in-person training protocol into a tailored and refreshed eLearning program to continue the training of community volunteers during the COVID-19 pandemic. She also initiated the conversion of physical client files and demographic information to a secure web-based data store and case management system, allowing for the compilation of statistical data that best represented the organization. Her contribution allowed for a marked increase of both state and national grant funding for the program. Additionally, Hailey planned and conducted education-focused community outreach events, developed and implemented marketing plans for recruitment, and designed refreshed marketing materials for the program to increase community education and awareness.

Second Chance for Pets Network (01/2015 to 01/2017)

As a member of the Board of Directors, Hailey provided oversight to help meet the organization's strategic goals, and managed strategies for the recruitment, training, and management of volunteers. She evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people.



Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



Caitlin Cabral is a Poynter-ACES-certified member of the BerryDunn Editorial/QA (EQA) team who has demonstrated experience in project management, copyediting, and teaching others business writing skills. She is a self-motivated learner with a strong academic history and the ability to master several roles in the workplace.

EDUCATION AND CERTIFICATIONS

BA, Psychology,
University of
Hartford

Poynter ACES
Certificate in Editing

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

5 years

PROJECT EXPERIENCE

BerryDunn (09/2021 to present)

As a member of BerryDunn's EQA team, Caitlin is responsible for proofreading and copyediting meeting notes, memos, reports, and PowerPoint presentations for various projects. This requires helping to ensure that documents conform to BerryDunn's formatting and writing standards as outlined in the BerryDunn Style Guide. Caitlin trains new teammates and creates and presents educational materials to the consulting team about various aspects of business writing. She helps to maintain the Style Guide and continuously improve EQA's service offerings.

QualityMetric (08/2020 to 09/2021)

Caitlin worked as a project research assistant and acted as project manager on several concurrent projects, with responsibilities including timeline management, client communications, and supervision of vendors. She provided administrative support to project teams by taking meeting minutes, scheduling calls, processing invoices, and quality-checking materials. She also served as the Deliverable Tracking Manager, which entailed maintaining detailed records and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

University of Hartford Department of Psychology (01/2019 to 05/2020)

Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.



True Colors, Inc. (01/2019 to 05/2019)

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

University of Hartford Department of Communication (09/2018 to 05/2020)

Caitlin worked as an office assistant to streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at University events.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
D01	Commissioner Briefing	A monthly status update delivered to the BMS Commissioner.
D02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
D03	Project Schedule	A visual depiction of project duration, phases, and key milestones.
D04	Action Item, risk, issue, and decision logs	Logs containing action items, risks, issues, and key decisions, respectively. These may be captured during project meetings and during project activities, via correspondence with stakeholders, and at the request of BMS. The logs will be maintained on the BerryDunn project SharePoint site.
D05	ADW Access Rule Provisions Gap Analysis	A comparison between the Ensuring Access to Medical Services final rule (Access Rule) requirements and existing ADW functionalities, and related processes of current HCBS waivers. This analysis aims to identify discrepancies between what is legally mandated and currently in place.
D06	IDDW Access Rule Provisions Gap Analysis	A comparison between the Ensuring Access to Medical Services final rule (Access Rule) requirements and existing IDDW functionalities, and related processes of current HCBS waivers. This analysis aims to identify discrepancies between what is legally mandated and currently in place.
D07	TBIW Access Rule Provisions Gap Analysis	A comparison between the Ensuring Access to Medical Services final rule (Access Rule) requirements and existing TBIW functionalities, and related processes of current HCBS waivers. This analysis aims to identify discrepancies between what is legally mandated and currently in place.
D08	Waivers Functions Crosswalk and Gap Analysis	A comparison between current waiver functions and proposed enhancements to waiver services and identify ways of streamlining waiver operations.
D09	BMS 1915(c) Waiver Development and Management Manual	A resource for BMS program managers to reference when questions related to waiver renewal or amendment applications arise. This resource will contain concise waiver management instructions and included several waiver management processes.



Deliverable ID	Deliverable Name	Deliverable Description
D10	Provider Manual Revisions	Edits to existing provider manual that will incorporate changes in provider functions related to changes arising from the Access Rule and the HCBS cohesion efforts.
D11	ADW Crosswalk of Assessments	A comparison of nursing assessments that may be administered to individuals who may potentially receive services under the Aged and Disabled Waiver to determine eligibility in a more streamlined manner.
D12	ADW Validation of New Assessment	A report that highlights assessments with streamlined administration for increased efficiency.
D13	IDDW Redesign Analysis	A report of findings to describe what is needed to streamline waiver functionality, increase efficiency, improve provider capacity,
D14	IDDW Redesign Plan	A plan detailing the steps to redesign the IDDW waiver payment methodology, including stakeholder engagement and collaboration with CMS for necessary waiver modifications.
D15	HCBS Waiver Amendment Plan	A plan detailing information within each of the program waivers that will be formally amended via waiver amendment application submission to CMS; the requirements of public notice and comment periods and the relevant support BerryDunn will provide; and how BerryDunn will support BMS during the CMS review period of each amendment.
D16	ADW Waiver Amendment	ADW amendment to incorporate program changes, Access Rule requirements, and waiver program cohesion/efficiency strategies. Includes waiver drafting and submission support.
D17	IDDW Waiver Amendment	IDDW amendment to incorporate program changes, Access Rule requirements, and waiver program cohesion/efficiency strategies. Includes waiver drafting and submission support.
D18	TBIW Waiver Amendment	TBIW amendment to incorporate program changes, Access Rule requirements, and waiver program cohesion/efficiency strategies. Includes waiver drafting and submission support.
D19	Quality Management Plan	A plan that identifies opportunities for strengthening data collection, improving participant-reported outcomes, and helping to ensure BMS is well-prepared to meet CMS LTSS reporting requirements.
D20	IAPD	The IAPD will be developed in compliance with requirements, including, but not limited to, 45 Code of



Deliverable ID	Deliverable Name	Deliverable Description
		<i>Federal Regulations (CFR) 95.610. An implementation project management approach will also be submitted with this deliverable.</i>



Appendix C: Artifacts Dictionary

Table 5: Artifacts Dictionary

Artifact ID	Artifact Name	Artifact Description
01	ADW Access Rule Provision Implementation Plan	A plan for the ADW that outlines necessary tasks to comply with the Access Rule, including programmatic and operational modifications to eligibility, services, and IT systems. The plan will include a timeline and strategy to ensure effective implementation for positive outcomes.
02	IDDW Access Rule Provision Implementation Plan	A plan for the IDDW that outlines necessary tasks to comply with the Access Rule, including programmatic and operational modifications to eligibility, services, and IT systems. The plan will include a timeline and strategy to ensure effective implementation for positive outcomes.
03	TBIW Access Rule Provision Implementation Plan	A plan for the TBIW that outlines necessary tasks to comply with the Access Rule, including programmatic and operational modifications to eligibility, services, and IT systems. The plan will include a timeline and strategy to ensure effective implementation for positive outcomes.
04	IDDW Stakeholder Engagement Plan and Facilitation	A structured approach to communicating with and involving groups and individuals who have an interest in the IDDW. The plan will help to identify stakeholders and outline participation strategies to help ensure their input is considered.
05	Public Comment Process Support	Assistance with management and tracking public comments received and help with drafting responses, tracking potential waiver changes that may arise from comments, and assisting in the incorporation of comments within the waiver application.
06	CMS Review Support	CMS communication and CMS request for additional information (RAI) queries support for all submitted waiver applications.
07	LTSS Aggregate Report	Data capturing LTSS 1, 2, 6, 7, and 8, measures across HCBS programs, aggregated for submission to CMS.
08	HCBS CAHPS® Reporting Plan	Outline of steps to help ensure BMS is compliant with CMS' biennial participant experience reporting requirements.
A09	Project Plan for Next Steps	Scope of work for additional work to complete Access Rule legislation implementation across all HCBS programs.



Appendix D: Acronyms/Abbreviations

Table 6: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
ADW	Aged and Disabled Waiver
ARP	American Rescue Plan
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CFR	Code of Federal Register
CM	Care Management
CMS	Centers for Medicare and Medicaid Services
CMA	Centralized Master Agreement
CL	Commodity Line
DoHS	Department of Human Services
EE	Eligibility and Enrollment
EM	Engagement Manager
FM	Financial Management
GPM	General Project Manager
HCBS	Home and Community-Based Services
IAPD	Implementation Advance Planning Document
IDDW	Intellectual and Developmental Disabilities Waiver
LCWPM	Lead Child Welfare Project Manager
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
LTSS	Long Term Services and Support
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
QI	Quality Initiative
QMP	Quality Management Plan
QMS	Quality Management Systems
RAI	Request for Additional Information
SOW	Scope of Work



Acronym/Abbreviation	Definition
SS	Project Management Support Staff
State, WV	West Virginia
TBIW	Traumatic Brain Injury Waiver



WEST VIRGINIA DEPARTMENT OF

**HUMAN
SERVICES**

STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

DATE: July 22, 2025

TO: Crystal Hustead
Senior Buyer
State of West Virginia Purchasing Division

FROM: Althea Greenhowe *Althea Greenhowe*
Procurement Specialist, Senior
Office of Shared Administration/Purchasing

RE: PF1743749, CDO BMS26*02
Dept 0511

The West Virginia Bureau for Medical Services (BMS) respectfully requests the approval of the above-referenced CDO for services performed by Berry, Dunn, McNeil & Parker LLC under PF785940, CMA HHR21*03.

These services are to assist the West Virginia Department of Human Services (DoHS) Bureau for Medical Services (BMS) by providing support for Home and Community Based Services Quality Initiative Project. The service period 08/14/2025-12/31/2025. The total estimated cost is \$927,125.00.

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-3924 or althea.m.greenhowe@wv.gov. Thank you for your time and consideration in this matter.



Subject: Governor's Office Approval of contracts over \$100,000



Rosen, Bryan D <bryan.d.rosen@wv.gov>
to Wagner, Roberta A, Price, Robert L

Thu, Jan 23,

I spoke with Curtis early today. He relayed the following information for how we will process these through his office.

1. He would like a synopsis of the purchase. I would suggest in most cases we can pull the extended description populate that in the email to him.
2. Please note if there is a specific timeframe in the request.
3. Contracts will be reviewed at the Master Agreement level meaning that he will not be approving DOs.
4. Renewals for contracts over \$100,000 must be approved.

This process is going to be fluid and will likely morph as we move forward but this is the best information that I have today.

Bryan



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- ☐ Any Words
- ☐ All Words
- ☒ Exact Phrase

e.g. 123456789, Smith Corp

"BERRY DUNN MCNEIL & PARKER LLC"

Classification

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Excluded Entity

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Exclusion Type

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Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information								
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason
LLC Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit			

Organization Information								
Business Purpose	5511 - Management of Companies and Enterprises - Management of Companies and Enterprises - Management of Companies and Enterprises Including Offices of Bank Holding Companies and Other Holding Companies			Capital Stock				
Charter County	Kanawha			Control Number	0			
Charter State	ME			Excess Acres				
At Will Term	A			Member Managed	MBR			
At Will Term Years				Par Value				
Authorized Shares				Young Entrepreneur	Not Specified			



Addresses

Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Notice of Process Address	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

Officers

Type	Name/Address
Member	CHARLES K. LEADBETTER III 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	SETH E. WEBBER 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	SARAH BELLIVEAU, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Name/Address

DBA

DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	

DBA Name	Description	Effective Date	Termination Date
Annual Reports			
Filed For			
2025			
2024			
2023			
2022			
2021			
2020			
2019			
2018			
2017			
2016			
2015			
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For more information, please contact the Secretary of State's Office at 304-558-8000.

Tuesday, July 22, 2025 — 12:46 PM

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