



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: 09-05-2025

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 BMS2600000009 1	Change Order No:	Procurement Folder:	1777397
Document Name:	EVV Reprocurement Planning Project		Reason for Modification:	
Document Description:	EVV Reprocurement Planning 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

Total Order Amount: \$1,050,600.00

Purchasing Division's File Copy

CH 9/24/25
PURCHASING DIVISION AUTHORIZATION
DATE: 9/25/25
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 9-25-25
ELECTRONIC SIGNATURE ON FILE

Extended Description:

Electronic Visit Verification (EVV) Reprocurement Planning Project

Service Period: 09/25/25-06/14/26

Total: \$1,050,600.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$86,000.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-09-25	2026-06-14				

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

Lead Project Manager: Optional Renewal Year Two

Hourly Rate: \$215.00

400 Hours @ \$215=\$86,000.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$27,000.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-09-25	2026-06-14				

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

Engagement Manager: Optional Year Two

Hourly Rate: \$270.00

100 Hours @ \$270=\$27,000.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$20,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-09-25	2026-06-14				

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

100 Hours @ \$205=\$20,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$792,300.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-09-25	2026-06-14				

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

Extended Description:
General Project Manager: Optional Renewal Year Two

Hourly Rate: \$190.00
4,170 Hours @ \$190=\$792,300.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$124,800.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2025-09-25	2026-06-14				

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
1,560 Hours @ \$80=\$124,800.00



August 27, 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 West Virginia Department of Human Services and Bureau for Medical Services by providing support for the Electronic Visit Verification Reprourement Planning Project under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be 10 months. BerryDunn agrees to a SOW start date effective September 25, 2025

Assuming a start date of September 25, 2025, the work would then conclude on June 14, 2026.

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:
A handwritten signature in black ink that reads 'Peter Alfrey'.

Peter Alfrey

Principal

Berry, Dunn, McNeil & Parker, LLC

207-541-2242

Ok

A handwritten signature in black ink that reads 'Ashlea Greenhouse'.

Berry, Dunn, McNeil & Parker, LLC is the trading name under which Berry, Dunn, McNeil & Parker, LLC and BMDP Assurance, LLC, independently owned entities, provide services. Berry, Dunn, McNeil & Parker, LLC provides the staffing and consulting services. BMDP Assurance, LLC is a licensed CPA firm, providing the services.



West Virginia Department of Human Services, Bureau for Medical Services

Electronic Visit Verification Reprocurement Planning Project

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21*03



Submitted By:

Berry, Dunn, McNeil & Parker, LLC
300 Capitol Street
Charleston, WV 25301
681.313.8905

Brandon Milton, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
bmilton@berrydunn.com

Peter Alfrey, PMP®, Principal
Berry, Dunn, McNeil & Parker, LLC
palfrey@berrydunn.com

Submitted On:

August 27, 2025



Staffing Plan and Scope of Work for the West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS) Electronic Visit Verification (EVV) Reprocurement Planning 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) with project management services for the Electronic Visit Verification (EVV) Reprocurement Planning Project (herein referenced as the EVV Project). The work completed under the EVV Project will be completed 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 assist BMS with developing and informing the re-procurement strategy for a compliant and cost-effective EVV solution, informed by market research, partner input, and cost analysis, to support program goals and federal and State requirements.

The EVV Project will also aid the State in meeting its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:

- Improving BMS' effectiveness and efficiency
- Leveraging technology to enhance performance and decision-making
- Improving healthcare outcomes for members
- Improving effectiveness and efficiency of the Performance Management function
- Helping to support the State's ability to monitor contractor performance against approved measures

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, BMS Deputy Commissioner of Policy and Operations, as State project sponsor and Cynthia Parsons as the State project lead.
- 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 Brandon Milton as the engagement manager (EM), Renzo Del Castillo as lead project manager (LPM), Emily McCoy as the lead Medicaid



Management Information System (MMIS) project manager (LMPM), Alex Tannenbaum as the program manager (PgM), and Sarah Vintorini as the project manager (PM).

- This work will begin with approval of this SOW and a mutually agreed-upon date and is projected to continue for 10 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 State of West Virginia Department of Human Services, Bureau for Medical Services Electronic Visit Verification Planning Advance Planning Document (PAPD) for this SOW. The Centers for Medicare & Medicaid Services (CMS) approved the EVV PAPD on July 22, 2025, for total State and federal funds in the amount of \$1,411,560 under project identifier WV-2025-06-03-MMIS-PAPD-EVV. The estimated cost of the services delivered under this SOW is \$1,050,600 (included in the approved Advance Planning Document (APD)). Therefore, any additional scope that is added to the services provided under this SOW may require the State to update its EVV PAPD 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. A high-level timeline for the activities described below is provided in Section 5.0.

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

Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
1.0	Engagement Oversight <i>Service Approach</i> BerryDunn's leadership team will provide oversight and coordination of BerryDunn staff, services, and deliverables. 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 will oversee BerryDunn staff, services, and review of deliverables. <i>Deliverable(s)</i> DO1: Commissioner Briefing <i>Completion Criteria</i> All parties will deem Engagement Oversight completed upon completion of the project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.	Ed Daranyi Brandon Milton Peter Alfrey Emily McCoy Dawn Webb Alex Tannenbaum	200
2.0	Project Execution and Control <i>Service Approach</i> In support of Project Execution and Control, BerryDunn's leadership team 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: - 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	Sarah Vintorini Kourtney Kirk Alex Tannenbaum MaryLou Banker Dawn Webb Sudha Ganapathy Renzo Del Castillo Alex Lyubarov Jordan Ramsey Caitlin Cabral Jonathan Williams Alycia Minshall	1,500



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	- Managing project logs (action item, decision, issue, and risk tracking) - Storing project documentation repository in an agreed-upon SharePoint location <i>Deliverable(s)</i> - D02: Monthly Status Report <i>Completion Criteria</i> All parties will deem Project Execution and Control complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Carole Ann Guay Megan Hamilton Grace Min Anna Beatriz Banks Aubrey Duplissie Rachel Eggleston Diane Maines Cate Poling Hailey Holden Hope Connard Shandia Benke Sam Kessler Megan Blount Payton Waybright	
3.0	Partner Outreach and Research <i>Service Approach</i> BerryDunn will assist the State with partner outreach and research by gathering actionable input, identifying system challenges, and capturing opportunities for enhancements to inform ongoing EVV strategic planning. Partner outreach and research activities may include the following: - Develop a partner matrix including program staff, providers, advocacy groups, and compliance officers - Develop, distribute, and analyze an EVV Partner Survey utilizing a State-approved survey platform to capture feedback on current issues and system pain points, synthesizing findings into actionable insights and recommendations to guide strategy and decision-making - Conduct up to 12 targeted interviews and/or focus groups to collect insights on user experience, compliance challenges, integration issues, and desired functionalities - Facilitate up to 10 workshops to capture real-time feedback and foster collaborative problem-solving - Document recurring pain points (e.g., usability issues, data accuracy problems, integration	Sarah Vintorini Kourtney Kirk MaryLou Banker Dawn Webb Sudha Ganapathy Renzo Del Castillo	1,780



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	delays) - Assess operational, technical, and compliance gaps from the partner perspective and evaluate the impact of identified issues on program efficiency - Capture opportunities for process improvements, new features, and workflow changes - Provide support and coordination with written correspondence, email blasts, and/or other related EVV reprocurement communications <i>Deliverable</i> - D03: Partner Matrix - D04: Partner Findings and Recommendations <i>Completion Criteria</i> All parties will deem Partner Outreach and Research complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
4.0	Market Research <i>Service Approach</i> BerryDunn will conduct unbiased market research to help inform the procurement strategy for the next EVV RFP to help ensure it meets all federal and State requirements, aligns with program objectives, and supports the needs of partners. Market research will include: - Review of the current EVV system functionality, compliance issues, and partner feedback - Identification and validation of functionality and technical requirements, including CMS-mandated features and State-specific program needs - Identification and profiling of potential EVV vendors - Coordinate, document, and participate in up to 12 demonstrations, as requested by the State - Coordinate and facilitate up to five discussions with, and/or gather information from other states to capture lessons learned, best practices, and considerations relevant to the	Sarah Vintorini Kourtney Kirk MaryLou Banker Dawn Webb Sudha Ganapathy Renzo Del Castillo Alex Lyubarov	850



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	EVV system - Analysis of vendor market share, solution maturity, scalability, and compliance history - Assessment of trends in EVV technology, including mobile GPS tracking, Application Programming Interface (API)-based integrations, offline capabilities, etc. <i>Deliverable(s)</i> - D05: Market Research Summary Report <i>Completion Criteria</i> All parties will deem Market Research complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
5.0	Analysis of Alternatives (AoA) Services <i>Service Approach</i> BerryDunn will support the State by evaluating the EVV procurement options available by performing an alternatives analysis and cost-benefit analysis of each option. AoA Services may include the following activities: - Define the problem and objectives - Partner engagement - Develop evaluation criteria - Identify alternatives - Analyze each alternative - Compare and score alternatives - Recommend preferred alternative - Prepare documentation for CMS and State review <i>Deliverable(s)</i> - D06: AoA <i>Completion Criteria</i> All parties will deem AoA Services complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor.	Sarah Vintorini Kourtney Kirk MaryLou Banker Dawn Webb Sudha Ganapathy Renzo Del Castillo Alex Lyubarov	1,000
6.0	RFP Research and Support BerryDunn will provide research, drafting, and consultation services to begin the development of a competitive, compliant, and vendor-attractive RFP for the modernized EVV solution. The approach will help	Alex Tannenbaum Sarah Vintorini Kourtney Kirk MaryLou Banker	750



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	ensure alignment with regulatory requirements, procurement best practices, and the State's program objectives. RFP research and support activities may include: - Requirements validation and /or development, which could include findings from partner engagement and market research - Identification and/or development of mandatory and desirable features based on market capabilities and program priorities - Confirmation that functional, technical, and compliance requirements align with CMS guidelines, HIPAA, and State procurement regulations <i>Completion Criteria</i> All parties will deem RFP research and support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Dawn Webb Sudha Ganapathy Renzo Del Castillo Elizabeth Vose Jonathan Watkins Alex Lyubarov	
7.0	APD Support <i>Service Approach</i> BerryDunn will develop and assist in facilitating the approval of APD updates to help ensure that the project continues to maintain buy-in and financial backing from relevant federal partners. <i>Deliverable</i> D07: Planning Advance Planning Document Update (PAPD-U) <i>Completion Criteria</i> All parties will deem APD Support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sarah Vintorini Kourtney Kirk Alex Tannenbaum Brandon Milton Dawn Webb Hailey Holden Sudha Ganapathy	250
Total Hours			6,330
Total Not-To-Exceed Cost Estimate			\$1,050,600



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 MMIS Project Manager (LMPM) (\$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	Brandon Milton	100	\$27,000
14	LPM	\$215	Renzo Del Castillo	400	\$86,000
16	LMPM	\$205	Emily McCoy	100	\$20,500
17	GPM	\$190	Dawn Webb	200	\$38,000
17	GPM	\$190	Ed Daranyi	20	\$3,800
17	GPM	\$190	Peter Alfrey	50	\$9,500
17	GPM	\$190	Alex Tannenbaum	400	\$76,000
17	GPM	\$190	Sarah Vintorini	800	\$152,000
17	GPM	\$190	Elizabeth Vose	150	\$28,500
17	GPM	\$190	Kourtney Kirk	600	\$114,000
17	GPM	\$190	MaryLou Banker	400	\$76,000
17	GPM	\$190	Cate Poling	150	\$28,500
17	GPM	\$190	Hailey Holden	300	\$57,000
17	GPM	\$190	Jonathan Watkins	300	\$57,000
17	GPM	\$190	Sudha Ganapathy	600	\$114,000
17	GPM	\$190	Alex Lyubarov	200	\$38,000
18	SS	\$80	Jordan Ramsey	20	\$1,600
18	SS	\$80	Caitlin Cabral	10	\$800
18	SS	\$80	Jonathan Williams	20	\$1,600
18	SS	\$80	Alycia Minshall	10	\$800
18	SS	\$80	Carole Ann Guay	20	\$1,600
18	SS	\$80	Megan Hamilton	20	\$1,600
18	SS	\$80	Grace Min	20	\$1,600
18	SS	\$80	Anna Beatriz Banks	10	\$800
18	SS	\$80	Hope Connard	100	\$8,000



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
18	SS	\$80	Shandia Benke	300	\$24,000
18	SS	\$80	Sam Kessler	200	\$16,000
18	SS	\$80	Aubrey Duplissie	10	\$800
18	SS	\$80	Rachel Eggleston	10	\$800
18	SS	\$80	Megan Blount	700	\$56,000
18	SS	\$80	Payton Waybright	100	\$8,000
18	SS	\$80	Diane Maines	10	\$800
Total				6,330	\$1,050,600



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

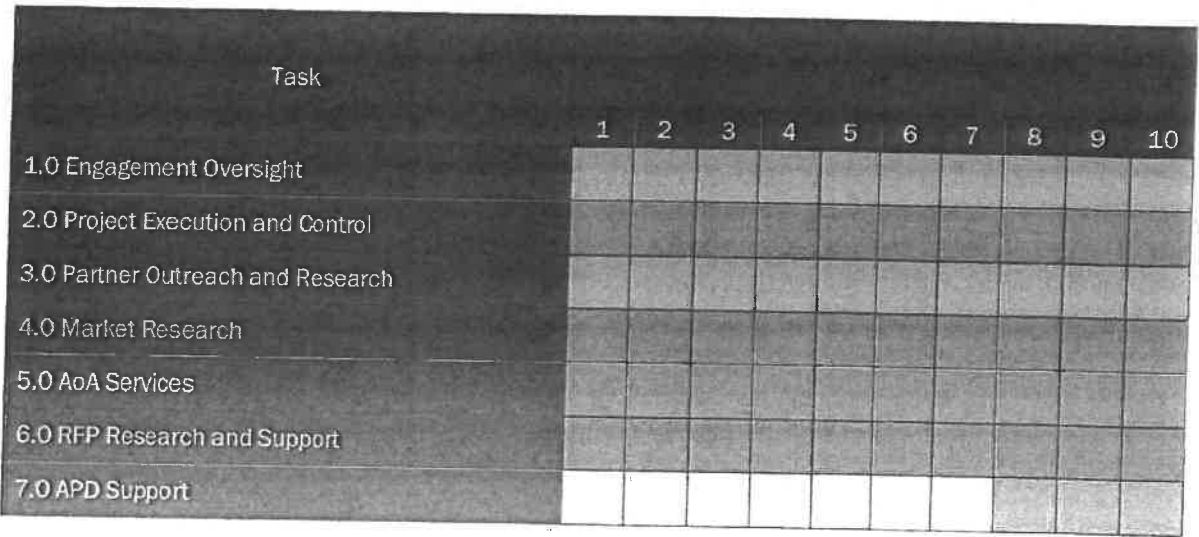
Month #	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	10	40	10	417	156	633	\$105,060
Month 2	10	40	10	417	156	633	\$105,060
Month 3	10	40	10	417	156	633	\$105,060
Month 4	10	40	10	417	156	633	\$105,060
Month 5	10	40	10	417	156	633	\$105,060
Month 6	10	40	10	417	156	633	\$105,060
Month 7	10	40	10	417	156	633	\$105,060
Month 8	10	40	10	417	156	633	\$105,060
Month 9	10	40	10	417	156	633	\$105,060
Month 10	10	40	10	417	156	633	\$105,060
Total	100	400	100	4,170	1,560	6,330	\$1,050,600



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline





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
2DAAA44ADB3M7T...

Signature

8/27/2025

Date

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

A handwritten signature in black ink, appearing to be 'C. [unclear]', written over a horizontal line.

Signature

9/4/25

Date



Appendix A: Resumes

Brandon Milton, MBA, PMP®, Prosci® CCP

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, University of New
Hampshire

BS, Business
Administration and
Political Science,
University of Maine

Certified Project
Management
Professional® (PMP®)

Prosci® Certified Change
Practitioner (CCP)

PROPOSED PROJECT ROLE

Engagement Manager

MEDICAID EXPERIENCE

14 Years

Brandon Milton is a leader in BerryDunn's Medicaid Practice Group (MPG). He specializes in Medicaid Enterprise Systems and organizational development for State Medicaid Agencies. He leads client engagements and project teams providing strategic planning, IT system selection, project management, process improvement, and quality management services to Medicaid clients across the country.

KEY QUALIFICATIONS

- Experience with Medicaid Management Information System (MMIS) procurement, implementation, and certification (WV, NJ, AK, IA)
- Experience with Medicaid eligibility audits, certification, and business process redesign (HI, AK, MO)
- Experience with organization development for Medicaid agencies (HI)
- Over 14 years of government consulting experience

PROJECT EXPERIENCE

BerryDunn (07/2011 to present)

– West Virginia Department of Human Services (DoHS)
People's Access to Help (PATH) DDI Project Management (07/2021 to present)

Brandon is the portfolio manager overseeing the implementation project for West Virginia's Integrated Eligibility System (IES), PATH, to support the eligibility, enrollment, and administration of the WV DOHS's human services programs, including Medicaid, Children's Health Insurance Program (CHIP), Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support.



He manages the PMO team that provides project management, certification, and compliance support working directly with CMS and State stakeholders, APD, deliverable review, testing support, organizational change management (OCM) support, requirements support, and general subject matter expertise supporting the PATH DDI project. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

Iowa Department of Health and Human Services (IA HHS)

Medicaid Modernization Effort (5/2022 to present)

Brandon serves as the Engagement Principal, overseeing all of the work of the BerryDunn teams serving Iowa's state Medicaid agency, IA HHS. He is accountable for the performance and quality of the BerryDunn services and deliverables. In addition to his oversight responsibilities, Brandon provides strategic guidance to executive leadership at the State, as well as subject matter expertise for Medicaid modernization activities.

– Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitations Consulting Serves (09/2020 to 6/2025)

Brandon served as the project principal for BerryDunn's team overseeing the work performed by the project team assisting HCS with visioning, researching, and developing a future MMIS solicitation, including vendor transition support.

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

Organizational and Business Process Redesign (07/2017 to 7/2024)

Brandon served in the role of project principal where he supported Hawai'i's single state Medicaid agency, the Department of Human Services. Brandon led a business process redesign effort for the customer-facing sections of MQD. His work included identifying opportunities for the State to leverage their new Medicaid eligibility determination system to improve efficiency and customer experience.

– New Jersey Department of Human Services, Division of Medical Assistance and Health Services

MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 09/2017)

Brandon served in the role of Certification Lead for the MMIS Implementation and Certification Leverage and Reuse Project where he supported New Jersey's single state Medicaid agency, the Department of Human Services. In this role, Brandon worked closely with the Implementation Team Office managers, the system vendor, and IV&V to plan for the certification of the replacement MMIS using the latest federal rules and regulations published by CMS. His work included leading a team of subject matter experts in the review of State policies and system requirements for alignment to certification criteria as well as system documentation that provides evidence of compliance for each of the certification checklist items.

– West Virginia Bureau for Medicaid Services (BMS)

Substance Use Disorder (SUD) Waiver Initiative Phase 1 Project (02/2016 to 07/2017)

Brandon served in the role of project manager for the development of 1115 Waiver to create a continuum of care for Medicaid beneficiaries with a SUD in West Virginia. He led a team of policy experts and actuarial analysts to develop the concept for the delivery system and determine the budget neutrality for the waiver services. His work also included the development of an



implementation plan for the waiver. The waiver received CMS approval in fall of 2017.

Project Management of MMIS Procurement, DDI, and Certification (07/2011 to 10/2016)

Brandon served as the lead project manager for the design, development, implementation, and certification for the West Virginia MMIS. His work on the project included managing a core team of 17 individuals and approximately 30 full-time equivalents. The project team had responsibility for:

- Facilitation of requirements validation sessions
- Facilitation of business process redesign sessions
- Facilitation of system design sessions
- Quality assurance reviews of the vendor deliverables, including:
 - Project Management Plans
 - Detailed system design documents
 - Business process mapping documents
 - Security, privacy, and confidentiality plans
 - System integration test cases
 - Provider documentation
 - Operational readiness plans
 - Training plans
 - CMS Certification evidence
- Planning and execution of user acceptance testing
- Planning and quality assurance reviews of CMS certification evidence
- Planning and execution of operational readiness testing
- Oversight of service level agreements and system performance in operations

The West Virginia MMIS went live in January of 2016, and the State received their certification letter from CMS in October 2016.

Data Warehouse/Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014)

Brandon provided project management and quality assurance services for the Bureau's DW/DSS implementation. As part of this effort, he facilitated business process redesign sessions with the Program Integrity staff to align their business processes with the new case management system. He also facilitated requirements validation sessions, worked with the State in identifying potential data suppliers, and worked with the selected suppliers to determine the data feeds they will provide the DW/DSS. He facilitated design sessions between the State, data suppliers, and vendors to determine the data elements that would make up each of the data feeds. In addition, he developed test cases for UAT to provide end users with assurance that the system processes information according to requirements.

Provider Enrollment (PEA) Project (09/2011 to 11/2011)

Brandon provided project management support for the design, development, and implementation of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He



created status reporting deliverables, assisted the project manager in executing the project according to the project management plan.

Office of U.S. Senator Susan M. Collins (2007 to 2010)

As mail director for the Office of U.S. Senator Susan M. Collins, Brandon was responsible for designing, implementing, and managing process improvements to streamline paperless mail operation involving a staff of 75 across eight offices in Maine and Washington, D.C. He reduced response time to constituent inquiries from 30 days to as little as two days and downsized the mailroom staff from four to two employees. In addition, he supervised legislative correspondents and interns; screened and edited outgoing correspondence on behalf of Senator Collins; and created and managed an amendment tracking system for major legislation, including the FY2010 budget, the American Recovery and Reinvestment Act (ARRA) of 2009, and multiple appropriation bills.

PUBLICATIONS

- *West Virginia MMIS Certification Pilot*, Presentation for MESC 2015, Co-presented with Edward Dolly (West Virginia Department of Human Services) and Chris Green (Molina Healthcare), 8/19/2015.



Renzo Del Castillo, PMP®, CSP-SM, SSM6, SA6, PAHM

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Renzo is a strategic executive leader with over 15 years of experience driving transformative organizational growth and enhancing innovation. He is skilled in building and developing high performing teams, mentoring servant leaders, and optimizing business processes. Renzo is known for fostering cross-functional communication and collaboration to deliver exceptional client experiences.

EDUCATION AND CERTIFICATIONS

MA, Mass
Communications,
University of Florida

BA, English, University of
Florida

Certified Project
Management
Professional (PMP®),
Project Management
Institute

Six Sigma White Belt, The
Council for Six Sigma
Certification (CSSC)

SAFe 6 Agilist Certified,
Scaled Agile, Inc.

SSM 6 Certified, Scaled
Agile, Inc.

CSP-SM Certified, SCRUM
Alliance

PAHM Certified, AHIP

CSM Certified, SCRUM
Alliance

PROPOSED PROJECT ROLE

Lead Project Manager

MEDICAID EXPERIENCE
11.5 years

KEY QUALIFICATIONS

- Over a decade of experience providing direct, impactful project management support to single State Medicaid Agencies with large-scale Pharmacy Benefits Management (PBM) projects
- History of successful development of Centers for Medicare & Medicaid Services (CMS) Certification data model
- Deep knowledge and expertise in integrating technology and operations processes to promote successful outcomes and returns on investment

RELEVANT EXPERIENCE

CastleBridge Solutions (05/2024 to present)

Renzo founded CastleBridge Solutions, LLC to empower mission-driven organizations through strategic consulting, leadership coaching, and creative, community-based initiatives. Combining expertise in business transformation, cross-functional collaboration, and the arts, CastleBridge guides clients toward long-term impact and growth. Within this role, Renzo led process optimization and executive coaching initiatives for asset management clients, developing scalable, compliance-ready playbooks and strengthening succession planning through KPI-driven leadership development. He facilitated strategic planning sessions and launched Unabridged Empathy, a storytelling-based workshop series that enhanced communication, emotional intelligence, and cross-functional team cohesion. Additionally, he designed and executed author engagement programs, including literary events and audiobook editing, elevating brand presence and deepening audience connection through high-impact narrative delivery.



AFFILIATIONS AND MEMBERSHIPS

- Advisory Board
Member, Spring Street
Exchange 2018 –
2024

Optum Rx (12/2023 to 05/2024)

As the VP of Client Operations and Development, Renzo directed a shared services operational department that spanned materials management, operational service specialists, prior authorizations, strategic project

management, benefit consulting, and client management for Optum Rx's pharmacy book of business. Renzo reviewed, streamlined, and redeveloped OKRs and KPIs to align separate areas into a more efficient department with inclusive goals while addressing resource allocation issues, projecting a 10% reduction in administrative overhead and emphasizing growth, well-being, and empowerment of employees. Additionally, Renzo led development of the Centers for Medicare & Medicaid Services (CMS) Certification data model for Pharmacy Benefit Management (PBM) Fee for Service (FFS) book of business, projecting a 30% reduction in resource costs.

Change Healthcare (12/2016 to 12/2023)

Renzo served as the Senior Director of Implementation and Strategic Initiatives. He directed PMO and business strategy department tied to PBM \$70M+ State Medicaid, Commercial, and Federal book of business; developed best practices, made recommendations, and led process improvement restructuring for the PMO. Renzo developed and implemented a role competency and career pathing framework, improving inclusivity, increasing job satisfaction, and reducing turnover by 10%. He integrated PBM Commercial and Federal lines into Medicaid workflows, boosting operational synergy and contributing to a 92% proposal win rate. Additionally, Renzo led product and proposal teams, building process playbooks and collaborative PMO solutions that reduced rework by 10%, cut project meetings by 20%, and achieved 90% OKR completion. Renzo also served as project manager and PMO Leader across multiple state agencies, overseeing end-to-end implementations of PBM solutions.

– Mississippi Division of Medicaid (DOM)

Project Manager (06/2016 to 11/2016); PMO Leader (12/2016 to 05/2024)

Renzo supported Mississippi's single state Medicaid agency with Pharmacy PDL, Supplemental Rebates, Prior-Authorizations, and Complex Pharmacy Care projects.

– Department of Vermont Health Access (DVHA)

PMO Leader (12/2016 to 05/2024)

Renzo supported DVHA within the State of Vermont's Agency of Human Services, responsible for administering the Vermont Medicaid health insurance program, with the Pharmacy Benefit Management Services Project.

– Illinois Department of Healthcare and Family Services (HFS)

PMO Leader (12/2016 to 05/2024)

Renzo supported Illinois' single state Medicaid agency with the Supplemental Drug Rebates Project.

– Pennsylvania Office of Medical Assistance Programs (OMAP)

PMO Leader (12/2016 to 05/2024)

Renzo supported OMAP, the single state Medicaid agency in Pennsylvania, with the Pharmacy Benefit Management System – SAAS Project.

– Sovereign States Drug Consortium (SSDC)

PMO Leader (12/2016 to 05/2024)



Renzo supported the Supplemental Drug Rebates Project.

– Wyoming Department of Health – Medicaid Division

PMO Leader (12/2016 to 05/2024)

Renzo supported the Pharmacy Benefit Management System and Fiscal Agent Services Projects.

– Ohio Department of Medicaid (ODM)

PMO Leader (12/2016 to 06/2023)

Renzo supported the Pharmacy Benefit Management Project.

– Office of MaineCare Services (OMS)

PMO Leader (01/2017 to 05/2024)

Renzo supported Pharmacy Benefit Management and Point of Purchase System Projects.

– Ohio Bureau of Workers' Compensation (BWC)

PMO Leader (11/2019 to 05/2024)

Renzo supported the Workers Comp – Pharmacy Benefits Management Project.

– West Virginia Bureau for Medical Services (BMS)

PMO Leader (12/2016 to 05/2024)

Renzo supported PDL/PPL/SMAC Programs.

Change Healthcare Consulting (07/2014 to 12/2016)

As a senior consultant, Renzo provided executive-level consulting services for health organizations with a special focus on technology and operations with an excellent record of delivering projects on time and within budget. He obtained actionable outcomes that provided clients with ready results, leading to a 100% billable rate. Renzo developed internal consulting best practices building templates, supporting the streamlining of processes and development of policies and procedures, resulting in 10% administrative cost savings.

Independent Living Systems (03/2010 to 07/2014)

Renzo served as a project manager, communications manager and PMO Program Manager. His duties and responsibilities included managing programs managed Duals Demonstration (Medicare and Medicaid eligible populations), ICP (integrated care population), and MLTC (managed long-term care) initiatives worth over \$100 million in revenue for clients in Illinois, Virginia, Florida, and New York markets. He also oversaw provider network builds in upstate NY and VA markets, managed software development, and implemented business process re-engineering resulting in a 5% efficiency increase. Renzo directed product development and launch of a commercial meal product, resulting in 10% increased sales. Finally, he developed the Account Services Department and managed \$10 million in projects, key accounts, implementations, business line improvement, expanding new lines of business and corporate marketing fulfillment.

Florida Agency for Health Care Administration (06/2011 to 07/2014)

Renzo served as project manager for meal preparation and delivery services for the Florida State Medicaid agency.



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 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 with 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). MMIS Modernization was an 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.



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

MANAGER

Berry, Dunn, McNeil & Parker, LLC



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 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 for 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 receivable. 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, Intergrity. 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 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



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

Eduardo "Ed" Daranyi, M.Ed., PMP®

PRINCIPAL

Berry, Dunn, McNeil & Parker, LLC

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 into 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 (03/2019 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 training for systems such as prior authorization processes and customer service and human resources related training 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*



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

General Project 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 Balrey 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.



Alex Tannenbaum

MANAGER

Berry, Dunn, McNeil & Parker, LLC



Alex Tannenbaum is a manager in BerryDunn's Medicaid Practice Group (MPG). He brings six years of project, resource, and client management experience with Medicaid agencies to the group. Alex's positive energy, excellent organization and communication skills, and professionalism complement his current work on multiple eligibility and enrollment projects, where he is responsible for providing project management organization services.

EDUCATION AND CERTIFICATIONS

BS, Clemson University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4.5 years

KEY QUALIFICATIONS

- Over four years' experience supporting single State Medicaid agencies with critical health and human services (HHS) projects and initiatives
- Eight years of diverse management experience, including resource and client management
- Eight years of experience in solving project and resource needs for clients
- Nine years of experience supporting clients in government, nonprofit, and private sectors

PROJECT EXPERIENCE

BerryDunn (09/2020 to present)

– Iowa Department of Health and Human Services (IA HHS)
Alex supports Iowa's single state Medicaid agency, IA HHS, as a project manager.

Eligibility Integration Application Solution (ELIAS) Phase II Governance and Project Support (10/2024 to present)

Alex provides risk-informed project oversight, strategic planning, and quality assurance to support the implementation and management of ELIAS, an integrated eligibility system (IES) for Medicaid, Children's Health Insurance Program (CHIP), and other programs. Alex facilitates project governance, coordinates backlog prioritization, and delivers project management services, including tracking progress, managing budgets, and monitoring compliance with federal requirements. By leveraging interactive tools such as Azure DevOps, Alex helps ensure efficient backlog management and alignment with project outcomes, while spearheading executive leadership meetings and reporting to maintain transparency and accountability.



Supplemental Nutrition Assistance Program (SNAP) Procurement (10/2024 to present)

Alex leads procurement advisory and facilitation efforts for Iowa's SNAP and Temporary Assistance for Needy Families (TANF) eligibility system modernization. He supports the state in developing a compliant, federally aligned Request for Proposal (RFP) package, including scope of work, performance requirements, cost worksheets, and structured proposal templates. Working closely with state procurement, legal, and IT teams, he ensures the RFP reflects the Agency's operational goals. As Program Manager, Alex leads a team that guides stakeholder planning, leads requirements refinement, and facilitates vendor selection through scoring, scripted demonstrations, and structured decision-making. He also advises on contract negotiation to help ensure alignment between proposed solutions, deliverables, and enforceable performance expectations.

ELIAS Phase I Assessment (01/2024 to 09/2024)

As project manager, Alex led project oversight and coordination, delivering strategic planning, quality assurance, and project management services. Alex spearheaded the development of a multiyear project plan and Project Management Plans (PMPs), helping ensure effective implementation and system enhancements of the Accenture Human Services Suite (AHHS) while supporting an overall strategy to streamline operations and reduce costs.

– West Virginia Bureau for Medical Services (BMS)

Advance Planning Document (APD) Assistance (05/2023 to present)

Alex provides subject matter expertise on Advance Planning Documents (APDs), advising on narrative development, federal cost allocation, and regulatory compliance. His guidance supports alignment between funding structures and evolving program needs, helping ensure consistency and strategic foresight across procurement planning and contract execution.

– West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) DDI Project Management (09/2020 to present)

Currently Alex is the project manager for a large-scale, system implementation project directly impacting four agencies in West Virginia. Alex oversees a 40-person team, managing a service approach for the PATH project which includes oversight, monthly project reporting, project management support, requirements management, deliverable management and review, federal review and certification support, testing support, organizational change management (OCM) support, and project closeout.

Alex is also the lead for the project's multi-program Implementation Advance Planning Document (IAPD) Updates. In addition to submitting narrative updates for the IAPD, Alex is also responsible for updating the project's Cost Allocation Methodology (CAM), which follows the International Function Point Users Group's (IFPUG) Function Point Counting Practices Manual.

Previously, Alex served as the internal project management office (PMO) manager, responsible for the management of the following work streams: project schedule, project scope, PMO tool management, monthly status and readiness reporting, budget, deliverables, compliance, system security, certification, issues, risks, action items, assumptions, decisions (IRAAD), audits, project resources, internal governance, and project communications.

TEKsystems (06/2016 to 09/2020)

Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of traditional software development (systems development life cycle [SDLC])



and Agile), cloud enablement, data analytics, DevOps and automation, and digital experience. Industries supported included healthcare (Medicaid, IES, EMR, and insurance), pharmaceutical/life science, and state/local government.

Alex was responsible for securing business with new accounts to provide IT project-based services and IT staffing services and to life science and pharmaceutical clients. This included engaging new and existing customers through phone calls and meetings to promote TEKsystems as a valued partner for IT services such as deliverable-based professional services, workforce planning, and staff augmentation. He identified new customers within a sales territory through research and networking to expand TEKsystems business opportunities; secured high-value accounts through consultative selling, effective customer solutions, and compelling business opportunities; and negotiated contracts and integrated contract requirements with business operations.

He was also responsible for relationship management, building relationships with clients to understand their business and analyze service growth opportunities. This has included leading the implementation of strategic business plans to address the needs of the customer to position TEKsystems as a service provider.



Sarah Vintorini

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Sarah Vintorini is a senior consultant with BerryDunn's Medicaid Practice Group (MPG), bringing extensive experience with complex project coordination and oversight, thoughtful meeting facilitation, and effective communication skills to projects. Sarah has a long-proven track record in marketing, communications, and community development with cross-functional organizations of all sizes. Sarah is a skilled senior consultant with strong organizational and interpersonal communication skills and demonstrates proficiency with Microsoft, Google, and Atlassian tool suites. Sarah lends invaluable expertise related to the development, delivery, and maintenance of key project documents and helps support engaging and productive relationships with clients as well as vendors.

EDUCATION AND CERTIFICATIONS

BS, Business
Administration and
Marketing, West Virginia
State University

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

KEY QUALIFICATIONS

- 20 years of experience in non-profit and governmental marketing and communications
- 17 years of experience in strategic planning and community needs assessments
- 10 years of experience in corporate event planning
- Eight years of experience in non-profit project management

PROJECT EXPERIENCE

BerryDunn (11/2019 to present)

– **West Virginia Department of Health Facilities (DHF)**
Contract Labor Management Services (CLMS) Request for Proposals (RFP) Development (08/2024 to present)

Sarah provides project management for the CLMS RFP Project. Sarah manages a team that developed and released a detailed RFP, as well as facilitating the group scoring process to help ensure proposal state procurement procedures were followed throughout the process.

– **West Virginia Bureau for Medical Services (BMS)**
Advanced Planning Document (APD) Assistance (08/2023 to present)
Sarah provides project management support for the APD project, overseeing the development and management of all APDs for WV's single state Medicaid agency, BMS. She maintains the APD tracker and schedule to help ensure federal funding for all aligned state projects.



Electronic Visit Verification (EVV) Solution Implementation Project (11/2019 to 06/2023)

Sarah provided project coordination, deliverable review and creation, and monitored project risks and issues. Sarah helped BMS with the release of their EVV RFP, coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of WV's EVV solution.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2020 to 08/2021)

Sarah provided business analyst support and deliverable review and development for MES. Sarah developed the As-Is environment deliverable as well as supporting the development of the To-Be environment deliverable. In addition, she developed graphics and presentations to support the project.

Provider Management Support (PMS) Project (11/2019 to 08/2021)

Sarah provided project coordination, deliverable development and review support, and monitored risks and issues related to all sub-projects within PMS. Sarah was involved in the facilitation of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of sharing knowledge, developed lessons learned, and identified opportunities for leverage and reuse. She assisted in developing a detailed and robust outreach plan to educate and engage direct care workers and enroll each worker in the State's Medicaid Management Information System (MMIS).

Mountain Health Promise (MHP) Implementation Project Management Support (01/2020 to 06/2020)

Sarah provided project coordination support, deliverable review, and creation support, and monitored project risks and issues during the implementation of a new specialized managed care plan with a diverse stakeholder group across multiple bureaus.

– Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitations Consulting Services (09/2020 to present)

Sarah helped develop and distribute a fact-finding survey to gain input from interested and invested parties and analyzed the results to help develop a presentation of recommendations for discussion and consideration. Additionally, Sarah assists with the development of deliverables, project presentations, and monitors project action items.

– West Virginia Department of Human Services (DoHS)

Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification Project (01/2021 to present)

Sarah provides documentation and deliverable lead support for the EDS Project. She provides leadership and helps manage a detailed library of deliverables from development to approval, leveraging approved schedules and cycles per service level agreements (SLAs) while also overseeing annual updates to help ensure compliance. As an experienced business analyst, Sarah also monitors the schedule and action items. Sarah works closely with the client and vendors on both internal and client deliverables to maintain and strengthen the project's reporting processes. Sarah helps to provide strategic direction on the best approach for monitoring vendor performance and strengthening vendor relationships.

People's Access to Help (PATH) DDI Project Management (12/2019 to 03/2021)

Sarah provided project coordination, tracked action items, and monitored project risks and issues. Additionally, Sarah assisted the cross-functional team in various project areas, including requirements and design, testing, certification, and compliance throughout the implementation of the Integrated Eligibility System.

Mental Health (MH) Parity Compliance Analysis (04/2020 to 08/2020)



Sarah provided project coordination support, monitored project risks and issues, and assisted with deliverable development of WV's MH Parity Compliance Report. She coordinated meetings with Managed Care Organizations (MCOs) and helped to gather documentation for accuracy related to fee-for-service (FFS) and pharmacy claims.

West Virginia Governor's Highway Safety Program (2013 to 2019)

Sarah served as a corporate event planner for the Governor, focusing on developing, organizing, and planning the annual Highway2Enforcement Conference from inception to execution. Her responsibilities included securing over \$150,000 annual sponsorships, a tradeshow of over 30 vendors from across the country, securing nationally acclaimed speakers, recruiting and registering law enforcement, prosecutors and administrators from across the state all while maintaining the vision of the organization and event. Responsibilities prior to the event include facilitating statewide planning meetings, capturing minutes from each meeting, and distributing minutes in a timely manner, along with carrying out and/or overseeing each action item from the meetings. She utilized various web-based software systems to handle registration, automatic emails, bulk text messaging, social media, etc.

KISRA (2012 to 2018)

Sarah oversaw all marketing, communications, and special events for one of the state's largest non-profit organizations. Her responsibilities included internal and external communications, sponsor requests, reports to funders, and meetings with funders and stakeholders. In addition, facilitated various program level strategic planning sessions and carried out the implementation of each plan, creative implementation of grant funds, and more. She held numerous committee and program meetings that required planning, organizing, capturing meeting minutes, and timely follow-up after each.

Terrell Ellis & Associates (2003 to 2007; 2009 to 2012)

As a senior program manager, Sarah managed a variety of non-profit and governmental accounts providing services including, but not limited to, fundraising, marketing and outreach activities, meeting facilitation, grant writing, and special events. She was responsible for seeking out and securing new clients, client relations, sales, fundraising, strategic planning, meeting facilitation, grant writing, and special events.

The Salvation Army (2001 to 2003)

Sarah served as the director of all communications for one of the state's largest social service agencies. Her responsibilities included securing earned media from print, television, and radio, developing all marketing and outreach materials, implementing a successful Christmas Bell Ringing Campaign, a Capitol Campaign, donor and stakeholder relations, community outreach, and more.



Elizabeth “Liz” Vose, MPA

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MPA, Finance & Information Management, Rockefeller College of Public Affairs & Policy

BA, French Literature and Language, Skidmore College

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

10.5 years

Liz Vose is a senior consultant in BerryDunn’s Medicaid Practice Group presenting with a strong understanding of state government oversight of Medicaid managed care compliance. She has 12 years’ experience in regulatory/policy environment at the crossroads of government and managed care plans, as well as demonstrated success in managing government regulatory and communications activities for New York State and on a national scale. She has a successful history in engaging internal and external stakeholders to promote Medicaid Initiatives.

KEY QUALIFICATIONS

- Experience leading large-scale transformation across multiple state agencies
- Drafted managed care requirements New York, Ohio, West Virginia
- Developed managed care organization (MCO) compliance component of Comprehensive Oversight and Monitoring Plan framework for Administración de Seguros de Salud – Puerto Rico
- State experience directing managed care compliance activities
- Designed beneficiary and provider engagement plans to inform managed care changes in Missouri, New York, Ohio, and Federal TRICARE program
- Led managed care procurement and readiness review efforts for multiple states
- Experience translating request for proposal (RFP) requirements into MCO model contract
- Directed behavioral health federal quarterly reporting activities
- Provided oversight and technical assistance to help ensure 1115 federal waiver compliance
- Over 10 years’ experience in Medicaid policy, transformation initiatives, compliance, and stakeholder engagement
- State agency management and national consulting perspective on Medicaid managed care transformation and oversight
- Background in transitioning behavioral health services and populations into Medicaid managed care



PROJECT EXPERIENCE

BerryDunn (02/2022 to present)

Liz is a senior consultant with BerryDunn and serves as a program manager for managed care projects. In addition, she provides support to the Office of Procurement Services to streamline purchasing efforts across various procurement projects.

– West Virginia Bureau for Medical Services (BMS)

Programmatic Managed Care Support (06/2024 to present)

Serving as program manager for the Programmatic Managed Care Support project, Liz oversees the project team monitoring activities and the requests for incoming sub-projects for ongoing technical support and assistance activities for new initiatives. Projects include implementation of Senate Bill 820 provisions, aligning WV Dual Special Needs Program with Medicare Part D Final Rule, designing and launching managed care modules for the Medicaid Learning Center, and conducting onboarding activities of a new MCO.

Mountain Health Promise (MHP) Procurement Support Project (06/2025 to present)

Liz serves as the Medicaid project manager and managed care SME. Her responsibilities include providing an oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

West Virginia Resource Integration Solutions for Enrollees (WV RISE) (06/2024 to present)

Liz serves as subject matter expertise in the development of the WV RISE RFP designed to procure a vendor to obtain a Medicaid and West Virginia Children's Health Insurance Program (WVCHIP) Modular Medicaid Management Information System (MMIS) replacement.

Advanced Planning Document (APD) Assistance (08/2023 to present)

Liz serves as a project liaison for the APD consulting services team as needed. She developed the APD toolkit, assists with client related support, and serves as a procurement SME in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2023 to present)

Liz serves as a Medicaid managed care subject matter expert (SME) for this initiative designed to help ensure access to coordinated comprehensive behavioral healthcare.

1115 Demonstration Behavioral Health Project (05/2023 to present)

Liz serves as a Medicaid managed care SME for the project designed to evolve the continuum of care for individuals with substance use disorder (SUD) by adding and expanding services under the Section 1115 demonstration to better support Medicaid enrollees with SUD.

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

Liz served as the Medicaid project manager and managed care SME. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

Liz served as the Medicaid project manager. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

Liz served as the Medicaid project manager and managed care SME. Her responsibilities include providing oversight into the project team's day-to-day activities, facilitating meetings, and monitoring progress



against the agreed-upon deliverables.

– West Virginia Department of Human Services (DoHS)

Purchasing Support (03/2024 to present)

Liz serves as a procurement SME in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects. She provides support across multiple procurement projects including, Child Welfare Initiatives (CWI) Phase, WV Resource Integration Solutions for Enrollees (WV-RISE) Procurement Assistance Project, Asset and Income Verification Procurement, and Incident Case Management Support.

Mercer Government Human Services Consulting (04/2019 to 05/2021)

Liz worked as a senior government consultant to assist state governments on a national scale implementing Medicaid programs and stakeholder engagement initiatives. She established Medicaid compliance programs for states that comport with federal regulations, drafted, and presented RFPs to secure funding for future contracts, and developed a platform to assist state governments in tracking and trending compliance issues over time. She worked with finance, policy, clinical and operations teams to offer comprehensive consulting services for state Medicaid agencies, including but not limited to the Ohio Department of Medicaid, Missouri Department of Social Services, New Hampshire Department of Health and Human Services, Puerto Rico Administración de Seguros de Salud, and Delaware Department of Health and Social Services. Liz supported the United States Defense Health Agency in developing a public engagement strategy to inform changes to the federal TRICARE health program.

New York State (NYS) Office of Mental Health (12/2013 to 03/2019)

Pursuant to Article 44 of the Public Health Law (PHL), the NYS Medicaid agency, the Department of Health (SDOH), jointly oversees the Medicaid managed care program with the Commissioners of the Office of Mental Health (OMH) and the Office of Alcoholism and Substance Abuse Services (OASAS), for New York State's Medicaid managed care program. Under this construct, Liz's roles included:

– Acting Deputy Director, Division of Managed Care (10/2018 to 03/2019)

Liz supported the associate commissioner for the Division of Managed Care in overseeing behavioral health managed care operations spanning analytical, policy, stakeholder engagement, and compliance workflows.

– Director of Compliance and Communications (05/2015 to 03/2019)

Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including but not limited to public presentations, road shows, and social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She consulted with federal and state governments and the private sector to establish standards that comply with regulatory guidelines. She was promoted to Acting Deputy Director prior to departure.

– Project Manager (12/2013 to 04/2015)

Liz managed the implementation of an unprecedented Medicaid managed care program in NYS. She collaborated internally and with three external state agencies to achieve common implementation goals, and guaranteed timelines were tracked, and risks were communicated to executive staff as well as the Governor's office.

SUNY Albany (09/2011 to 12/2013)

Liz served as a budget analyst to manage Income Fund Reimbursable (IFR) accounts with a net worth of \$9M. She conducted fiscal analyses including running quarterly projections and year-end activity reconciliation for a variety of accounts and funds and worked with account managers to identify and resolve fiscal inconsistencies.



HAVE Inc. (04/2007 to 08/2009)

Liz served as accounts payable manager to process invoices, present payable activity to the CEO, and manage the credit card reconciliation process.

New York & Company (09/2002 to 08/2005)

Liz served as an assistant buyer responsible for the skirts business. She monitored sales activities against projected on a daily, weekly, quarterly, and annual basis and presented findings to the CEO. She also worked closely with design, sourcing, and marketing to help ensure trend-right silhouettes hit the stores on time and generated targeted revenue.



Kourtney Kirk

SENIOR CONSULTANT

Berry, Dunn, McNeill & 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

General Project Manager

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 of 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 clients 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.

Glenville 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 the 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.



MaryLou Banker, CAPM®, LSSGB

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



MaryLou Banker is a senior consultant with 20+ years in project coordination and management. MaryLou brings diverse experience working with agencies in states such as Massachusetts, West Virginia, and Puerto Rico, as well as federal partners such as Centers for Medicare & Medicaid Services (CMS) and Federal Emergency Management Agency (FEMA).

EDUCATION AND CERTIFICATIONS

Certified in American Sign Language (ASL),

Northeastern University

Certificate in Computer Operations, Computer Learning Center of Boston

Certified Associate in Project Management® (CAPM®)

Lean Six Sigma Green Belt (LSSGB)

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

KEY QUALIFICATIONS

- Over two years' experience providing certification support.
- Over six years' experience providing Independent Verification and Validation (IV&V) services.
- Over 12 years' experience providing Medicaid support.
- Over 14 years' experience providing IT technical support.

PROJECT EXPERIENCE

BerryDunn (03/2013 to present)

– West Virginia Department of Health Facilities (DHF) Contract Labor Management Services (CLMS) Request for Proposal (RFP) Development (05/2024 to present)

As a general project manager, MaryLou developed an RFP to procure a single vendor to manage contracted labor for all State-owned hospitals. MaryLou conducted State research, presented findings, and gathered requirements for review in joint requirement sessions. MaryLou also provided group scoring tools to support the vendor evaluation activities and will continue to support DHF through the vendor selection activities.

– West Virginia Bureau for Medical Services (BMS) Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (03/2023 to present)

As a general project manager MaryLou is assisting in the development of an outcomes-based RFP to procure a single vendor in support of the CMS streamlined modular certification process. MaryLou has conducted State research, presented findings, and gathered requirements for review in joint requirement sessions. MaryLou has assisted in developing and maintaining the action item tracker. MaryLou will provide group scoring tools and training sessions for State staff in support of the vendor evaluation activities.



Asset Verification System (AVS) Project Management Services and Procurement Assistance (02/2023 to 10/2023)

As a business analyst MaryLou was responsible for providing content to assist in the development of the AVS Request for Quotations (RFQ) and Implementation Advance Planning Document (IAPD) documents.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (09/2019 to 09/2020)

As a project coordinator, MaryLou effectively summarized the client's needs and issues in meeting notes. MaryLou also contributed and brainstormed with the BerryDunn team regarding project research assignments.

– West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) DDI Project Management (07/2020 to 11/2023)

As a lead business analyst, MaryLou facilitated weekly meetings with project leads to discuss the Child Welfare configuration action items. MaryLou was responsible for maintaining the action item tracker within the Application Life cycle Management (ALM) system. MaryLou was also responsible for reviewing functional design documents, mapping requirements to designs, and identifying requirement gaps. MaryLou assisted with mapping certification outcome criteria for Eligibility and Enrollment (E&E) requirements. MaryLou provided a weekly project status report to both BerryDunn and West Virginia stakeholders that addresses key project health items, such as progress of configuration and requirement design.

– Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (01/2020 to 01/2022)

As a business analyst and project coordinator, supporting Puerto Rico's Medicaid Program MaryLou reviewed the evaluation criteria for the Outcomes-Based Certification (OBC) effort of the new E&E system. MaryLou assisted in mapping criterion to system requirements and test cases in preparation for system demonstrations set forth by CMS. MaryLou has developed a reusable checklist to help other states prepare for operational readiness review (ORR) and the final certification review. MaryLou created and organized an extensive project documentation repository to help maintain over 1,000 documents. MaryLou also prepared and oversaw the development of the monthly status report deliverable and participates in weekly project status meetings.

– Massachusetts Health Insurance Exchange and Integrated Eligibility System (MA HIX/IES) Entities

IV&V Services (03/2013 to 09/2019)

The Massachusetts HIX/IES project focused on enhancing HIX/IES to establish a fully integrated system for determining eligibility for a variety of state-funded health and human service programs, which included Medicaid and Qualified Healthcare Programs (QHP). As an IV&V analyst and project coordinator, MaryLou provided critical supporting data for findings and recommendations in the IV&V Monthly Assessment report. MaryLou developed and maintained dashboards and report templates for tracking planned requirements vs. requirements delivered. In addition, MaryLou monitored and reported on risks and issues, including analysis of the stability of the HIX/IES production system, review and tracking of planned system integrator contractual system requirements vs actual requirements delivered, and analysis of active workarounds needed to operate the solution. MaryLou supported the BerryDunn contractual deliverable review and submission process, as well as the IV&V deliverable review and comment management effort for all the IV&V resources. MaryLou participated in weekly meetings related to CMS Blueprint testing, test case verification for CMS scenario results, and submission of testing results to CMS for approval. MaryLou has experience with IBM® Rational Quality Manager (RQM), IBM® Rational Requirements Composer (RRC), and ALM automated testing tools (e.g., Selenium). In addition,



MaryLou has coordinated and conducted User Acceptance Testing, recorded test results, and provided testing metrics and requirement traceability reports.

Town of North Reading (04/2011 to 05/2013)

MaryLou worked for the Town as a Board of Selectmen transcriptionist. MaryLou attended board meetings and documented meeting minutes.

Homeland Security FEMA (02/2011 to 11/2011)

MaryLou held multiple positions with FEMA, including working as a logistic supply chain management system specialist. In this position, MaryLou was responsible for total asset visibility (tracking temporary housing units shipped to and from staging areas), helping to ensure proper time arrival of commodities, providing reports as needed to upper management, helping to ensure all employees received the accounts required to complete their mission (email, network, database), helping to ensure mission information and tools were provided to all, providing accountability report daily to management, ordering office and field supplies as needed, receiving temporary housing units for flood applicants, inspecting two to three bedroom housing units to help ensure FEMA standards and specifications were met, helping to ensure all forms were filled out before releasing housing units to applicants, and supporting the Joint Field Office (JFO) staff procuring materials needed to support applicant process in a timely manner.

Espresso Plus Inc. (02/2003 to 04/2009)

As a service manager for the repair and installation of restaurant beverage equipment, MaryLou oversaw daily operations of the service department. This included providing daily support to the director of operations and sales department, helping to ensure positive customer relations to all aspects of the company, providing input and coordinated process for implementing the Mass90 service module, and documented and trained all service technicians on new process and procedures.

GENUITY (formerly GTE Internetworking, formerly BBN) (1988 to 2002)

– Supervisor, Desktop Services

MaryLou managed operational teams responsible for implementation and support services, implemented Service Level Agreements (SLAs) for all desktop services, led teams in rolling out sales force automation tool (Siebel), managed rollout of a Comprehensive Client Management (CCM) tool to all employee desktops/laptops, and implemented fast-start program for the account creation team to that enabled new employees to be up and running the day of employment.

– Supervisor, IT Help Desk

As a supervisor, MaryLou managed five help desk staff members responsible for daily operations of customer call center.

– IT Help Desk Analyst

MaryLou provided services to a 1,500-employee company base and was a major contributor to the implementation of call center ticketing system.



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

General Project Manager

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 project manager, 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. Additionally, she supports drafting of the State's requests for federal funding to align with proposed initiatives for implementation.

– **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) Resource Integration Solutions for Enrollees Project (WVRISE) (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/notetaking 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/notetaking. 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 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.



Hailey Holden

STAFF CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

BA, Psychology, Purdue University

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3 years

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.

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:

- BerryDunn Medicaid Learning Center,
- West Virginia Operations Improvement Team,
- 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 change management across 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, implementation, and user training for several enterprise applications. She has designed and maintained a variety of trackers, budgets, and data stores used 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 to ensure data quality and accurate reporting.



Organizational Development (OD) Project Phase II (06/2024 to)

Hailey served as a subject matter expert in instructional design and training. She supported the research, design, and development of four onboarding courses for the client. Hailey created visual assets including icons, informational graphics and videos to support user learning.

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 parties involved. 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 part 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.



Jonathan “Jon” Watkins

SENIOR 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 senior consultant in BerryDunn's Medicaid Practice Group, with a strong understanding of Medicaid managed care oversight and compliance. He has a history of working in high pressure, fast-paced roles that require diligence, precise communication, and organization. Jon presents with dependable skills in account management, organization and interpersonal communication, which 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
- Experience in procurement, Managed Care Organization (MCO) onboarding, Medicaid Enterprise System (MES) modernization, Home and Community Based Services (HCBS), and risk mitigation and assessment
- Business and technical requirements analysis
- Assisted in developing Medicaid Learning Center (MLC) managed care training modules for West Virginia
- Experience in managed care research, client correspondence, cross-agency coordination and strategic planning
- Assisted in MCO readiness review efforts
- 10 years' experience in 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 support by assisting in the facilitation of meetings, monitoring risks, issues, decisions and action items in support of the Office of Procurement Services to streamline purchasing efforts across various procurement projects.

– West Virginia Bureau for Medical Services (BMS)

Mountain Health Promise Support (06/2025 to present)

Jon served as Deputy Project Manager for the Mountain Health Promise. Procurement, and provided oversight of the project team's day-to-day activities, facilitating meetings, and monitored progress against the agreed-upon deliverables.



Programmatic Managed Care Support (06/2024 to 06/2025)

Jon assisted in facilitation of project meetings, monitoring project risks, issues, decisions and action items, as well as day-to-day tracking of the project's deliverables and budget. Jon also managed the development of an implementation timeline for recently passed State legislation, helping to ensure compliance with federal mandates through cross-agency coordination and project planning best practices. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives

Strategic Managed Care Technical and Systems Support Project (06/2025 to present)

Jon facilitates project meetings and monitors project risks, issues, and action items, as well as day-to-day tracking of project deliverables, and monitoring progress against the agreed-upon deliverables.

Medicaid Enterprise Systems (MES) Modernization Strategy and Procurement (MSP) Project (11/2021 to 09/2023)

Jon provided project coordination and monitored project risks and issues that assisted the client with management and facilitation of the MES MSP Project.

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise Systems (MCES) Project (02/2024 to 2/2025)

Jon assisted in making updates to the strategic plan, facilitation of project meetings and monitoring project risks, issues, decisions and action items, as well as day-to-day tracking of project deliverables, and monitoring progress against the agreed-upon deliverables. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project (2/2025 to 06/2025)

Jon assisted in facilitation of project meetings and monitoring project risks, issues, and action items, as well as day-to-day tracking of project deliverables, and monitoring progress against the agreed-upon deliverables. Jon's work helped to keep the client informed and helped ensure the project met its goals and objectives.

Mental Health Parity and Behavioral Health Support Project (01/2022 to 06/2022; 03/2025 to present)

Jon assists in monitoring project risks, issues, decisions and action items, as well as day-to-day tracking of project deliverables, and monitoring progress against agreed-upon deliverables. Jon also facilitates the delivery of project updates to the Centers for Medicare and Medicaid Services (CMS) and the BMS Commissioner.

ARPA Section 9817: HCBS Implementation Project (09/2024 to 6/2025)

Jon provides support to the Aged and Disabled Waiver (ADW), Traumatic Brain Injury Waiver (TBIW), and Intellectual and Development Disabilities Waiver (IDDW) renewal and amendment applications, ensuring compliance with CMS Ensuring Access to Medicaid Services Final Rule. Jon also assists in monitoring project risks, issues, decisions and action items, as well as day-to-day tracking of project deliverables, and monitoring progress against agreed-upon deliverables.

HCBS Quality Initiative (QI) (06/2025 to present)

In support of the HCBS Quality Initiative project, Jon facilitates meetings and monitors project risks, issues, and action items, as well as day-to-day tracking of project deliverables and budget.

Take Me Home (TMH) HCBS QI (10/2024 to 06/2025)



In support of the TMH HCBS Quality Initiative, Jon assisted in the implementation of Long-Term Services and Supports (LTSS) quality measures and HCBS Quality Management Plan (QMP). Jon also monitors project risks, issues, and action items, as well as day-to-day tracking of project deliverables and budget.

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

Jon provided project coordination and monitored project risks, issues, decisions and action items 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 monitored project risks and issues, decisions action items, decisions to assist the client with management and facilitation of the ICMS procurement. Jon also supported requirements gathering and business analysis efforts for the ICMS RFP.

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

Jon monitored project risks, issues, decisions and action items 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 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; 05/2025 to present)

Jon monitored project risks, issues, decisions and action items 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, issues, decisions action items 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, issues, decisions and action items to assist the State with temporary flexibility that provides services to different beneficiaries during PHE.

Mountain Health Promise (MHP) Procurement Assistance and 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 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.



Sudha Ganapathy, PMP®, Prosci® ITIL(F), LSSGB, MCMP-II

SENIOR CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Computer Science,
Rutgers University

SDNBV College,
TamilNadu, India – Major:
Chemistry, Minor:
Mathematics and Physics

Information Technology
Infrastructure Library
(ITIL) Foundation
Certification

Certified Lean Six Sigma
Green Belt (LSSGB)

Prosci® Certified Change
Practitioner

Certified Project
Management
Professional® (PMP®)

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

25 years



Sudha Ganapathy is a project manager with more than 25 years of extensive experience in the IT areas of development, system analysis, business analysis, and quality assurance. She has led project teams to help clients achieve their quality assurance objectives on multi-stakeholder and multi-agency projects. She brings a proven track record in successfully implementing and maintaining software programs utilizing PL/I, COBOL, DB2, IMS, various IBM utility programs, Easytrieve, and SQL, and creating test plans and test cases for unit and integration testing and production support. Sudha prides herself on her ability to collaboratively work with clients and vendors (Internal and external) to help them utilize analytical tools and techniques to support project objectives, enhance and/or create new processes to help with testing, and realize opportunities for improvement in their existing processes.

KEY QUALIFICATIONS

- Over 25 years of experience in Medicaid related projects
- Over 15 years in project management and team leadership
- Over 18 years of experience in testing related activities
- Certified Project Management Professional®
- Prosci® Certified Change Practitioner

PROJECT EXPERIENCE

BerryDunn (07/2015 to present)

– West Virginia Department of Human Services (DoHS)
People's Access to Help (PATH) DDI Project Management (10/2019 to present)

Sudha is the Child Support release manager, guiding her team of subject matter experts (SMEs) in accomplishing a variety of Maintenance and Operations (M&O) related tasks. She serves as the primary liaison between the vendor and State leadership teams to communicate M&O processes, prioritize tasks, and follow up on the progress of resolution to production issues. Sudha facilitates the implementation of issue solutions through biweekly hotfixes, and by coordinating maintenance releases that require state testing and validation.



As the Child Support test lead, Sudha supported the project activities to consolidate and integrate DoHS program service systems into a single enterprise. As the System Integration Test (SIT) lead, Sudha created, reviewed, and provided input on project testing deliverables, coordinated project activities, and assigned and oversaw team assignments for 8-10 consultants. She collaborated with Optum on the requirements coverage, release schedule, and deliverable activities related to testing. Sudha assigned test scenario/test case/test results reviews to her team, communicated with Optum on the findings, and approved the responses from Optum. She also helped the project achieve its objectives by collaborating with the vendor, Optum, and DoHS to assist with User Acceptance Testing (UAT) scenario development and testing related activities. Sudha supported all release activities leading to the successful implementation of Child Support in production in July 2024.

RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)

Sudha assisted with the RAPIDS transition facilitation project and identified and documented risks/issues prior to the transition of RAPIDS from Deloitte to Optum. She also assisted with tracking project change requests (PCRs) and creating reports to capture the aging of the defects, and reviewed and provided feedback on process documents such as the Incident Management Report and Problem Management Report.

– West Virginia Bureau for Medical Services (BMS)

Medicaid Performance Management and Quality Assurance (MPMQA) (05/2022 to 12/2023)

As the project manager on the MPMQA project, Sudha was responsible for coordinating quality assurance activities related to Medicaid. She worked with the last project manager to finalize the statement of work (SOW) and governance documents and worked on the Advance Planning Document (APD) for 2023. Sudha submitted the SOW for MPMQA Phase III, which was approved for May 2023 – June 2024. She collaborated with the functional, testing, and certification teams on the PATH project to gather the information necessary to present in the MPMQA status report. She also collaborated with other teams such as Enterprise Data Solution (EDS) as necessary to gather information for the MPMQA status report that was sent to the BMS Deputy Commissioner monthly.

Project Management of MMIS Procurement, DDI, and Certification (07/2015 to 08/2016)

Sudha assisted with UAT for BMS' MMIS re-procurement in the MITA business area of Provider Management. She reviewed and assisted with modifying the Doc Matrix, which was the primary document that drove the provider enrollment web portal options based on provider types.

– Massachusetts HIX/IES Entities

IV&V Services (07/2016 to 09/2019)

Sudha served as the BerryDunn IV&V testing lead for nine end-to-end project release cycles. In this role, Sudha interfaced with the State and vendor (Optum) counterparts to provide deliverable quality oversight, process improvement guidance, and enforced program and project best practices in project communication, integration, quality management and risk management per the Project Management Body of Knowledge (PMBOK®).

For ongoing releases, she assessed the test coverage and execution against plan and the PMBOK® best practice, as well as monitored defect management practices against plan and the best practice generally accepted by similar industries and monitored planned versus delivered requirements by release. In case of discrepancies, the findings were reported via the monthly IV&V assessment report and logged as issues and risks in JIRA® if the discrepancies warranted further and immediate remediation efforts.

For an alternate project for the same client, Sudha also played a key role in developing a new



JIRA® Implementation and Requirements Management Plan. She worked with the MassIT analysts to analyze existing ALM/JIRA® data elements and define them in the new JIRA® instance.

XEROX – Government Health Solutions/Cognizant Technology Solutions (2012 to 2015)

As a functional lead for Montana MMIS, Sudha collaborated with the Montana Department of Human Services (DHS) business analysts to define and enhance the online provider enrollment portal. As a team leader for the Architecture and Letter related functional areas, Sudha defined quality assurance (QA) strategy, estimates, and roadmaps with on-site and offshore working models. Additionally, she created and executed test cases, analyzed, and reviewed written test cases, and created and conducted various knowledge transfer sessions as needed. She conducted triage meetings as necessary with the functional team, development team, and QA team to identify and rectify defects and complete testing activities as per schedule.

Affiliated Computer Services, Inc. (ACS) (2007 to 2012)

Sudha worked as a systems consultant senior analyst and provider team subsystem lead for the Alaska MMIS. The position involved analyzing business use cases, user interface specifications, and user requirement specification documents to create effective test scenarios and test cases. Additionally, she conducted online training to team members and provided statistics and reports to management as required; and created and executed quality test plans, test cases, and test scripts to comprehensively validate the functionality components of the provider/security subsystems using Rational tools.

UNISYS (2000 to 2006)

Sudha supported the Louisiana MMIS, converting several Easytrieve programs to COBOL and successfully promoting them to production. She was a member of the Medicaid Eligibility Determination System (MEDS) enhancement team, responsible for the modification and testing of several management and administrative reporting subsystem (MARS) programs to accommodate new recipient processing files. She conducted testing and provided QA support to the testing team within critical staffing and time constraints. She partnered with team members in formulating their test cases to help ensure testing was conducted and completed on time. In addition, she led acceptance testing for McKesson HBOC ClaimCheck project in the project leader's absence, helping to ensure required tests were completed successfully in a timely manner.



Alex Lyubarov, MS, MCP

SENIOR MANAGER

Berry, Dunn, McNeil & Parker, LLC

EDUCATION AND CERTIFICATIONS

MS, Computer Engineering, Dagestan State Technical University

BS, Computer Engineering, Dagestan State Technical University

MCP (Microsoft Certified Professional)

PSI - Business of Health Care Providers, Payers and Life Sciences

CompTIA A+ Certified

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

10 years



Alex Lyubarov is a senior manager with more than 20 years of IT experience who has worked in various healthcare, government, health and human services and financial management organizations. He has led various IT projects for project scope, requirements, budget, schedule, risk management plan, communication plan, RFP/procurement development and other project management related tasks and has developed the ability to support clients during the systems development life cycle using Agile and Waterfall methodologies. He is adept at working in a fast-paced business environment possessing excellent communication, analytical, presentation, and leadership skills.

KEY QUALIFICATIONS

- Experience with Integrated Eligibility System (IES) projects in multiple states
- More than 20 years in IT and Project Management, including over eight years of Eligibility and Enrollment experience
- Direct experience with Medicaid Data Warehouse (MDW) and T-MSIS
- MCP (Microsoft Certified Professional)
- PSI - Business of Health Care Providers, Payers, and Life Sciences
- CompTIA A+ Certified

RELEVANT EXPERIENCE

BerryDunn (07/2021 to Present)

– **Hawai'i Department of Human Services Med-QUEST Division (MQD) Organizational and Business Process Redesign (10/2023 to present)**
Alex is serving as the engagement manager overseeing BerryDunn's BPRASSP team as well as a business process redesign effort for the customer-facing sections of Hawai'i's State Medicaid Agency, MQD.

– **Missouri Department of Social Services Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2021 to present)**
Alex is serving as the engagement manager overseeing BerryDunn's IV&V team supporting MEDES, Missouri's eligibility determination and enrollment system.



– West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) DDI Project Management (07/2021 to present)

Alex is currently serving as the program manager overseeing BerryDunn's PMO team supporting the implementation project for West Virginia's IES, also called PATH. This system supports the eligibility, enrollment, and administration of DOHS' human services programs, including Medicaid, CHIP, SNAP, TANF, Low Income Energy Assistance Program (LIEAP), Child Welfare, and Child Support. To support the PATH DDI project, Alex manages the PMO team that provides project management, APD support, deliverable review, testing support, organizational change management (OCM) support, requirements support, general subject matter expertise, and certification and compliance support working directly with CMS and State stakeholders. He works directly with the State's leaders from the Bureau for Medical Services (BMS) (the State's Medicaid Agency), the Office of Management Information Services (MIS), the Bureau for Child Support Enforcement (BCSE), the Bureau for Social Services (BSS), and the Bureau for Family Assistance (BFA).

Technology Professionals Group Inc. (11/2019 to 07/2021)

Alex worked as a senior program manager and senior business-technical consultant to support all phases of the New York State Department of Health (DOH) MDW implementation cycle. In this role, he developed customer deliverables in accordance with contract requirements and State documentation standards, and researched and provided recommendations to the client on critical business decisions. He helped with RFP/RFQ proposal responses including all aspects of document development. He also assisted leadership by providing consulting expertise in state and local government and healthcare industries. He helped support daily program/project teams to support the enablement and expansion of the new and existing business initiatives.

KPMG (05/2014 to 05/2019)

Alex worked as a manager, assisting the State of Connecticut Department of Social Services (DSS) on their IES and Medicaid projects with project management and data analysis. Alex liaised between the systems integrator, IV&V, and State stakeholders to help ensure the project was on time and within the budget. He also assisted on the New York State IES project, for which he helped develop State RFP for systems integrator vendor. In addition, he led the team of consultants to perform audit/analysis for New York County's (62) IT systems. Alex worked as a PMO manager leading a team of SMEs providing healthcare patient access and revenue cycle assessments and implement projects for process improvements, enhance the patient experience, and reduce financial risks.

Albany Medical Health System (09/2008 to 05/2014)

Alex worked as a senior systems analyst to implement vendor purchased solutions, analyze EHR/EMR deployment, and assess the needs of internal business units. He performed systems application support and provided on-site technical support for multiple environments.



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.



Caitlin Cabral

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BA, Psychology, University of Hartford

Poynter ACES Certificate in Editing

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years

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.

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 improves 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 the 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 streamline faculty responsibilities by completing deliveries, filing documents, and tackling office projects. She monitored the departmental computer lab, assisted students, and maintained an environment conducive to productivity. Caitlin also served as a representative for the department at university events.



Jonathan “Jon” Williams, MA, LSSGB

DOCUMENTATION SPECIALIST

Berry, Dunn, McNeil & Parker, LLC



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

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.

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.



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.

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

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.



– 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.



Carole Ann Guay

MANAGER

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 manager 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.



Megan Hamilton, MA

SENIOR WRITER/EDITOR

Berry, Dunn, McNeil & Parker, LLC



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

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.

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.



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.



Anna Beatriz Banks

ADMINISTRATIVE ASSISTANT

Berry, Dunn McNeil & Parker, LLC



Anna Beatriz Banks is a meticulous administrative assistant with a solid foundation in customer and client service. She is known for coordinating multiple responsibilities in fast-paced environments while maintaining a high standard of accuracy in data entry and analytical tasks.

EDUCATION AND CERTIFICATIONS

Psychology, Minor in Spanish, Worcester State University (*degree in progress*)

Psychology, Quinsigamond Community College

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

3 years

PROJECT EXPERIENCE

BerryDunn (05/2025 to present)

Anna is part of BerryDunn's consulting support services team, assisting project teams with administration and coordination tasks.

Telefluent Communications (07/2022 to 05/2025)

As a senior administrative assistant, Anna was responsible for coordinating meetings and conferences, managing logistics and vendor access, and maintaining the office. She compiled and analyzed data for daily, weekly, and monthly reports shared company-wide; managed shared inboxes; prepared weekly department meeting agendas; and acted as backup for teammates' reports.

Celedon Law (02/2022 to 06/2022)

Anna managed client payments, processed and mailed invoices, and maintained accurate records. She scheduled appointments for new clients, coordinated paperwork, managed multiple phone lines, and responded to client inquiries via phone, email, and automated text system. She also coordinated remote court sessions within office conference rooms and assisted with room scheduling for client meetings, and collaborated with the team to prepare for and participate in weekly meetings.



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 I 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. Special projects Hope led for this initiative included



creating and managing a job board for interns and professionals entering the IT profession and coordinating events for the IT sector.



Shandia Benke, IIBA™ ECBA™

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC



Shandia Benke is a certified business analyst consultant with over 14 years of experience successfully supporting and leading projects across a variety of industries. Shandia specializes in instructional design, e-learning design and 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.

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

KEY QUALIFICATIONS

- 20+ years of experience in education, with over 14 years of cross-industry project support
- 7+ years designing and leading onboarding and training as well as working with single-state Medicaid agencies
- Proficient in e-learning design and development using Articulate Storyline and Rise 360; created more than eight full-length client onboarding and training modules in the last 18 months and redesigned numerous internal Medicaid modules in the last 12 months
- Skilled in video and audio production using Camtasia and Logic Pro; developed and produced more than 16 client instructional videos and authored, developed, and/or produced over 40 scripts and audio recordings
- Currently co-managing a learning management system (LMS)
- Skilled in instructional design consulting and course development leadership (on internal and client projects)
- Expert in Microsoft Office Suite and SharePoint; co-led the design and creation of an engagement-wide internal SharePoint resource library
- Proficient in Camtasia, Storyline 360, Rise 360, and Logic Pro
- Strong communication, meeting facilitation, data synthesis, and presentation skills

PROJECT EXPERIENCE

BerryDunn (04/2018 to present)

- West Virginia Department of Human Services (DoHS)



Medicaid Information Technology Architecture (MITA) (8/2025 to present)

Shandia is providing assessor support on the MITA project.

Advance Planning Document (APD) (8/2025 to present)

Shandia is providing instructional design support for APD training as well as written and editorial support in the development of APDs.

– Iowa Department of Health and Human Services (IA HHS)

Quality Management System (QMS) Minimum Viable Product (MVP) 2 (01/2025 to present)

Shandia provides business analysis support and instructional design subject matter expertise for roadmap and strategic planning work for the client.

– West Virginia DoHS Bureau for Medical Services (BMS)

WV Medicaid Information Technology Architecture (MITA) SS-A 2022 (07/2025 to present)

Shandia is providing business analysis support.

Programmatic Managed Care (MC) and Strategic MC Support (06/2024 to 7/2025)

Shandia completed the design and creation of e-learning training courses and provided coordination support for the project.

Organizational Development (OD) Project Phase II (07/2024 to 06/2025)

Shandia led and executed the creation of client e-learning onboarding training courses.

Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (02/2024 to 06/2024)

Shandia led and executed the design and creation of client e-learning training courses.

– West Virginia 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 Missouri's State Medicaid Agency through three implementation projects from start-up to certification and project closure. She managed the project document tracking; provided meeting facilitation, analysis, and metrics; led JAD sessions, and conducted User Acceptance Testing (UAT); and improved client process and structures.

– Internal Projects

Business Analysis Community of Practice (BACOP) (11/2024 to present)

Shandia is co-leading the practice group and its initiatives to equip business professionals with the skills and certifications needed for business analysis.

Medicaid Learning Center (05/2024 to present)

Shandia led and executed the redesign of dozens of Medicaid e-learning courses.

West Virginia Engagement Operations Improvement Team (09/2023 to present)

Shandia co-led the buildout of the WV 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 internal EQA processes.

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, 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 changes within the company that increased efficiency, promoted efficacy, and supported the goals and visions of the business.

Lighthouse Preparatory Academy

– Office Manager (2015 to 2017)

As an office manager, Shandia provided technical training to staff; interviewed new families; established systems and structures that increased office efficiency; oversaw daily accounting activities for the general ledger; assisted in the preparation of the annual budget; helped resolve accounting, payroll, and financial issues; managed office records; and facilitated meetings with staff and parents.

– Teacher (2012 to 2016)

In her role as an educator, Shandia developed course curriculum, created class lesson plans, taught subject matter for a wide range of classes including but not limited to literature, composition, and psychology.

– Dean (2012 to 2015)

In her role as dean, she developed and facilitated school-wide onboarding training for new staff and families, technical training for staff, and weekly training for the students.



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.



Aubrey Duplissie

ADMINISTRATIVE ASSISTANT

Berry, Dunn McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

BS, Business
Administration -
Marketing, University of
Maine

BA, Economics, University
of Maine

PROPOSED PROJECT ROLE

Project Management
Support staff

RELEVANT EXPERIENCE

5 years

Aubrey Duplissie is an experienced administrative professional, skilled in multiple IT systems, social media management, website management, editing, project support, and operational management.

PROJECT EXPERIENCE

BerryDunn (05/2025 to present)

Aubrey is part of BerryDunn's consulting support services team, assisting project teams with administration and coordination tasks.

ATX Advisory (05/2024 to 05/2025)

As an Operations Support Specialist, Aubrey maintained a CRM database of new and prospective clients, including contact information, communication efforts, meeting reminders, and in-process deals. She also generated and proofread engagement letters and client contracts; helped to ensure smooth and efficient office operations including troubleshooting technology issues, space planning and scheduling, and coordinating maintenance as needed; coordinated key projects for senior leadership; worked with the marketing team on conference and tradeshow preparation and event logistics; and maintained incoming and outgoing mail, including invoices and payments, as well as secure deposits to the bank. She was responsible for the execution of quarterly all-staff meetings, team building events, and holiday parties, as well as for soliciting information from vendors about hotel bookings, office maintenance, product ordering, and restaurant booking.

University of Maine Foundation (08/2022 to 03/2024)

As an annual fund, marketing, and events associate, Aubrey oversaw day-to-day website operations, content management, web design, and timely updates. Was the primary point of contact for website-related tasks and issues and successfully redesigned primary website pages. She managed membership for 1400+ donors, including data processing and record keeping in CRM systems, design of certificates and letters, managing product inventories and reordering, and helping to ensure the packing and on time mailing. She also co-managed social media including Facebook, Instagram, and the Foundation's blog, and aided in creative design of events, product ordering, set up and takedown, managing event phone lines, emails and pre-



registration, name tag creation, invites and other materials, running registration table during events

Undiscovered Maine (09/2020 to 05/2022)

As a social media team leader, Aubrey was responsible for managing social media accounts including Instagram, Facebook, and TikTok; coordinating weekly posts on project accounts; managing all social media team members; editing 600+ web pages to help ensure accuracy; and creating photos and videos to create relevant material for pages.



Rachel Eggleston, MBA

ADMINISTRATIVE ASSISTANT

Berry, Dunn McNeil & Parker, LLC



EDUCATION AND CERTIFICATIONS

MBA, Business
Administration, Johnson
& Wales University

BS, Business
Administration, Minor:
Human Resource
Management, Johnson &
Wales University

PROPOSED PROJECT ROLE

Project Management
Support Staff

RELEVANT EXPERIENCE

5 years

Rachel Eggleston is an experienced administrative assistant with a solid foundation in customer service, time management, and attention to detail.

PROJECT EXPERIENCE

BerryDunn (05/2025 to present)

Rachel is part of BerryDunn's consulting support services team, assisting project teams with administration and coordination tasks.

Varney Agency (05/2023 to 05/2025)

As a customer service advocate, Rachel was responsible for making changes on policies, getting information for renewals, emailing and talking on the phone with the insured, and taking payments and sending invoices. Additionally, she was responsible for making renewal proposals with all of the current policies and coverages, sorting mail, updating clients' files in EPIC, and sending out letters and LPRs for signatures and shelling new policies.

Hub International (04/2022 to 04/2023)

As an assistant account manager, Rachel worked with clients to make policy changes, gather information that was needed for account managers, and update files.

MEMIC (03/2020 to 03/2022)

As a claims associate, Rachel communicated with clients, employers, and providers. She organized appointments and communications, investigated injuries, reviewed medical records, and approved bills and payments.

Prior to March 2020, Rachel served as a claims assistant, responsible for supporting claims specialists in administrative tasks such as mailings, faxing, phone calls, emails, paying medical bills and obtaining wage information.



Megan Blount, MBA

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

Megan Blount is a highly efficient project coordinator, experienced in scheduling, time management, written and verbal communication, and collaboration with all levels of administrators, stakeholders, and community leaders. She is comfortable performing detailed and intricate tasks with a high degree of accuracy and confidentiality within a complex environment with tight, constantly shifting deadlines.

EDUCATION AND CERTIFICATIONS

MBA, University of Charleston

BS, Communications, West Virginia State University

West Virginia Division of Personnel (DOP) Trainer Certification

PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

4 years

KEY QUALIFICATIONS

- 10+ years of Microsoft Office experience
- 10+ years of customer and client relations
- Five years of Google Workspace experience
- Over four years of project coordination experience
- Business analysis, data analysis, and research
- Training creation and delivery

PROJECT EXPERIENCE

BerryDunn (04/2021 to present)

– West Virginia Bureau for Medical Services (BMS)
IT Control Environment Review (07/2024 to present)

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Project (03/2024 to present)

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables.

Advanced Planning Document (APD) Assistance (05/2023 to present)

Megan serves as a project coordinator for the APD Assistance project where she supports the strategic planning of APDs. In this role, Megan assists the State team with processes for renewal and tracking progress in the development and submission of APD documents to Centers for Medicare & Medicaid Services (CMS), by assisting with the development, updates, and management of multiple APDs in support of funding for new Department of Human Services (DoHS) systems projects.



Payment Error Rate Measurement (PERM) Project (04/2021 to present)

Megan provides project coordination, tracks action items, schedules meetings, and develops and reviews deliverables. Megan supports the project by assisting in the creation of multiple project trackers on SharePoint Online.

Public Health Emergency (PHE) Support Project (12/2021 to 12/2024)

Megan provided project coordination, deliverable development and review, and tracked action items. Megan was involved with the creation of the Communications Plan and assisted in creating trackers in SharePoint Online for project documents.

System Development Life Cycle (SDLC) Coordination Project (06/2024 to 10/2024)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

Data Improvement Project (06/2021 to 06/2024)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

Organizational Development Project (07/2022 to 10/2023)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

Provider Management Support (PMS) Project (11/2021 to 03/2023)

Megan provided project coordination, deliverable development and review, and monitored risks and issues related to all sub-projects within PMS. Megan was involved in the coordination of the Multistate Collaborative Forum to discuss current and future business needs for the purpose of knowledge sharing, lessons learned, and leverage and reuse.

Fee Schedule and Edit Quality Review Project Phases IV and V (04/2021 to 02/2023)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

Third-Party Liability Post-Implementation (01/2022 to 03/2022)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

Third-Party Liability Options Analysis and Procurement Assistance Project (04/2021 to 06/2021)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables during the implementation phase of the project.

– West Virginia Department of Human Services (DoHS)

Child Welfare Initiatives Project Management Services Phase III (12/2021 to 02/2022)

Megan provided project coordination, deliverable development and review, and tracked action items, as needed.

West Virginia State Tax Department (10/2019 to 04/2021)

As a tax analyst, Megan performed research projects involving the collection of taxes to provide feedback on internal policies and controls. She analyzed data to produce internal reports on tax proposals, law(s), regulations, and in support of general administration of taxes; assisted in the development of tax administration and desk audit programs by providing data analysis of the taxpayer base; and provided meaningful analysis of revenue reports prior to distribution of special revenue funds and local government distributions.

Thyssenkrupp Elevator (TKE) (10/2018 to 01/2019)

Megan served as the operations coordinator for new installation and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of



information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

West Virginia State University (WVSU) (06/2013 to 10/2018)

– Assistant Director, International Affairs (01/2016 to 10/2018)

Megan worked with both degree-seeking and non-degree-seeking international students, working with a recruiting agency, evaluating foreign transcripts, creating and managing admission reports, and maintaining process and procedure manuals.

– Assistant Director, Academic Educational Outreach (04/2014 to 01/2016)

Megan partnered with Director to provide evidence and submit accreditation application for the National Alliance of Concurrent Enrollment Partnerships (NACEP). She provided outreach and registration for Early Enrollment/Dual Credit program and provided support to the WVSU Prison Initiative program.

– Executive Secretary, Academic Affairs (06/2013 to 04/2014)

Megan served as the liaison for Academic Policies Committee, WVSU Board of Governors, managed front office for Academic Affairs, scheduled meetings and events, and worked closely with the Office of the President.



Payton Waybright

CONSULTANT

Berry, Dunn, McNeil & Parker, LLC

Payton Waybright has 10 years of clinical experience and medical knowledge. She is experienced in office settings and organization, as well as teamwork. Payton is hardworking and great with communication within the project and the team.

EDUCATION AND CERTIFICATIONS

BA, Marshall University,
coursework in nursing,
psychology, and dietetics

PROPOSED PROJECT ROLE

Project Management
Support Staff

MEDICAID EXPERIENCE

4.5 years

PROJECT EXPERIENCE

BerryDunn (08/2020 to present)

– Iowa Department of Health and Human Services (IA HHS)
Eligibility Integration Application Solution (ELIAS) (12/2024 to present)

Payton is the project resource and reporting lead coordinator for the ELIAS project. She manages drafting the ELIAS monthly status reports and Centers for Medicare & Medicaid Services (CMS) reports for the project. She oversees the deliverables, DAFs, meeting notes, and action items for the project. Payton holds a weekly action item meeting with the project to help ensure updates are provided on action items to help with timely closures on tasks.

– West Virginia Department of Human Services (DoHS)
People's Access to Help (PATH) DDI Project Management (08/2020 to present)

Payton is the project resource and reporting lead coordinator for the PATH project. She manages the day-to-day coordination of a 40+ member team. She has a variety of responsibilities, which include conducting 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), and helping to ensure vendor accountability and adherence to SLAs. Payton drafts monthly status reports and the Commissioner briefing report for the PATH project, oversees the project team's reporting activities, and provides quality assurance to help ensure assignments are complete and on time for client submission. She manages a team of project coordinators and provides onboard documents and training for new hires. Prior to the lead resource coordinator position, Payton worked as a project coordinator for the PATH project for 10 months.



Mildred Mitchell Bateman Hospital (05/2016 to 08/2020)

Payton aided mentally/emotionally impaired clients, assisting in daily living activities. She filed paperwork for the unit for inpatients, outpatients, and new hires, served as team leader for new employees and sanitation, and was responsible for medical terminology and management.

Holzer Senior Care (06/2015 to 05/2016)

Payton was responsible for unit charting on patients. She performed CNA duties and served as a team patient activity leader.

Huntington Health and Rehabilitation Center (05/2014 to 02/2015)

Payton performed CNA duties, aiding patients with daily needs. She was responsible for unit charts on patients and patient activities.

Pleasant Valley Nursing Home (05/2011 to 03/2014)

Payton served CNA duties and assisted with charting patients.



Diane Maines

GRAPHIC DESIGNER

Berry, Dunn McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management
Support staff

RELEVANT EXPERIENCE

20 years

Diane Maines is an experienced graphic designer with close to 20 years in branding, digital marketing, web design and print media. She is skilled in working with teams, collaborating with clients, and delivering impactful designs on time, while maintaining her passion for creating meaningful and high-quality design.

PROJECT EXPERIENCE

BerryDunn (04/2025 to present)

Diane is part of BerryDunn's consulting support services team, assisting project teams with graphic design tasks and requests

Maine Design Co. (03/2023 to 04/2025)

As a freelance graphic designer, Diane delivered long-term contracted design services for major organizations, including rebranding extensive health education resources for MaineHealth. She provided project-based design solutions to clients such as Glacial Multimedia and Saint Joseph's College, including branding, digital assets, and print materials tailored to their needs. In addition, she managed social media content creation and scheduling for two clients, including photography and video for one account, helping to ensure cohesive branding and consistent audience engagement across platforms.

Glacial Multimedia (03/2018 to 03/2023)

As the creative director and graphic/web designer, Diane designed over 50 healthcare websites and landing pages annually, helping ensure functionality and user-focused design. She trained and art-directed designers, fostering team growth and design consistency; collaborated with clients directly to understand their needs and deliver tailored solutions; worked closely with developers, account managers, and copywriters to execute cohesive campaigns; and developed logos, brand identities, ads, brochures, magazines, and presentations for various health care specialties.

King + Miller Real Estate (01/2013 to 03/2018)

Diane served as the marketing director, designing marketing materials including brochures, flyers, newsletters, ads, and email marketing. She also photographed and edited images and videos of homes including for publication in the Portland Press Herald.



Martin's Point Health Care (02/2006 to 06/2012)

Diane designed marketing and member materials including print and web ads, insurance benefits books and directories, newsletters, and signage. She also managed direct mail printing and processing for more than 300 mailings annually to over 300,000 members and eligible members.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
01	Commissioner Briefing	A monthly status update delivered to the BMS commissioner.
02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
03	Partner Matrix	A stakeholder matrix identifying all impacted parties, their roles, level of influence, engagement needs, and communication strategies to support the EVV reprourement process.
04	Partner Findings and Recommendations	A report that captures key insights, issues, and opportunities identified through stakeholder engagement, with actionable recommendations to inform the EVV reprourement strategy and system requirements.
05	Market Research Summary Report	A consolidated report summarizing EVV market research findings, vendor capabilities, industry trends, and comparative analysis to guide procurement strategy and requirements development.
06	Analysis of Alternatives	A comparative assessment of viable EVV solution options, evaluating functionality, compliance, cost, and implementation considerations to determine the most cost-effective and operationally suitable approach for reprourement.
07	PAPD-U	The PAPD will be updated in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advance Planning Document
API	Application Programming Interface
AoA	Analysis of Alternatives
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CFR	Code of Federal Regulations
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
EVV	Electronic Visit Verification
GPM	General Project Manager
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
PAPD	Planning Advance Planning Document
PAPD-U	Planning Advance Planning Document Update
PgM	Program Manager
PM	Project Manager
SOW	Scope of Work
SS	Project Management Support Staff
State, WV	West Virginia



STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

DATE: September 4, 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: PF1777397, CDO BMS26*09
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 Electronic Visit Verification Reprocurement Planning Project. The service period 09/25/2025-06/14/2026. The total estimated cost is \$1,050,600.00

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.





STATE OF WEST VIRGINIA
DEPARTMENT OF HUMAN SERVICES
BUREAU FOR MEDICAL SERVICES

Alex J. Mayer
Cabinet Secretary

Cynthia Beane, MSW, LCSW
Commissioner

Date: August 29, 2025

To: Office Shared Administration/Finance

From: Jimmy Dowden, WVPBC
Director
BMS, Procurement Services

Re: PF1777397, CDO BMS26*09
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for Month 1-8 in SFY26 and Month 9-10 in SFY27, per the table below:

CDO BMS26*09
EVV Reprocurement
Project
PR05
9/25/25-4/30/26

05/01/2026-06/14/2026

2026 Payment Medicaid		2027 Payment Medicaid	
Lead Project Manager hours @ \$215	\$68,800.00	Lead Project Manager hours @ \$215	\$17,200.00
Engagement Manager hours @ \$270	\$21,600.00	Engagement Manager hours @ \$270	\$5,400.00
Lead MMIS Project Manager 20 hours @ \$205	\$16,400.00	Lead MMIS Project Manager 4 hours @ \$205	\$4,100.00
General Project Manager hours @ \$190	\$633,840.00	General Project Manager hours @ \$190	\$158,460.00
Project Management Support Staff hours @ \$80	\$99,840.00	Project Management Support Staff hours @ \$80	\$24,960.00
	\$840,480.00		\$210,120.00
		Grand Total:	\$1,050,600.00

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4286 or jimmy.k.dowden@wv.gov. Thank you for your time and consideration in the 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

 An official website of the United States government [Here's how you know](#) ▼

Revolutionary FAR Overhaul Impacts to SAM.gov Show Details
Aug 15, 2025

✕

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Records Retention Policy Impacts Old SAM Registration Data Show Details
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✕

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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		
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			
2014			
2013			
2012			
2011			
2010			
2009			
Date filed			

For more information, please contact the Secretary of State's Office at 304-558-8000.

Thursday, September 4, 2025 — 4:00 PM

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