



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: 06-11-2026

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 2688 BMS2600000039 1	Change Order No:	Procurement Folder:	1970921
Document Name:	Electronic Visit Verifications (EVV) Phase II		Reason for Modification:	
Document Description:	Electronic Visit Verifications (EVV) Phase II			
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: Stuart Sellears Requestor Phone: 304-352-4319 Requestor Email: stuart.sellears@wv.gov 2026 FILE LOCATION _____
	Discount Allowed	Discount Percentage	Discount Days																		
#1	No	0.0000	0																		
#2	No																				
#3	No																				
#4	No																				

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

Purchasing Division's File Copy

Total Order Amount: \$898,550.00

CH 6/15/26

PURCHASING DIVISION AUTHORIZATION
DATE: 6/15/26
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6/15/26
ELECTRONIC SIGNATURE ON FILE: 6-15-26

Extended Description:

Electronic Visit Verifications (EVV) Reprocurement Planning Project Phase II

Service Period: 06/015/2026 - 06/14/2027

Total: \$898,550.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$21,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2026-06-15	2027-06-14				

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

Lead Project Manager: Optional Renewal Year Three

Hourly Rate: \$215.00

Estimate: (1) 2000 Hours

100 Hours @ \$215.00 = \$21,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$13,500.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2026-06-15	2027-06-14				

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

Engagement Manager: Optional Renewal Year Three

Hourly Rate: \$270.00

Estimate: (1) 2000 Hours

50 Hours @ \$270.00 = \$13,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$5,330.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2026-06-15	2027-06-14				

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

Lead MMIS Project Manager: Optional Renewal Year Three

Hourly Rate: \$205.00

Estimate: (1) 2000 Hours

26 HOURS @ \$205.00 = \$5,330.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$780,140.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2026-06-15	2027-06-14				

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

Extended Description:

General Project Manager: Optional Renewal Year Three

Hourly Rate: \$190.00

Estimate: (10) 20000 Hours

4,106 Hours @ \$190.00 = \$780,140.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$78,080.00
Service From	Service To	Manufacturer	Model No	Delivery Date	
2026-06-15	2027-06-14				

Commodity Line Description: Project Management Support Staff: Opt. Renewal Year Three

Extended Description:

Project Management Support Staff: Optional Renewal Year Three

Hourly Rate: \$80.00

Estimate: (25) 50000 Hours

976 Hours @ \$80.00 = \$78,080.00



May 8, 2026

To Whom It May Concern:

Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the Bureau for Medical Services (BMS) by providing support for the Electronic Visit Verification (EVV) Reprocurement Planning Project Phase II under our master contract (CMA HHR 21*03). As stated in the SOW document, the duration of this work is estimated to be 13 months. BerryDunn agrees to a SOW start date effective June 15, 2026.

Assuming a start date of June 15, 2026, the work would then conclude on June 14, 2027.

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:

Peter Alfrey

2DAAA44ADB3A477...

Peter Alfrey
Principal | Berry, Dunn, McNeil & Parker, LLC
207-541-2242

Ok

Althea Greenhowe



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 Phase II

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 Phase II (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 reprocurement 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 and Randall Hill as the State project co-leads.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.



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 oversee and coordinate the activities, services, and deliverables of BerryDunn staff. The project leadership will regularly meet with the project lead and key team members to review project status, address issues affecting timely completion, and help ensure thorough oversight and evaluation of staff, services, and deliverables. <i>Deliverable(s)</i> D01: Commissioner Briefing <i>Completion Criteria</i> All parties will deem Engagement Oversight complete upon completion of project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.	Nicole Becnel Ed Daranyi Brandon Milton Peter Alfrey Emily McCoy Dawn Webb Alex Tannenbaum Renzo Del Castillo	500
2.0	Project Execution and Control <i>Service Approach</i> At the start of the project, BerryDunn will conduct a kickoff meeting. Throughout Project Execution and Control, BerryDunn's leadership will regularly meet with the project sponsor to review project status, address any issues impacting timely completion, and provide oversight of BerryDunn staff, services, and deliverables.	Alex Tannenbaum Sarah Vintorini Nolan Cyr Kourtney Kirk Cate Poling MaryLou Banker Stanley Chang Peter Alfrey Alex Lyubarov Dawn Webb Hailey Holden	1,134



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	- Recommend preferred alternative - Conduct a cost benefit analysis - Conduct a feasibility study - Prepare documentation for CMS and State review <i>Deliverable(s)</i> - D03: AoA <i>Completion Criteria</i> All parties will deem AoA Services complete upon acceptance of Deliverable D03: AoA by the project sponsor or their designee.		
4.0	EVV Business Process Definition and Documentation <i>Service Approach</i> The project team will develop comprehensive EVV business process documentation to clearly articulate program expectations, operational workflows, and internal procedures. This approach helps ensure bidding vendors understand end-to-end processes and responsibilities, while also supporting State implementation readiness and ongoing programmatic operations. The documentation will reflect current and future-state workflows, align with programmatic and regulatory requirements, and provide clarity across State, vendor, provider, and member interactions. <i>EVV Business Process Definition and Documentation activities will include:</i> Programmatic Requirements Definition: Define EVV program-level business rules, roles, and operational expectations to help ensure consistency across vendors and alignment with State policy and regulatory requirements.	Alex Tannenbaum Sarah Vintorini Nolan Cyr Kourtney Kirk Cate Poling MaryLou Banker Matt Oaten Muriah Nutter Stanley Chang	1,235



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	D04: EVV Business Process Documentation <i>Completion Criteria</i> All parties will deem EVV Business Process Definition and Documentation complete upon acceptance of Deliverable D04: EVV Business Process Documentation and Workflow Report by the project sponsor or their designee.		
5.0	Requirements Development <i>Service Approach</i> The project team will lead a structured and collaborative requirements development process to ensure all functional, technical, operational, and compliance needs for the EVV repurchase are clearly defined, validated, and traceable. This approach emphasizes partner engagement, regulatory alignment, and procurement readiness. <i>Requirements Development activities will include:</i> - Regulatory and Policy Alignment: Incorporate all applicable federal and state EVV requirements (e.g., CMS EVV mandates, Medicaid guidelines, and state policies) to help ensure full compliance. - Requirements Definition: Develop clear, testable requirements across functional, technical, data, security, reporting, integration, and vendor service domains. - Joint Requirements Planning Sessions (JRPS): Conduct structured JRPS sessions to review drafted requirements, validate partner intent, resolve gaps or ambiguities, and collaboratively finalize requirement language. - Validation and Sign-Off: Obtain formal validation and approval from the State following the JRPS sessions to confirm accuracy, completeness, feasibility, and readiness for procurement use.	Alex Tannenbaum Sarah Vintorini Nolan Cyr Kourtney Kirk Cate Poling MaryLou Banker Stanley Chang	1,000



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	Services complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
7.0	APD Support <i>Service Approach</i> BerryDunn will assist with the preparation and coordination of APD approvals to help ensure the project maintains ongoing support and financial commitment from key federal partners. <i>Deliverable(s)</i> D06: Planning Advance Planning Document Update (PAPD-U) <i>Completion Criteria</i> All parties will deem APD Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Brandon Milton Dawn Webb Alex Tannenbaum Sarah Vintorini Nolan Cyr Kourtney Kirk Cate Poling MaryLou Banker Muriah Nutter Stanley Chang	150
Total Hours			5,258
Total Not-To-Exceed Cost Estimate			\$898,550



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
23	GPM	\$190	Hailey Holden	78	\$14,820
23	GPM	\$190	Sam Kessler	14	\$2,660
23	GPM	\$190	Alex Lyubarov	51	\$9,690
23	GPM	\$190	Payton Waybright	14	\$2,660
23	GPM	\$190	Dawn Webb	37	\$7,030
23	GPM	\$190	Kristine West	14	\$2,660
23	GPM	\$190	Ed Daranyi	24	\$4,560
23	GPM	\$190	Nicole Becnel	24	\$4,560
24	SS	\$80	Muriah Nutter	344	\$27,520
24	SS	\$80	Stanley Chang	344	\$27,520
24	SS	\$80	Alycia Minshall	14	\$1,120
24	SS	\$80	Caitlin Cabral	14	\$1,120
24	SS	\$80	Grace Min	14	\$1,120
24	SS	\$80	Carole Ann Guay	14	\$1,120
24	SS	\$80	Anna Beatriz Banks	14	\$1,120
24	SS	\$80	Aubrey Duplissie	14	\$1,120
24	SS	\$80	Rachel Eggleston	14	\$1,120
24	SS	\$80	Diane Maines	14	\$1,120
24	SS	\$80	Jonathan "Jon" Williams	14	\$1,120
24	SS	\$80	Jordan Ramsey	14	\$1,120
24	SS	\$80	Megan Hamilton	14	\$1,120
24	SS	\$80	Hope Connard	67	\$5,360
24	SS	\$80	AnnaBella Hyre	67	\$5,360
Totals				5,258	\$898,550



5.0 High-Level Timeline

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

Figure 1: Proposed High-Level Timeline

Task	Month												
	1	2	3	4	5	6	7	8	9	10	11	12	13
1.0 Engagement Oversight													
2.0 Project Execution and Control													
3.0 AoA													
4.0 EVV Business Process Definition and Documentation													
5.0 Requirements Development													
6.0 Reprocurement Support Services													
7.0 APD Support													



Appendix A: Resumes

Brandon Milton

MBA, PMP®, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Engagement Manager

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

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, University of New Hampshire
- BS, Business Administration and Political Science, University of Maine
- Certified Project Management Professional® (PMP®)
- Prosci® Certified Change Practitioner (CCP)

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.

EXPERIENCE

BerryDunn (07/2011 to present)

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (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 Project Management Office (PMO)



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 an 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 vendor to determine the data elements that would make up each of the data



Renzo Del Castillo

PMP®, CSP-SM, SSM6, SA6, PAHM

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Lead Project Manager

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

MEDICAID EXPERIENCE

12 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, Mass Communication, 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
- Advisory Board Member, Spring Street Exchange 2018 – 2024

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.

EXPERIENCE

BerryDunn (07/2025 to present)

Renzo serves as a Project Manager within BerryDunn's Medicaid Practice Group, supporting State Medicaid Agencies on MMIS and pharmacy modernization initiatives. He brings 10+ years of direct State Medicaid experience, providing project leadership across complex, multi-vendor environments, overseeing governance, risk and issue management, schedule coordination, and quality assurance while ensuring alignment with CMS requirements, State objectives, and implementation timelines.

West Virginia Department of Human Services (DoHS)



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.

Vermont Agency of Human Services, 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 Wyoming's single State Medicaid Agency the Wyoming Department of Health with the Pharmacy Benefit Management System and Fiscal Agent Services Projects.

Ohio Department of Medicaid (ODM)

PMO Leader (12/2016 to 06/2023)

Renzo supported Ohio's single State Medicaid Agency the Department of Medicaid with the Pharmacy Benefit Management Project.

Maine Department of Health and Human Services, Office of MaineCare Services (OMS)

PMO Leader (01/2017 to 05/2024)

Renzo supported Maine's single State Medicaid Agency the Department of Health and Human Services with the Pharmacy Benefit Management and Point of Purchase System Projects.



Emily E. McCoy

RN, BSN, PMP®

Senior Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Lead MMIS Project Manager

KEY QUALIFICATIONS

- More than four years supporting and leading Medicaid policy for long-term care (LTC), Pre-Admission Screening and Resident Review (PASRR), hospice, and home health programs
- Over two years of experience leading the Transformed Medicaid Statistical Information System (T-MSIS) efforts as the WV state representative
- Design, development, and implementation (DDI) experience with large-scale Medicaid Management Information Systems (MMIS) implementations, in various roles,
- Three years of project management experience with West Virginia’s large-scale integrated eligibility system, WV, People’s Access to Help (PATH)
- Over 20 years of experience interacting and collaborating with federal agencies
- 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)

MEDICAID EXPERIENCE

22 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Nursing, Marshall University
- Registered Nurse (RN)
- Certified Project Management Professional® (PMP®)
- Executive Coaching Certification



Emily McCoy is an experienced project manager and RN with deep expertise in healthcare consulting, including LTC and Medicaid/MMIS. Her clinical experience includes direct care for individuals requiring skilled and LTC services, inpatient behavioral health services, and neurological care. Emily also has over 25 years of combined program management, project management, and leadership experience for both private and public sectors, including hospitals and state health and human services (HHS) agencies, of which over 13 years was spent working in Medicaid and MMIS



- *Mental Health Parity (MHP) and Behavioral Health Support (BHS) Project Phase V (06/2024 to present)*
- *Office of Nutrition Services (ONS) Product Management Office (PMO) Crossroads User Group (11/2023 to present)*
- *Organizational Development Phase II (07/2024 to 06/2025)*
- *IT Control Environment Review (07/2024 to 06/2025)*
- *System Development Lifecycle (SDLC) Coordination Project Phase I (06/2024 to 06/2025)*
- *ARPA Section 9817: Home and Community Services (HCBS) Implementation Project Phase II (06/2024 to 06/2025)*

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.

West Virginia Department of Health Facilities (DHF)

Contract Labor Management Services (CLMS) Request for Proposal (RFP) Development (07/2024 to 5/2025)



- Oversight and management of multiple federal regulations within the MMIS, such as 5010/D.0, 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 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 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.



Alex Tannenbaum



Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Clemson University

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.

EXPERIENCE

BerryDunn (09/2020 to present)

West Virginia Department of Human Services (DoHS)

Program Manager – Enterprise Systems & Strategy Portfolio (08/2025 to present)

Alex oversees and coordinates a portfolio of technology-related initiatives, ensuring alignment with organizational goals, fostering collaboration across projects and portfolios, and driving successful delivery through strategic planning and stakeholder engagement. Specific projects include:

- *Advance Planning Document (APD) Assistance (12/2025 to present)*
- *Project Management Organization Services for the West Virginia Medicaid People's Access To Help (08/2025 to present)*
- *Resource Integration Solutions for Enrollees (RISE) Procurement Assistance (08/2025 to present)*
- *Third Party Liability (TPL) and Recovery Audit Contractor (RAC) Procurement Assistance (08/2025 to present)*
- *Enterprise Data Solution (EDS) Project Management (08/2025 to present)*



West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (09/2020 to 08/2025)

Alex was 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 was 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 was 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.



Advanced Planning Document (APD) and Procurement Consulting Services (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) Reprocurement Support Project (09/2025 to present)

Sarah provides project management support for the EVV Reprocurement Project, guiding strategic planning, procurement activities, and stakeholder engagement to advance a more efficient and user centered statewide EVV solution. She facilitates decision-making, mitigates project risks, and helps to ensure project outcomes strengthen compliance and service delivery.

Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement (04/2025 to present)

Sarah provides project management support for the TPL and RAC Reprocurement Project, coordinating timelines, deliverables, and stakeholder communications to ensure a seamless procurement process. She also supports the development of project artifacts and facilitates cross team alignment to keep the reprocurement on track.

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 and supported the development of the To-Be environment deliverable. She also developed graphics and presentations to support the project.

Mountain Health Promise (MHP) Procurement Assistance (01/2020 to 06/2020)

Sarah provided project coordination support, deliverable review and creation support, and project risk and issue monitoring support during the implementation of a new, specialized managed care plan with a diverse group of interested and invested parties across multiple bureaus.

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 its EVV RFP, coordinated proposal evaluation and oral presentations, and assisted with the implementation phase of WV's EVV solution.

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

Sarah provided project coordination support, deliverable development and review support, and risk and issue monitoring support for 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 knowledge sharing. She developed lessons learned and identified opportunities for leverage and reuse. She assisted in developing a detailed and robust outreach



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, and social media.

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, she 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 interested and invested party relations, community outreach, and more.



- *Resource Integration Solutions for Enrollees (RISE) Procurement Assistance (10/2025 to present)*
- *Third Party Liability (TPL) and Recovery Audit Contractor (RAC) Procurement Assistance (10/2025 to present)*
- *Transformed Medicaid Statistical Information System (T-MSIS) Support (10/2025 to present)*
- *APD and Procurement Consulting Services (08/2023 to present)*

West Virginia Bureau for Medical Services (BMS)

APD and Procurement Consulting Services (08/2023 to present)

As an APD subject matter expert (SME), Nolan supported the development, updating, and tracking of BMS APDs. In this role, Nolan drafted APD documents and budgets, supported the project management of APD development, and assured project goals and objectives were met.

Partnership Management Support and Provider Management Support Projects (08/2023 to present)

Nolan provided project management and APD support for the partnership management work provided between WV and partnering states and territories. In his role, Nolan drafts APD documents and budgets, supports the project management of APD development, helps identify and track project risks. Nolan continues to provide support specifically focused on APD financials.

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

As a business analyst, Nolan worked with the content development team to help design, develop, and deliver training courses and programs through BerryDunn's Medicaid Learning Center (MLC). Services included the design of employee onboarding training programs and oversight of learning management system customizations and operations.

Organizational Development Project Phase I (07/2022 to 06/2023)

As a business analyst, Nolan assisted the State with activities specific to organizational development in WV. His focus included supporting the State as BMS developed and implemented a three-year strategic plan. Services included the design and facilitation of a multi-day strategic planning retreat, creating workshops, webinars, and e-learning courses that supported strategic plan implementation, deliverable development, and meeting facilitation.

American Rescue Plan Act (ARPA) Section 9813: Mobile Crisis Grant Project (08/2022 to 02/2023)

As project coordinator ARPA Mobile Crisis project, Nolan assisted the State in planning for the implementation of the Medicaid Mobile Crisis Services program. He conducted program coordination among interested and invested parties, captured meeting notes, tracked action items, and supported the development of project deliverables, such as the creation of the State Plan Amendment (SPA) draft.

Iowa Department of Health and Human Services (IA HHS)

Quality Management System (QMS) (06/2024 to present)



strategic priorities and goals. His role included the development and facilitation of agile and inclusive workshops, data collection and analysis, deliverable development, and meeting facilitation.

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

APD Consulting Services (07/2022 to 04/2026)

Nolan served as an APD SME for BerryDunn where he supported Delaware's single state Medicaid agency, DMMA. As an APD SME, Nolan supports the development, updating, and tracking of DMMA's APDs. In his role, Nolan drafts APD documents, tracks APD progress, reports monthly on project deliverables, and helps ensure project goals and objectives are met. In addition, he helps identify and track project risks, issues, decisions, and action items for state leadership.

BerryDunn MLC (07/2022 to present)

As the MLC operations lead, Nolan manages the platform's learning management system (LMS), course content, and technical support team. In this role, Nolan spearheaded the redevelopment of the platform's website and course appearance to increase brand reputation and engagement with content. He regularly facilitates product overview meetings with prospective clients, helps assure product satisfaction, and evaluates current training materials to identify areas of improvement.

MaineHealth (05/2019 to 06/2022)

Nolan worked as an intern with the senior HR team to develop pieces of training targeted at improving leadership competencies in directors and executives across the MaineHealth network. He developed pieces of training on time mastery, emotional intelligence, and DiSC®, as well as assisted in the creation of MaineHealth's new leader first-year success and leader as Coach training programs, which were administered to all directors and executives. He organized and summarized annual systemwide employee engagement survey data and build a dashboard to measure and chart changes across HR metrics.

Student Engagement & Leadership, University of Southern Maine (09/2021 to 06/2022)

Nolan served as graduate assistant to help create meaningful connections with the campus community through engagement and leadership development opportunities. He advised and mentored student leaders, oversaw group activities, and facilitated conflict resolution. He worked as lead project manager for event sequences and envisioned and constructed a campus-wide event calendar for student groups.

Outdoor Adventures Board, University of Southern Maine (09/2017 to 05/2021)

Nolan served on the executive board, which involved tasks ranging from guiding trips to overseeing club activities. He expanded student engagement, oversaw club partnerships with outside organizations, and implemented annual club leadership and wilderness medical training retreat to improve quality and safety of trips. He also managed the budget as financial chair and coordinated local and out-of-state trips.

PUBLICATIONS



Kourtney Kirk

BS

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

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, Statements of Work (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

MEDICAID EXPERIENCE

3 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Business Administration – Marketing, Glenville State University
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

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 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.

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 (BMS), 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 (WV) Bureau for Medical Services (BMS)

Electronic Visit Verification (EVV) Reprocurement Planning Project (09/2025 to present)



Contract Labor Management Services (CLMS) RFP Development (01/2025 to 06/2025)

As the project coordinator supporting the WV DHF, Kourtney created agendas, maintained meeting schedules, and provided quality control for meeting materials to satisfy project SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

Tek Systems (03/2021 to 01/2022)

As a subcontractor through Tek Systems with BerryDunn, Kourtney supported the West Virginia Bureau for Medical Services as a project coordinator:

- *Medicaid and Children's Health Insurance Program Enterprise System Procurement Assistance Project (03/2021 to 01/2022)*
- *Enterprise Data Solution Project (03/2021 to 01/2022)*

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 potential leads, 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 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



Cate Poling

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

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 Requests for Proposals (RFPs)
- Over four years' experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

MEDICAID EXPERIENCE

4.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, emphasis in English Literature, Marshall University
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)
- Poynter ACES Certificate in Editing

Cate is a knowledgeable researcher and writer with extensive experience researching and documenting detailed information in the insurance, clinical practice, and project management settings, with a latter focus on understanding, documenting, and articulating compliance needs through systems planning and development, from design, development, and implementation (DDI) to maintenance and operations (M&O). Cate transitioned from clinical practice work to working with single state Medicaid agencies in support of health and human services Medicaid Enterprise System (MES) projects and initiatives. Her attention to detail allows her to be an invaluable resource for coordinating, drafting, and interpreting federally-mandated documentation and funding requests, deliverables, RFPs, meeting agendas and notes, and other project documentation. She presents a well-developed understanding of project and system requirements as relates to MES privacy and security architecture and standard security frameworks, such as National Institute of Standards and Technology (NIST) 800-53 and Acceptable Risk Controls for Affordable Care Act [ACA], Medicaid, and Partner Entities (ARC-AMPE). She demonstrates proficiency with Microsoft, Google, and Atlassian tool suites, as well as Azure DevOps. 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).

EXPERIENCE

BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical 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



As project manager, Cate supported 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 facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate managed 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 (WV RISE) (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.

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (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



MaryLou Banker

CAPM®, CLSSGB

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Certified in American Sign Language (ASL), Northeastern University
- Certificate in Computer Operations, Computer Learning Center of Boston
- Certified Associate in Project Management® (CAPM®)
- Certified Lean Six Sigma Green Belt (CLSSGB)
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

MaryLou Banker is a senior consultant with 20+ years in project coordination and management across State and federal agencies, including Centers for Medicare & Medicaid Services (CMS) and Federal Emergency Management Agency (FEMA). She has supported complex procurements, certifications, and modernization initiatives for Medicaid programs and health systems in states such as Massachusetts, West Virginia, and Puerto Rico. Her technical ability includes IBM® Rational tools, Application Lifecycle Management (ALM) systems, and automated testing frameworks.

EXPERIENCE

BerryDunn (03/2013 to Present)

West Virginia Bureau of Medical Services (BMS)

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Planning (03/2023 to present)

As a subject matter expert (SME) MaryLou assists in the developing of an outcomes-based Request for Proposal (RFP) aligning with the CMS modular certification process, conducting State research, presenting findings, gathering requirements for review in joint requirement sessions, assisting in the development and maintenance of an action item tracker, and providing a group scoring tool and training sessions to State staff in support of the vendor evaluation activities.



As a general project manager, MaryLou supported Outcomes-Based Certification (OBC) for new Eligibility and Enrollment (E&E) system, developed reusable Operational Readiness Review (ORR) checklists for operational readiness and certification reviews, organized a documentation repository of 1,000+ artifacts, improving audit and compliance processes, prepared monthly status reports and facilitated stakeholder meetings.

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

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

As an IV&V analyst and project coordinator, MaryLou produced IV&V monthly assessment reports, dashboards, and risk analysis, monitored system stability, contractual compliance, and active work-arounds, participated in CMS Blueprint testing, test case verification, and submission of results for approval, coordinated User Acceptance Testing (UAT) and delivered 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 managed coordination and supply chain operations, ensuring prompt delivery of housing units and commodities and oversaw the asset visibility tracking, compliance inspections, and procurement of mission-critical materials.

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

As a service manager for the repair and installation of restaurant beverage equipment, MaryLou Directed service department operations, implemented Mass90 service module, and trained technicians.

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

As a supervisor MaryLou managed the IT Help Desk and Desktop Services teams, implementing Service Level Agreements (SLAs) and enterprise tools and led the rollout of Siebel Customer Relationship Management (CRM) and Comprehensive Client Management (CCM) tools, improving service delivery and onboarding processes.



WV Resource Integration Solutions for Enrollees (WVRISE) Project (07/2022 to present)

Matthew serves the WVRISE project by providing BA and PC support. Matthew provides support to the WVRISE team in various areas including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. Matthew assists in the development of deliverables for contractual obligations, such as project status reports, SOWs, RFPs, APDs, and project closeout summaries. He also assists in the development, organization, and process flow of requirements for joint requirement planning (JRP) sessions with the client.

Matthew served as the project lead for the MES Purchasing Contract Management Support Subproject; a project focused on process improvement activities for the State. The project assisted in streamlining purchasing processes, researched procurement best practices, and provided aid to the State in meeting several of its identified purchasing goals.

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (07/2022 to 06/2025)

Matthew served the EDS project providing BA and PC support. Matthew provided support to the EDS team in various areas, including meeting notes, artifact research, tracking project milestones, action items, risks/issues, decisions, and maintaining project budgets. He also assisted in the development of deliverables for contractual obligations such as project status reports, SOWs, APDs, and project closeout summaries.

Arizona Health Care Cost Containment System (AHCCCS)

Forensic Auditing and Accounting (05/2023 to 03/2024)

Matthew served the Forensic Auditing and Accounting project providing BA and PC support for Arizona's single state Medicaid agency. Matthew provided support to the AHCCCS task order in various areas including meeting notes, tracking and completing action items, keeping the client informed, and helping ensure the project met its goals and objectives.

Concentra Health Services (01/2019 to 06/2022)

Matthew served as facilities coordinator to analyze, prioritize, dispatch, resolve, and follow up on 80 – 120 service requests daily. He delegated workload to a team of five project coordinators, designed and maintained a security database for over 500 company locations across 41 states, and collaborated with multiple vendors to resolve time-sensitive, large-scale projects. He researched, evaluated, and bid quotes to proceed with the most cost-effective option while meeting timelines. Matthew established quick, mutually beneficial interpersonal relationships with clients and vendors to enhance company productivity, initiated and developed a training manual to assist center managers in effectively working with the facilities department, and served as interim facilities manager to achieve company strategic goal for three months of manager vacancy.

Michigan State University (MSU) Cheer and Dance (08/2018 to 07/2022)

Matthew worked as assistant cheer and dance coach to co-manage operations of a D1 athletic team of 80 co-ed athletes. He assessed athlete performance while providing training to develop skill sets in compliance with National Collegiate Athletic Association (NCAA) and MSU Athletic



Peter Alfrey

MBA, MA, PMP®, LSSGB, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

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

MEDICAID EXPERIENCE

12 year(s)

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- 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

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.

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.



Peter is supporting Hawaii's State Medicaid agency as financial officer for the project helping support BerryDunn project team's delivery of project management services, quality management and communications, and overseeing project resource planning and invoicing.

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



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

- 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 (NESCO) Medicaid Enterprise Systems Conference (MESC), Louisville, Kentucky, 08/2024
- Session abstract, *Transforming Systems, Culture and Operations to Support Your Medicaid Enterprise* selected by NESCO 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 NESCO 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.



Advanced Planning Document (APD) and Procurement (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 03/2026)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables. Megan supported the project by assisting in the creation of multiple project trackers on SharePoint Online. Megan assisted with the daily and monthly data tracking for PERM.

IT Control Environment Review (07/2024 to 06/2025)

Megan provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables. Megan supported 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 sharing knowledge, lessons learned, and leverage and reuse.

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



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



United States Air Force (03/2012 to present)

Adam supports an Aeromedical Evacuation Squadron by supervising logistical and equipment technicians to help ensure medical equipment is stocked, operational, and ready to deploy. He also plans, organizes, and performs network operations to include establishment, operations, information assurance, and defense in support of joint, national and Air Force objectives. He provides cyberspace expertise to commanders and Joint Task Forces (JTF) for cyber operations, command and control communications, and information management, translates system operational concepts, requirements, architectures, and designs into detailed engineering specifications and criteria to present to non-technical audiences, and researches or oversees research of technologies and advises commanders on associated risks and mitigation factors in conjunction with meeting requirements. He currently holds a Top Secret/ Single Scope Background Investigation (SSBI) / Office of Personnel Management (OPM) security clearance.

Adam previously supervised a team of seven radio operators that provided support for over 50 paramedics and nurses in deployed locations, took Executive Member Committee (EMC) meeting minutes, served as a member of the squadron and wing level Company Grade Officer (CGO) Council, and completed over 1,000 hours of coursework while attending undergraduate cyber training.

Ruchman and Associates Inc. (04/2018 to 08/2022)

Adam supported the FBI's Criminal Justice Information Systems Division by performing criminal records retrieval services. He was entrusted to complete required work in a timely and accurate manner in an unsupervised setting while maintaining responsibility for physical security of his assigned work laptop.

CMS Insurance (10/2011 to 09/2018)

As the IT director, Adam planned, budgeted, and purchased the IT system in its entirety. This included configuring cloud storage and email services, maintaining physical computers for employees across multiple states, keeping essential software accessible and up to date, and troubleshooting day-to-day issues.



Puerto Rico Medicaid Program (PRMP) Enterprise Data Security Support Subproject

Ed serves as a Subject Matter Expert and policy reviewer supporting Puerto Rico's single State Agency, Puerto Rico Department of Health, for the PRMP Enterprise Data Security Support Subproject. He is responsible for reviewing and updating existing policies, including AI and ensuring alignment with ARC-AMPE, NIST, and HIPAA standards to maintain regulatory compliance and strengthen PRMP organizational security posture.

West Virginia Department of Human Services (DoHS) (04/2019 to present)

Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification Project (07/2021 to present)

As the systems security lead for the project, Ed supports West Virginia's single State Agency, WV DoHS, by providing oversight of privacy and security-related project workstreams. He assists in the development, update, and review processes for security and technical deliverables and helps review and establish documented compliance with system security requirements at the project, Agency, and federal level.

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (04/2019 to 09/2021)

Ed supported West Virginia's single State Agency, WV DoHS, by coordinating numerous reviews for 92 separate deliverables, managing intake of all documents from contract vendor, dissemination to internal reviewers, and compiling comments for posting back to Optum. He also administered accurate documentation and tracked all deliverables to and from the vendor. He was responsible for the review and commentary of the Security, Privacy, and Confidentiality Management Plan, as well as for employing documentation industry best practice processes and methodologies for consistency and traceability.

West Virginia Bureau for Medical Services (BMS) (04/2019 to 10/2021)

Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project

Ed supported WV BMS by maintaining an Access database for the MITA project used for gathering and compiling data during the annual SS-A, helping to ensure that BMS consistently maintained compliance with its federal partners.

West Virginia Bureau for Medical Services (06/2010 to 04/2019)

As HIPAA security officer for WV BMS, Ed provided management and operational support services to the single State Medicaid agency which included, but was not limited to, IT security controls, system performance monitoring, project management, report administration, and stakeholder engagement. Areas of focus included research, analysis and management of comprehensive IT security policies and procedures for the Medicaid Enterprise (MMIS, DW/DSS and E&E), and all related MITA business process areas. He also provided senior level technical support services for both the Bureau and external staff.

West Virginia Office of Technology (WVOT) (02/2009 to 06/2010)



Jim Downie



Senior Consultant | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

34 year(s)

KEY QUALIFICATIONS

- Five years' experience in multiple MMIS Certification methodologies (Legacy, Medicaid Enterprise Certification Toolkit, Outcomes-Based Certification, Streamlined Modular Certification)
- Ten years' experience in MMIS modernization (OH) with a focus on financial work streams
- Ten years' MMIS project and portfolio management experience

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Production and Operations Management, The Ohio State University

Jim is a motivated, personable professional with over 30 years healthcare administration experience with a successful track record of timely completed projects. He possesses multi-dimensional skills enabling quick mastering of technologies and situations. As a senior consultant in BerryDunn's Medicaid consulting practice, he serves state Medicaid agencies in an advisory and management capacity.

EXPERIENCE

BerryDunn (09/2018 to present)

Puerto Rico Medicaid Program

Puerto Rico Medicaid Program State Plan Amendment and Policy Risks and Issues Management (07/2024 to present)

Jim provides support to Puerto Rico's Medicaid Agency; the Puerto Rico Medicaid Program. Jim serves as the lead for tracking and managing Puerto Rico Medicaid Program State Plan Amendment (SPA) and Policy risks and issues. In this role, he helps ensure that risks and issues are being tracked, managed, and mitigated.

Missouri Department of Social Services, HealthNet Division (MHD)

Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2023 to 06/2025)

Jim served as an IV&V analyst supporting Missouri's State Medicaid Agency the Department of Social Services. In this role, he and the team assessed project health, reviewed project deliverables, evaluated MEDES progress against CMS' Medicaid Eligibility & Enrollment Toolkit (MEET) requirements, produced IV&V progress reports, identified potential risks and issues, and offered recommendations for mitigation.



Project Manager for the Reinstatement of Medicaid for Public Institution Recipients

Jim had overall management of this project from business case development through timely implementation. This project required coordination across four state agencies, modification of mainframe systems, and the creation of a new web-based application. Through successful implementation of this project, Jim helped enable the prompt reinstatement of Medicaid eligibility as people exited institutions.

Medicaid Deputy Director's Office (2004 to 2008)

Medicaid Coordinator for the Ohio Administrative Knowledge System (OAKS)

When the State of Ohio converted seven separate financial/accounting systems into one enterprise knowledge system, Jim served as the Medicaid lead. This project required coordination across all thirteen cabinet level agencies and all state level boards and commissions. Jim helped ensure that the MMIS was ready to send Medicaid provider payment information to OAKS at implementation. In addition, he was responsible for training and communication within the Office of Medicaid and with providers.

Interagency Contract Consultant for Medicaid Programs

Jim oversaw Bureau staff who had primary contract management responsibilities for other state agencies that performed day-to-day administration of certain Medicaid programs.

Budget Support

Jim participated on Budget teams to develop budget allocations and enabling statutory language.

Medicaid Administrative Claiming Lead

Jim was the departmental expert on the development of Medicaid Administrative Claiming (MAC) programs for other state and local agencies. He successfully developed and implemented, with federal approval, Ohio's School MAC Program and Ohio Department of Health's MAC Program.

Acting Bureau Chief, Plan Operations

Jim filled the Bureau Chief Position while a permanent replacement was found.

Medicaid Bureau of Consumer Access (2002 to 2004)

Jim participated in the core team that developed the new Bureau of Community Access to focus Medicaid's relationship with sister state agencies. He had primary contract management responsibilities for other state agencies that performed day-to-day administration of certain Medicaid Programs, which primarily consisted of Home and Community Based Services Waivers. Jim also developed Ohio's first Sister Agency MAC Program with the Ohio Department of Education.

Medicaid Deputy Director's Office (2000 to 2002)

As the assistant to the Assistant Deputy Director for Disability Policy, Jim worked with the local and Statewide Independent Living Councils to help ensure Medicaid programs and services



Kortney Ester

MBA, CSM

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 12+ years of Medicaid experience, including three years contracting with single state Medicaid agencies
- 4+ years of experience with project management and procurement
- 9+ years of experience with Centers for Medicare and Medicaid Services (CMS)-state systems testing

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Organizational Management, Mount Vernon Nazarene University
- BA, Sociology, Central State University
- Certified ScrumMaster (CSM)

Kortney Ester is a CSM with more than seven years of Eligibility and Enrollment and Medicaid experience. She provides hands-on project leadership, driving complex Medicaid initiatives from planning through execution while coordinating CMS-aligned testing, procurement activities, and multi-stakeholder collaboration at the state and federal level.

EXPERIENCE

BerryDunn (03/2023 to present)

West Virginia Bureau for Medical Services (BMS)

Operations Support – Program Management Office (PMO) (11/2025 to present)

Kortney serves as a key Operations support resource for CMS Monthly Status Report (MSR) efforts, contributing to reporting structure, process development, and cross-functional coordination. She supports reporting multi-project status, stakeholder engagement, and data consistency.

Mountain Health Reprocurement Assistance (07/2025 to present)

Kortney serves as a general project manager (GPM) for the project, responsible for developing and overseeing the procurement library and collaborating with other subject matter experts (SMEs) as needed during development.

Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (01/2024 to present)



Kortney assessed processes and procedures to support the implementation of lean practices, successfully coordinated external testing between the State and CMS, and oversaw MCO test data on behalf of the State. She also led CMS interoperability data exchange transformation testing, coordinating activities among CMS, state stakeholders, and vendors to support accurate testing execution and timely project updates.

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

Kortney served as a Case Manager responsible for determining eligibility for the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Needy Families (TANF), and various categories of Medicaid, including waiver services, Children's Health Insurance Program (CHIP), pregnant mothers, and Skilled Nursing Facilities (SNFs).

She acted as a front-end SME on two major state system integration and transformation initiatives, including Ohio Benefits and statewide telephony enrollment, providing operational insight and user feedback to vendors. She independently supported eligibility determination efforts at The Ohio State University Wexner Medical Center, coordinating benefits with hospital billing and support services.

She analyzed complex eligibility system issues to identify sustainable solutions, provided detailed feedback on flawed or inefficient business processes, and collaborated with MCOs such as Buckeye, Aetna, United HealthCare, and Molina to assist enrollees and coordinate benefits.

Walls Wiring (10/2012 to 11/2017)

Kortney worked as Project Manager (PM) responsible for reviewing RFPs to identify new contract opportunities, supporting business development efforts, and facilitating daily scrum meetings with project teams. She managed project execution, monitored quality and progress, communicated status to stakeholders, and mapped business processes to drive continuous improvement using lean practices.

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

Kortney served as a member service representative providing retirement counseling to members and their families, enrolling members into healthcare plans with Aetna and other MCOs, and maintaining retirement accounts. She determined retirement and healthcare eligibility, created retirement benefit estimates, and calculated retirement payments and healthcare costs in accordance with applicable policy.

Kortney liaised with MCOs, members, and nursing facilities, interpreting and applying policy to help ensure accurate benefit determinations and payment amounts.

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

Kortney served as an Eligibility Counselor and Unit Lead, interpreting and applying state policy to determine eligibility for Medicaid, SNAP, and TANF. She independently managed a large caseload, utilized multiple state systems to verify information, and supported the implementation of a new state eligibility system.



Hailey Holden



Staff Consultant | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

3.5 years

KEY QUALIFICATIONS

- Over 10 years of experience providing solution-focused coordination
- Over five years of successful development, design, and implementation of business processes, education, and training

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Psychology, Purdue University

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.

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

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.

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



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.



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 e-Commerce 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.



Missouri Department of Social Services

Missouri Eligibility Determination and Enrollment System (MEDES) Independent Verification and Validation (IV&V) Services (07/2021 to 08/2025)

Alex supported Missouri's single State Medicaid agency, serving as the engagement manager and oversaw BerryDunn's IV&V team supporting MEDES.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (07/2021 to present)

Alex supports BerryDunn's Project Management Office (PMO) team supporting the implementation project for West Virginia's IES. 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, Advance Planning Document (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 the Centers for Medicare & Medicaid Services (CMS) and state stakeholders. He works directly with the State's leaders from the Bureau for Medical Services (BMS), 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 for New York's single State Medicaid Agency, the New York State Department of Health (DOH). In this role, he supported all phases of MDW implementation cycle. Alex 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 Request for Proposal and Request for Quotation (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 supporting Connecticut's single State Medicaid Agency, the Connecticut Department of Social Services (DSS). In this role, Alex assisted the State 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 Subject Matter Experts (SME) providing healthcare patient access and revenue cycle assessments and implement projects for process improvements, enhance the patient experience, and reduce financial risks.



Payton Waybright

BA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Over five years' experience providing direct support to single state Medicaid agencies
- Over five years' experience providing coordination support between state bureaus and agencies, federal partners, and vendors according to strict timelines
- Adept at establishing and managing effective and efficient client, vendor, partner, and internal cross-collaborative relations
- Experience managing coordination and support tasks for teams of 40+ staff to support positive and timely project outcomes

MEDICAID EXPERIENCE

5.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

Payton is a consultant in BerryDunn's Medicaid Practice Group (MPG), with 10 years of clinical experience and five years of Medicaid administrative and project management support experience. She has deep familiarity with managing and coordinating complex organizational needs between multiple interested and invested parties simultaneously. Payton's attention to detail and ability to build productive, trusting relationships allow her to be an invaluable asset to the projects and initiatives she supports.

EXPERIENCE

BerryDunn (08/2020 to present)

Payton is a staff consultant with BerryDunn's Medicaid Practice Group. Payton provides support to the Bureau for Medical Services (BMS), 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 Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (08/2020 to present)

Payton is the 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 facilitating daily meetings for team organization, overseeing daily project coordination



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.



BerryDunn (08/2017 to present)

Commonwealth of the Northern Mariana Islands (CNMI) Medicaid Enterprise System (MES) Modernization

Medicaid Program Integrity (PI) Manager (9/2025 to present)

As the Medicaid PI Manager, Dawn provides leadership to the PI team and delivers expert guidance as they develop a modernized MES and Medicaid PI unit within the CNMI Medicaid Agency, the designated single state Medicaid agency in the CNMI.

Guam Enterprise Portfolio Management Office (EPfMO)

Medicaid PI Manager (3/2025 to present)

As the Medicaid PI Manager, Dawn supports the PI team and offers expert guidance as they help establish a Medicaid PI unit within the Department of Public Health and Social Services (DPHSS), which serves as Guam's single state Medicaid agency.

West Virginia Bureau for Medical Services (BMS)

Client and Engagement Operations Program Deputy 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.

APD and Procurement Consulting Services (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.

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.



Dawn functioned as the Medicaid engagement manager responsible for supervising the auditing services of DWIHN's Medicaid claims. She efficiently coordinated BerryDunn resources and managed all auditing activities in close collaboration with DWIHN leadership to help ensure high-quality execution of the work.

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

Unisys (06/2004 to 11/2009)

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

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

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



Kristine West

BSN, RN, CPC, CPMA, CPIP

Senior Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Fraud, Waste & Abuse Prevention & Mitigation
- Medicaid Compliance Oversight
- Program Integrity Leadership & Governance
- Audit Strategy, Risk Management & Corrective Action
- Policy Development & Regulatory Alignment
- Cross-Functional Leadership
- Executive Collaboration
- Ethics, Accountability & Transparency

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BSN, Aspen University
- AD, Applied Science in Nursing, Rose State College
- Registered Nurse (RN), State of Oklahoma
- Certified Professional Coder (CPC), American Academy of Professional Coders (AAPC)
- Certified Professional Medical Auditor (CPMA), AAPC
- Certified Program Integrity Professional (CPIP), Medicaid Integrity Institute (MII)

Kristine West is a senior healthcare executive with 15 years of progressive leadership in Medicaid compliance, program integrity, and healthcare audit operations. She is adept at navigating complex regulatory landscapes, aligning state Medicaid programs with CMS requirements, and leading enterprise-wide strategies to mitigate risk and promote accountability. She is known for driving organizational transformation through data-informed decision-making, cross-agency collaboration, and regulatory foresight. Kristine has a proven ability to lead high-performing teams, direct federal and state audit initiatives, and serve as a trusted advisor to executive leadership, policymakers, and oversight bodies.

EXPERIENCE

BerryDunn (01/2026 to present)

Kristine is a senior consultant in BerryDunn's Medicaid Practice Group.

Oklahoma Health Care Authority (04/2011 to 11/2025)

Kristine supported Oklahoma's single State Medicaid Agency, the Oklahoma Health Care Authority in a variety of roles.

Chief of Compliance (07/2025 to 11/2025)



operations, collaborated with federal and state partners, and provided strategic consultation on fraud, waste, and abuse prevention. She also directed surveillance and utilization reviews to identify and address potential fraud, waste, and abuse by Medicaid providers. She led and reviewed comprehensive audit plans, managed caseload from intake through appeals, ensuring alignment with standards of care, state and federal regulations, and applicable Oklahoma policy.

Kristine served as an expert witness in legal proceedings related to audits and fraud investigations, collaborating closely with the OAG/MFCU on evidence and testimony. She acted as the primary liaison with Oklahoma's Unified Program Integrity Contractor (UPIC), coordinating audits and compliance initiatives. She also developed comprehensive audit plans based on risk analysis, data trends, and investigative processes. Kristine advised on managed care inquiries from contracted entities/managed care organizations including Program Integrity and Compliance directives, interpreting regulations, audit findings, and medical necessity standards.

In addition, Kristine oversaw training and quality assurance of physician consultants and clinical auditors. She provided oral and written reports to agency leadership, CMS, and external partners on audit findings, credible allegations of fraud, and compliance risks. She represented Oklahoma in external audits (e.g. CMS, federal contractors) and ensured state compliance with reporting mandates. She also contributed to internal policy development, quality improvement initiatives, and multi-agency workgroups.

RN Medical Audit Supervisor (11/2013 to 09/2015)

Kristine provided training and supervision of the clinical audit team. She participated in the development of audit plans, audit processes and programs, tracking audit progress, and coordinating staff assignments to ensure timely and accurate completion. She also led on-site audits and ensured that all team members were able to manage the review. She conducted comprehensive supervisory reviews of audit findings, audit reports, and supporting documentation. She also corrected and made improvements to the necessary elements of the report, findings, and comprehensive worksheets. Kristine conducted internal audits to help develop productivity requirements. She also coached and trained team members and completed annual performance evaluations of her team.

RN Medical Audit Specialist (11/2012 to 10/2013)

Kristine conducted comprehensive clinical audits of healthcare providers using clinical expertise, proficiency in coding principles, and application of applicable policies. She performed verification of provider credentials and ensured providers were properly contracted, licensed, and working within scope of practice. She also performed extensive reviews and research to ensure accuracy of audit results, as extensive knowledge of various fields of medicine and care is required to complete each review adequately and with confidence of the findings. Kristine referred cases to internal and external entities, as appropriate, under direction of management team. She also prepared detailed audit reports and supporting documentation and audits for appeals processes: reconsideration and formal appeal. She also closed cases per department protocols.

Exceptional Needs Coordinator/Nurse Care Manager (04/2011 to 10/2012)



Ed Daranyi

M.Ed., PMP®

Principal, Medicaid Practice Group Lead | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Senior project management professional, providing principal oversight in over 100 Medicaid projects and leads BerryDunn's Medicaid Practice Group (MPG) with a management team of 34 and over 134 full-time consultants
- 29 years of project manager experience, including 18 years as a Certified PMP®
- Over 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 15 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

RELEVANT EXPERIENCE

26 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- M.Ed., Education, Lesley College
- BS, Physics, Mathematics, Business Administration, Hillsdale College
- Certified Project Management Professional® (PMP®)

Ed Daranyi is a principal and leads BerryDunn's 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 his engagements, and helping to ensure clients benefit from the breadth of deep expertise BerryDunn provides.

EXPERIENCE

BerryDunn (09/2005 to present)

EVV Project Phase II | May 8, 2026



contributes to WV as a contributing principal, assisting in oversight of the ongoing projects in that engagement.

SUD Waiver Initiative Project (02/2016 to 06/2025)

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 managed care organization (MCO) contract requirements specific to the SUD demonstration. Through this Section 1115 Waiver, WV can test innovative policy and delivery approaches to reform systems of care for individuals with SUD.

Medicaid Information Technology Architecture (MITA) 3.0 SS-A Maintenance and Annual Update Assistance Project (2012 to 06/2025)

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 2024)

The State 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 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 most recent 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.

West Virginia Children's Health Insurance Program (WVCHIP) Operational Readiness Review (ORR) (2019 to 2022)



- *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)*
- *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) Procurement Assistance (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)*
- *Eligibility and Enrollment Implementation Assistance (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; 03/2020 to 02/2021)*
- *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)*



policies, procedures, and practices were significantly improving the likelihood that a given project would be brought in on time and on budget. This included the review of the Medicaid North Carolina Families Accessing Services through Technologies, a program designed to improve the way North Carolina DHHS and county departments of social services do business. The Auditor's Office utilized the evaluation report to adjust their teams and processes, developing a plan based on the outcomes of our reporting.

Martin's Point Health Care

HIPAA Compliance Planning and Implementation (2005 to 2007)

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

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

GHS is a leading provider of services to Medicaid agencies across the nation. Ed served as strategic project manager, technical writer, office manager, and training coordinator, which entailed developing and managing technical proposal preparation and writing; collaborating and developing strategy with senior management, the Medical Director, and staff pharmacist; providing company-wide management support for strategic project development; designing, developing, and authoring technical user documentation; and preparing and delivering training materials. As a result of the growth experienced while working as a strategic project manager, and in his office manager role, Ed oversaw a move of over 200 employees from one office into a larger office complex. His training role included developing trainings for systems such as prior authorization processes and customer service, and human resources related trainings for the pharmacies affiliated with GHS.

Iowa Department of Human Services (DHS)

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

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

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

Maine DHHS

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



Nicole Becnel

PMP®, ECCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 22 years' HHS portfolio, program, and project management experience for single state Medicaid and other HHS agencies
- Large-scale IT and Medicaid Enterprise technical implementation and certification experience
- Currently leading the West Virginia project management (PM) team to support the State with the implementation of a fully integrated eligibility and enrollment solution—one of the first in the nation
- Proven project management track record of over 100 short and long-term projects delivered on time and within budget
- Led the project team that supported the State to secure over \$750M federal dollars for West Virginia's transformation initiatives for their state programs
- Private Sector Technology Group (PSTG) Past Vice-Chair
- Led the WV PM team, who became one of the first in the nation to help the State successfully implement a Medicaid Management Information System (MMIS) solution in accordance with the project's schedule and budgets, without issuing advanced payments to providers

MEDICAID EXPERIENCE

23.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Speech and Hearing Science, University of South Florida
- Certified Project Management Professional® (PMP®)
- Executive Coaching Certification®

Nicole Becnel has steered a career track for over 22 years leading to her current role as Principal at BerryDunn. Throughout her career, she has consistently demonstrated a deep grasp of processes, policies, analysis, and industry knowledge, earning a brand as an influential leader whose distinction interlaces a broader view of business needs to connect the dots between people, data, technology, and business strategy. This unique strength has enabled a different and fresh perspective in building and leading a Medicaid practice—reaching beyond the traditional role to help clients deliver transformations in their health and human services (HHS) programs.



- *Medicaid Information Technology Architecture (MITA) State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2015 to 08/2018)*
- *Technical Information and Enterprise Project Management Services (TEPMS) (05/2017 to 07/2018)*
- *Gap Analysis and Project Management Services (GAPMS) (10/2016 to 06/2018)*
- *Provider Re-enrollment Application Project (03/2017 to 02/2018)*
- *Eligibility and Enrollment RFP Development Assistance (10/2015 to 12/2017)*
- *Income Maintenance Manual (IMM) Update Project (09/2016 to 09/2017)*
- *R-MMIS Implementation and Certification Leverage and Reuse Project (01/2017 to 07/2017)*
- *Updates to Health Information Technology (HIT) Plans and HIT and Health Information Exchange (HIE) Advance Planning Document (APD) Assistance (03/2016 to 04/2017)*
- *Project Management of MMIS Procurement, Design, Development, and Implementation (DDI), and Certification (07/2015 to 12/2016)*
- *RAPIDS (Eligibility System) Transition Facilitation Project (02/2016 to 05/2016)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (09/2013 to 03/2016)*
- *Medicaid Eligibility and Enrollment APD (06/2015 to 09/2015)*
- *PEA Project (2012 to 2015)*
- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *State Medicaid Health IT Planning and Health Care Reform Consulting (2012 to 2014)*

Additional project details are provided below:

APD Assistance (07/2020 to present)

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

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

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



software system, the procurement of federal funding for epidemiological activities and testing and staffing and organizational development activities for DoHS and Bureau for Public Health (BPH). The software helped the State coordinate its contact tracing initiatives and use of the contact tracing platform across a workforce of DoHS volunteers, the National Guard, WV University staff, and State local health departments. The outcome of the project was the successful statewide launch of the new contact tracing and disease investigation software and the procurement of \$37 million in federal relief funding for public health initiatives related to COVID-19.

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

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

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

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

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

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

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

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



maintenance implementation project, which created an online tool for enrollment, re-enrollment, and maintenance for Maine's provider community consisting of approximately 8,000 providers. Nicole managed large and complex configuration projects and provided expertise to other implementation initiatives, including conversion, reporting, and interface development.

WV MMIS

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

Contract Configuration and Reports Lead for WV MMIS

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

Project Management Support

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

PRESENTATIONS

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



Provider Management Support Project Phase III (02/2023 to 10/2023)

Children's Health Insurance Program (CHIP) Out-of-Pocket Maximum (MOOP) Project (02/2023 to 10/2023)

Payment Error Rate Measurement (PERM) Project (02/2023 to 10/2023)

Public Health Emergency (PHE) Support Project (02/2023 to 09/2023)

Electronic Visit Verification (EVV) Solution Implementation Project (02/2023 to 06/2023)

Technical Assistance and Program Support Project (TAPS) Phase IV (02/2023 to 06/2023)

CHIP Plan Managed Care Organization Transition Planning Project (02/2023 to 04/2023)

Medicaid Management Information System (MMIS) Fee Schedule and Edit Quality Review (02/2023 to 04/2023)

Greenbrier County Homeland Security & Emergency Management (07/2020 to 02/2023)

Muriah served as an Administrative Assistant and Coordinator. Muriah recorded meeting minutes to provide historical account of actions, measured progress against the strategic plan, and drove accountability. She answered a multi-line phone system, routed calls, delivered messages to staff, and greeted visitors. She also monitored office calendars and planned meetings, activities, and travel to maximize productivity; executed record filing system to improve document organization and management; and provided exceptional customer service using her excellent time management skills and memory. Muriah helped with over 10 Federal Emergency Management Agency (FEMA) projects, and created spreadsheets using Microsoft Excel for daily, weekly, and monthly reporting.

First Neighborhood Bank (01/2019 to 06/2020)

Muriah worked as a Bank Teller who sold and cross-sold bank products to new and existing customers. She assisted customers with setting up or closing accounts, completing loan applications, and signing up for new services. Muriah provided customer records, account statements, copies of checks, and documentation reporting. She also scheduled and coordinated internal/external meetings.

Buckle, INC. (01/2015 to 01/2019)

Muriah served as Operations Manager to liaise with store managers to set up visually appealing layout for store merchandise. She controlled shipments, inventory, purchasing, and inspection to reduce workflow gaps, and oversaw preparation and distribution of promotional materials and flyers. She established customer relationships and helped complete purchases, locate items, and join reward programs. Muriah also trained new associates on cash register operations, conducting customer transactions, and balancing the drawer.



Stanley served as a groundsman where he loaded, unloaded, and moved material to and from storage and production areas. He maintained work areas by cleaning and straightening for maximum productivity and safety. He also adhered to company policies, safety procedures, and performance standards. As a part of a team, Stanley enhanced efficiency and multitasking abilities by effectively using hand tools, power tools, and equipment. He worked in a team environment to maintain high levels of productivity and helped ensure team safety by controlling traffic around and within the site.

Boyd County School District (09/2021 to 06/2022)

Stanley served as a teacher where he incorporated exciting and engaging activities to achieve student participation and hands-on learning. He kept students on task with proactive behavior modification and positive reinforcement strategies.

Pivot Charter School, Riverside (08/2018 to 06/2021)

Stanley served as a teacher where he communicated frequently with parents, students, and faculty to provide feedback and discuss instructional strategies. He planned and implemented integrated lessons to meet national standards, and graded and evaluated student assignments, papers, and course work. During his tenure, Stanley designed dynamic lesson plans based on student interests to increase overall student GPA. He also fostered team collaboration between students through group projects and instructed students in core educational principles, concepts, and in-depth subject matter. He supported student physical, mental, and social development using classroom games and activities.

Texas Roadhouse Restaurant (07/2017 to 07/2018)

Stanley worked as a food server where he cultivated warm relationships with regular customers. He explained menu items, suggested appropriate options for food allergy concerns, and elevated customer satisfaction through follow-up and enthusiastic customer service. He also kept an updated knowledge of menu and promotions, recommending specific items according to preferences and food allergies.



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)



Caitlin Cabral

BA

Writer/Editor | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

6 years

KEY QUALIFICATIONS

- Over six years of technical writing and editing experience
- Over four years of experience developing and delivering business writing education to various consulting audiences
- Poynter ACES-certified editor with experience working on a variety of documents, including project reports, presentations, meeting notes, and communication materials

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Psychology, University of Hartford
- Poynter ACES Certificate in Editing

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 who has helped develop EQA’s service offerings and educational materials and practices.

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



Grace Min



Documentation Specialist | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE
Project Management Support Staff

RELEVANT EXPERIENCE
8 years

- KEY QUALIFICATIONS
- Over 8 years of copyediting experience
 - Over 5 years of technical writing experience

- EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS
- BA, English Literature, *summa cum laude*, Oral Roberts University
 - Poynter ACES Certificate in Editing

Grace Min is an experienced technical writer and editor, bringing experience in copywriting, project management, research, quality assurance, and proofreading.

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 (SMEs) 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 refines 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)



Carole Ann Guay

BS

Manager | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

21 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Accounting, University of Southern Maine

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.

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 02/2022)

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

Justice and Public Safety Systems Replacement Initiative (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)



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.



Anna Beatriz Banks



Administrative Assistant | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

- Over four years' experience in administrative roles.
- Experienced in coordination, organization, and agenda creation.

RELEVANT EXPERIENCE

4 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Psychology, Minor in Spanish, Worcester State University (*in progress*)
- Psychology, Quinsigamond Community College

Anna Beatriz Banks is a meticulous administrative assistant with a solid foundation in customer 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.

EXPERIENCE

BerryDunn (03/2025 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 02/2025)

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.



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. Aubrey 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. She also co-managed social media including Facebook, Instagram, and the Foundation's blog, and aided in all aspects of event planning.

Undiscovered Maine (09/2020 to 05/2022)

As a social media team leader, Aubrey was responsible for managing all social media accounts. Aubrey oversaw the coordination of weekly posts, managed all social media team members, edited 600+ web pages to help ensure accuracy, and produced creative media for publishing on the project site and social media accounts.



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.



developed logos, brand identities, ads, brochures, magazines, and presentations for various healthcare 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.



First as a visual software operator and later as a purchasing manager, Jon was responsible for contacting vendors to purchase items needed for manufacturing jobs, for stock, or for general shop or office use. He worked with Engineering and Sales to determine needs and order accordingly and met with current and potential vendors. He scheduled service or maintenance for equipment, operated manufacturing software, and served as office/shop liaison.

Spring Hill Nurseries (02/2001 to 06/2001)

Jon proofread catalogs and mailing pieces for this direct-mail horticulture group. He checked facts, layout, grammar, and spelling, and wrote copy for planting guides included with shipments.



Jordan 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 Illinoian (2014 to 2015)

As copyeditor, proofreader, and sports clerk, Jordan wrote and edited articles and prepared them for publications. In addition, he wrote headlines and subheads for articles and reviewed content to help ensure it was published error-free.

Other Teaching Experience (2006 to 2010)

Lanier Technical College

As adjunct instructor, Jordan created curriculum and instruction of multiple English courses, including Remedial English, Introduction to Composition, and Technical Writing. He taught approximately 90 students per quarter and served as English tutor for the College Student Success Program.

Hardin County, IL

Jordan taught English at the elementary, middle, and high school levels as a substitute teacher.

NOVA Group of Japan

Jordan worked as an English instructor, teaching conversational English to students with varying degrees of English literacy.



Megan 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 the finance director, to edit and update pertinent documents for ISO auditing and company records. She created MS Excel report to support the general ledger and maintained company records and documents to meet tax guidelines.



Serving as the Project Manager, Hope provides strategic guidance and direction to lead the team in assessment and analysis activities, overseeing project planning, tasks coordination, and timeline management to support successful execution of the MITA 3.0 SS-A project.

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 Organization Development (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 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.



AnnaBella Hyre

BBA, BLA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

- Experience in State Plan Amendment (SPA) development and process
- Experience in Medicaid Advisory Council implementation and support
- Experience in conducting research and analysis

MEDICAID EXPERIENCE

1.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BBA, Marketing, Marshall University
- BLA, Political Science, Marshall University

AnnaBella Hyre is an emerging consultant with experience and continued interest in partnering with Medicaid agencies to support them in fulfilling policy goals, especially related to waiver programs. As a Political Science and Public Administration major, AnnaBella developed a deep knowledge of state and local government policies and business processes, allowing her to bring a broad and unique perspective to the projects she now engages with and supports. AnnaBella is well versed in business communication strategies and relationship management, working closely with state agencies to help align project and initiative expectations and strategies with research-supported results.

EXPERIENCE

BerryDunn (06/2023 to 08/2023; 07/2024 to present)

West Virginia Bureau for Medical Services (BMS)

MITA Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) AU 2024 (07/2025 to present)

AnnaBella assists the project team with day-to-day project management tasks such as scheduling, client communication, and updating organizational repositories such as the decision log and action items lists. AnnaBella is also responsible for assessing the Provider Management business area in support of MITA SS-A report and Roadmap.

State Plan Review and Support (SPRS) Project (11/2024 to present)

In support of development of SPAs, AnnaBella assists with the creation of SPA package materials, project management tasks including tracking of key action items and decisions, and research analysis in support of current and developing SPAs. AnnaBella has also assisted in



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
D01	Commissioner Briefing	A monthly status update delivered to the BMS Commissioner.
D02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
D03	AoA	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.
D04	EVV Business Process Documentation and Workflow Report	A comprehensive document that defines and maps end-to-end EVV business processes, roles, and workflows to guide bidding vendors, support State implementation, and enable ongoing program operations.
D05	RTM	A structured matrix that maps business, regulatory, and program requirements to procurement artifacts to ensure completeness, traceability, and alignment throughout vendor evaluation, implementation, and operations.
D06	PAPD-U	The PAPD will be updated in compliance with requirements, including, but not limited to, 45 Code of Federal Regulations (CFR) 95.610.

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Berry, Dunn, McNeil & Parker, LLC leases professional and administrative staff to BDMP Assurance, LLP. These individuals work under the direct control and supervision of BDMP Assurance LLP, which is solely responsible for their performance.

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

Christina Mullins, MA
Acting Cabinet Secretary

Christy D. Donohue, CMC
Commissioner

DATE: May 22, 2026

TO: Office Shared Administration/Finance

FROM: Stuart Sellears
Procurement Specialist
Office of Procurement Services

RE: PF 1970921, CDO BMS26*39
Dept 0511

A handwritten signature in black ink, appearing to read "Stuart Sellears".

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 1-11 in SFY27 and Month 12-13 in SFY28, per the table below:

06/15/2026-04/30/2027		05/01/2027-06/14/2027	
PR07-2027	Payment	PR07 - 2028	Payment
Lead Project Manager hours 100 @ \$215	\$21,500.00	Lead Project Manager hours 0 @ \$215	\$0.00
Engagement Manager hours 41 @ \$270	\$11,070.00	Engagement Manager hours 9 @ \$270	\$2,430.00
Lead MMIS Project Manager 22 hours @ \$205	\$4,510.00	Lead MMIS Project Manager 4 hours @ \$205	\$820.00
General Project Manager 3699 hours @ \$190	\$702,810.00	General Project Manager 407 hours @ \$190	\$77,330.00
Project Management S upport Staff 827 hours @ \$80	\$66,160.00	Project Management S upport Staff 149 hours @ \$80	\$11,920.00
	\$806,050.00		\$92,500.00
		Grand Total:	\$898,550.00



CDO BMS26*39 Funding Memo

May 22, 2026

Page 2

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-4319 or stuart.sellears@wv.gov . Thank you for your time and consideration in this matter.





Subcontracting Plan Reporting system issues resolved [Show Details](#)
Jun 10, 2026



[See All Alerts](#)

Subcontracting Plan Report (SPR) - ISR Extension for Mid-Year 2026 [Show Details](#)
May 12, 2026



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Search

All Words

e.g. 1606N020Q02

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Keyword Search

For more information on how to use our keyword search, visit our [help guide](#)

Simple Search

Search Editor

☐ Any Words ⁱ

☐ All Words ⁱ

☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc" ×

Entity

Location

Status

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Business Entity Details

Main

Name: BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Number: 263902

Type: LLC

Sec Type:

City: PORTLAND

Class: P

Ch Type: F

Eff Date: 1/8/2008

Fil Date: 1/8/2008

Term Date:

Term Reason:

AW/Term: A

CH County: Kanawha

Ch State: ME

Bus Purp: 5412

Ex Acres:

Term Yrs:

Auth Shrs:

Cap Stck:

Status: Active

Par Val:

MGMT: MBR

In Compliance: Yes

Addresses

Principal Office Address:	Name:	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102
Designated Office Address:	Name:	Addr1: 209 WEST WASHINGTON STREET	Addr2:	City: CHARLESTON	State: WV	Zip: 25302
Notice of Process Address:	Name: URA SERVICES, INC.	Addr1: 5098 WASHINGTON STREET W.	Addr2: SUITE 407	City: CHARLESTON	State: WV	Zip: 25313
Mailing Address:	Name:	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102
Mailing Address:	Name:	Addr1:	Addr2:	City:	State:	Zip:

Officers

Member:	Name: SETH E. WEBBER	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102
Member:	Name: KATHY PARKER, C.P.A.	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102
Member:	Name: SARAH BELLIVEAU, C.P.A.	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102
Member:	Name: JASON FOURNIER, CPA	Addr1: 2211 CONGRESS STREET	Addr2:	City: PORTLAND	State: ME	Zip: 04102

DBAs

Eff Date	DBA Type	DBA Name	Term Date
11/5/2019	TN	BERRY, DUNN, MCNEIL & PARKER, PLLC	
3/21/2011	TN	BERRY DUNN	

Names

No Records Found.

Mergers

No Records Found.

Subsidiaries

No Records Found.

No Records Found.

Dissolutions

No Records Found.

Annual Reports

Filing For	Date Filed
2026	5/30/2026
2025	6/2/2025
2024	6/5/2024
2023	6/29/2023
2022	6/28/2022
2021	7/1/2021
2020	6/24/2020
2019	6/13/2019
2018	6/25/2018
2017	6/7/2017
2016	6/6/2016
2015	6/28/2015
2014	6/2/2014
2013	6/14/2013
2012	5/30/2012
2011	6/21/2011
2010	6/22/2010
2009	2/5/2009

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