



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: 06-24-2026

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 2680 BMS2600000043 1	Change Order No:	Procurement Folder:	1973457
Document Name:	1115 Demonstration Behavioral Health Implementation Ph III	Reason for Modification:		
Document Description:	1115 Demonstration Behavioral Health Implementation Ph III			
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: \$1,130,810.00

CA 6/25/26

PURCHASING DIVISION AUTHORIZATION
DATE: <i>[Signature]</i> 6/25/24
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: <i>[Signature]</i> 6-26-26
ELECTRONIC SIGNATURE ON FILE

Extended Description:

1115 Demonstration Behavioral Health Implementation and Operationalization Project Phase III

Service Period: 06/15/2026 - 06/14/2027

Total: \$1,130,810.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$36,335.00
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

169 Hours @ \$215.00 = \$36,335.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$14,040.00
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

52 Hours @ \$270.00 = \$14,040.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$13,325.00
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

65 Hours @ \$205.00 = \$13,325.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$832,390.00
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

4,381 Hours @ \$190.00 = \$832,390.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$234,720.00
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

2,934 @ \$80.00 = \$234,720.00



June 12, 2026

To Whom It May Concern:

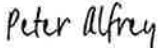
Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services, Bureau for Medical Services by providing support for the 1115 Demonstration Behavioral Health Implementation and Operationalization Project Phase III under our master contract (CMA HHR21*03). As stated in the SOW document, the duration of this work is estimated to be thirteen (13) months. BerryDunn agrees to a SOW start date effective upon approval of the SOW and a mutually agreed-upon date.

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:

2DAAA44ADB3A477...

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

Ok




West Virginia Department of Human Services, Bureau for Medical Services

1115 Demonstration Behavioral Health Implementation and Operationalization Project Phase III

Staffing Plan and Scope of Work

Prepared for Centralized Master Agreement HHR 21*03



Submitted By:

Berry, Dunn, McNeil & Parker, LLC

300 Capitol Street

Charleston, WV 25301

681-313-8905

Peter Alfrey, Principal

Berry, Dunn, McNeil & Parker, LLC

Palfrey@berrydunn.com

Bill Richardson, Principal

Berry, Dunn McNeil & Parker, LLC

Brichardson@berrydunn.com

Submitted On: June 12, 2026



Staffing Plan and Scope of Work for the West Virginia Department of Human Services, Bureau for Medical Services, 1115 Demonstration Behavioral Health Implementation and Operationalization Project (WV 1115 Project) Phase III

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 regarding operationalization, implementation, monitoring maintenance, systems processes and procedures oversight for the WV 1115 Demonstration. BerryDunn will also continue to support BMS with alignment and compliance with federal agreements as documented in the 1115 Special Terms and Conditions (STCs). The work completed under WV 1115 Project Phase III 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 the WV BMS.

1.0 Introduction

The intent of the WV 1115 Project Phase III staffing plan and SOW is to help ensure common expectations for deliverables and services BerryDunn will provide to BMS. BerryDunn considered the following information in preparing this SOW.

1.1 Key Information

The overarching objective of the WV 1115 Project Phase III is to support WV BMS with ongoing planning, implementation, and operationalization of new services and initiatives approved under the 1115 Demonstration waiver renewal for individuals with substance use disorder (SUD) needs.

BerryDunn will assist BMS in implementing, monitoring, and reporting on expanding and/or new 1115 waiver demonstration renewal services in alignment with federal operations, monitoring, and reporting requirements per the federally approved STCs. Project work will include activities such as, but not limited to: developing and communicating policy for new services, navigating changes to the Medicaid Management Information System (MMIS) to support service delivery and claiming for 1115 waiver services, assessing potential impacts on the eligibility system, supporting managed care entities in updating systems to support service delivery and claiming, and leveraging the Enterprise Data Solution (EDS) to support required waiver monitoring and reporting efforts. The WV 1115 Project Phase III also supports gap analyses between current and future state policy, systems, and operations capacity to support expanded or new 1115 services, identifying actions needed to accomplish successful implementation and ongoing oversight.

To facilitate the above work activities, BerryDunn will continue to support the BMS 1115 program team in communicating with a range of stakeholders both internal to BMS and more broadly at the State, with federal partners, with supporting vendor teams, and with provider communities.

The WV 1115 Project Phase III will also aid the State in meeting its identified Medicaid Information Technology Architecture (MITA)-specific goals, such as:



- Improve BMS effectiveness and operational efficiency
- Minimize risk and maximize value from contracted services and products
- Leverage technology to enhance performance and decision-making
- Assess, implement, and monitor compliance with all relevant federal regulations
- Improve operational efficiency and reduce costs in the healthcare system
- Improve healthcare outcomes for members

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of BMS Commissioner Christy Donohue as the project sponsor, BMS Deputy Commissioner Sarah Young as the lead project manager, Cynthia Parsons, as Behavioral Health program director and Keith King as 1115 program manager.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- The BerryDunn leadership team will consist of Peter Alfrey as the engagement manager, Bill Richardson as the portfolio manager, Susan Chugha as the program manager, and Jenna Tetrault as the 1115 project manager.
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories and leverage any needed tools and procedures when applicable.
- Deliverables will be provided in an agreed-upon format.
- All project documents—including meeting outcomes, action items, issues, risks, and decisions—will be on the State-designated site and will be brought to the attention of the BMS project sponsor.
- BerryDunn recognizes that external factors, including, but not limited to, stakeholder involvement might impact project timelines. BerryDunn will work with the State project manager and State project lead to mitigate any such issues as they arise.
- As agreed upon by BMS, BerryDunn will support BMS with transitioning 1115 waiver support tasks, as well as 1115 deliverables and artifacts identified during the project by BerryDunn to BMS staff as appropriate.
- The WV 1115 Project Phase III work will begin upon approval of this SOW and a mutually agreed-upon date and is projected to continue for thirteen (13) months.

1.3 Project Funding

The State intends to utilize the MMIS Implementation Advance Planning Document Update (IAPD-U) for this SOW. The Centers for Medicare & Medicaid Services (CMS) have previously approved the MMIS IAPD-U on April 21, 2026, for total State and federal funds in the amount of



\$54,876,177, under project identifier WV-2026-03-04-MMIS-IAPDU-DoHS (MITA). The estimated cost under this SOW is \$1,130,810.00. Any expansion of scope may require an update to the MMIS IAPD-U to allocate additional project management funds.

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.	Peter Alfrey Bill Richardson Nicole Becnel Emily McCoy Ethan Wiley Ed Daranyi Susan Chugha Jenna Tetrault	781
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. Project Execution and Control will also include:	Jenna Tetrault Kitty Purington Liz Vose John Laukkanen Sandra Manzo Sarah Rinn Marie LaPres AnnaBella Hyre Allison Fischman Eileen Gardner Stephanie Duncan	2,770



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	- Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn- and State-owned meetings - Preparing monthly project status updates, risks, issues, and briefings for the State leadership team - Managing project logs (action item, decision, issue, and risk tracking) - Storing project documentation repository in an agreed-upon SharePoint location <i>Deliverable(s)</i> - D02: Monthly Status Report - D03: Project Timeline - D04: Action Item, Risks, Issues, and Decision log <i>Completion Criteria</i> All parties will deem Project Execution and Control complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Peter Alfrey Alex Lyubarov Dawn Webb Hailey Holden Sam Kessler Payton Waybright Kortney Ester Megan Blount Kristine West Ed Crawford Jim Downie Adam Bowman Emily McCoy Hope Connard Alycia Minshall Caitlin Cabral Carole Ann Guay Anna Beatriz Banks Aubrey Duplissie Rachel Eggleston Diane Maines Jonathan "Jon" Williams Jordan Ramsey Megan Hamilton Grace Min Ben Giesser Colin Buttarazzi Kasie McCarty Jacqueline Prokop	
3.0	1115 Deliverables and Artifacts per STC Requirements <i>Service Approach</i> BerryDunn will perform the following activities related to development of 1115 deliverables and artifacts required by federal partners: - Assist with the development of annual monitoring reports and their submission to CMS. - Provide research, subject matter expert (SME), and design support for deliverable and	Jenna Tetrault Kitty Purington Liz Vose John Laukkanen Sandra Manzo Sarah Rinn Marie LaPres AnnaBella Hyre Allison Fischman Eileen Gardner	1,200



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	artifact development related to the waiver renewal. - Provide project management support for submission and tracking of required deliverables through a CMS Deliverable Tracker. - Support BMS in responding to and updating deliverables based on CMS' feedback for example, Implementation Plans, monitoring reporting, and/or reinvestment plans. - Provide project management support for compliance with Budget Neutrality, evaluation, and monitoring STCs, providing oversight for other BMS and/or vendor teams. As determined by BMS, and as needed, provide interim support for tasks such as weekly reports for SUD residential providers, and reviewing and recommendations of approval for Intensive Outpatient Program (IOP) and SUD residential programs. - As agreed upon by BMS, BerryDunn will support BMS with in transitioning 1115 waiver support tasks and 1115 deliverables and artifacts identified during the project by BerryDunn to BMS staff as appropriate. <i>Deliverable(s)</i> - D05: Monitoring Reports - D06: Updated 1115 Deliverables (as needed, per CMS feedback to BMS) <i>Artifacts</i> - A01: CMS Deliverable Tracker <i>Completion Criteria</i> All parties will deem 1115 Deliverables and Artifacts per STC Requirements complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Stephanie Duncan	
4.0	Waiver Implementation Project Management Support <i>Service Approach</i> BerryDunn will provide project management support to BMS with the rollout of services such as reentry,	Jenna Tetrault Kitty Purington Liz Vose John Laukkanen Sandra Manzo	800



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	Quick Response Team(s) (QRT), Recovery Residence Support Services (RRSS), and other program elements as defined in the waiver's STCs, including: - Maintaining project schedules, project timelines, and supporting the development of materials to assist in implementation of waiver services. - Providing facilitation of planning and implementation workgroup meetings with stakeholders within and outside BMS. - Supporting BMS with modifying or removing services such as supported housing or supported employment from the waiver as needed, and at the request of BMS. - Assisting BMS with negotiation and preparation of waiver amendments and other policy changes related to services. <i>Artifacts</i> - A02: Implementation Support Materials - A03: Waiver Amendment Documentation <i>Completion Criteria</i> All parties will deem Waiver Implementation Project Management Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sarah Rinn Marie LaPres AnnaBella Hyre Allison Fischman Eileen Gardner Stephanie Duncan	
5.0	Waiver Renewal Implementation Project Management Support <i>Service Approach</i> Provide research, SME, and benefit design support for policy finalization related to approved waiver renewal services. Support BMS in public notice processes for the updated policy, including maintenance/tracking of public comments and updates to the online policy manual accordingly. Provide facilitation of planning and implementation workgroup meetings with stakeholders within and outside BMS. <i>Artifacts</i> - A04: Updated 1115 policy manual chapter - A05: Public notice period materials	Jenna Tetrault Kitty Purington Liz Vose John Laukkanen Sandra Manzo Sarah Rinn Marie LaPres AnnaBella Hyre Allison Fischman Eileen Gardner Stephanie Duncan	2,000



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	<i>Completion Criteria</i> All parties will deem Waiver Renewal Implementation Project Management Support complete upon completion of project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
6.0	Advance Planning Document (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>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.	Peter Alfrey Bill Richardson Emily McCoy Ethan Wiley Susan Chugha Jenna Tetrault AnnaBella Hyre Alex Lyubarov Dawn Webb Hope Connard Hailey Holden	50
Total Hours			7,601
Total Not-To-Exceed Cost Estimate			\$1,130,810.00



3.0 Project Resources and Hours

The table below displays additional staffing plan details, total hours, and costs by resource based on the hourly rates and staffing classifications provided in the Commodity Lines (CLs) for Optional Year 3 in CMA HHR 21*03.

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

- Commodity Line 21: Engagement Manager (EM) (\$270/hour)
- Commodity Line 20: Lead Project Manager (LPM) (\$215/hour)
- Commodity Line 22: Lead Medicaid Management Information System (MMIS) Project Manager (LMPM) (\$205/hour)
- Commodity Line 23: General Project Manager (GPM) (\$190/hour)
- Commodity Line 24: Project Management Support Staff (SS) (\$80/hour)

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

CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
21	EM	\$270	Peter Alfrey	52.00	\$14,040.00
20	LPM	\$215	Ethan Wiley	169.00	\$36,335.00
22	LMPM	\$205	Emily McCoy	65.00	\$13,325.00
23	GPM	\$190	Bill Richardson	39.00	\$7,410.00
23	GPM	\$190	Ed Daranyi	28.00	\$5,320.00
23	GPM	\$190	Susan Chugha	221.00	\$41,990.00
23	GPM	\$190	Nicole Becnel	24.00	\$4,560.00
23	GPM	\$190	Jenna Tetrault	1,625.00	\$308,750.00
23	GPM	\$190	Kitty Purington	520.00	\$98,800.00
23	GPM	\$190	Liz Vose	39.00	\$7,410.00
23	GPM	\$190	John Laukkanen	260.00	\$49,400.00
23	GPM	\$190	Sandra Manzo	195.00	\$37,050.00
23	GPM	\$190	Sarah Rinn	260.00	\$49,400.00
23	GPM	\$190	Marie LaPres	26.00	\$4,940.00
23	GPM	\$190	Alex Lyubarov	39.00	\$7,410.00
23	GPM	\$190	Dawn Webb	39.00	\$7,410.00
23	GPM	\$190	Hailey Holden	39.00	\$7,410.00
23	GPM	\$190	Sam Kessler	39.00	\$7,410.00



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
23	GPM	\$190	Payton Waybright	39.00	\$7,410.00
23	GPM	\$190	Kortney Ester	39.00	\$7,410.00
23	GPM	\$190	Megan Blount	39.00	\$7,410.00
23	GPM	\$190	Kristine West	39.00	\$7,410.00
23	GPM	\$190	Ed Crawford	39.00	\$7,410.00
23	GPM	\$190	Jim Downie	39.00	\$7,410.00
23	GPM	\$190	Adam Bowman	39.00	\$7,410.00
23	GPM	\$190	Colin Buttarazzi	195.00	\$37,050.00
23	GPM	\$190	Kasie McCarty	260.00	\$49,400.00
23	GPM	\$190	Jacqueline Prokop	260.00	\$49,400.00
24	SS	\$80	AnnaBella Hyre	455.00	\$36,400.00
24	SS	\$80	Allison Fischman	364.00	\$29,120.00
24	SS	\$80	Eileen Gardner	1,455.00	\$116,400.00
24	SS	\$80	Stephanie Duncan	39.00	\$3,120.00
24	SS	\$80	Alycia Minshall	39.00	\$3,120.00
24	SS	\$80	Caitlin Cabral	39.00	\$3,120.00
24	SS	\$80	Carole Ann Guay	36.00	\$2,880.00
24	SS	\$80	Anna Beatriz Banks	39.00	\$3,120.00
24	SS	\$80	Aubrey Duplissie	39.00	\$3,120.00
24	SS	\$80	Rachel Eggleston	39.00	\$3,120.00
24	SS	\$80	Jonathan "Jon" Williams	39.00	\$3,120.00
24	SS	\$80	Jordan Ramsey	39.00	\$3,120.00
24	SS	\$80	Megan Hamilton	39.00	\$3,120.00
24	SS	\$80	Grace Min	39.00	\$3,120.00
24	SS	\$80	Hope Connard	39.00	\$3,120.00
24	SS	\$80	Ben Giesser	195.00	\$15,600.00
Total				7,601	\$1,130,810.00



4.0 Project Hours and Cost Per Month

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

Table 3: Estimated Project Costs by Month

Month	EM Hours	LPM Hours	LMPM Hours	GPM Hours	SS Hours	Est. Hours Per Month	Est. Cost Per Month
Month 1	4	13	5	337	226	585	\$87,010
Month 2	4	13	5	337	226	585	\$87,010
Month 3	4	13	5	337	226	585	\$87,010
Month 4	4	13	5	337	226	585	\$87,010
Month 5	4	13	5	337	226	585	\$87,010
Month 6	4	13	5	337	226	585	\$87,010
Month 7	4	13	5	337	226	585	\$87,010
Month 8	4	13	5	337	226	585	\$87,010
Month 9	4	13	5	337	226	585	\$87,010
Month 10	4	13	5	337	226	585	\$87,010
Month 11	4	13	5	337	225	584	\$86,930
Month 12	4	13	5	337	225	584	\$86,930
Month 13	4	13	5	337	224	583	\$86,850
Total	52	169	65	4,381	2,934	7,601	\$1,130,810



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 1115 Deliverables and Artifacts per STC Requirements													
4.0 Waiver Renewal Implementation Project Management Support													
5.0 APD Support													



Berry, Dunn, McNeil & Parker, LLC Authorized Signature

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

DocuSigned by:

Peter Alfrey

306AA44AD83A477

Signature

6/12/2026

Date

BMS Approval of Approach, Staffing, and Not-to-Exceed Cost

Sarah Young

Signature

6/23/2026

Date



Appendix A: Resumes

Peter Alfrey

MBA, MA, PMP®, LSSGB, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Engagement 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.

West Virginia DoHS, BMS, and West Virginia Children's Health Insurance Program (WVCHIP)

BerryDunn Project Management Office (10/2014 to present)

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

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



- *Project Management of Medicaid Management Information System (MMIS) Procurement, DDI, and Certification (10/2014 to 12/2016)*

State of Hawaii, Department of Human Services. Med-QUEST Division

Business Process Redesign and Associated Support Services Project

(01/2026 to present)

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 implement complex projects, managed vendor relationships and contract negotiations, and served as client contact for external care management vendors.

Health Dialog (01/2006 to 11/2008)

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

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

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

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

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

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

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

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



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

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

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

PUBLICATIONS

- 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.



Ethan Wiley

MPPM, LSSGB, PMP®, Prosci® CCP

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



PROPOSED PROJECT ROLE

Lead Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

12 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPPM, Concentration on Policy Analysis, University of Southern Maine Edmund S. Muskie School of Public Service
- Certificates of Graduate Study: Applied Research and Evaluation Methods, Performance Management and Measurement, and Social Policy Analysis
- BA, Political Science and History, University of Maine at Farmington
- Certified Project Management Professional® (PMP®)
- Prosci® Certified Change Practitioner (CCP)
- Certified Lean Six Sigma Green Belt (LSSGB)

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

EXPERIENCE

BerryDunn (07/2014 to present)

West Virginia Bureau for Medical Services (BMS)

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



As the portfolio manager, Ethan works alongside the project management team to help ensure the deliverables and time frames are met. He provides overall reviews, program oversight, and project health monitoring.

Strategic Managed Care Technical and Systems Support (06/2024 to present)

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

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

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

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

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

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

Ethan oversees this project and provides project management, subject matter expertise, and support for the DDI of multiple Medicaid business initiatives and activities that BMS may undertake—such as Third-Party Liability (TPL) procurement support, interim support for Payment Error Rate Measurement (PERM) audits, and mental health parity analysis. Ethan and his team provide critical project support such as program research, financial analysis and modeling, waiver construction, regulatory analysis, federal and stakeholder negotiation, and program development. To date, this team has helped BMS achieve its objectives on projects such as the development of Section 1135 Disaster SPAs, managed care organization (MCO) readiness reviews, and Minimum Acceptable Risk Controls for Exchanges (MARS-E) Security and Privacy Assessments.

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

As program manager, Ethan planned and executed the design, successful negotiation, and implementation of a CSED waiver program. The CSED waiver provides services that are additions to Medicaid State Plan coverage for those enrolled in the CSED waiver program. The CSED waiver permits West Virginia to provide an array of services that enables children who would otherwise require institutionalization to remain in their homes and communities. In



addition, it is anticipated that this waiver will reduce the number of children housed both in-state and out-of-state in psychiatric residential treatment facilities (PRTFs) and shorten the lengths of stay for children who require acute care in PRTFs. Ethan continues to support the state with ongoing research, facilitation and implementation tasks in support of the CSED Waiver Program.

EPMO (07/2018 to present)

As portfolio manager of the Medicaid Innovations Portfolio of projects for the West Virginia BMS EPMO, Ethan leads a team of three program managers executing over 12 Medicaid policy and program development projects. In this role, he is responsible for aligning project outcomes with the organization's overarching goals and master strategy for its Medicaid and human services enterprise.

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

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

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

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

American Rescue Plan Act (ARPA) Section 9817: HCBS Implementation Project (05/2021 to 06/2025)

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



Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (06/2019 to 06/2021)

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

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

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

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

As project manager, Ethan determined the research design and methodology to perform an analysis of TPL options. This included leading the project team through the investigation of both the solution and financing alternatives for the State. This research helped West Virginia save money in recoupments and system costs as well as conduct its Health Insurance Premium Payment program and Medicaid buy-in programs through new and innovative approaches.

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

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

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

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

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

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

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



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

U.S. Virgin Islands (USVI) Department of Human Services (DHS)

USVI Enterprise Portfolio Management Office (EPMO) (09/2024 to present)

As portfolio manager of the Medicaid Innovations Portfolio of projects for the USVI EPMO, Ethan leads a team of five project leads executing over 10 Medicaid policy and program workstreams. In this role, he is responsible for aligning project outcomes with the organization's overarching goals and master strategy for its Medicaid and human services enterprise.

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

APD Consulting Services (05/2021 to present)

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

Minnesota Department of Human Services (DHS)

Research Studies for Contingency Management (CM) Services (04/2024 to 05/2025)

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

1115 Waiver for Justice-Involved Individuals (02/2024 to 12/2024)

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

Program Analysis of Implementation of a Program of All-Inclusive Care for the Elderly (PACE) Program (09/2023 to 06/2024)

Ethan served as the project manager for a project to help DHS analyze options for the implementation of a PACE program. In this role, Ethan designed an iterative project approach, oversaw the development of project deliverables, and directed project work for a team of five. In



addition, Ethan served as primary point of contact with DHS and provided responsibility for quality of all final project deliverables.

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

Training and Leadership Development (03/2024 to 07/2024)

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

Iowa Department of Human Services (DHS)

Hope and Opportunity in Many Environments (HOME) Gap Analysis Project (05/2024 to 08/2024)

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

Puerto Rico Medicaid Program (PRMP)

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

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

Nebraska Department of Motor Vehicles

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

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

Michigan Department of Education

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

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



West Virginia Bureau for Children and Families

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

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

Colorado Department of Human Services (DHS)

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

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

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

As a graduate assistant, Ethan made use of Statistical Package for the Social Sciences (SPSS) and other data management tools to work with large data sets. He also assisted with data organization and quantitative analysis and performed literature reviews and analysis.

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

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

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

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



Emily E. McCoy

RN, BSN, PMP®

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

PROPOSED PROJECT ROLE

Lead MMIS Project Manager

MEDICAID EXPERIENCE

22 years

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)

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



supporting and leading Medicaid projects within the WV MMIS, with the last two and a half years as the WV Director of MMIS Operations.

EXPERIENCE

BerryDunn (07/2016 to present)

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

West Virginia Department of Human Services (DoHS) & Bureau for Medical Services (BMS)

Client Relationship Manager and Program Manager – WV Engagement: Portfolio Management Office (11/2023 to present)

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

- *Third Party Liability (TPL) Recovery Audit Contractor (RAC) Procurement Phase II (06/2025 to present)*
- *School-Based Health Services (SBHS) Support Phase II (06/2025 to present)*
- *Mountain Health Reprourement Assistance (06/2025 to present)*
- *Transformed Medicaid Statistical Information System (T-MSIS) Support Project (06/2025 to present)*
- *Electronic Visit Verification (EVV) Reprourement (06/2025 to present)*
- *Child Welfare Initiative (CWI) Phase VI (06/2024 to present)*
- *Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project Phases VI (11/2023 to present)*
- *WV RISE Procurement Assistance Project Phase II (06/2024 to present)*
- *Medicaid Information Technology Architecture (MITA) SS-A Maintenance and Annual Update Assistance Project (06/2024 to present)*
- *Advance Planning Document (APD) Assistance Phase III (06/2024 to present)*
- *Partnership Management Support Project Phase III (06/2024 to present)*
- *Payment Error Rate Measurement (PERM) Project Reporting Year (RY) 2026 Phase II (06/2024 to present)*
- *Technical and Program Support Project (TAPS) Phases VII (11/2023 to present)*
- *PATH Project Management Phase III (06/2024 to present)*
- *Child Welfare Initiatives Project Management Services Phase V (06/2024 to present)*
- *State Plan Review and Support Project Phase V (06/2024 to present)*
- *Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA) Phase IV (06/2024 to present)*
- *1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project Phase VI (06/2024 to present)*
- *1115 Demonstration Behavioral Health Project Phase II (06/2024 to present)*
- *Strategic Managed Care Technical and Systems Support (06/2024 to present)*
- *Justice-Involved Program Support Phase II (06/2024 to present)*



- *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)



Emily served as a project manager for the CLMS project, leading and providing oversight to a team of individuals assisting the State in the creation of an RFP and other procurement activities.

American Samoa Medicaid State Agency (ASMSA)

Medicaid Training (10/2025 to 01/2026)

Emily served as the Medicaid SME and trainer for a two-day on-site training session with the ASMSA team. In addition to providing training, Emily assisted with the final recommendations and report to close out the project.

New Jersey Department of Human Services (DHS)

MMIS Modernization (07/2022 to 12/2023)

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

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

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

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

Henrico County, VA

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

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

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

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

- Interpreting regulatory policy to determine possible impacts to the MMIS and other systems
- Monitoring system performance against Medicaid policies and federal regulations for compliance and reimbursement



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



MDS Coordinator.

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

Clinical Nurse II.

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

Neuroscience Unit (01/1998 to 05/1999)

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

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

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

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



Bill Richardson

MHA, PMP®, Prosci® CCP, ITIL (F)

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 25 years of experience providing direct support to single state Medicaid agencies in over 15 states and territories, including AS, GA, GU, HI, MA, MN, MO, MS, OH, NC, ND, NH, NM, PR, USVI, WV
- Broad experience across program and policy, procurement, systems, and finance
- Over 10 years of Medicaid program and policy experience, including most federal authorities such as the state plan, Section 1115 waivers, Section 1915(c) waivers, and Section 1902(j) waivers
- Comprehensive system development experience including system development lifecycles (SDLCs), system design, and hands-on system coding and data experience

RELEVANT EXPERIENCE

25 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MHA, University of Minnesota, School of Public Health
- BS, Business, University of Minnesota, Carlson School of Management (Major: Management Information Systems, Minor: Political Science)
- Information Technology Infrastructure Library (ITIL) Foundation Certification
- Certified Project Management Professional® (PMP®)
- Prosci® Certified Change Practitioner (CCP)

Bill Richardson is a principal in BerryDunn's Medicaid Practice Group, presenting with 25 years of experience providing program—and project—level management services for Medicaid program, policy, and enterprise system projects. Bill has deep knowledge and experience both within the technical realm as a programmer and in the business and policy realm as professional with an enhanced focus on managing eligibility policy projects, Medicaid waivers, and State Plan Amendments (SPAs).

EXPERIENCE

BerryDunn (04/2011 to present)

Principal, Medicaid Practice Group (07/2018 to Present)

As a principal, Bill manages the strategy and execution of a portfolio of engagements. He utilizes his Medicaid experience to guide and develop the team to meet client needs. His work includes helping teams create solutions tailored to the individual client that leverage industry best practice and evidence-based decisions. Bill helps ensure project teams consistently deliver quality results to satisfied clients. In addition, Bill combines his experiences to support



BerryDunn initiatives such as BerryDunn's Healthcare Community of Practice, Innovation Council, Visioning Process, and Culture Team. In turn, he applies this experience to support client organizations.

American Samoa Department of Medicaid

Alternatives Analysis (10/2025 to Present)

Bill serves as the principal supporting BerryDunn's Medicaid policy team in an alternatives analysis project for American Samoa. Faced with a capped allotment and limited local funds, American Samoa seeks to understand the benefits of moving from their novel, Section 1902(j) Waiver-approved presumptive eligibility process, to a more traditional individual eligibility process. BerryDunn's policy team is helping American Samoa understand the financial and operational implications of this potential shift, along with options for strengthening the financial health of the American Samoa Medicaid program.

Guam Department of Public Health & Social Services (DPHSS)

Enterprise Portfolio Management Office (EPfMO) (01/2025 to Present)

Bill and BerryDunn's Medicaid policy team currently provide consulting services to the Guam DPHSS, Guam's single state Medicaid agency. Currently, this work includes supporting Guam in developing a Section 1915(c) waiver for home and community based services (HCBS), the first ever in a territory. Additionally, Bill and the team support Guam in assessing the Guam State Plan as it relates to coverage for new services, including diabetes prevention services. Through this work, Bill and the team navigate extensive stakeholder engagement and the federal authorities to support Guam's Medicaid program along with the financial considerations specific to territory Medicaid program.

United States Virgin Islands Department of Human Services (VIDHS)

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

Bill currently serves as a Medicaid policy principal and oversees BerryDunn's Medicaid policy related work for BerryDunn's work in the United States Virgin Islands for the VIDHS, USVI's single state Medicaid agency. In this capacity, Bill is helping the USVI assess options for Medicaid buy-in for the USVI, coverage for new benefits and payment methodologies, eligibility policy, financial modeling, and strengthening provider manuals. In his role, Bill helps ensure that BerryDunn brings the resources and expertise necessary to support the USVI's policy initiatives and helps this USVI manage compliance.

Minnesota Department of Human Services (DHS)

Bill currently serves as the contract manager for two projects supporting Minnesota's Department of Human Services, MN's single state Medicaid agency. He also served in that role for a project that has been completed. Bill helps ensure staff with the right experience support MN, the quality of BerryDunn's work, and MN's satisfaction with BerryDunn's support. These projects include:

- *Research Studies for Contingency Management Services (05/2024 to Present)*
- *1115 Waiver for Justice-Involved Individuals (02/2024 to present)*
- *Program Analysis of Implementation of a PACE Program (09/2023 to 06/2024)*



Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (07/2019 to Present)

Bill serves as the contract manager and principal in BerryDunn's partnership with PRMP under the PR Department of Health, PR's single state Medicaid agency, as it transforms its Medicaid enterprise. BerryDunn's EOMC services span from Medicaid policy and program transformation to program management across PR's Medicaid enterprise. BerryDunn has helped PR complete strategic planning for its Medicaid Enterprise System road map, improve the management of contracts and advanced planned documents (APDs), complete certification of multiple modules such as integrated eligibility system (IES), and transition aspects of operations from system vendor staff to the PRMP staff. In addition to Bill's contract management focus, he focuses his content knowledge on supporting the Medicaid program and policy. Some example projects include:

SPAs and Compliance

BerryDunn supports PR in maintaining its State Plan by reviewing SPA needs, reviewing related regulatory and sub regulatory guidance, drafting SPAs and public notices, and submitting SPAs. BerryDunn's work includes collaborating with Administration de Seguro's de Salud (ASES) to help ensure that Managed Care Organization (MCO) contracts and the State Plan are aligned. Further, BerryDunn works with PRMP to bring the State Plan up to date, including navigating the difference in funding and regulatory compliance for a territory as compared to states.

Federally Qualified Health Centers (FQHC) Payment Methodology Assistance

As PR navigated reimbursement rates for FQHCs, BerryDunn assisted PRMP in assessing options for rates for FQHCs. The work included identifying rates, assessing options for re-baselining rates, and assisting PR with options for documenting PR's approach to reasonable costs.

Money Follows the Person (MFP) Grant Application and Assessment

Puerto Rico sought to leverage the MFP grant to assess opportunities for expanding Long Term Services and Supports (LTSS) services in Puerto Rico. BerryDunn supported Puerto Rico's successful grant application and follow-on assessment work to support the awarded grant. BerryDunn worked with both PR and Centers for Medicare & Medicaid Services (CMS) to navigate the successful grant application despite PR not covering institutional long term care services.

LTSS Financial Analyses

As PR sought to secure funding through Congressional action, Bill and the BerryDunn team created financial estimates for funding needs for PR to support expanding Medicaid services to cover LTSS in PR.

Ohio Department of Medicaid (ODM)

Ohio Medicaid Enterprise System (OMES) independent verification and validation (IV&V) Services (12/2016 to 9/2025)



Bill served as the contract manager and project principal for the OMES IV&V engagement with Ohio's single state Medicaid agency. BerryDunn is helping ODM ensure a modular approach and implementation along with governance that will work for Ohioans and support ODM's modular certification process. BerryDunn works to support the interest of both CMS and ODM in successfully completing program goals.

Ohio Department of Administrative Services (DAS)

Ohio Benefits Program IV&V Services (04/2021 to 07/2023)

Bill served as the project principal and contract manager for the Ohio Benefits IV&V engagement. Through this work, BerryDunn supported DAS in addressing specific requirements of CMS during the operations phase of the Ohio Benefits program. DAS successfully transitioned away from IV&V in July of 2023.

Missouri Department of Social Services (DSS)

Missouri Medicaid Enterprise (MME) PMO Engagement (11/2017 to 07/2023)

Bill served as the project principal and contract manager for the MME PMO project spanning multiple MO DSS divisions with MO's single state Medicaid agency. Key activities included partnering with the MME to support the implementation of a program integrity solution along with business intelligence (BI) and enterprise data warehouse (EDW) solution and supporting certification.

Missouri Eligibility Determination and Enrollment System (MEDES) IV&V Services (07/2013 to 07/2023)

Bill served as the project principal and contract manager for the MEDES IV&V engagement. As part of this project, BerryDunn served as an independent partner as MO implemented a new IES. This work included an initial implementation, transition to a new systems vendor, and transition to a third vendor for maintenance and operations. BerryDunn provided proactive risk and issue identification and management.

Bill has worked on additional projects with MO, including serving as project principal for MO's Electronic Visit Verification (EVV) procurement assistance project where BerryDunn helped MO's Medicaid agency develop an EVV Request for Proposal (RFP), along with the MO Medicaid IT governance assessment that seeks to help MO determine a governance model that will help the State transform its Medicaid enterprise.

West Virginia Department of Human Services (DoHS), Bureau for Medical Services (BMS), and Children's Health Insurance Program (WVCHIP)

Bill has supported West Virginia in achieving their project goals in a variety of roles since 2011. Some of these roles include project manager, portfolio manager, and engagement manager. Projects in which Bill has supported West Virginia include:

- *West Virginia Technical Assistance Program Support (10/2025 to present)*
- *Section 1115 Behavioral Health Demonstration (10/2025 to present)*
- *HCBS projects (10/2025 to present)*
- *Certified Community Behavioral Health Clinic (10/2025 to present)*



- *Community Behavioral Health Clinic (10/2025 to present)*
- *WVCHIP Assessment of ACA Compliance and Transition Project Management Support (10/2013 to 08/2015)*
- *ICD-10 Transition Planning, Implementation, and Policy Remediation (03/2013 to 06/2015)*
- *PPACA Planning, Analysis, and Implementation Support (04/2011 to 12/2013)*
- *Data Warehouse/Decision Support System (DW/DSS) Project Management (02/2012 to 12/2014)*
- *Eligibility and Enrollment Project Support Services (04/2013 to 04/2014)*

Bill has worked on additional projects with West Virginia, including serving as project manager for some of WV's Health IT initiatives, assisting BMS with its PMO initiative, leading the development of an IV&V services RFP, and facilitating RAC vendor procurement evaluations.

New Mexico Human Services Division

Health and Human Services (HHS) 2020 Project Support (08/2016 to 06/2018)

BerryDunn provided support to the HHS 2020 project—New Mexico's modular MMIS replacement project under its single state Medicaid agency. As the engagement manager, Bill brought his MMIS experience in support of project management and system architecture.

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

Organizational and Business Process Redesign (07/2017 to 12/2017)

Bill served in the role of program director for the eligibility business process redesign effort for the customer-facing sections of Hawai'i's MQD with Hawai'i's single state Medicaid agency. Duties included overseeing the work performed by BerryDunn's team, reviewing and approving all deliverables, being involved in key meetings with the MQD and State leadership, and helping to ensure the full commitment of BerryDunn to the engagement. Phase two of the project culminated in a findings and recommendations report that included recommendations for organizational transformation of eligibility offices and call centers.

ACS, A Xerox Company – Government Healthcare Solutions (06/2001 to 04/2011)

ACS Health Enterprise Program

As a systems delivery manager, Bill provided team leadership and implementation management for internal and client-facing phases of the development and deployment of the ACS Health Enterprise system. Bill supported single state Medicaid agencies such as New Hampshire Department of Health and Human Services. In this role, he oversaw teams of business analysts, testers, and developers; directed the creation of an automation testing process to expedite testing of claim exceptions and reduce costs and risk; proactively identified risks and developed plans to mitigate risk and loss; led efforts to develop and document standard and repeatable processes for use across the organization; and implemented a risk-based testing methodology to manage schedule constraints while maintaining deployment quality.

State of North Dakota MMIS Project



As a project manager and team lead, Bill was responsible for the business design of ND's largest-ever IT project. He developed and adapted processes to overcome challenges of deployment of the system under a new methodology; managed scope expectations by focusing on minimizing enhancements to the system; managed the creation of use cases and design artifacts; led the development of ND's requirements analysis document for all business functionality related to healthcare claims adjudication and payment; led the alignment of the ND deployment with the Medicaid Information Technology Architecture (MITA) Framework; and provided weekly maintenance of multiple work plans.

State of North Carolina LEADS Project

As team lead, Bill was responsible for documenting requirements and a detailed system design for a multi-payer healthcare claims back-end processing system, including application of policy edits and audits. He authored business and technical designs to document system functionality in accordance with the State's goals; developed and maintained the project plan to manage project risks and management expectations; managed the process for systematically documenting existing claim audits, extracting, transforming, and loading (ETL) the audits into ACS format; and led the design of table-driven duplicate claim checking.

State of Mississippi's Envision Project

As a consultant, Bill provided design, development, and unit testing of healthcare claims back-end processing modules. He documented and enhanced functionality based on change requests; modified utilization review and prior authorization healthcare claims processing modules; and documented processes based on client input and analysis of the State's legacy system.

State of Georgia's Health Partnership Project

As an analyst, Bill completed development and unit testing of non-inpatient healthcare claim pricing, editing, and mass adjustment modules.



Eduardo "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)



Principal – MPG Lead (2014 to present)

As the leader of BerryDunn's MPG, Ed works with eight other principals to oversee all Medicaid projects, including managing risks, staffing/hiring, workload balance, strategy, pricing, contract negotiation, staff development, and business development. Ed's leadership has led to the growth of the Medicaid practice from two consultants in 2005 to over 135 team members in 2026.

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

Under his guidance, the practice responds to emerging trends and helps Medicaid agencies respond to policy changes such as the HR 1 ("One Big Beautiful Bill Act" or OBBBA), American Recovery and Reinvestment Act (ARRA), the Affordable Care Act (ACA), Substance Use Disorder (SUD) waivers, and Public Health emergencies, as well as state policies.

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

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

West Virginia Department of Human Services (DoHS)

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

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

Since Ed joined the WV project on a full-time basis in 2012, he has held many roles, including engagement manager, lead project manager, and general project manager. In 2012, he took responsibility for stabilizing and growing the local Charleston office to employ over 25 local staff. Ed has overseen over 150 projects for WV, several of which are described below. He now



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)



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

WVCHIP MCO Transition Planning Project Phases I and II (03/2019 to 2022)

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

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (10/2017 to 2021)

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

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

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

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

- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*



- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *SUD Waiver Initiative Project (03/2019 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *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)*



- *PPACA Planning, Analysis, and Implementation Support (2012 to 2015)*
- *5010 Refresh Project (2012 to 2015)*
- *State Medicaid Health IT Planning and HIT Plan Updates (2012 to 2014)*
- *Non-Emergency Medical Transportation (NEMT) RFP Development (2012 to 2013)*
- *MITA 3.0 Organizational Redesign (2013)*
- *Policy Workflow Assessment (2013)*
- *Prior Authorization Forms Revisions (2013)*
- *Pharmacy ePrescribing Planning, Communication, and Training (2012)*

Ohio Department of Medicaid (ODM)

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

BerryDunn provided IV&V support for ODM in implementing its vision for a modular MMIS in the OMES project. As project principal, Ed was responsible for the forming of the project team and initiating the project. Ed met with the Ohio sponsor monthly to review the project status and review identified risks, issues, and recommendations to mitigate those risks and issues. He oversaw the BerryDunn team helping ODM ensure a modular approach and implementation that will work for Ohioans and support ODM's modular certification process, including applying to Outcomes-Based Certification (OBC) approach. Ed monitored risks and mitigated exposure to the client, project, and firm. He managed the project and teamwork and facilitated appropriate stakeholder discussions, implementing smart practices. Ed helped ensure that all reporting was submitted accurately and timely to CMS. Ed transitioned from this project in 2018 to allow a new principal to establish and grow the relationship with the client.

Maine Department of Health and Human Services (DHHS)

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

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

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

North Carolina Office of the State Auditor

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



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

Martin's Point Health Care

HIPAA Compliance Planning and Implementation (2005 to 2007)

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

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

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

Iowa Department of Human Services (DHS)

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

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

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



Maine DHHS

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

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

Electronic Data Systems (1985 to 1988)

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

PUBLICATIONS AND PRESENTATIONS

- *Flexible Contracting and Contracting Best Practices*, Presentation for MESC 2014, 8/19/2014
- *Project Management/Testing*, Presentation for NESCSO workshop (2017)
- Moderator, MESC Conference sessions (2015-2019)
- *People and processes: Planning health and human services IT systems modernization to improve outcomes*, 11/23/2020 Blog
- Published Insights on www.berrydunn.com include but are not limited to: *NAMD 2020 reflections: Together towards the future* and *MESC 2020, 2021, 2022, and 2023 reflections*



Susan Chugha

BA, Prosci® CCP

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Extensive experience leading large-scale Medicaid policy and program portfolios
- Expert 1115 waiver professional with experience assisting clients with all stages of the waiver process, including program implementation oversight
- Experience with the successful implementation of the Medicaid Certified Community Behavioral Health Clinic (CCBHC) program as well as program monitoring
- Brings 10 years of expertise in Medicaid policy, transformational initiatives, compliance oversight, and engaging diverse stakeholders
- Demonstrated experience guiding request for proposal (RFP) development and managing end-to-end oversight of a completed Medicaid Managed Care Organization (MCO) model contract RFP
- Effective in driving efforts for policy and program design, development, and implementation (DDI)
- Strong portfolio, program and project management proficiencies

MEDICAID EXPERIENCE

10 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Business Management, Belmont Abbey College
- Prosci® Certified Change Practitioner (CCP)
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP II)

Susan Chugha is a manager in BerryDunn’s Medicaid Practice Group with more than 20 years of project management experience. In the past 10 years, Susan has honed her expertise in policy and Medicaid program efforts in various roles, including program manager, project manager, business analyst, and project coordinator. She provides strategic support to clients through waiver demonstrations, policy and program design, and implementation across behavioral health, managed care, and Home and Community Based Services (HCBS), including ongoing advisory and analytical support for managed care operations. Additionally, she has multiple years of experience with the Medicaid Information Technology Architecture (MITA) State-Self Assessment (SS-A) Annual Update report and roadmap activities, business process improvement, data quality initiatives, Medicaid Management Information System (MMIS) claim edit processes, project, and program management.



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

EXPERIENCE

BerryDunn (10/2015 to present)

West Virginia Bureau for Medical Services (BMS)

Mountain Health Promise (MHP) Support Project Phase II (6/2025 to present)

Susan provides dual leadership as program manager and subject matter expert (SME) by facilitating Joint Requirements Planning (JRP) sessions, overseeing project activities and budget performance, and helps to ensure consistent tracking and resolution of decisions, action items, risks, and issues.

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

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

Strategic Managed Care Technical and Systems Support Project (formerly known as the Programmatic Managed Care Support Project) (06/2024 to present)

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

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

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

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

Susan began serving in a dual capacity in June 2025, functioning as both program manager and SME to support project delivery and strategic oversight. Previously, Susan served as the project manager, where she oversaw the project team through project management, budgeting, and monitoring decisions, action items, risks, and issues. She has assisted the client and team with a variety of activities, such as SPA submission and approval, policy and provider application development including oversight of the public comment process. Susan also helped create a service code matrix that provides an overview of all allowable and required program services.



She has also been instrumental in coordinating a data workgroup that focuses on CCBHC state and clinic measures for reporting requirements. On a regular basis, she facilitates client, provider, and vendor meetings. She assists the client with MMIS system configuration edits and provides technical assistance with provider billing and Medicaid and/or Medicare reimbursement scenarios.

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

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

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

ARPA Section 9817: HCBS Implementation Project Phases I and II (05/2022 to 6/2024)

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

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

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

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

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

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

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

Organization Development (OD) Project (05/2022 to 11/2023)



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

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

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

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

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

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

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

MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (10/2016 to 09/2025)

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

Susan moved into the project manager role in November 2019. She provided oversight to the project team and managed the project budget and deliverables. Susan managed the flow of information and access to the client's MITA Management Portal (MMP) SharePoint site that



stores and tracks all the required MITA SS-A documents (e.g., business process forms, scorecards, goals and objectives, roadmaps, concept of operations, SS-A reports, supporting documentation) used for current and past assessments.

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

Susan managed the SUD waiver initiative project with responsibilities that included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables. She conducted deliverable review of all documents. She performed research on SUD services, Centers for Medicare & Medicaid Services (CMS) requirements, and State policies and procedures to support waiver activities. She drafted monitoring reports and oversaw the on time completion of assignments for federal submission. During the most recent phase of the project, Susan assisted in the development of the 1115 waiver renewal application and successful submission, created documents for the federal public comment period, presented during public hearings, and oversaw all communications with federal partners and actuarial vendors.

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

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

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

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

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

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

Independent Consultant (08/2010 to 10/2014)

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



Columbia Management (09/2012 to 10/2013)

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

Evergreen Investments (06/2004 to 05/2009)

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

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

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

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

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



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.



Nicole delivers results with a passion for building and motivating top-performing teams. The combination of Nicole's experience, drive, business savvy, and emotional intelligence has influenced her transformational leadership style. She has shaped a credible executive presence and is credited with playing an instrumental role in BerryDunn's evolution to its now prominent standing as a national leader in the HHS industry. Nicole's talents are exemplified through the partnership with WV Medicaid leadership she championed to initiate a multi-state collaborative where states can share information and brainstorm solutions; Nicole leads the WV project team with this initiative, and since its inception, WV has increased membership to 14 state partners that participate monthly.

EXPERIENCE

BerryDunn (06/2010 to present)

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

West Virginia Department of Human Services (DoHS) Engagement Manager (2012 to present)

- *Payment Error Rate Measurement (PERM) Project Phase II (05/2020 to 05/2021)*
- *Substance Use Disorder (SUD) Waiver Initiative Project Phases III and IV (03/2019 to 05/2021)*
- *State Plan Review and Support (SPRS) Project (02/2020 to 05/2021)*
- *Technical Assistance and Program Support Project (TAPS) (11/2018 to 04/2021)*
- *Project Management and Support Services for the Access to Care Project Monitoring Phase (04/2016 to 10/2016; 03/2017 to 04/2021)*
- *Managed Care Organization (MCO) Transition Planning Project Phase II (03/2020 to 02/2021)*
- *MCO Operational Readiness Review Assistance (09/2020 to 12/2020)*
- *MMIS Fee Schedule and Edit Quality Review (09/2017 to 09/2018; 01/2019 to 04/2020; 06/2020 to 11/2020)*
- *Enterprise Program Management Office (EPMO) (11/2018 to 10/2020)*
- *Mountain Health Trust (MHT) MCO Procurement Assistance Project Phase II (05/2020 to 09/2020)*
- *Mountain Health Promise (MHP) 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 (WVV) Solution Implementation Project (06/2018 to 12/2019)*
- *Data Visioning and Warehouse Request for Proposal (RFP) Development and Procurement Assistance (09/2017 to 08/2019)*
- *WVCHIP MCO Transition Planning (01/2019 to 07/2019)*
- *Provider Enrollment Application (PEA) Year 2 (05/2018 to 05/2019)*
- *Innovation Accelerator Program (IAP) Data Analytic Technical Support (09/2017 to 08/2018)*



- *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.



Project Management Organization Services for the West Virginia Medicaid People's Access To Help (10/2015 to present)

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

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

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

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

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

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

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

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

Nicole led the team that assisted the State with the response to the COVID-19 public health emergency. She supported the DoHS Commissioners and the Secretary to help ensure the State had the support they needed to address COVID-19 and the response to its aftermath. She oversaw the procurement and implementation of a contact tracing and disease investigation



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

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

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

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

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

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

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

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

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



procurements to support the five-year demonstration, and MCO contract requirements specific to the SUD demonstration.

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

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

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

Nicole served as project manager for the successful implementation of the 5010/D.0 standards required by federal mandate. In this role, Nicole supported the Bureau with her project management and subject matter expertise during the conversion of Health Insurance Portability and Accountability Act (HIPAA) Accredited Standards Committee (ASC) X12 version 4010A1 to ASC X12 version 5010 and National Council for Prescription Drug Programs (NCPDP) version 5.1 to NCPDP version D.0. This work included project management of deliverable review, subject matter expert (SME) advisory services, UAT planning assistance, operational readiness assessment assistance, and post implementation project management and monitoring.

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

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

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

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

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

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

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

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

Project Manager for Maine Integrated Health Management Solution (MIHMS) Provider Enrollment

Nicole served as project manager and SME for the Maine Department of Health and Human Services (DHHS), Maine's single state Medicaid agency, provider re-enrollment and



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

WV MMIS

Nicole managed the development, implementation, and evaluation of quality management and risk management activities to help ensure project compliance with all budget, time, and quality specifications to help assure client requirements across the Medicaid Enterprise. In her role, Nicole successfully project managed the on-time delivery of the 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



Jenna Tetrault

MBA

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

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Direct management of an 1115 Behavioral Health Transformation Demonstration
- Experience with 1115 demonstration waivers' federal application and negotiation processes
- Management and oversight of managed care related, finance, program integrity and federal reporting
- Extensive experience with CMS compliance deliverables and practices
- Skilled communicator and manager of a wide range of interested stakeholders to execute program goals

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Cambridge College
- BA, Rhode Island College

Jenna Tetrault is a multifaceted leader and innovator with over five years of experience in managed care, behavioral health, and project implementation. She brings a proven record of provider engagement, health care quality analysis, and stakeholder collaboration across programs, bureaus, and divisions.

EXPERIENCE

BerryDunn (01/2026 to present)

Jenna serves as a senior consultant in BerryDunn's Medicaid Practice Group. She is presently focused on the West Virginia 1115 Behavioral Health Demonstration project, serving as project manager.

West Virginia Bureau for Medical Services

1115 Behavioral Health Demonstration Waiver Project (01/2026 to present)

As project manager, Jenna assists the State with activities specific to program implementation, development, and oversight of waiver services in West Virginia. She facilitates project planning with internal State teams and external partners on behalf of BMS, while managing implementation workstreams such as policy development, systems preparations, and deliverable development in accordance with waiver requirements, monitoring, and evaluation.



Idaho Department of Health and Welfare (9/2020 to 12/2025)

Jenna supported Idaho's State Medicaid Agency, the Idaho Department of Health and Welfare in multiple roles.

Operations Program Manager (4/2024 to 12/2025)

As operations program manager, Jenna was responsible for implementing and building a Centers for Medicare & Medicaid Services (CMS) required state Medicaid residential facility designation process. She supported the implementation of Idaho's largest managed care contract for behavioral health and oversaw program operations for the state's behavioral health contract. She was also responsible for ensuring a cohesive approach to contracted services including Medicaid and non-Medicaid funded populations, claims processing, facility designation, financial impact oversight, program integrity concerns, and provider and member relations.

Additionally, Jenna managed and trained a team of five full time staff and a part time temp program specialist. She supported the management of seven program specialist/human services support staff on other division teams. Jenna directly managed the state's 1115 Behavioral Health Transformation demonstration, Medicaid residential facility designation process, CMS readiness review for the state's behavioral health MCO contract, Magellan Healthcare Inc., and behavioral health MCO-related finances, program integrity and federal reporting. Jenna also led support efforts for the state's behavioral health concerns tracking, including system claims processing coordination with internal and external stakeholders; fiscal tracking and program integrity; federal reporting, including maintenance of the state's authority compliance tracking; and CMS APD for 988 crisis system funding.

Business Analyst (5/2021 to 4/2024)

As a business analyst, Jenna was responsible for implementing and building a managed care compliance tracking system for contract Code of Federal Regulations (CFR), managed care program annual reporting (MCPAR), and network adequacy and access assurances reporting (NAAAR). This responsibility entailed countless hours of collaboration efforts across programs, bureaus, and divisions as well as with federal partners at CMS. She assisted in the development of a tracking system for 1915i YES enrolled members and a monitoring system for compliance with federal requirements. She also facilitated multiple stakeholder engagement events for the Medicaid 1915i YES SPA, and managed care quality strategy.

In addition, Jenna assisted with the development of a bureau employee onboarding Smartsheet and managed care standardized contract template. She helped with the state's American Rescue Plan (ARP)-directed payment application and evaluation, as well as the state's 1115 Behavioral Health Transformation demonstration which included the serious mental illness/substance use disorder (SMI/SUD) institution for mental disease (IMD) waiver and risk mitigation waiver demonstration. She also assisted with the development of the state's Managed Care Quality Strategy and Quality Strategy evaluation process and submission.

Program Specialist (9/2020 to 5/2021)



As a program specialist, Jenna provided contract monitoring and worked on establishing a metric protocol for the state's 1115 waiver. She collaborated with internal and external stakeholders, including CMS, on demonstration deliverables and expectations. She also developed a structure for demonstration compliance. Jenna complied with CMS deadlines for deliverables including reports and questions, and she assisted in the development of contract language and monitoring reports for the Idaho behavioral health plan contract.

Propeople (4/2021 to 11/2024)

Jenna served as temporary support staff/after hours on-call where she supported Family and Community Services (FACS) with foster youth supervision in the state-funded short-term homes. She trained and prepared support staff for working in homes with high needs children with significant behaviors. Jenna was available on-call after hours for youth and support staff for emergencies/crises. She also assisted and collaborated with the division of Family and Community Services, Division of Medicaid, state and local authorities, and hospitals to assist in youth crisis care.

Care New England - Integra (6/2019 to 9/2020)

Jenna served as a practice improvement specialist where she worked closely with practices and facilities, accepting accountable entity (AE) Medicaid patients to meet quality and efficiency goals, building collaborative relationships with key stakeholders. She efficiently captured and tracked data for HEDIS and Medicaid compliance and reporting. Jenna attended state meetings to aid in newly formed guidelines and measures for Medicaid AE total cost of care quality and outcome slate building, as well as state performance, and guidelines for key AE measures upheld for the organization. She also attended national healthy equity meetings with the National Health Equity Collaborative to support internal work on community health equity efforts.

Southcoast Health (9/2015 to 12/2019)

While working as a practice quality coordinator, Jenna was promoted from commercial HEDIS quality analyst to a grant-based position focused on the Medicaid population. She captured data and tracked HEDIS and Medicaid compliance. She also collaborated in a project to construct an Epic registry for the target population, providing input on the development of electronic health record data collection and clinical decision support tools. Jenna identified opportunities for performance improvement within various quality measures, developing and implementing action plans to increase HEDIS scores. In her role, she worked closely with practices and facilities accepting Medicaid patients to meet quality and efficiency goals, building collaborative relationships with key stakeholders.



Kitty Purington

JD

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Over 25 years' experience in Medicaid, behavioral health, long-term care policy analysis, program development, and systems transformation
- Over 10 years at the National Academy for State Health Policy, providing Medicaid technical assistance to states
- Leadership positions in local, state and national organizations
- Expertise in policy innovation, vendor and stakeholder management, and program implementation
- Focus on behavioral health and long-term care innovation, working with states to implement emerging models of care and financing
- Extensive state experience improving care for people with complex needs, including working for the State of Maine to develop and implement health home program

MEDICAID EXPERIENCE

6 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Juris Doctor, University of Maine School of Law
- BA, History and Spanish, University of Massachusetts

Kitty Purington is an experienced manager with almost 30 years of policy experience working with states on Medicaid, behavioral health, and long-term care. She has served in multiple leadership positions in state agencies, community organizations, and non-profits. She has a strong background in policy research and analysis, vendor and stakeholder management, and development and implementation of programs.

EXPERIENCE

BerryDunn (04/2022 to present)

West Virginia Bureau for Medical Services (BMS)

Justice-Involved Program Support (JIPS) Project (06/2024 to present)

Kitty serves as a subject matter expert (SME) for the JIPS project, assisting BMS in meeting the compliance requirements of Section 5121 of the Consolidated Appropriations Act (CAA) 2023.



Kitty supports BMS by providing timely policy research and analysis, developing materials, and providing guidance on all aspects of 5121 strategy and implementation.

*Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (SPA)
(06/2022 to present)*

Kitty serves as SME, supporting BMS in developing and implementing the CCBHC model in West Virginia, including SPA and policy development, stakeholder engagement, quality measurement, and other issues.

State Plan Review and Support (SPRS) Project (05/2022 to present)

In Phase II of the SPRS Project, Kitty provides subject matter expertise associated with the Medicaid State Plan. The SPRS Project Team drafts the SPA packages, tracks amendments through the review and approval process, supports BMS with the execution of Medicaid Services Fund Advisory Council meetings, and provides ad hoc assistance for State Plan related activities.

Substance Use Disorder (SUD) Waiver Initiative Project (05/2022 to present)

Working as a SME for Phase IV of the SUD project, Kitty provides expertise on the Medicaid 1115 waiver process, state policy development, national trends and best practices, and behavioral health systems and services.

Minnesota Department of Human Services (DHS)

Research Studies for Contingency Management (CM) Services (05/2024 to 09/2024)

Kitty served as a Medicaid SME for BerryDunn where she supported Minnesota's single state agency, Minnesota Medical Assistance. She provided expertise on SUD services and researched and developed policy documents to assist the client in understanding options related to service models and payment.

1115 Waiver for Justice-Involved Individuals (02/2024 to 02/2025)

Kitty served as a Medicaid SME for BerryDunn where she supported Minnesota's single state agency, Minnesota Medical Assistance. The project seeks to provide the State with the necessary information, data, and policy and cost analyses to develop Medicaid funding models that support corrections-involved Medicaid-eligible populations. The project will provide options and considerations for DHS for reentry services, as well as implementation, quality, and monitoring recommendations.

Puerto Rico Medicaid Program

State Plan Amendments and Compliance (05/2022 to 12/2023)

Kitty served as a SME for BerryDunn where she supported Puerto Rico's single state Medicaid agency, the Puerto Rico Medicaid Program. In that role, she researched and analyzed a range of policy issues, with a particular focus on services for older adults and the Money Follows the Person program.

National Academy for State Health Policy (NASHP) (04/2015 to 05/2022)



As Senior Program Director, Kitty led the Behavioral Health, Aging, and Disability portfolio for NASHP, a national, non-partisan, mission-driven organization that supports state leaders in their work to improve health policy. She worked with private foundations, federal agencies, states, and partner organizations to develop and implement multiyear projects that focused on delivery system transformation, payment reform, implementation of best practices, and other policy innovations. Kitty designed and oversaw technical assistance and learning opportunities to support state policy makers in their work on numerous Medicaid topics including physical and behavioral health integration, behavioral health data and quality, behavioral health crisis systems, palliative care policy, long-term care, and value-based payment. Kitty oversaw the development and dissemination of briefs, blogs, webinars, and other resources for state Medicaid, behavioral health, and long-term care officials, and facilitated meetings, webinars, and conference sessions to assist state health officials in problem solving and sharing best practices. Kitty has presented at state and national conferences on behavioral health and long-term care and has served in an advisory capacity to numerous state and federal initiatives, including the National Academies for Science, Engineering and Medicine's Roundtable on Quality Care for People with Serious Illness, and the National Council for Community Behavioral Health Policy Committee. She supervised a team of professionals to manage grant development, contracts, budgets, and staffing.

Office of MaineCare Services (OMS) (06/2012 to 04/2015)

Kitty worked as the Program and Policy Manager of Value-Based Purchasing with MaineCare, Maine's Medicaid agency, overseeing the development, implementation, and ongoing growth and improvement of OMS practice transformation and value-based purchasing initiatives. She developed and implemented the State's Health Home regulatory framework (SPAs, Medicaid regulation, provider contracts, licensing, and certification related to payment and provider requirements) in collaboration with OMS Office of Policy and State Attorney General's Office. Kitty worked with OMS Operations team and external vendors to implement an online portal and set of tools for primary care and behavioral health providers to support population-based care coordination, integration, and quality improvement. Kitty collaborated with internal and external stakeholders (related state agencies, providers, peer leaders, and family and advocacy organizations) on program development, implementation and quality improvement; oversaw communications, including production of member materials, provider communications and technical assistance, webinars, and public forums; and developed the State Innovation Plan and behavioral health-related initiatives as part of a successful \$30 million Centers for Medicare and Medicaid Services State Innovation Model grant. Kitty served as liaison post-award on projects such as Health Information Exchange, connectivity for Behavioral Health Home providers, learning collaboratives, and work force development, and developed the concept paper for the State's accountable care organization initiative.

National Academy for State Health Policy (NASHP)(01/2009 to 06/2012)

Kitty worked as a policy specialist, managing NASHP activities and deliverables under a five-year project funded by the Substance Abuse and Mental Health Services Administration focused on promoting evidence-based practices for adults, older adults, and children with behavioral health needs in state Medicaid programs. She designed and fielded a comprehensive state policy survey to capture current data on state Medicaid support for assertive community treatment, supportive housing, medication assisted treatment, and other



evidence-based services. She provided technical expertise and analysis on Medicaid and other state policies topics, including behavioral health, value-based purchasing, health information technology and exchange, data analytics, behavioral health privacy and confidentiality issues, and quality measurement. She also developed materials and facilitated activities to promote state learning objectives.

Community Counseling Center (01/2007 to 01/2009)

Kitty served as the Director of Government and Business Affairs for a large community mental health center. In this role Kitty identified new business opportunities and strategic initiatives for the organization, resulting in programs and partnerships to support physical and behavioral healthcare integration, school-based health centers, and pre-trial behavioral health supports for corrections-involved women. Kitty provided ongoing analysis and information regarding regulatory, reimbursement, and policy changes at federal, state, and local levels.

Maine Association of Mental Health Services (11/2001 to 01/2007)

Kitty served as interim Executive Director and policy analyst, providing leadership and strategic planning to the board of directors on a variety of issues for a statewide trade association of mental health and SUD provider organizations. Her role included development of a new governance structure and bylaw changes, and planning and implementation of an annual legislative agenda. She worked with state and federal agencies in advocacy, interpretation, and development of rules, legislation, and standards pertinent to reimbursement and delivery of behavioral health services. She represented the Association in a variety of forums, including as chair of the Governor's Medicare Part D Implementation Task Force, chair of the state Medicaid Advisory Committee, and member of the Policy Committee of the National Council for Community Behavioral Health.

Legal Services for the Elderly (12/1998 to 11/2001)

Kitty worked as a staff attorney to provide legal counsel to low-income seniors on a variety of elder law topics such as public benefits, estate planning, healthcare coverage, and disability matters.

National Alliance on Mental Illness (10/1993 to 05/1996)

Kitty worked as a managed care policy analyst to analyze Medicaid managed care policies for the state chapter of a national advocacy organization.



Elizabeth “Liz” Vose

MPA

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Experience leading large-scale transformation across multiple state agencies
- Experience with directing managed care organization (MCO) compliance and drafting care requirements
- Designed beneficiary and provider engagement plans to inform managed care changes
- Experience translating request for proposal (RFP) requirements into MCO model contract
- Directed behavioral health federal quarterly reporting activities
- Background in transitioning behavioral health services and populations into Medicaid managed care

MEDICAID EXPERIENCE

10 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPA, Finance & Information Management, Rockefeller College of Public Affairs & Policy
- BA, French Literature and Language, Skidmore College

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

EXPERIENCE

BerryDunn (02/2022 to present)

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

West Virginia Bureau for Medical Services (BMS)

Mountain Health Reprocurement Assistance (06/2025 to present)



Liz serves as the Medicaid project manager and procurement/ managed care subject matter expert (SME). Her responsibilities include providing oversight of the project team's day-to-day activities and monitoring progress against the agreed-upon deliverables.

Strategic Managed Care Technical Assistance and Support Project (06/2024 to present)

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

For the Legislative Implementation Assistance Project (LIAP) subproject, Liz served as the Medicaid project manager. Liz managed the project and led a team of consultants. Her responsibilities included providing oversight of the project team's day-to-day activities, facilitating meetings, and monitoring progress against the agreed-upon deliverables.

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

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

Purchasing Support (03/2024 to present)

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

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

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

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

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

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2023 to 09/2024)

Liz served as a Medicaid managed care SME for this initiative designed to help ensure access to coordinated comprehensive behavioral healthcare.



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

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

Mountain Health Promise (MHP) Procurement Assistance (07/2022 to 09/2023)

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

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

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

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

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

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

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

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

Liz worked in the Division of Managed Care to oversee a team of regulators on managed care plan compliance with Medicaid Model Contract. She oversaw stakeholder engagement activities including public presentations, road shows, and social media activities, and was responsible for the development and approval of internal policies and procedures and external communications including press releases and newsletters. She consulted with federal and state governments and the private sector to establish standards that comply with regulatory guidelines.



Project Manager (12/2013 to 04/2015)

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

SUNY Albany (09/2011 to 12/2013)

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

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

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

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

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



John Laukkanen

MAR, MSW

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

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Six years' experience directly supporting a single state Medicaid agency
- Served as State Authority for Institutes of Mental Disease (IMD) policy
- Maintained State Behavioral Health Services billing manual for all Medicaid covered behavioral health services used by providers and Managed Care Entities (MCE)
- Extensive stakeholder engagement experience to represent Medicaid policy in public forums, collaborate with sister State agencies for alignment and support, and managed a 3-year provider satisfaction initiative to improve Independent Provider experiences

MEDICAID EXPERIENCE

7 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MSW, University of Southern Mississippi
- MA, Religion, Trinity International University
- BA, Bible and Pastoral Ministry, Central Bible College

John Laukkanen is a management professional with a history of meeting challenges in complex organizations that rely on collaborative skills to contribute to agency growth and success. He has a proven track record of delivering results in fast-paced environments that have pockets of ambiguity.

EXPERIENCE

BerryDunn (02/2025 to present)

John currently serves as a Medicaid subject matter expert (SME) supporting clients with policy research, analysis, and development of project deliverables for a wide variety of program initiatives.

West Virginia Bureau for Medical Services (BMS)

Home and Community Based Services (HCBS) Quality Improvement (QI) (11/2025 to present)

John provides SME and project support for implementation of the Federal 2024 "Access" Rule for HCBS waivers quality improvement requirements. John collaborates with other BerryDunn SMEs and State Waiver program managers to identify compliance factors and strategies to execute federal standards.

Mountain Health Reprocurement Assistance (07/2025 to present)



John provides SME and project support through the re-procurement process of West Virginia's Mountain Health Promise managed care organization (MCO) contract which provides specialized managed care for children and youth and assists children in foster care, kinship care, and adoptive care.

1115 Demonstration Behavioral Health Project (02/2025 to present)

John provides SME and project support with BMS managed care-related activities including conducting regulatory and policy research and analysis of issues impacting policy and system implementation. John works to translate policy decisions into Medicaid Enterprise System (MES) change requests to help ensure integrity across the Medicaid system.

Justice-Involved Program Support (JIPS) (02/2025 to present)

John provides SME and project support, conducting regulatory and policy research and analysis of issues. John works with State staff and stakeholders to develop policy, implementation, and operational direction and workflows. This includes navigating and tracking overlap and distinctions with other re-entry initiatives in the State happening in parallel.

Strategic Managed Care Technical and Systems Support (02/2025 to 12/2025)

John provided SME and project leadership to present 2024 and 2025 Final Rule summary, analysis, and recommendations to West Virginia, including creating a formal training for state staff to support onboarding and orientation for the Dual Eligible Special Need Plan oversight and engagement.

Puerto Rico Medicaid Program (PRMP)

External Quality Review Organization (EQRO) Re-Procurement (09/2025 to 11/2025)

John provided SME and project support through the re-procurement process of Puerto Rico's EQRO request for proposal (RFP) development and publication. The RFP was updated from the previous contract cycle to align with current managed care federal regulations and other CMS resources. John supported the RFP evaluation team by orienting them to the scope of the RFP and framework to review and score proposals from EQROs.

Colorado (CO) Department of Health Care Policy and Financing (HCPF) (01/2019 to 01/2025)

John served in multiple roles providing support to Colorado's single state Medicaid agency, HCPF.

Behavioral Health Strategy Manager

John worked with the Division Director to identify, prioritize, and manage project execution of Medicaid behavioral health policy and benefit changes (new, expansion, or redesign) for CO's single state Medicaid agency that aligned with Executive Leadership priorities and goals. This included identifying leadership priorities to division staff in order to move program and benefit implementation forward within the scope and goals established by Executive Leadership; facilitating conversations with Centers for Medicare & Medicaid Services (CMS) related to behavioral health policy proposals and benefit design to help ensure CO strategy complied with all federal parameters and can optimize Federal Financial Participation (FFP); and serving as



the technical SME for the managed care Capitated Behavioral Health Benefit and its integration with other Department benefits and State Agency alignment. He also worked to align Medicaid policy and process with Behavioral Health Administration (BHA) rules and design to promote and build a cohesive and comprehensive behavioral health continuum of care. John maintained authority over CO's State Behavioral Health Services (SBHS) Billing Manual with an expert knowledge of its contents and scope. He served as the Senior Authority with single, unique, technical subject matter expertise related to federal IMD guidelines. He worked with Department contractors seeking appropriate waivers to advance CO Medicaid behavioral health benefit and policy considerations in line with established strategy.

Behavioral Health Policy and Benefit Unit Supervisor

In this role, John managed all aspects of HR responsibilities for the Unit. He oversaw the integration and promotion of diverse behavioral health programs into the Accountable Care Collaborative (ACC) to accomplish effective and efficient program improvements and enhancements. He also served as the liaison to the CO Department of Human Services (CDHS) Office of Behavioral Health (OBH) quality assurance and standards programs, including licensing and designation, and provided consultation and technical assistance to other Department divisions and sections, state agencies, providers, vendors, and advocates.

ACC Pediatric Behavioral Health Liaison

John was responsible for liaising with State and County staff to promote understanding and access to Medicaid behavioral health services for the Child Welfare population, including staff at CDHS-Division of Child Welfare (DCW) and OBH, CO counties, and the CO Human Services Directors Association (CHSDA). He helped facilitate the "HRCC" Forum, which consisted of representatives from HCPF, the Regional Accountable Entities (RAE), CDHS and Counties [HRCC stands for the first letter of each representative group], to promote shared understanding between parties responsible for meeting the behavioral health needs of children in Child Welfare. He also led Medicaid policy design and implementation related to the Family First Prevention Services Act (FFPSA) including drafting residential policy related to IMD and representing the Department in stakeholder engagement work with providers, county leadership, and state counterparts. John managed the Capitated Behavioral Health Benefit's SBHS Billing Manual for the state, including facilitating Coding Committee meetings, and editing and publishing the manual quarterly. He was responsible for ensuring the Capitated Behavioral Health Benefit was accurately represented; answers were consistent with Medicaid authority and scope and ensuring new policy and benefit coding components were integrated into the manual accurately.

Mental Health Center of Denver (12/2015 to 12/2018)

Behavioral Health Consultant

As a behavioral health consultant, John responded to warm handoffs by multiple pediatric providers at Horizon Pediatrics and Sapphire Pediatrics in an Integrated Care model. He provided brief interventions to patients to address social, emotional, and behavioral concerns ranging from pregnancy-related depression to tantrumming, ADHD, family/sibling conflicts, and teen anxiety and depression.

Community Reach Center (12/2013 to 01/2016)



Behavioral Health Consultant

John responded to warm handoffs by multiple pediatric providers at Rocky Mountain Youth Clinics (now Every Child Pediatrics) in an Integrated Care model. He provided brief interventions to patients to address social, emotional, and behavioral concerns ranging from pregnancy-related depression to tantrumming, ADHD, family/sibling conflicts, and teen anxiety and depression. He also created and implemented a 1-hour ADHD Orientation for parents and families and managed a system to coordinate referrals from agency-wide Behavioral Health Consultants (BHC) for specialized mental health services at Community Reach Center.

Crisis Response Therapist

John provided crisis counseling for referrals coming from outpatient therapists and inpatient step-down clients. He conducted home visits/community based monitoring for high-needs clients receiving intensive mental health services and conducted intake interviews for clients engaging mental health services for the first time.



Sandra Manzo

MSW

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

18 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

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

EXPERIENCE

BerryDunn (05/2025 to present)

Puerto Rico Medicaid Program (PRMP)

Targeted Case Management Implementation as per Section 5121 of the Consolidated Appropriations Act (CAA) of 2023 (07/2025 to present)

Sandra supports Puerto Rico's Medicaid agency by working to establish and implement targeted case management and screening and diagnostic services through provision of subject matter expertise in the areas of SPA processes, research and policy analysis, and program implementation. She also supports the team through translation of documents and in meetings.

State of Vermont, Department of Vermont Health Access (DVHA)

Medicaid Management Information System (MMIS) Core Claims and Fiscal Agent Services (MMIS Core) Procurement Assistance (07/2025 to 09/2025)



Sandra provided subject matter expertise on the impacts of MMIS modernization efforts for Vermont's 1115 waiver and programs. The findings were included in the Research and Recommendations Summary client deliverable.

West Virginia Bureau for Medical Services (BMS)

Home and Community Based Services (HCBS) Quality Initiative (QI) Project (08/2025 to present)

Sandra assists BMS with its implementation of provisions within the Access rule to meet the Centers for Medicare & Medicaid Services (CMS) requirements for quality measure tracking and reporting. This work involves regular client engagement and working with her team to help BMS identify the most efficient way to adopt and implement standardized processes.

Mountain Health Reprocedure Assistance (07/2025 to 12/2025)

Sandra provides subject matter expertise in the development of technical and detailed specifications for the MHP managed care contract.

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

Sandra supports BMS in the management of CSEDW activities and 1915(c) waiver amendments. She analyzes federal and state policy to assess impact on the waiver program and the West Virginia. Sandra also prepares reference and resource documentation to support the completion of BMS project tasks.

1115 Demonstration Waiver Initiative Project (05/2025 to present)

Sandra assists BMS with activities specific to program implementation and development, focusing on efforts related to supported housing, quick response teams, and managed care initiatives.

State Plan Review and Support (SPRS) Project (05/2025 to present)

Sandra provides support on state plan submissions, working closely with BMS to help ensure SPAs move forward toward approval. She also supports BMS with research and policy analysis to advance West Virginia's Title XIX initiatives

Oklahoma Health Care Authority (05/2008 to 05/2025)

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

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

Sandra provided direction, coordination, management, and oversight of all phases of SoonerSelect (Oklahoma's managed care) program design and implementation. She was lead for the managed care procurement processes, including drafting the managed care procurement contract and participating on the review committee. She served as the primary leadership contact to managed care contracted entities and to the Centers for Medicare & Medicaid Services (CMS) regarding attainment and management of managed care authority, program implementation, proposed policy, and contract submission and management for Oklahoma's SoonerSelect programs. Her responsibilities included collaborating with various



interagency departments, sister agencies, and managed care contracted entities for the successful implementation of SoonerSelect; representing the Oklahoma Health Care Authority as needed in multiple public forums at local, state, and national levels; and directing the work of 21 professional and technical employees.

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

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

Federal Authorities Manager (01/2015 to 10/2019)

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

Policy Specialist and Senior Policy Specialist (7/2009 to 01/2015)

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

Child Health Specialist (05/2008 to 7/2009)

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

Bethany Behavioral Health Hospital (01/2014 to 10/2018)

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



Sarah Rinn

MPH

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Seven years' experience supporting a state Medicaid agency implement an opioid prescribing quality improvement program authorized by the State legislature, including the development of state opioid prescribing guidelines and clinical quality measures.
- Served as strategic engagement lead for the Health Resources and Services Administration (HRSA) Bureau of Primary Health Care's data modernization effort.
- Directly supported a state Medicaid agency's eligibility policy and system reform under the Affordable Care Act.
- Extensive stakeholder engagement experience to represent Medicaid policy and programs with health care providers, Medicaid Managed Care Organizations (MCOs), tribal nations, and beneficiaries.

MEDICAID EXPERIENCE

10 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPH, George Washington University, School of Public Health
- BA, Government and Legal Studies, Bowdoin College

Sarah Rinn is a senior consultant in BerryDunn's Medicaid Practice Group with over a decade of experience in multiple state Medicaid agencies and the federal government. Sarah is well-versed in health policy development and analysis, quality measurement, and program implementation, as well as stakeholder engagement with a focus on organizational and programmatic change management. Sarah specializes in implementing quality improvement initiatives and identifying data-driven solutions to challenging problems. Sarah has deep familiarity with the importance of stakeholder engagement and involving those with lived experience in program and policy development. Sarah is an effective communicator and skilled at developing collaborative relationships.

EXPERIENCE

BerryDunn (07/2025 to present)

Sarah is a senior consultant in BerryDunn's Medicaid Practice Group. She serves as a Medicaid Subject Matter Expert (SME) supporting clients with policy research, analysis, and the translation of policy and program needs into systems requirements. She will support projects by



providing subject matter expertise, reviewing client deliverables, project engagement, and research.

West Virginia Bureau for Medical Services (BMS)

Certified Community Behavioral Health Clinics (CCBHC) (7/2025 to present)

Sarah provides SME and project support for implementation of the CCBHC program in West Virginia, conducting policy and data research and analysis. Sarah facilitates the CCBHC Data Work Group, and collaborates with other BerryDunn SMEs, program managers, and BMS and Bureau of Behavioral Health staff to operationalize the CCBHC-specific data reporting requirements.

Section 1115 Demonstration Project (07/2025 to present)

Sarah provides SME and project support, conducting regulatory and policy research and analysis to identify and translate information needs, defining data-sharing requirements and developing processes to support data exchange for the reentry and supported housing services. Sarah works with State staff and community stakeholders to clarify workflows, align policy and operational goals, and support timely and secure data-sharing.

Justice-Involved Program Support (JIPS) (07/2025 to present)

Sarah provides SME and project support, conducting regulatory and policy research and analysis of Centers for Medicare & Medicaid Services (CMS) rules, as well as West Virginia juvenile justice rules and procedures, to inform information and data-sharing needs to support compliance with Section 5121. The JIPS work includes analysis and tracking of overlap and distinctions with the Section 1115 reentry initiative.

United States Department of Health and Human Services

Health Resources and Services Administration (10/2023 to 06/2025)

Sarah served as a public health analyst: strategic engagement lead for data modernization initiative where she implemented the modernization of electronic clinical data reporting for 1,400 community health centers serving 31 million patients, managing testing support for 20+ Health Information Technology (HIT) vendors. She developed and executed a strategic communications plan for data reporting modernization, with participation in monthly stakeholder meetings increasing 700% from 2024 to 2025. She also managed responses to thousands of Salesforce inquiries, analyzing trends to identify engagement opportunities, staff training needs, and new business requirements. Sarah led the modernization of financial data collection from community health centers.

Minnesota Department of Human Services (DHS) (2015 to 2022)

Sarah served in a variety of positions for Minnesota's state Medicaid Agency, the Department of Human Services.

Opioid-prescribing Quality Improvement Program Within Medicaid (2016 to 2022)

Serving as team lead, Sarah developed statewide opioid prescribing guidance, leveraging expertise in the scientific literature, and federal and state policy landscape for treatment of



substance use disorder. During her tenure, she facilitated monthly meetings of a multi-disciplinary, expert advisory body, developed an opioid prescribing quality improvement initiative among clinicians, and prepared program briefs for agency leadership, state legislative, and governor's office.

Diabetes Prevention Project (2015 to 2016)

As a diabetes prevention project manager, Sarah administered a study on behavioral health incentives among Medicaid enrollees, including fiscal reporting and communications with federal, state, and insurance industry partners.

Independent Contractor, Tennessee Department of Finance & Administration (2013 to 2015)

Sarah served as an independent contractor for Tennessee's state Medicaid agency, the Department of Finance and Administration, Sarah provided Medicaid subject matter expertise and guidance to state eligibility policy staff during the build out and implementation of a new electronic eligibility determination system and led development of eligibility policy and procedures manual.

Tennessee Department of Finance & Administration, Bureau of TennCare (2012 to 2013)

Sarah served as a policy expert for Tennessee's state Medicaid agency, the Department of Finance and Administration. Sarah provided expertise to support Medicaid eligibility reform under the Affordable Care Act where she analyzed federal regulations for their impact on Tennessee's policy goals and provided policy briefs to state officials and industry experts. She also directed IT contractors developing an automated eligibility determination system.

Tennessee Department of Human Services (2011 to 2012)

As a Medicaid policy director, Sarah provided guidance to state Medicaid caseworkers about eligibility regulations and procedures. She developed a training program which was delivered to 2,500 staff statewide. She also supervised a team supporting Medicaid-Medicare dual eligibility and long-term services.

PUBLICATIONS

- Gilmer T, O'Conner PJ, Schiff JS, Taylor J, Vasquez-Benitez G, Garrett JE, Vue-Her H, **Rinn S**, Anderson J, Desai JR. Cost effectiveness of a community based Diabetes Prevention Program with participation incentives for Medicaid beneficiaries. *Health Services Research* 2018;53(6):4704-4724.
- **Sarah Rinn, MPH**, David Kelly, MS, Ellie Garrett, JD, Robert Lloyd, Monica Patrin, MS and Jeff Schiff, MD, MBA. It's shorter than you think: Understanding how quickly acute opioid use can convert to chronic and why. 2018 AcademyHealth Annual Research Meeting held June 24-26 in Seattle, Washington.
- David Kelly, MS, **Sarah Rinn, MPH**, Titilope Adeniyi, PhD, Kevan Edwards, PhD, Jeffrey Schiff, MD, MBA. Big crisis meets big data: Provider-level analysis of opioid prescribing for Minnesota's Opioid Prescribing Improvement Program. 2018 AcademyHealth Annual Research Meeting held June 24-26 in Seattle, Washington.
- **Sarah Rinn, MPH**. Multi-level opioid prescribing measures in the Minnesota Medicaid program. February 12, 2018. Centers for Medicare and Medicaid Services. CMS Quality Conference, Baltimore, MD.



Marie LaPres

JD, BSN, RN

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Experience with Medicaid policy development and implementation
- Experience with research, analysis, implementation activities, and budget oversight for existing and new policy initiatives regarding statewide Medicaid policy
- Medicaid state plan amendment (SPA) development and implementation experience
- Section 1115 Demonstration waiver application development and evaluation monitoring
- Experience conducting claims payment system logic testing for systems enhancement activities
- Law degree with certification in Health Law

MEDICAID EXPERIENCE

17 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Juris Doctor, De Paul University College of Law, Certificate in Health Law
- BSN, Nursing, University of Michigan
- Registered Nurse, State of Illinois, Active
- Registered Nurse, State of Michigan, Active

Marie is a state Medicaid program subject matter expert (SME) with more than 17 years of state government experience in clinical healthcare and legal practice expertise. She is detail-oriented with results-driven outcomes through analytical thinking, decision-making, and problem-solving skills. Marie also has experience implementing innovative strategic Medicaid program initiatives with cross-team collaboration.

EXPERIENCE

BerryDunn (01/2024 to present)

Marie is a senior consultant in BerryDunn's Medicaid Practice Group. She currently serves as a Medicaid SME, supporting clients with policy research, analysis, and development of project deliverables for a wide variety of program initiatives.

United States Virgin Islands (USVI) Department of Human Services

Enterprise Portfolio Management Office Project (09/2024 to present)

Marie serves as a Medicaid policy SME for the project. In this role, she supports the USVI's single state Medicaid agency, the Department of Human Services, by helping to ensure compliance with territory and federal regulations through research and analytics; drafting SPA documents; preparing public notice documents and SPA package materials; and developing provider policy manual materials for a wide variety of program covered benefits. She also



performs targeted research and delivers strategic insights through summaries and impact analyses on Centers for Medicare & Medicaid Services (CMS) regulations and guidance to drive client decision-making.

West Virginia Bureau for Medical Services (BMS)

Mountain Health Reprocedure Assistance (07/2025 to present)

Marie provides subject matter expertise and project support through the re-procurement process of West Virginia's Mountain Health Promise program contract which provides specialized managed care for children and youth and assists children in foster care, kinship care, and adoptive care.

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

Marie provides subject matter expertise and project support with BMS managed care related activities, including conducting regulatory and policy research and analysis of issues impacting managed care operations and quality initiatives.

Substance Use Disorder (SUD) Demonstration Waiver Initiative Project (09/2024 to present)

Serving as a SME for Phase IV of the SUD project, Marie assists with the development of waiver services policy and implementation planning; Special Terms and Conditions (STC) compliance; and managed care programmatic integration activities.

School Based Health Services (SBHS) Grant Support (07/2024 to present)

Marie assists with supporting BMS in the management of grant activities and deliverables. This multiyear grant project supports the department in the planning and implementation of expanding SBHS to additional Medicaid-eligible children in West Virginia.

State Plan Review and Support (SPRS) Project (05/2024 to present)

Marie provides subject matter expertise associated with the West Virginia Medicaid State Plan. As a member of the SPRS team, she assists with the research, analytics, drafting, and planning of SPA packages; tracks amendments through the review and approval process; and supports BMS with planning for advisory group meetings in compliance with federal requirements.

Technical Assistance and Project Support (TAPS) (03/2024 to present)

Marie serves as a senior consultant to BMS as part of the TAPS team. In this role, she conducts research and prepares summaries and impact analyses related to CMS rules and other federal Medicaid guidance. She also conducts ad hoc research in support of client initiatives.

Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (02/2024 to present)

As a senior consultant, Marie serves as a SME, supporting BMS with policy research and development and drafting of project deliverables. This work contributes to the team's initiative of implementing a Medicaid State Plan Amendment for West Virginia's new CCBHC program which provides coordinated physical health and behavioral health services through an integrated model of care delivery. She assists BMS with its Medicaid Management Information System (MMIS) system configuration edits, provides technical assistance with provider billing



and reimbursement issues, and develops policy and provider communication materials that enhance engagement and help ensure compliance with program guidelines.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (02/2024 to 06/2025)

Marie served as a Medicaid SME supporting BMS with managed care related policy research and development, quality initiatives, reporting activities, and staff education curriculum development. She provided ongoing technical support and assistance for programmatic implementation of new policy initiatives.

Mississippi Department of Rehabilitation Services (MDRS)

Comprehensive Statewide Needs Assessment (CNSA) Project Management Services (02/2024 to 12/2024)

Marie served as a Medicaid SME for the project team. The purpose of the project was to complete a CNSA for Mississippians with disabilities to satisfy requirements in the Rehabilitation Act of 1973, and to meet federal guidelines in helping to ensure accessibility of vocational services.

Michigan Department of Health and Human Services (03/2011 to 01/2024)

During her tenure with the state organization, Marie held several positions supporting Michigan's single state Medicaid agency, the Michigan Department of Health and Human Services.

State Administrative Manager (05/2014 to 01/2024)

Marie planned and directed specialized areas of Medicaid policy development and implementation, including physician services, maternal and infant health, reproductive health, and home visiting program benefits. She was responsible for research and analysis of complex Medicaid program concepts/policies to help ensure compliance with federal and state legal requirements, and she developed and implemented waiver activities related to the state's Medicaid eligibility expansion, Healthy Michigan Plan Section 1115 Demonstration waiver and policy. Marie planned, convened, and chaired/attended meetings with state managed care organizations, departmental staff, providers, lobbyists, and federal agency staff. She oversaw budget and rate development for Medicaid policy initiatives related to physician services, physician-administered drugs, and new program preventive services initiatives. She directly supervised a multi-skilled team, including assigning work, reviewing work products, promoting teamwork, and fostering professional development.

Departmental Specialist (03/2011 to 05/2014)

Marie served as sole staff specialist responsible for statewide Medicaid policy for physician services benefit, including research, analysis, implementation activities, and budget oversight activities for existing and new policy initiatives. She prepared and maintained policy research documents and presentations and developed and maintained relationships with managed care entities, community stakeholders, and other government agencies. Marie implemented directives from the state legislature and the governor's office, and she was responsible for policy benefit plan operations and compliance, working with state and federal auditors and legal authorities.



Medicaid Utilization Analyst (01/2009 to 03/2011)

Marie was responsible for research and analysis of complex medical procedures and new technology in relation to recognized standards of clinical practice and current Michigan Medicaid policy coverage for reimbursement determinations. She worked on Medicaid payment resolution of suspended claim processing issues and served as medical review resource to the State's Medicaid Provider Support Unit and other members of the division. Marie conducted claims payment system logic testing for systems enhancement activities.

McLaren Greater Lansing Hospital (12/2001 to 12/2009)

As a registered nurse, Marie was a staff nurse in the inpatient critical care unit, including Surgical Intensive Care Unit and Cardiac Intensive Care Unit. She was responsible for all aspects of nursing care of critically ill patients, including post-surgical, cardiac, and infectious disease care.

Lowery and Associates (07/1998 to 12/2005)

Marie worked as an associate attorney for a civil litigation firm practicing insurance defense of personal injury claims arising from auto-truck accidents. She has experience in assisting with pretrial discovery, document production review, and analysis of medical and insurance documents in preparation for defense at trial.



Alex Lyubarov

MS, MCP

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

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Experience with Integrated Eligibility System (IES) projects in multiple states
- More than 20 years in IT and Project Management, including over eight years of Eligibility and Enrollment experience
- Direct experience with Medicaid Data Warehouse (MDW) and T-MSIS

MEDICAID EXPERIENCE

11 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MS, Computer Engineering, Dagestan State Technical University
- BS, Computer Engineering, Dagestan State Technical University
- Microsoft Certified Professional (MCP)
- Performance Solutions International, LLC (PSI) - Business of Health Care Providers, Payers and Life Sciences
- CompTIA A+ Certified

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

EXPERIENCE

BerryDunn (07/2021 to present)

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

Organizational and Business Process Redesign (10/2023 to present)

Alex supports Hawai'i's single State Medicaid agency, and is serving as the engagement manager overseeing BerryDunn's Business Process Redesign and Associated Support Services Project (BPRASSP). Alex also oversees the business process redesign effort for the customer-facing sections of Hawai'i's eligibility department, MQD.



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.



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

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

Micro Merchant Systems, Inc (03/2007 to 06/2008)

Alex served as a senior systems analyst managing vendor pharmacy software, providing full application support, client-specific customizations, and database/SQL query support. Alex managed and supported more than 700 client Windows XP and 2000 workstations and Windows Server 2003 environments, including migrations, troubleshooting, and system repairs. He maintained LAN/WAN connectivity across offices to support local and remote users, and led the pharmacy's initial implementation of DNS, DHCP, and WINS. He monitored system and application health, administered user accounts, and provided on-site technical support and consultation to implement vendor solutions, analyzed EHR/EMR deployments, and assessed internal business unit needs.

Marine Park Electronics, Inc (09/2000 to 03/2006)

Alex served as technical support manager, building and managing a team of customer support specialists and providing training across technical support and customer relationship management functions. Played a key role in managing customer and vendor relationships while supervising Help Desk operations. Delivered on-site technical support in Windows and NetWare environments, including LAN setup and maintenance. Planned and executed equipment purchases for internal operations and customer deployments. Maintained and repaired Intel-based desktops and servers, troubleshooted Windows and other applications, assembled and tested network hardware, and provided technical consulting support to sales and purchasing teams.



Dawn Webb

BS, PMP®, CPC, COC, Prosci® CCP, LSSGB

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Healthcare Leadership, Wheeling Jesuit University
- Certified Project Management Professional® (PMP®)
- Certified Professional Coder (CPC)
- Certified Outpatient Coder (COC)
- Prosci® Certified Change Practitioner (CCP)
- Certified Lean Six Sigma Green Belt Certification (CLSSGB)

Dawn Webb serves as a manager within BerryDunn's Medicaid Practice Group (MPG), where she offers leadership and oversees project management for West Virginia's MMIS and policy unit initiatives. With three decades of experience in medical claims processing and revenue cycle administration, including 14 years dedicated to MMIS, state Medicaid programs and policies, and federal funding requests such as Advance Planning Documents (APDs), Dawn brings substantial expertise to her role. Her 15 years of project management experience, along with credentials as a CPC, COC, and Prosci® CCP, equip her with a distinctive perspective that benefits clients throughout the Medicaid sector.

EXPERIENCE



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.



Partnership Management Support Project (12/2022 to 12/2023)

Dawn held the position of Program Manager for the Partnership Management Support project, overseeing budgets and project deliverables while collaborating closely with the client to help ensure that the team fully met all project requirements and expectations.

Quality Improvement Initiatives Portfolio Manager (05/2019 to 12/2023)

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

- IT Control Environment Review (07/2024 to 6/2025)
- Certified Community Behavioral Health Clinics (CCBHC) State Plan Amendment (06/2024 to 12/2023)
- System Development Life Cycle (SDLC) Coordination Project (06/2024 to 6/2025)
- Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (04/2022 to 12/2023)
- MES Modernization Strategy and Procurement (MSP) Project (07/2021 to 3/2022)
- State Plan Review and Support (SPRS) Project (02/2020 to 12/2023)
- MITA 3.0 SS-A Maintenance and Annual Update Assistance Project (05/2019 to 12/2023)
- Substance Use Disorder (SUD) Waiver Initiative Project (07/2017 to 12/2023)
- Public Health Emergency (PHE) Support Project (12/2021 to 12/2024)
- Data Improvement Project (09/2019 to 06/2024)
- Provider Management Support Project (11/2019 to 10/2023)
- Third-Party Liability (TPL) Options Analysis and Procurement Assistance Project (05/2019 to 03/2022)
- Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (08/2020 to 02/2022)

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

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

Colorado Office of State Auditor (OSA)

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

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

Detroit Wayne Integrated Health Network (DWIHN)

Medicaid Claims Audits (10/2024 to 10/2025)



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.



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

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

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

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

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

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

Acordia National (12/1994 to 05/1996)

Dawn began her career as a medical claims examiner.

PUBLICATIONS AND PRESENTATIONS

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



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)



Hailey assists in compiling, tracking, and reviewing a variety of APDs. Hailey also provides project management support and assists with aligning APD submissions with engagement initiatives.

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

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

Partnership Management Support Project (12/2023 to 06/2024)

Hailey assisted with leverage and reuse initiatives and provided project management support.

Provider Management Support Project (01/2023 to 10/2023)

Hailey worked on leverage and reuse initiatives for West Virginia and the United States Virgin Islands, including support with compiling and reviewing APDs.

El Paso County Department of Human Services (04/2021 to 07/2022)

Hailey served as an adolescent lead social caseworker IV to provide intensive casework services to families and children. She developed productive working relationships with reluctant clients, establishing positive rapport and creating collaborative partnerships between all involved parties. Hailey successfully identified clients' needs to create and implement solution-focused plans of action to meet and exceed those needs. Additionally, Hailey helped to ensure the successful completion of short- and long-term goals by monitoring and documenting progress toward client goals. She conducted research, investigation, and strategic decision-making to help ensure proper reporting, prosecution, and handling of child abuse and neglect reports. Hailey also performed assessments of new cases, referred clients to appropriate resources, and provided accurate updates and testimony in court hearings and mediations. Her efforts resulted in a substantial decrease in repeat infractions. During her tenure, Hailey acted in a supervisory role to members of the casework team, providing feedback, continuous education, and training to other caseworkers.

Lake County Court Appointed Special Advocate (CASA) Program (04/2016 to 04/2021)

Hailey served as a Lake County CASA who advocated for the best interests of abused and neglected children involved in child welfare proceedings. She provided representation and testimony in open court on behalf of the client's best interest, collaborated with the local Department of Child Services and service providers, and led and trained volunteers to properly conduct case management supporting the best interests of clients. Hailey played an integral in the development of the organization. She worked alongside program leadership for annual goal setting and tracked the completion of milestones, facilitating the organization's strategic goals. Hailey pioneered creative strategies for the recruitment, training, and management of over 100 community volunteers. Hailey conducted an extensive analysis of program training content and protocols and transformed an outdated in-person training protocol into a tailored and refreshed eLearning program to continue the training of community volunteers during the COVID-19 pandemic. She also initiated the conversion of physical client files and demographic information to a secure web-based data store and case management system, allowing for the compilation of statistical data that best represented the organization. Her contribution allowed for a marked



increase of both state and national grant funding for the program. Additionally, Hailey planned and conducted education-focused community outreach events, developed and implemented marketing plans for recruitment, and designed refreshed marketing materials for the program to increase community education and awareness.

Second Chance for Pets Network (01/2015 to 01/2017)

As a member of the Board of Directors, Hailey provided oversight to help meet the organization's strategic goals, and managed strategies for the recruitment, training, and management of volunteers. She evaluated business and fiscal plans to help ensure the proper running of the organization, organized social media campaigns, and hosted fundraisers for over 400 people.



Samuel “Sam” Kessler

MBA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5.5 years

KEY QUALIFICATIONS

- Over five years of experience supporting state Medicaid projects with large scale integrated systems, implementation, and operations
- Experience managing project deliverables both internally and externally on behalf of a vendor from inception to final client approval and signoff.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Marketing, West Virginia Wesleyan College
- MBA, West Virginia University

Samuel Kessler is an experienced customer service professional, bringing eight years of quality performance in related roles. He is skilled in mentoring team members to deliver exceptional service and building team morale through effective communication and positive performance feedback. His skills include market strategy and management, research and due diligence, pipeline development, business development, and quality assurance.

EXPERIENCE

BerryDunn (08/2020 to present)

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)

As deliverables lead, Samuel manages contract deliverables from the training, testing, functional, technical, certification, and operations areas. As such, he manages the production of the DDI and maintenance and operations (M&O) deliverables by working collaboratively with the vendor and the client to produce, review, and approve each contract document as it relates to the system. He implements quality controls to help ensure that the documents reflect functionality within the system and works with the vendor and the client to address any gaps.

West Virginia Bureau for Medical Services (BMS)

1915(c) Children with Serious Emotional Disturbance (CSED) Waiver Development Project (08/2020 to 12/2022)



Samuel acted as a project coordinator and performed a variety of responsibilities for the project which included organizing daily meetings for team organization, overseeing daily project coordination activities, developing process flows and scheduling meetings to help ensure adherence to project schedule, providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs). In addition, as part of the CSED project, Samuel tracked decisions, interfaced with vendors, assisted with the drafting of reports, and supported the project team in a variety of functions.

N3 LLC (05/2018 to 08/2020)

Working alongside IBM®, Magento, Adobe, and Microsoft, Samuel managed the accounts for SMB/Enterprise level businesses and connected potential and existing customers to senior level account executives. For IBM®, this was focused on DB2 and VMware adoption. For Magento and Adobe, this was focused on 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.



Payton Waybright

BA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5.5 years

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

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



activities, developing process flows, and scheduling meetings to help ensure adherence to project schedule. Payton also provides quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs) and helping to ensure vendor accountability and adherence to SLAs. Payton assists with deliverable management, drafts monthly status reports and the Commissioner briefing report for the PATH project, oversees the project team's reporting activities, and provides quality assurance to help ensure assignments are complete and on time for client submission. She manages a team of project coordinators and provides onboard documents and training to new hires. Prior to being the lead resource coordinator position, Payton worked as a project coordinator on the PATH project for 10 months.

West Virginia Bureau for Medical Services (BMS)

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (08/2025 to present)

Payton provides business analysis and research support to the MITA team by conducting detailed reviews of Medicaid business process areas, such as Eligibility & Enrollments (E&E), gathering and analyzing operational information, and contributing to the development of assessment documentation. She assists in evaluating current-state processes, identifying gaps and improvement opportunities, and supporting the team's efforts to complete MITA maturity assessments and related deliverables.

Electronic Visit Verification (EVV) (08/2025 to present)

Payton provides project coordination support to the EVV project by organizing and facilitating biweekly meetings, including developing agendas, preparing meeting materials, capturing decisions, and tracking action items. She also assists in focus groups for market research, supporting data collection efforts, and contributing to the development and refinement of project deliverables.

Iowa Department of Health and Human Services (IA HHS)

Eligibility Integration Application Solution (ELIAS) (12/2024 to 10/2025)

Payton supported Iowa's single State Medicaid Agency and was the resource and reporting lead coordinator for the ELIAS project. She managed drafting the ELIAS monthly status reports and Centers for Medicare & Medicaid Services (CMS) reports for the project. She oversaw the deliverables, meeting notes, and action items for the project. Payton held a weekly action item meeting with the project team to help ensure updates were provided on action items to help facilitate prompt and collaborative follow-up and timely closures on tasks. Payton also assisted with project scheduling needs, cross-collaborating with various teams to help ensure appropriate interested and invested party involvement.

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

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

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



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

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

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

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

Payton served CNA duties and assisted with charting patients.



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 serves as a SME, conducting data exchange analysis, supporting MITA 3.0 SS-A maintenance, annual updates, quality assurance, and validation in alignment with CMS requirements.

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

As a GPM, Kortney leads and coordinates multiple sub-projects, develops and edits contract requirements, conducts procurement-related research, and helps ensure high-quality, CMS-aligned deliverables, including the request for proposal (RFP) and supporting documentation.

Home and Community Based Services Quality Improvement (HCBS QI) Project (02/2025 to 05/2025)

As a SME, Kortney researched state and federal Medicaid policies, and assisted with performance measurement services, waiver applications, and renewals.

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

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

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

As a SME, Kortney conducted peer reviews and targeted research to support the development, refinement, and quality assurance of ICMS procurement documentation.

Puerto Rico Medicaid Program (PRMP)

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

Kortney served as a GPM for PRMP, providing interface testing among CMS, PRMP, and CMS' testing vendor. She helped ensure that testing requests and responses met CMS requirements and standards, and developed testing reports and tracking deliverables to support accurate, timely CMS validation.

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

TennCare, Tennessee Department of Finance & Administration

Kortney served as a Senior Associate in Advisory, contracted with the Tennessee Department of Finance and Administration, Tennessee's State Medicaid Agency, supporting the TennCare program. She managed project planning and execution activities, including development of project plans, performance reporting, tracking, and client communications related to testing and procurement efforts.

Kortney coordinated and facilitated client-facing and CMS-facing meetings, documented key decisions and action items, and provided guidance and quality support to associate-level team members as an engagement transition coach. She conducted procurement and market research across multiple states to support active and potential Medicaid procurements and provided ongoing procurement support to the State.



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.



As unit lead, Kortney provided on-the-job training and ongoing support to newly hired staff and communicated with clients through written, phone, and in-person channels to support accurate and timely eligibility determinations.



Megan Blount

MBA

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, University of Charleston
- BS, Communications, West Virginia State University
- West Virginia Division of Personnel (DOP) Trainer Certification

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

EXPERIENCE

BerryDunn (04/2021 to present)

Megan serves as Project Coordinator for BerryDunn where she supports West Virginia’s single state Medicaid agency. Megan supports a variety of practice group initiatives, such as the West Virginia Operations Improvement Team.

West Virginia Bureau for Medical Services (BMS)

Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement Assistance Project (06/2025 to present)

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

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

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



Advanced Planning Document (APD) 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 provided project coordination, tracked action items, scheduled meetings, and developed and reviewed deliverables.

TPL Post-Implementation (01/2022 to 03/2022)

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

TPL Options Analysis and Procurement Assistance Project (04/2021 to 06/2021)

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

West Virginia DoHS

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

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

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

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

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

Megan served as the operations coordinator for new installations and modernization. In this role, she provided project level administrative support (i.e., meeting organization, distribution of information, meeting minutes), acted as point of contact for mechanics and subcontractors as directed by management, and assisted in documentation management.

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

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

Megan worked with both degree-seeking and non-degree-seeking international students, worked with a recruiting agency, evaluated foreign transcripts, created and managed admission reports, and maintained process and procedure manuals.

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

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

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



Megan served as the liaison for 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.



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)



Kristine was appointed to lead agency-wide regulatory strategy, ensuring adherence to federal and state Medicaid requirements, CMS regulations, and internal audit standards. She directed comprehensive compliance initiatives, fraud prevention strategies, and policy alignment across programs and other state agencies. She also oversaw internal and external audits, risk assessments, and corrective action plans, reducing organizational risk and enhancing regulatory readiness. She collaborated with executive leadership, legal counsel, and operational divisions to embed on a culture of accountability, transparency, and ethical performance. Kristine provided compliance training, strategic guidance, and oversight to cross-functional teams, executive stakeholders, and operational staff. She represented the agency in formal communications with CMS and other oversight regulatory bodies. She also retained full leadership scope and responsibilities from her former position.

Senior Director of Program Integrity & Accountability (06/2023 to 06/2025)

Kristine directed and oversaw all audit operations across five key units: Clinical Provider Audits, Data Analytics & Payment Accuracy, Member Investigations, State & Federal Audits, and System Integrity. She directed federally mandated audits (e.g. PERM, MEQC, PAM) with tremendous success and served as liaison with CMS, contractors, and healthcare providers. She also served as subject matter expert on audit planning, risk assessments, SoonerSelect compliance and reporting, and Medicaid program integrity.

Additionally, she collaborated with internal and external stakeholders in all aspects of audit activities and risk assessments for the agency to reduce risk and promote federal and state compliance. She served as an expert witness in criminal and civil proceedings related to fraud, waste, and abuse. She also served as subject matter expert for Program Integrity and Compliance for State of Oklahoma. Kristine actively participated in the development and revision of the Oklahoma Administrative Code. She oversaw and directed all aspects of federally mandated audits.

As part of her role, Kristine developed and directed corrective actions plans for the Oklahoma Health Care Authority and other state agencies as warranted in relation to audits and findings. She coordinated and corresponded with the Centers for Medicare and Medicaid Services (CMS), federal contractor(s), other state agencies, and healthcare providers regarding the performance of audits and compliance reviews. She provided oral and written presentations to the audit committee, CMS, and other parties upon request regarding audit plans and associated results. She also managed the Performance Management Process for all audit staff, developed job accountabilities, designated accountability priority, performed employee evaluations, documented performance and conveyed results to employees, and created employee development plans. Kristine developed and began the implementation of compliance plans and standards for Oklahoma's single state agency responsible for administering the Medicaid program.

Director, Clinical Provider Audits (07/2020 to 06/2023)

Manager, Clinical Provider Audits (10/2015 to 06/2020)

Kristine was promoted to director after serving as manager for Clinical Provider Audits, the unit responsible for performing all comprehensive, clinical audits for the State of Oklahoma. She retained oversight of the Clinical Provider Audits unit, expanding scope and strategic responsibilities in alignment with Oklahoma's transition to managed care. She led clinical audit



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)



Kristine completed case management of complex SoonerCare members. She identified medically complex and special health care needs through incident reports, verbal and written agency interfaces, provider referrals, and other state agency referrals. She also coordinated and communicated with community support and social services systems to link members with needed services, in addition to resolving eligibility issues of select members. She completed assessments and case management activities of assigned SoonerCare members based on applicable program requirements and/or high-risk circumstances.

Peters Agency Care Management & Provider Services (08/2010 to 04/2011)

Healthcare Innovations Private Services (09/2008 to 07/2010)

Case Manager/Transition Coordinator (09/2008 to 04/2011)

Kristine led and directed an interdisciplinary team to develop comprehensive plans and goals. She completed Uniform Comprehensive Assessment Tools to establish acceptable service plans, service plan goals, and appropriate interventions to promote safety and continued residence in community for members who were nursing facility level of care. She also communicated with members and informal support through telephone assessments and home visits to verify appropriateness of care and safe, effective delivery of services. She developed and maintained strict safety plans to promote physical, social, and emotional safety.

In addition, Kristine coordinated the care and resources necessary to meet the needs of the members and their informal support systems. She maintained accurate documentation and billing logs for all services performed. She also assigned responsibility of completing internal audits of documentation and billing logs for colleagues monthly through random selection processes.

Home Health/Skilled Nurse (09/2008 to 04/2011)

Kristine provided nursing services including skin care, wound care, medication assistance and/or administration, safety transfers, and coordination with physicians and other health care providers as necessary. She also obtained orders for delivery of care requiring prescription. Kristine's other responsibilities included nursing interventions such as crisis planning, safety measures and protocols, comfort care, education, and coordination of care. She conducted supervisory visits of licensed (LPN and RN) and unlicensed personnel (PCA, CNA) and trained licensed and unlicensed personnel to ensure safe and consistent delivery of care.

OU Medical Center (02/2008 to 09/2008)

As a staff RN, Kristine performed routine nursing tasks while adhering to standards of care and acceptable nursing process. She also served as lead RN/charge nurse.



Marvin “Ed” Crawford

CHP, CSCS

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Over 15 years of experience directly supporting a single state Medicaid agency, including providing Health Information Technology (HIT) subject matter expertise and project management support
- Extensive experience analyzing relevant federal security guidelines outlining rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information (ePHI) in the context of enterprise system implementations, maintenance, and operations
- Deep knowledge of HIT-relevant federal security and privacy compliance frameworks, including National Institute of Standards and Technology (NIST), Minimum Acceptable Risk Standards for Exchanges (MARS-E), and Acceptable Risk Controls for Affordable Care Act (ACA), Medicaid, and Partner Entities (ARC-AMPE)

MEDICAID EXPERIENCE

15.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Certified Health Insurance Portability and Accountability Act (HIPAA) Professional (CHP)
- Certified Security Compliance Specialist (CSCS)

Ed Crawford brings demonstrated experience in all aspects of Health Information Technology (HIT) security to projects, focusing on policy, research, and analysis and interpretation of laws, rules, and regulations. His experience includes project management services in support of both design, development, and implementation (DDI) and Operations for the West Virginia Medicaid Management Information Systems (MMIS) and eligibility and enrollment (E&E) projects. Ed works closely with both the client and vendors to help ensure that applicable systems security infrastructure is in place and provides subject matter expertise in the areas of privacy and security as they relate to systems development and maintenance, architecture, and documentation.

EXPERIENCE

BerryDunn (04/2019 to present)

Puerto Rico Department of Health (PRDoH) (04/2025 to present)



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)



Ed served as an IT client technician, providing project management, coordination, reporting, and operational support services for new and existing, IT implementation activities for the State Executive Domain. He provided senior level technical support services for designated agencies within the Executive Branch.

West Virginia Office of the Insurance Commissioner (09/2005 to 02/2009)

As primary HIPAA security officer, Ed was responsible for the creation, promulgation, implementation, management and reporting of projects, initiatives, policies, and procedures related to accessing the Workers Compensation Insurance System (WCIS) and Information Complexity Criterion (ICOMP) for federal, State and outside access users. He researched and analyzed relevant federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of ePHI.

West Virginia Workers Compensation Commission (12/1999 to 09/2005)

Ed was the primary information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures related to the access to WCIS and ICOMP for federal, State and outside access users. He researched and analyzed relevant federal security guidelines which specified the rules and guidance surrounding the protections, confidentiality, integrity, and availability of electronic protected health information.

West Virginia Division of Corrections (12/1995 to 12/1999)

As communications officer, Ed was also the primary designated information security officer responsible for the creation, promulgation, implementation, and management of the processes, policies, and procedures for IT environment at the Mount Olive Correctional Complex.



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.



Ohio Department of Administrative Services (DAS)

Ohio Benefits Program IV&V Services (09/2022 to 06/2023)

DAS is renewing the Enrollment and Eligibility vendor in a maintenance and operations (M&O) contract and BerryDunn is providing IV&V support. Jim successfully transitioned reporting on the progress of the project through the successful acquisition of the new vendor. Jim also served as a senior consultant on the project, helping to provide DAS with crucial project health analysis; recommendations, security, and disaster recovery program as a whole.

Ohio Department of Medicaid (ODM)

Ohio Medicaid Enterprise System (OMES) IV&V Services (09/2018 to 08/2022)

ODM is implementing its vision for a modular MMIS in the Ohio Medicaid Enterprise Syst project and BerryDunn is providing IV&V support. Jim successfully guided ODM through Phase I of the MMIS Provider module. Jim also serves as a senior consultant on the project, helping to provide ODM with crucial project health analysis; budget, schedule, and scope analysis; and risk and issue tracking for the Ohio Medicaid program as a whole.

Health Management Associates (2014 to 2018)

Jim led five surveys of health care professionals, thought leaders, and senior health care managers. He participated in reviews of local agencies for oversight councils and was Ohio Lead for Health Management Associates (HMA) on state policy issues, including state statute and regulations, state budgeting, and initiatives.

Ohio Department of Medicaid / Department of Job and Family Services (1986 to 2014)

Medicaid Chief Strategy Office (2011 to 2014)

Chief of State and Federal Compliance

Jim's team developed, submitted, negotiated, and monitored all Ohio APDs, which allowed Ohio to draw enhanced Federal Financial Participation for select Information Technology Projects.

Department of Medicaid Portfolio Manager

As portfolio manager, Jim prioritized, coordinated, tracked, assigned project managers, and monitored the successful completion of Medicaid projects.

Project Manager for the Certification of Ohio's new MMIS System

Jim had overall management of this enterprise-wide project from document compilation, toolkit preparation, CMS response and negotiation, site visit preparation and execution, and follow-up. Ohio was one of two states to have their system successfully certified without any findings.

Medicaid Project Management Office (2008 to 2009)

Medicaid Information Technology System (MITS) Financial Workstream Lead

As part of the enterprise-wide MITS project replacing Ohio's legacy claims payment system, Jim was responsible for the oversight and guidance of the design, development, testing, and implementation of the financial transactions. Jim's guidance helped ensure there was no delay in Medicaid payments during the new system implementation.



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



were compliant with state and federal regulations. He also worked with CMS on the review and deficiency correction of Ohio's HCBS waivers.

Medicaid Bureau of Consumer and Program Support (1996 to 2000)

Jim established and managed Ohio's Medicaid Consumer Hotline. He developed the RFP, oversaw the evaluation of proposals and the selection of the contractor, and managed the contracts for Medicaid Consumer Satisfaction Surveys as required by CMS under Ohio's Managed Care Demonstration Program.

Medicaid Case Mix and Systems Administration Unit (1992 to 1996)

Jim supervised the unit that collected nursing home acuity data that established part of the nursing home reimbursement rate.

Medicaid Bureau of Facility Contracting (1991 to 1992)

Jim supervised bureau administrative staff.

Medicaid Bureau of DD Services (1988 to 1991)

Jim was in charge of coordinating the collection of data from Mental Retardation and Targeted Area Review Teams.

Medicaid Division of Long Term Care (1986 to 1988)

Jim coordinated special projects such as long-term care (nursing home) settlements and long-term care prior authorization requests.

Independent Contract Manager – Government Resource Center (2010 to 2011)

Jim served as the team leader for development of Ohio's Electronic Health Record Incentive Program. This involved leading a team of independent contractors in the development of Ohio's Medicaid Provider Incentive Program State Medicaid HIT Plan.

PUBLICATIONS AND PRESENTATIONS

- *Emerging Innovations in Managed Long-Term Services and Supports for Family Caregivers*, AARP Public Policy Institute, November 2017
- *Analysis of Proposed Ohio Initiated Statute to Regulate State Prescription Drug Purchasing*, September 22, 2016



Adam Bowman

BS, CEH, CCNA

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Over six years of experience supporting a single state Medicaid agency with large scale integrated systems implementation and operations
- Experience developing and articulating IT tools, processes, and procedures to help facilitate enhanced project operations and interested and invested party communication and coordination

MEDICAID EXPERIENCE

6 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Computer Science, West Virginia State University
- CompTIA Security+ Certified
- Certified Ethical Hacker (CEH)
- Cisco-Certified Network Associate (CCNA) Trained

Adam Bowman is an experienced security professional who brings a background in IT supported by 14 years in the United States Air Force. His work experience includes managing teams, automating tasks, and building applications. He is a United States Air Force Cyber Operations Officer, and has completed undergraduate cyber training, Cyberspace 20, and Squadron Officer School.

EXPERIENCE

BerryDunn (10/2019 to present)

Adam is a senior consultant with BerryDunn's Medicaid Practice Group (MPG). Adam supports the Transform Health & Human Services (tHHS) body of work, geared toward providing states with an enterprise portfolio solution designed to enhance data integration across state Medicaid and health and human services (HHS) agencies, Centers for Medicare & Medicaid Services (CMS), and vendors.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (10/2019 to present)

Adam supports DoHS' PATH Project by leading and coordinating Project Management Office (PMO)-related business planning efforts while working with the Bureau for Medical Services (BMS), WV's single state Medicaid agency. He collaborates with various teams across state agencies and vendors and holds meetings to develop project plans to present to upper-level management. He also closely monitors each work stream to help ensure that the project remains on track, meets deadlines, and develops according to established plans.



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.



Colin Buttarazzi

PMP®

Manager | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Nine years of experience in compliance and risk management consulting

MEDICAID EXPERIENCE

9 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Economics and Business Management, University of Maine
- Certified Project Management Professional® (PMP®)

Colin Buttarazzi is a manager in BerryDunn's Government Assurance Practice Group, specializing in compliance and risk management. He has experience conducting internal control reviews, evaluating payroll processes, and performing compliance and programmatic audits. Colin has worked on a wide range of projects with a focus on programmatic audit, procurement audit, financial process improvement, invoice review, and data analysis. Colin holds a Project Management Professional® certification and uses best practices from A Guide to the Project Management Body of Knowledge® (PMBOK®) to help clients achieve their objectives.

EXPERIENCE

BerryDunn (05/2015 to present)

Puerto Rico Medicaid Program (PRMP)

Medicaid/Children's Healthcare Insurance Program (CHIP) Eligibility Determination Review (11/2021 to present)

Colin is a lead auditor on the BerryDunn team in charge of reviewing accuracy of PRMP eligibility determinations and recertifications, as well as capitation payments, on a sample of Medicaid and CHIP beneficiaries.

Maine Department of Environmental Protection (DEP)

Enterprise Licensing System Planning and Procurement Project (06/2020 to present)

Colin is working on the BerryDunn team that is assisting the DEP in planning for the replacement of its Enterprise Licensing System. This project involves the development of functional and technical requirements, performing research into licensing systems in peer states, and conducting an analysis of the overall cost of acquisition. At the conclusion of the



project, BerryDunn will present a comprehensive business case for the acquisition and implementation of a next generation licensing system to executive bodies. Colin is also assisting with the return-on-investment document that will help the DEP anticipate costs of implementing a modern licensing system.

West Virginia Bureau for Medical Services (BMS)

Electronic Health Record (EHR) Provider Incentive Payment (PIP) Audit (07/2016 to present)

Colin is serving as the manager on BerryDunn's team that is providing expertise and assistance in performing annual Medicaid EHR PIP Audits. As a part of this team, he develops an audit strategy, performs risk assessments to identify the sample selection, communicates with providers and hospitals, and conducts both desk and field audits of an identified sample selection. Colin performs extensive deliverable creation and review; maintains action, decision, and question logs; and develops weekly completion of client-ready documentation.

State-Based Health Insurance Exchanges (HIXs)

Programmatic and Financial Audits (2015 to present)

Colin is on the team that provides the annual programmatic audits for 10 state-based HIXs: California, Kentucky, Maine, Massachusetts, Minnesota, Nevada, Pennsylvania, Rhode Island, Vermont, and Washington. The programmatic audit assesses compliance with federal requirements associated with 45 CFR 155. Colin also serves as project management on four of these audits: Kentucky, Nevada, Rhode Island, and Vermont

Missouri Division of Accounting

Overtime Pay Review (10/2021 to 12/2021)

Colin was a lead analyst on the team that reviewed if employee payroll and compensatory time provided to essential government workers as a result of the COVID-19 pandemic was calculated in accordance with the requirements of the Fair Labor Standards Act (FLSA).

Maine Department of Administrative and Financial Services (ME DAFS)

Enterprise Services Assessment (03/2021 to 10/2021)

Colin was the lead analyst on an engagement to review ME State Postal Service operations and finances to assess their current and future financial viability. As a part of this project, Colin reviewed revenue and expense reports, interviewed internal stakeholders and peer states, analyzed staffing and payroll levels, managed project stakeholders, facilitated meetings, and prepared and presented the final report.

New Hampshire Secretary of State (NHSOS)

Coronavirus Aid Relief and Economic Security (CARES) Act Grant Management (06/2020 to 06/2021)

As the senior cost analyst, Colin helped New Hampshire identify and claim costs under the CARES Act to prepare for and respond to COVID-19-related challenges during the 2020 federal election cycle. Colin assisted with identifying eligible costs for reimbursement and how to claim those costs to the federal grant. He coordinated with cities and towns to respond to requests for information and data under very short and non-negotiable timelines. Colin also supported the



development of a methodology to calculate a standard cost rate for processing the additional absentee ballots.

Wyoming State Legislature

State IT Funding Request Study (08/2020 to 12/2020)

Colin worked on the BerryDunn team that conducted a study of the State's IT funding request development and review processes. His work focused on specific IT funding requests selected by the Joint Appropriations Committee (JAC). The JAC hired BerryDunn to assess 19 IT funding requests as examples, constructing a comprehensive review. The level of detail in this review included the planning stage, the review and decision-making phase, and identification of areas for improvement. BerryDunn then correlated recommendations to further enhance and develop the JAC's process. The JAC also directed BerryDunn to use five of the 19 IT funding requests as case studies, for purposes of determining the sufficiency of the due diligence exercised in the planning and decision-making related to each request. BerryDunn delivered a formally presented study report to the JAC containing the study's findings. Colin assisted with process flow diagramming, project management, and reporting.

Alaska Division of Legislative Audit (DLA)

Medicaid and CHIP Eligibility Determinations and Best Practices (06/2019 to 09/2019)

Colin worked as a senior analyst on BerryDunn's team, conducting redeterminations of eligibility for Medicaid and CHIP members. These redeterminations were used to help to identify whether the State was appropriately granting eligibility according to federal and state regulations and statutes.

Colorado Office of the State Auditor

Marijuana Inventory Tracking Data Evaluation (03/2019 to 09/2019)

Colin worked as an analyst on BerryDunn's evaluation of the Colorado Department of Revenue's (DOR) administration of the marijuana industry. The team worked to identify opportunities for the DOR to better leverage marijuana inventory tracking data to inform and direct the DOR Marijuana Enforcement Division's (MED) inspection and enforcement activities, in addition to the DOR Tax Division's audit activities. Colin helped assess to what degree the DOR had proper controls in place to minimize the risk of tax evasion and the diversion of marijuana products to illegal markets.

Metropolitan Government of Nashville and Davidson County (Metro), TN Office of Internal Audit (OIA)

Program Audit and Monitoring Services (03/2019 to 05/2019)

Colin worked as a project lead and senior auditor for BerryDunn on two vendor audits structured as AUP engagements for the Office of Internal Audit. Colin led interviews, performed invoice and labor testing, reviewed contracts, and assisted developing the final report for the Office of Internal Audit.

Colorado Department of Human Services (DHS)



Operational, Financial, and Account Review of Automated Support and Enforcement Processes and System (02/2018 to 06/2018)

Colin's analysis assisted the Division of Child Support Services (DCSS) in modernizing their financial system and reconciliation process within the Colorado Automated Support and Enforcement System (ACSES). Colin was responsible for identifying program requirements and documenting applicable federal and State laws. He also helped research and write the final deliverable, providing recommendations to the State in hopes of modernizing their existing approach.

Massachusetts HIX/IES Entities

IV&V Services (05/2015 to 04/2018)

BerryDunn provided IV&V for Massachusetts' HIX/IES implementation. Colin assisted with the Financial Review task area of the IV&V services, providing monthly financial status reporting, documenting cost allocation methodologies, reviewing of System Integrator's invoices, and assisted with change request review. Colin's main role was to perform a monthly analysis of all expense reports and compile a detailed deliverable invoice review.

Children and Family Services of New Hampshire

Forensic Accounting Services (10/2016 to 12/2016)

Colin was a lead analyst on BerryDunn's team providing Forensic Accounting Services to Children and Family Services of New Hampshire, a nonprofit organization. He assisted with on-site interviews and document review activities. The project included drafting initial findings, and preparing a final audit report.

City of Alexandria, VA

Review of Community Based Mental Health and Substance Abuse Services (07/2015 to 02/2016)

The City's Community Services Board (CSB) oversees the use of public funds to provide mental health, intellectual disability, and substance abuse services. Colin helped review the CSB's processes for third-party billing sources, identifying opportunities for the CSB to improve its identification and collection of revenues, submission and monitoring pre-authorization requests, and management and determination of patient payment responsibilities (including co-payments, co-insurances, and deductibles). Colin performed data analysis and reviewed documents to help ensure compliance with federal and state regulations. Colin helped develop BerryDunn's recommendations to assist with the implementation of a more sustainable and efficient process.

Board of Trustees for the University of Maine (2012 to 2014)

Colin attended Board of Trustees meetings as an undergraduate representative, traveling around the State of Maine and reporting back to the Student Government. He maintained constant communication with the Board of Trustees, the President of the University of Maine, the Vice President and Dean of Students, and the executives of the Undergraduate Student Government at the University. Colin served as an intermediary and often facilitated open discussion between the groups to establish common ground and agreement. As a member of the Blue Sky Strategic Advisory Board (2014), Colin participated in the University's five-year



strategic planning process. While a member of this board, Colin was the representative of the students and worked to help ensure student needs were properly addressed.

PUBLICATIONS

- *Internal Audit Potential for Not-for-Profit Organizations*, a BerryDunn blog post, March 4, 2020
- *Was your COVID-19 essential worker hazard pay FLSA-compliant?* a BerryDunn blog post, December 23, 2021



Kasie McCarty



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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

13 years

KEY QUALIFICATIONS

- Senior leader in Medicaid policy and managed care
- Expertise in managed care organization (MCO) procurement, contracts, and oversight
- Deep experience with 1915(b) and 1115(a) waivers
- Strong knowledge of federal Medicaid regulations and Centers for Medicare & Medicaid Services (CMS) expectations
- Experience leading complex Medicaid initiatives from policy development through implementation

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Psychology (emphasis in Business Management), Oklahoma State University, Stillwater

Kasie McCarty is an experienced health and human services (HHS) professional with 13 years of Medicaid experience driving regulatory transformation, cross-functional collaboration, and program innovation to successful program and policy outcomes. She is well-versed in building collaborative and trusting relationships with partners and agencies as she leads complex research initiatives, identifies policy risks and opportunities, and supports the design and implementation of wide-scope system changes. Kasie has deep expertise in regulatory compliance across fee-for-service (FFS) and managed care, with a strong track record in facilitating CMS approvals and federal/state reporting.

EXPERIENCE

BerryDunn (08/2025 to present)

Kasie is a senior consultant in BerryDunn's Medicaid Practice Group (MPG) serving as a trusted thought partner, bringing former Medicaid agency perspective to consulting engagements. She supports multi-workstream Medicaid consulting projects, coordinating tasks, timelines, and deliverables.

West Virginia Bureau for Medical Services (BMS)

Mountain Health Reprocare Assistance (09/2025 to present)



Kasie supports the development of the Mountain Health program's Request for Proposal (RFP) by regularly conducting policy and regulatory analysis to inform the client's program design and implementation planning.

Oklahoma Health Care Authority (07/2012 to 08/2025)

Throughout her tenure supporting Oklahoma's single state Medicaid agency, the Oklahoma Health Care Authority, Kasie provided critical HHS program and policy support as outlined below:

Senior Director of Policy and Program Management (2022 to 2025)

Kasie served as Senior Director of Policy and Program Management where she recommended and led a strategic pivot from 1115(a) to 1915(b) waiver authority, resulting in CMS approval for the State's managed care program (SoonerSelect) in under six months, demonstrating advanced regulatory expertise and effective invested party influence. She led a team of 16 staff across policy, grants, and compliance divisions, including direct reports and cross-functional project oversight. Kasie was responsible for the ongoing assessment, development, and long-term planning of policy changes for the State's Medicaid benefit programs. She also directed cross-functional teams (policy, finance, legal) to implement federal and state regulatory changes across benefit programs; conducted regulatory analysis of federal legislation to inform Medicaid operations and ensured compliance through timely policy and contract updates—resulting in reduced Payment Error Rate Measurement (PERM) errors, improved audit readiness, and increased operational efficiency that drove cost savings for the state; and served as lead liaison with CMS to help ensure program integrity and compliance with federal Medicaid regulations, including State Plan Amendment (SPA)/waiver alignment.

Manager of Federal Authorities (2018 to 2022)

Within her role as Manager of Federal Authorities, Kasie led the successful expansion of Medicaid eligibility by aligning adult benefits with the state plan and Essential Health Benefit-benchmark plan, securing CMS approval within six months through proactive federal coordination and extensive intra-agency collaboration. She interpreted federal policy and assessed regulatory risks to maintain Medicaid program compliance. She also developed compliance strategies in coordination with legal, policy, and finance teams to meet changing state and federal requirements. Kasie applied emerging regulatory trends to optimize program implementation and maintain compliance integrity.

Policy Specialist/Senior Policy Specialist (2012 to 2018)

In her role as Policy Specialist/Senior Policy Specialist, Kasie developed and submitted the federally mandated Access Monitoring Review Plan (AMRP), including access-to-care analyses to support rate changes, with annual monitoring to help ensure ongoing compliance and beneficiary access. She drafted policy amendments, provider letters, and legislative briefs in response to changes in law and regulation or strategic development of the agency. She also interpreted federal and state regulations to identify appropriate legal authority for policy amendments, ensuring compliance and program integrity.



Jacqueline Prokop

PhD, RN

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Extensive experience in Medicaid policy, federal and state regulations, State Plan Amendments, and other Medicaid operational processes
- Specializes in quantitative and qualitative analysis and research
- Skilled in research and evaluation, including designing, developing, implementing, monitoring, and evaluating projects

MEDICAID EXPERIENCE

25+ years

EDUCATION, CERTIFICATIONS, AND AWARDS

- PhD, Nursing, University of Texas at Tyler
- BS, Nursing, Michigan State University
- University of Texas at Tyler Distinguished Dissertation Award, 2018.
- MDHHS Director's Leadership Award for Excellence in Leadership, 2018
- MDHHS Director's Leadership Award, 2018.

Jacqueline Prokop is a dynamic research professional with expertise in qualitative and quantitative methodologies and project design, development, and evaluation at various government levels. She has a proven track record as the primary author of five peer-reviewed publications, demonstrating a strong foundation in strategic planning, project management, and compliance with federal and state regulations. Her leadership experience within a Medicaid Agency includes effective management of a team focused on Medicaid policy, claims, and coding operations. Jacqueline's background is complemented by experience in developing Requests for Proposals (RFPs), 1915b/c waivers, 1115 demonstrations, grants, and comprehensive reports, as well as clinical experience in diverse healthcare settings such as nursing homes and inpatient hospitals.

Strongest Relevant Experience (Half-Page Summary)

Jacqueline Prokop brings 25+ years of Medicaid leadership and analytical experience directly applicable to independent monitoring and compliance-focused evaluation. During her 28-year tenure with the Michigan Department of Health and Human Services (MDHHS), she served in progressively senior roles, including over a decade as Director of the Medicaid Program Policy Division (2010–2021), where she managed a 35-person team and led statewide Medicaid policy promulgation. In this role, she oversaw federal and state regulatory compliance, Medicaid State Plan alignment, budget and policy impact analysis, and frequent coordination with CMS to ensure policies met the needs of covered populations. She also led policy development and implementation across multiple programs and initiatives, including managed care, and assessed the programmatic and fiscal impacts of Section 1115 and 1915(b)/(c) waivers, including monitoring waiver budget activities.



Jacqueline’s strongest technical expertise is in the “mechanics” of Medicaid-funded community-based service delivery—developing, interpreting, and operationalizing State Plan Amendments and waiver authorities—and translating those requirements into implementable policy and measurable oversight. Building on her state leadership background, she expanded this work as an Associate Principal at Health Management Associates (2021–2026), supporting State Medicaid agencies and health care organizations by drafting SPAs, writing 1915(b)/(c) waivers and Section 1115 demonstrations, and conducting structured data review to identify eligibility and implementation issues tied to policy, processes, or IT configuration.

Complementing her Medicaid policy credentials is deep experience in program evaluation and performance monitoring. Earlier in her career as a Senior Medicaid Utilization Analyst (1993–2003), Jacqueline developed and evaluated quality monitoring standards under a 1915(b) waiver, managed evaluation-focused procurements, and served as contract manager monitoring vendor performance, deliverables, and budgets. She led and supported evaluations of Medicaid health plans and child- and disability-serving programs, focusing on access, quality, satisfaction, and cost. In addition, as a researcher (2018–2026) she designed and executed mixed-method studies—including interviews and focus groups—synthesizing findings into actionable recommendations. Across roles, Jacqueline’s strength is rigorous, evidence-based review paired with practical, policy-informed guidance that helps agencies translate requirements into operational improvements and compliant outcomes.

EXPERIENCE

BerryDunn (01/2026 to present)

Jacqueline is a senior consultant in BerryDunn’s Medicaid Practice Group.

Springer Nature (05/2025 to present)

As a manuscript reviewer, Jacqueline reviews scholarly manuscripts for Springer Nature journals, providing detailed evaluations and constructive feedback to uphold research quality and academic standards. She also assists the journal in determining whether a manuscript should be published or further refined.

Health Management Associates, Inc. (09/2021 to 01/2026)

As an associate principal, Jaqueline provided health care consulting to assist and support State Medicaid Programs and health care providers in solving health care service-related issues. This responsibility included creating state plan amendments, writing 1915b/c waivers, and Section 1115 demonstrations. She also gathered, organized, and analyzed information and data to identify Medicaid eligibility errors related to policy, IT implementation, or processes. She offered consultation, support, and project management for customers to achieve strategic objectives. Jaqueline also streamlined processes for increased efficiency and improved project outcomes.

Self-Employed (06/2018 to 01/2026)

As a qualitative and qualitative researcher, Jaqueline designed and executed comprehensive research projects, analyzed data, and generated actionable insights. She conducted in-depth



interviews, focus groups, and content analysis to uncover insights and inform decision-making. She collected, analyzed, and reported on data, a responsibility that involved identifying patterns and generating actionable recommendations. Jacqueline also conducted thorough literature reviews to identify gaps in knowledge and inform future research directions.

Michigan Department of Health and Human Services (10/1993 to 09/2021)

Jacqueline supported Michigan's State Medicaid Agency, the Department of Health and Human Services, in multiple roles.

Director, Medicaid Program Policy Division (12/2010 to 09/2021)

Jacqueline managed 35 staff and oversaw Medicaid Policy Promulgation for the Michigan Medicaid Program. Her policy function included federal and state regulatory oversight, budget analysis, compliance with the Medicaid State Plan, and close work with The Centers for Medicare & Medicaid Services (CMS) in assuring policies met the needs of the populations served. Jacqueline also oversaw policy related to Medicaid, Maternity Outpatient Medical Services, MIChild, The Healthy Michigan Plan, The Flint Water group, MI Care Team, Managed care programs, and other Medicaid administered programs. Her division often held the lead role in implementing new programs for the State of Michigan. Additionally, she determined the impact of Section 1115, 1915(b), and 1915(b)(c) waivers on the Medicaid program and monitoring waiver budget activities.

Section Manager, Ambulatory Benefits Policy (07/2008 to 12/2010)

Jacqueline provided oversight of policies related to maternal and child health, family planning, certified nurse midwives, hospital services, pharmacy, and Adult Benefit Waiver, and responded to all general policy issues. She coordinated the promulgation of all Medicaid policy bulletins, L-Letters, brochures, and the Medicaid website. This responsibility included reviewing, editing, and providing consultation for all material sent to providers and Medicaid beneficiaries. She also oversaw the updating and management of the Medicaid Provider Manual.

Medicaid Waiver Specialist (07/2006 to 07/2008)

Jacqueline served as the content expert on Medicaid federal and state laws and regulations as they relate to waiver and program-specific issues. In this role, she was responsible for developing, monitoring, and overseeing federally approved waivers; reviewing programs to ensure compliance with relevant statutes and regulations; and monitoring complex laws, regulations, and federal guidance to identify key developments. She served as the Medicaid liaison to the federal government on both current and future waiver initiatives and coordinated oversight to ensure MDHHS met all federal and state waiver reporting requirements, including conducting budget analyses of waiver services and administrative costs. Additionally, she evaluated the impact of Section 1115, 1915(b), and 1915(b)(c) waivers on the Medicaid program and monitored associated budget activities.

Medicaid Program Policy Specialist (01/2003 to 06/2006)

Jacqueline served as the policy specialist for the Maternal Infant Health Program (MIHP); Early and Periodic Screening, Diagnosis and Treatment (EPSDT) program; Family Planning; Family Planning Waiver; Certified Nurse Midwives; and Maternity Outpatient Medical Services (MOMS) Program. During her tenure, Jacqueline completed analysis in the development, research,



promulgation, and implementation of Medicaid policy. She determined utilization and reimbursement methodologies, including third party reimbursement for services provided under such policies, and developed reimbursement specifications within the confines of Medicaid management systems. She represented the department in all legal matters related to respective policy programs and worked with the Office of Legal Affairs and Attorney General as needed. She also completed and established budget analysis and implications for all policies promulgated within the purview of this position. Jacqueline provided and advised the management of federal waiver policy and developed appropriate state responses. She reviewed all prior authorizations (PA) requiring policy review and interpretation for the MOMS, EPSDT, and MIHP programs. Additionally, she provided back-up for policy interpretation for Private Duty Nursing policy and long-term care ventilator dependent patient placement.

Senior Medicaid Utilization Analyst (10/1993 to 01/2003)

Jacqueline served as an analyst in the Managed Care Quality Improvement Section in MDCH where she modified, developed, implemented, and evaluated standards and criteria for monitoring the quality of care provided to Medicaid enrollees as stated under the Michigan Comprehensive Health Care Program Section 1915(b) waiver. She developed and monitored contracts and/or projects related to the monitoring of services provided by Medicaid Health Plans. She also coordinated the development, writing, budget, and implementation of state and federally required Request for Proposals (RFP) designed to complete evaluations of the Medicaid Health Plans, the Children's Special Health Care Services Program, the Mental Health Program, Substance Abuse Program, and the Program for Persons with Developmental Disabilities. These RFPs focused on patient access, quality of medical care, patient satisfaction, and program cost evaluation. Additionally, Jacqueline served as contract manager, which included monitoring and evaluation of contractor performance, assuring compliance with contract deliverables, and budget management. She designed special studies to determine program needs and assisted in planning, implementing, and evaluating these programs. She consolidated data to prepare specialized reports for the department, state, and federal staff. She also assessed the political, social, operational, and organizational implications of existing and proposed policies and program decisions.

PUBLICATIONS

Prokop, J., Reid, C., & Palmateer, B. (2022). Experiences with COVID-19. *Nursing Research*, 71(3), E21-E27. doi:10.1097/NNR.0000000000000583

Prokop, J., & Zeller, L., (2020). "Understanding Health Reform as Justice Reform: Medicaid, Care Coordination, and Community Supervision." *Square One Project Executive Session on the Future of Justice Policy*. Retrieved December 7, 2020 from: (<https://squareonejustice.org/wp-content/uploads/2020/11/Final-Understanding-Health-reform-WEB-201103.pdf>).

Prokop, J., Alfred, D., & Reid, C. (2019). Nursing impact on chronic disease Medicaid health home patients: A Qualitative Study. *Nursing Forum*, 2019,1-7. doi: 10.1111/nuf.12403



Prokop, J. (2018). *Nurses' role in health home mixed methods study*. (Paper 90). Nursing Dissertations, University of Texas at Tyler Scholar works Database.
<http://hdl.handle.net/10950/1189>

Prokop, J., LaPres, M., Barron, B., & Villasurda, J. (2017). Implementing a health home: Michigan's experience. *Policy, Politics & Nursing Practice*, 18(3): 149-157.
doi:10.1177/1527154417749849

Prokop, J. (2016). Care coordination strategies in reforming health care: A concept analysis. *Nursing Forum*, 51(4), 268-274. doi:10.1111/nuf.12157



AnnaBella Hyre

BBA, BLA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2.5 years

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

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



the implementation of the Beneficiary Advisory Council (BAC) and updates to the Medical Services Fund Advisory Council (MSFAC) as required by federal rule.

Technical Assistance and Project Support (TAPS) Project (07/2024 to present)

On a monthly basis, AnnaBella creates a Federal Guidance Tracker, consolidating and summarizing all guidance released by Centers for Medicare & Medicaid Services (CMS). As needed, AnnaBella also assists in the development of research and impact summaries of guidance to inform and assist the State in remaining compliant at the federal level.

Substance Use Disorder (SUD) Waiver Initiative Project (06/2023 to 08/2023; 07/2024 to present)

As a research analyst supporting the SUD project, AnnaBella provides research support on a range of topics aligned with the planning for BMS's 1115 waiver renewal and implementation. Responsibilities include surveying other approved or pending 1115 waivers for SUD populations and investigating provider and member outreach and engagement strategies. AnnaBella also assists in the development of deliverables such Quarterly SUD Monitoring Reports and Health-Related Social Needs (HRSN) Implementation plan. AnnaBella assists in the planning and implementation of Quick Response Teams (QRTs) as a Medicaid payor of services.

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

As project coordinator, AnnaBella assists 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.

ARPA Section 9817: HCBS Implementation Project (06/2023 to 08/2023)

Supporting the initiatives under ARPA HCBS, AnnaBella assists with project management tasks, including tracking key decisions and updating organizational repositories such as the decision log and action items lists to help ensure project documentation is updated.

County Commissioners Association of West Virginia (05/2021 to 09/2021)

AnnaBella was an intern and worked as a staff assistant tasked with the responsibility of researching and analyzing pieces of State legislation. She routinely communicated with elected officials and utilized Microsoft Office products on daily projects.



Allison Fischman

MPH

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

1 year

KEY QUALIFICATIONS

- Experience with health policy research and analysis, including Social Determinants of Health (SDoH) and equity-focused frameworks.
- Experience with project coordination and tracking goals and deliverables for public health initiatives
- Experience with stakeholder engagement and interagency collaboration to align priorities and advance health outcomes

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MPH, Health Policy and Law, Boston University School of Public Health
- BA, Sociology, Bates College

Allison Fischman is a consultant in BerryDunn’s Medicaid Practice Group (MPG) with experience in Medicaid policy, interested and invested party engagement, and project management. She is dedicated to promoting community well-being through the intersection of public health and law. Allison is skilled in legislative and regulatory research, cross-sector collaboration, and translating research into actionable insights for state agencies. She brings a strong foundation in Medicare, Medicaid, and health systems to client engagements she supports, with direct experience supporting government-facing initiatives and equity-focused reforms.

EXPERIENCE

BerryDunn (10/2025 to present)

Allison Fischman works with the MPG to support state Medicaid agencies through research, analysis, and project coordination. She assists with stakeholder engagement, policy review, and data-driven recommendations to advance projects and initiatives. Allison contributes to project management tasks, such as tracking goals and deliverables, maintaining documentation, and supporting quality assurance for deliverables.

West Virginia Bureau for Medical Services (BMS)

1115 Behavioral Health Demonstration Waiver Initiative Project (10/2025 to present)

Allison supports BMS, West Virginia’s (WV) single state Medicaid agency, to advance initiatives under the 1115 waiver renewal and expansion, approved in December 2024. Her current focus is the reentry component of the 1115 waiver, supporting policy design, system readiness, and the development of key deliverables. Allison also assists with monitoring and evaluation activities to ensure compliance and effective implementation of waiver services.



Justice Involved Program Support (JIPS) Project (10/2025 to present)

Allison supports the JIPS project, assisting BMS, WV's single state Medicaid agency, in meeting requirements under Section 5121 of the Consolidated Appropriations Act (CAA), 2023. She assists with research and policy analysis related to juvenile reentry, reviews Centers for Medicare & Medicaid Services (CMS) rules and federal guidance, and contributes to drafting and refining deliverables. Allison assists with stakeholder coordination and maintaining documentation and reporting to meet state and federal requirements.

Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (10/2025 to present)

Allison supports the PRMP EOMC State Plan Amendment (SPA) and Policy Management Support service areas for the Puerto Rico (PR) Department of Health, PR's single state Medicaid agency. She contributes to the research and development of SPAs, assists with deliverable development for policy initiatives, and supports the designing and tracking of project schedules while monitoring key project elements within the policy area.

Healthworks Group (03/2024 to 10/2025)

Allison served as a member services associate, where she delivered responsive, inclusive service aligned with organizational health and equity values in fast-paced wellness space. She supported operations through client onboarding, issue resolution, and cross-team communication.

Massachusetts Department of Public Health (12/2023 to 06/2025)

Allison served as a maternal and child health practice fellow, where she led stakeholder engagement to refine Massachusetts' statewide definition of SDoH, aligning with equity goals and interagency priorities. Allison tracked project goals and deliverables to ensure project progress and accountability. She conducted a statewide landscape analysis of SDoH initiatives to inform strategic planning and policy alignment. She also drafted data-informed recommendations to address systemic barriers to care and advance equity across child and family health outcomes.

Boston University School of Public Health (09/2024 to 05/2025)

Allison served as a teaching assistant, where she facilitated learning on U.S. health systems, legal frameworks, and financing mechanisms. She supported lectures, clarified core concepts, and provided guidance on health policy assignments.

Bates College (11/2022 to 05/2023)

Sociology Department

Allison served as a research assistant, where she collaborated on a study examining how geographic location influences Community Action Agencies (CAAs), poverty policy, and the provision of public goods. She expanded a national data set of U.S. CAAs by incorporating new variables and initiating quantitative analysis to support evidence-based policy insights.

University of Edinburgh (05/2022 to 10/2022)



Global Health Policy Unit

Allison served as a research assistant, where she reviewed English and Irish policy frameworks to analyze how the need for home care among older adults is conceptualized. She conducted a PRISMA-driven systematic review of peer-reviewed literature on need and unmet need and collaborated on a journal article prepared for submission to academic publications.

Wiley Etter Doyon (06/2021 to 01/2022)

Allison served as a legal assistant, where she supported Medicaid (Title XIX) applications, ensuring compliance with healthcare regulations, and collaborating with the Connecticut Department of Social Services, gaining knowledge of state regulatory processes and care eligibility.



Eileen Gardner

BGS

Project Coordinator | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

- 33+ years of senior-level office experience
- 8+ years of providing project support for state Medicaid agencies including West Virginia Bureau for Medical Services (BMS) and MO HealthNet Division (MHD)

MEDICAID EXPERIENCE

8 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Bachelor of General Studies (BGS), University of Missouri, Columbia
- Registered Work Comp Specialist, National Council on Compensation Insurance (NCCI)

Eileen Gardner is a project coordinator and consultant in BerryDunn's Government Consulting Group, focused on providing project coordination and project management support, research, and facilitation. Eileen brings more than 33 years of senior-level office management experience, and over 12 years of project management and analysis services to Medicaid clients, including over eight years in the Missouri Medicaid Management Information System (MMIS) healthcare application and over four years in the MO Eligibility Determination & Enrollment System (MEDES) healthcare application.

EXPERIENCE

BerryDunn (12/2017 to present)

Guam Enterprise Portfolio Management Office (EPfMO)

Department of Public Health and Social Services (DPHSS) (09/2025 to present)

Eileen serves as project management support staff to support the EPfMO project supporting Guam's designated Medicaid agency. She assists in the organization of and preparation for meetings, attending meetings and maintaining a written record of discussions. She uses transform Health and Human Services (tHHS) to record risks, issues and decisions, and supporting daily project coordination activities. She assists with the Monthly Status Report (MSR) as needed.

West Virginia Bureau for Medical Services (BMS)

1115 Demonstration Behavioral Health Project (10/2023 to present)

Eileen serves as project management support staff to support the 1115 Demonstration Behavioral Health project for WV's single state Medicaid agency. She assists in the organization of and preparation for meetings, attending meetings and maintaining a written record of discussions, risks, issues, and decisions, and supporting daily project coordination activities.



She prepares monthly action items and risk reports; and drafts the MSR for leadership review and processing.

Missouri Department of Social Services

Missouri Medicaid Enterprise (MME) Program Management Office (PMO) (12/2017 to present)

Eileen served as the project coordinator for the MME PMO and the Business Intelligence Solution—Enterprise Data Warehouse (BIS-EDW) project for Missouri's single state Medicaid agency.

She now assists the project manager on a team that assesses project health, reviews project deliverables, evaluates and edits vendor management plans, reviews Independent Verification and Validation (IV&V) progress reports, assists in identifying potential risks, issues, and decisions, manages the document repository, records meeting minutes, and writes the project's MME PMO Weekly Status Report (WSR). She writes the MME PMO WSR v2.0(s) and monthly Deliverable Acceptance Form (DAF) for State acceptance and processing.

West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) Design, Development, and Implementation (DDI) Project Management (06/2023 to 01/2025)

Eileen served as project management support staff to support the PATH project. She assisted in the organization of and preparation for meetings, attended meetings maintaining a written record of discussions, and supporting daily project coordination activities. She continues to assist on an as needed basis.

Iowa Department of Health and Human Services (IA HHS)

Medicaid Enterprise Modernization Effort (MEME) (01/2025 to 09/2025)

Eileen served as project management support staff to support the MEME project supporting Iowa's single State Medicaid Agency. She assisted in the organization of and preparation for meetings, attending meetings and maintaining a written record of discussions. She used Jira® to record risks, issues and decisions, and supporting daily project coordination activities.

Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (08/2022 to 06/2024)

Eileen served as a project coordinator for the PRMP EOMC project supporting Puerto Rico's designated Medicaid Agency. She assisted the project team through the certification review process. She assisted with the Integrated Medicaid Enterprise Systems (IMES) and Payment Error Rate Measurement (PERM) project teams in editing Centers for Medicare & Medicaid Services (CMS) documents, EOMC Roadmap, risks, issues and decisions, Data Governance Plan, writing team process documents, updating spreadsheets, and recording meeting minutes.

Missouri Office of Administration (OA)

Enterprise Resource Planning (ERP) Program Management Services (09/2022 to 05/2023)

Eileen served as a part-time project coordinator for the MO OA ERP Missouri Vital Enterprise Resource System (MOVERS) Implementation. She assisted the project manager by drafting



and updating the project's WSR, scheduling meetings, attending meetings, and recording meeting minutes.

Missouri Department of Mental Health (DMH)

Electronic Health Record (EHR) Business Planning Project (09/2021 to 05/2023)

Eileen served as a part-time project coordinator for the MO DMH EHR Business Planning project. She assisted the team with editing business processes, performance deliverable plans, and recording meeting minutes.

Briljant, LLC (05/2016 to 12/2017)

Division of Family Services

MEDES PMO

Eileen served as the project management analyst on the MEDES project for the PMO, where she was accountable for schedule management, recording meeting minutes, decisions, action items, and risks and issues for the project. She provided oversight and management of the project's document repository. Prior to this position, she served as the project coordinator responsible for assisting the project manager in all phases of project oversight.

ENTAP, Inc. (12/2015 to 05/2016)

Division of Family Services

MEDES PMO

Eileen worked as a project coordinator on the MEDES project.

EngagePoint, Inc. (07/2013 to 07/2015)

Division of Family Services

MEDES PMO

Eileen held multiple positions with EngagePoint. As a senior project specialist, she provided leadership and guidance in the project's implementation and maintenance to include recruiting and resource onboarding, facilities management, security setup, vendor maintenance, and timesheet reporting. She controlled, managed, and approved all resource onboarding for the MEDES project.

Missouri Employers Mutual (MEM) (06/2008 to 01/2013)

Eileen provided high-level support for two senior-level executives during her five years at MEM, along with managing committee assignments and organizational goals and objectives.

University of Missouri – Columbia (01/2007 to 06/2008)

Eileen provided high-level support for the Art Department chairperson in managing schedules, the department's budget, and staff timekeeping. She assisted in developing the department's classes and scheduling teaching assistants, and she supervised three staff.

U.S. House of Representatives – MO Congressman Kenny Hulshof (11/2004 to 06/2006)



Eileen managed the Washington, D.C., office of Congressman Kenny Hulshof, where she coordinated all schedules for the congressional representative and the D.C. office legislative staff. She managed the office correspondence, budget allocation, travel arrangements, and staff payroll.

Boone Hospital Center – Boone Hospital Foundation (06/2002 to 11/2004)

Eileen provided high-level support for the Boone Hospital Foundation director to manage the organization's goals and objectives. She provided accountant maintenance, organized, and managed direct mail campaigns, fundraising objectives, and managed the Boone Hospital Foundation Board meetings and assignments.

University of Missouri – Columbia

School of Medicine (12/1999 to 04/2002)

Eileen provided high-level support for the dean of the School of Medicine and assisted in managing the office, travel arrangements and expense reports, and hospital committee assignments.

College of Arts and Science (04/1992 to 06/1999)

Eileen provided high-level support for the Executive Director of Advancement and managed the college's fundraising goals and objectives. She provided account management, direct mail campaigns, special event planning, management, and event wrap-up for the 31 college departments.



Stephanie Duncan

BA

Project Coordinator | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

10+ years

KEY QUALIFICATIONS

- Over 10 years professional experience
- Experience in project creation and organization
- Experienced in relationship management and communication

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Broadcast Journalism, Marshall University

Stephanie Duncan is a project coordinator in BerryDunn’s Medicaid Practice Group (MPG). She brings experience in content creation, social media engagement, and digital marketing to the projects she supports. Stephanie is adept at leveraging her expertise in relationship management, internal and cross-team collaboration, and communication and strategy development to support project outcomes.

PROJECT EXPERIENCE

BerryDunn (10/2025 to present)

Stephanie provides project coordination support to BerryDunn’s state Medicaid agency clients, supporting meeting coordination and scheduling, managing meeting materials, supporting deliverable management, and assisting with other project coordination needs, all while adhering to established Service Level Agreements.

West Virginia Bureau for Medical Services (BMS)

- *Justice Involved Program Support (JIPS) Phase II (10/2025 to present)*
- Stephanie serves as project management support staff to support JIPS Phase II. She assists in organization and preparation for meetings, attending meetings, and maintaining a written record of discussions, risks, issues, and decisions, and supporting daily project coordination activities.
- *1115 Behavioral Health Demonstration Project Phase II (10/2025 to present)*
- Stephanie serves as project management support staff to support the 1115 Behavioral Health Demonstration Project Phase II. She assists in the organization of and preparation for meetings, attending meetings, and maintaining a written record of discussions, risks, issues, and decisions, and supporting daily project coordination activities.



- *Payment Error Rate Measurement (PERM) Reporting Year (RY) 2026 Phase II (10/2025 to present)*
- Stephanie provides project coordination activities such as meeting coordination, note-taking, preparing meeting agendas, tracking action items, decisions, risks, issues, and other ad hoc requests as needed.
- *WV Resource Integration Solutions for Enrollees (RISE) Procurement Assistance Project Phase II (10/2025 to present)*
- Stephanie serves as project management support staff to support the WV RISE Procurement Assistance Project Phase II. She assists in the organization of and preparation for meetings, attending meetings, and maintaining a written record of discussions, risks, issues, and decisions, and supporting daily project coordination activities.
- *WV Project Management Organization Services for West Virginia (10/2025 to present)*
- Stephanie provides project coordination activities such as meeting coordination, note-taking, preparing meeting agendas, tracking action items, decisions, risks, issues, and other ad hoc requests as needed.

West Virginia Department of Human Services (DoHS)

- *Medicaid People's Access To Help (PATH) Phase III (10/2025 to present)*
- Stephanie provides project coordination activities such as meeting coordination, note-taking, preparing meeting agendas, tracking action items, decisions, risks, issues, and other ad hoc requests as needed.

Hurricane Media (11/2023 to present)

Stephanie serves as owner and creative lead, specializing in video production and photography for branding, portraits, events, and commercial projects. In this role, she provides portraits, action photography, and unique photoshoot creation and design. Published in a variety of magazines in 2024 and 2025. Within this role, Stephanie has garnered an aptitude for utilizing Microsoft Teams to facilitate collaborative coordination, scheduling, planning, communication, and organization.

West Virginia Junior College (08/2016 to 05/2025)

Stephanie served as an adjunct instructor and content creator, where she developed and delivered course materials, assessed student work, and provided guidance to students. Stephanie also created syllabi, lectures, assignments, and assessments that aligned with the course curriculum and learning objectives; conducted lectures, led discussions, and facilitated learning activities in the classroom or online; evaluated student work, including papers, quizzes, exams, and projects, and gave feedback; and provided support and guidance to students outside of class time. She worked with other faculty members and staff to enhance the curriculum and support students; handled photography and videography for promotional materials; collaborated with teams to grow social media engagement and audience retention; documented, coordinated and scheduled for internal/external College needs; and taught marketing, communications and other general education courses. Stephanie also guided students on using digital media and marketing to enhance their work and business; utilized



digital media for unique classroom instruction; and led recruitment efforts through digital media strategies, including social media marketing, photography, and promotional videos.

Northwestern Mutual (2013 to 2016)

Stephanie served as director of client relations and sales execution team (SET) leader, where she focused on building and maintaining strong, positive relationships with a company's clients. She helped ensure client satisfaction and retention, as well as identifying opportunities for business growth. Stephanie developed and implemented client engagement strategies to address client concerns, collaborating with internal teams to improve service delivery.

WVNN Infusion Services (2011 to 2013)

Stephanie served as marketing and Public Relations administrator. In this role, Stephanie created and executed a comprehensive marketing plan, including social media and digital content. She also managed media relations and networking with healthcare professionals.



Alycia Minshall

MA

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



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

17 years

KEY QUALIFICATIONS

- More than 17 years of experience copyediting and proofreading various deliverable types, including reports, work plans, press releases, strategic plans, and meeting notes
- More than three years of experience working with WV engagement deliverables

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, English Language and Literature, Central Michigan University
- BA, English, Alma College
- Poynter American Copy Editors Society (ACES) Certificate in Editing
- Sigma Tau Delta Honors Society

Alycia Minshall is an ACES-certified editing and communications professional with more than 17 years of experience in higher education and corporate settings. She excels in copywriting, editing, and collaborating on deliverables, helping ensure strong communication and flexibility when working with writers. Alycia maintains a strong understanding of the copyediting process, citation styles, and the importance of accessibility.

EXPERIENCE

BerryDunn (08/2022 to present))

Alycia works with the BerryDunn team in West Virginia to offer documentation support, including copyediting, proofreading, and formatting services for deliverables. She also develops educational resources on various writing topics such as creating accessible documents; integrating diversity, equity, and inclusion principles into writing; and using PerfectIt to self-edit.

Alycia Minshall Editing Services (03/2014 to present)

Alycia provides editing services to clients across a variety of assignments, including poetry books, master’s theses, and doctoral dissertations. She fact-checks, copyedits, and proofreads documents, helping to ensure a well-written final product. Past clients include Public Sector Consultants, Michigan Saves, and MedHealth.

Public Sector Consultants (04/2017 to 08/2021)

Senior Editor (06/2020 to 08/2021)



As senior editor, Alycia wrote copy for various mediums, including websites, social media, and event collateral. She copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; case studies; meeting notes; and more. She helped ensure consistency in voice, brand, and tone across messaging channels and that all materials are well written, accurate, properly researched, objective, and concise. She managed a team of editors, providing guidance on improving speed and accuracy as well as continuing education. She also maintained the company style guide, updating the document annually to help ensure proper terminology and appropriate treatment of diversity, equity, and inclusion principles.

Editor (04/2017 to 06/2020)

As an editor, Alycia copyedited, proofread, and fact-checked marketing collateral; web copy; press releases; research reports; financial, legal, and technical documents; presentations; social media copy; proposals and requests for proposals; and meeting notes. She helped ensure materials were accurate, objective, concise, and consistent in voice, brand, and tone across messaging channels.

University of Southern California Graduate School of Social Work (09/2015 to 06/2016)

Alycia served as a learning support writing coach, working collaboratively with graduate students on a variety of writing topics and assignments, including research papers, theses, and dissertations. She taught biweekly seminars on mastering APA style, writing with clarity, conducting research, and organizing writing assignments.

Central Michigan University Writing Center (08/2013 to 06/2014)

Alycia served as the Writing Across the Curriculum coordinator to develop and schedule more than 100 writing center orientations, writing workshops, and presentations across campus; topics covered included APA style, business writing, and peer-review techniques. She trained writing center staff on delivering workshop and orientation materials, and she maintained a database of record for writing center presentations, including data on number of attendees, date of presentation, and lead presenter.

Central Michigan University (01/2012 to 06/2014)

Alycia served as a graduate assistant to collaborate with students, staff, and faculty on writing assignments to improve clarity and organization. She conducted more than 1,000 writing sessions for undergraduates, graduates, and faculty, and served as lead consultant for ESL students, providing culturally sensitive, tailored sessions for their specific needs.

Alma College Writing Center (08/2008 to 12/2011)

Student Director (08/2010 to 12/2011)

Alycia supervised and managed seven employees, worked closely with the faculty director to properly staff the center, coordinated on-campus presentations, and conducted monthly staff meetings. She created weekly work schedules for staff, scheduled and delivered writing center orientations, and managed monthly payroll submissions.



Writing Center Tutor (08/2008 to 12/2011)

Alycia tutored and collaborated with undergraduate students on class assignments, resumes, and graduate school application essays to improve their writing. She also delivered writing center orientations across campus.



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



and proper storage of deliverables for all ongoing projects. Caitlin was also responsible for copyediting proposals and deliverables for spelling, grammar, fluency, and consistency.

University of Hartford Department of Psychology (01/2019 to 05/2020)

Caitlin worked as a research assistant to aid in running experimental sessions by overseeing the distribution and collection of materials. She facilitated timely data processing by efficiently scoring participant response booklets with colleagues and maintained the integrity of experimental sessions by managing participant entry.

True Colors, Inc. (01/2019 to 05/2019)

Caitlin worked as an intern to supervise vendors at the True Colors Annual Conference, which is the largest consistently run LGBTQ+ youth conference in America. She coordinated check-in and check-out, responded to vendor needs, and directed guests. She also secured donations, identified potential donors, established correspondence, and facilitated donation process. Caitlin redesigned presentation materials to best represent True Colors' current mission and achievements.

University of Hartford Department of Communication (09/2018 to 05/2020)

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



Carole Ann Guay

BS

Manager| Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE	RELEVANT EXPERIENCE
Project Management Support Staff	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)



BerryDunn has performed the State's financial and programmatic audit of its health insurance exchange since 2016. Carole Ann currently serves as the project coordinator on this audit to determine whether the Exchange is in material compliance with 45 CFR 155.

Minnesota Health Benefit Exchange (MNSure)

Programmatic Audit (10/2015 to present)

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.

Monroe County, FL

Clerk and Court Business Process Review (02/2023 to 02/2024)

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

City of St. Charles, MO

Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

Arizona Department of Agriculture (AZDA)

Assessment of Current Licensing System and Development of a Transition Scope of Work (12/2022 to 07/2023)

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

Montana Department of Corrections (MDOC)

OMS Procurement (01/2023 to 07/2023)

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

Metropolitan Government of Nashville and Davidson County (Metro), TN

Information Security Program Development (05/2016 to 04/2021)



For Metro's development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

New Mexico Corrections Department (NMCD)

Commercial Off-the-Shelf (COTS) OMS Replacement (11/2016 to 06/2020)

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

Oregon Enterprise Technology Services (OR ETS)

Integrated IT Service Management (ITSM) (03/2018 to 03/2019)

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

Colorado Office of the State Auditor

IT Evaluation (09/2017 to 02/2019)

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

Sacramento Municipal Utility District (SMUD)

Information Security Audit (08/2016 to 12/2017)

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

West Virginia Department of Human Services

Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for West Virginia E&E Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.



Massachusetts State Ethics Commission

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

Washington State Auditor's Office (SAO)

Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service, helping ensure new customer satisfaction, and directly assisted the branch manager in all daily office operations.



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.



Aubrey Duplissie

BS

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



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

5 years

KEY QUALIFICATIONS

- One year of experience proofreading WV engagement deliverables.
- Over three years' experience in operational roles, including editing support, organizational management, and project startup.

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Business Administration – Marketing, University of Maine
- BA, Economics, University of Maine

Aubrey Duplissie is an experienced client and administrative support professional, with a developed attention to detail that helps her provide thorough support in all her tasks. Aubrey is skilled in project support, operational management, editing and proofreading, web management, and communication.

EXPERIENCE

BerryDunn (02/2025 to present)

Aubrey works within the Consulting Services Support team, contributing in an administrative setting and with project support. Aubrey assists BerryDunn project principals with administration and coordination tasks. Aubrey also provides project support through creating deliverable shells, project startup documents, and surveys with results analysis, as well as managing meeting requests and website creation.

ATX Advisory (05/2024 to 11/2024)

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



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

As an annual fund, marketing, and events associate, Aubrey oversaw day-to-day website operations, content management, web design, and timely updates. 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.



Rachel Eggleston

MBA

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



PROPOSED PROJECT ROLE	RELEVANT EXPERIENCE
Project Management Support Staff	6 years
KEY QUALIFICATIONS	EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS
▪ One year of proofreading/editing WV documents ▪ Over two years' experience with project set up and PowerPoints ▪ Over five years of administrative tasks with support and organization management.	▪ MBA, Business Administration, Johnson & Wales University ▪ BS, Business Administration, Minor: Human Resource Management, Johnson & Wales University

Rachel Eggleston is an experienced administrative assistant with a solid foundation in customer service, time management, and attention to detail. Rachel is also skilled in project support with editing, proofreading, and communication.

EXPERIENCE

BerryDunn (03/2025 to present)

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

Varney Agency (05/2023 to 05/2025)

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

Hub International (04/2022 to 04/2023)

As an assistant account manager, Rachel worked with clients, making policy changes, gathering information that was needed for account managers, and updating files.

MEMIC (03/2020 to 03/2022)

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



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



Jonathan Williams

BA

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

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

21 years

KEY QUALIFICATIONS

- Over 21 years' experience editing a wide range of projects and formats
- Over six years' experience editing West Virginia deliverables
- Demonstrated ability to prioritize projects and meet strict deadlines

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, English, Bowling Green State University
- ACES: The Society for Editors

Jon Williams is an experienced writer and editor, bringing more than 20 years of experience in proofreading, copyediting, and professional writing across several industries. He works with BerryDunn's consulting teams to review and revise written documentation before it is submitted to clients.

EXPERIENCE

BerryDunn (02/2019 to present)

Jon serves as an editor for BerryDunn's Consulting Team, tasked with proofreading and copyediting client deliverables, meeting notes, memos, and PowerPoint presentations for various government entities.

Freelance Proofreader and Copyeditor (11/2010 to present)

Jon has worked with Ertel Publishing to proofread several niche magazines, as well as with Gypsy Publications to copyedit children's books, novels, and various other local publications.

Midwest Tape (11/2004 to present)

Jon proofreads monthly catalogs and weekly newsletters, as well as various other printed and digital documents. He writes copy for advertisements, service brochures, the company blog (mwtnewsandviews.com), social media, and other projects. He serves on a committee that established the company's brand guidelines and now works to help ensure those guidelines are followed on all materials, internal and external.

Mitchell Equipment Corporation (02/2002 to 11/2004)



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

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

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



Jordan Ramsey

MA, LSSGB

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



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

15 years

KEY QUALIFICATIONS

- Technical expertise in language and digital tools
- Mastery of the BerryDunn and AP Style Guides
- Formatting proficiency for consistent, high-quality documentation

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, English, Professional Writing, Southeast Missouri State University
- BA, Liberal Arts and Sciences, English Literature and Creative Writing, University of Illinois at Urbana-Champaign
- Lean Six Sigma Green Belt
- Poynter ACES Certificate in Editing

Jordan Ramsey is a Consulting Services Support Manager in BerryDunn’s Government Consulting Group and manager of Editorial/QA. He provides document quality assurance and editing for BerryDunn client deliverables and marketing/communications documents. Jordan is a Poynter American Copy Editors Society (ACES) Certified Editor, Lean Six Sigma Green Belt, and holds a MA in English: Professional Writing.

EXPERIENCE

BerryDunn (07/2019 to present)

Jordan leads a team of editors and proofreaders who work in Portland, ME, and remotely across the country. He is responsible for implementing a new submission ticketing system for Editorial/QA, as well as organizing multiple years of fiscal year Editorial/QA data, communicating with consultants regarding edits and turnaround times, and creating and providing multiple writing presentations. Jordan has recently worked on ensuring WCAG 2.1 AA accessibility for the firm and client work, updating the BerryDunn Style Guide to include the newly added Department of Justice (DOJ) requirements. He also led an effort for the entire Consulting Team (approximately 350 people at the time) to install and utilize the PerfectIt software, an application that checks for consistency in documents.

Jordan supports BerryDunn’s consulting groups by providing copyediting, proofreading, formatting, and other quality assurance tasks for various types of documents, including client deliverables and marketing/communications content.

Portland Adult Education (2019)



Jordan delivered writing instruction to international students and taught Level 100 and 200 English courses. In addition, he was responsible for assessments and level placement for students.

Pearson Smarthinking Writing Lab (2017)

Jordan revised and edited a variety of essays, working under strict deadlines and providing personalized feedback to help students strengthen their technical writing, creative writing, career writing, and English-as-a-Second Language skills.

Southeast Missouri State University (2015 to 2017)

As a graduate assistant, Jordan taught English Composition and aided in the delivery of the Introduction to Creative Writing course, leading workshops in poetry and fiction and facilitating group work. In addition, he wrote book reviews and reviewed authors' submissions for the Big Muddy, an online journal published by the Southeast Missouri State University Press.

As a writing tutor, he assisted students with their writing in both face-to-face and online settings and scored writing proficiency exams.

As publications assistant, Jordan proofread and edited copy for campus-wide publications and wrote copy for advertising documents.

The Southern Illinoisan (2014 to 2015)

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

Other Teaching Experience (2006 to 2010)

Lanier Technical College

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

Hardin County, IL

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

NOVA Group of Japan

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



Megan Hamilton

MA

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



PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

6 years

KEY QUALIFICATIONS

- Several years of experience copyediting and proofing diverse document types, including audit documentation, academic research, and client deliverables
- Over three years of experience working with WV engagement deliverables

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, Literary and Cultural Studies, Carnegie Mellon University
- BA, English, Kent State University
- Poynter ACES Certificate in Editing

Megan Hamilton is a knowledgeable editor with writing, editing, and research experience in corporate and academic settings. She has a strong understanding of the copyediting process, citation styles, and the intersections of technical, journalistic, and academic writing. Megan also focuses on collaboration efforts between editors and writers, supporting continuous education on business writing guidelines and evolving editorial processes.

EXPERIENCE

BerryDunn (12/2022 to present)

Megan works as an editor for Editorial and Quality Assurance (EQA), a cohort within the Consulting Services Support team. She provides copyediting, proofreading, and formatting support to a variety of client-facing deliverables. Megan also helps to develop and support business writing presentations, supplemental documentation, and adherence to the style guide.

Fiverr (05/2022 to 12/2022)

Megan served as a freelance editor and proofreader on professional documents for clients.

Institute of Reading Development (05/2021 to 08/2021; 05/2022 to 12/2022)

Megan served as a teacher responsible for instructing reading and writing for students in kindergarten through college. She organized and conducted meetings with parents regarding reading assessments and progress.

Carnegie Mellon University (08/2021 to 05/2022)



Megan served as a research assistant to gather and articulate research findings for a range of academic projects.

Brainchild Literary Magazine (08/2020 to 05/2021)

Megan served as editor in chief to lead the process of soliciting poetry and prose submissions. She collaborated with staff to select and edit submissions and led discussions with staff about goals of publication and establishing a social media presence.

Academic Success Center (08/2018 to 05/2021)

Megan served as a tutor and as program assistant to facilitate team meetings, assist with new tutor observations, and evaluate study materials. She assisted professors with navigating student technology and academic material.

Seglian Manufacturing Group (01/2012 to 01/2022 [seasonal])

Megan served as an administrative assistant, directly under 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.



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)



Grace assisted professors in grading and attendance, updated the computer log of student petitions, and designed and maintained department bulletin boards.

Private SAT Tutor (05/2015 to 08/2015)

Grace developed individualized SAT study plans for the reading, writing, and essay sections. She conducted tutoring sessions, administered regular practice tests, and monitored student progress.

ORU Writing Center (08/2015 to 12/2015)

As a writing tutor, Grace provided personalized feedback to students on their essays, focusing on clarity, coherence, grammatical accuracy, and adherence to style guides. She guided students through grammar and writing tutorials and conducted one-on-one tutoring sessions to address individual writing challenges to enhance overall writing skills.

Oral Roberts University (08/2014 to 05/2015)

As an academic peer advisor, Grace provided individualized tutoring to students for various subjects. She edited student papers and worked with student leadership in dormitories.

Private Dental Practice (2012 to 2016)

As an office assistant, Grace checked in patients, verified insurance information, and processed payments. She also answered phone calls and responded to patient inquiries, scheduled and confirmed patient appointments, and updated patient records.



Hope Connard

BA, PHR, SHRM-CP, ECCP

Manager | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

2 years

KEY QUALIFICATIONS

- 30 years' Strategic HR Leadership Experience
- 20 years' Organizational Effectiveness
- 20 years' Change Management Leadership

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Human Resource Management, University of Arizona
- Professional in Human Resources (PHR)
- Society for Human Resource Management – Certified Professional (SHRM-CP)
- Executive Coaching Certification Program (ECCP)

Hope Connard is a Consulting Manager with expertise in strategic human resource leadership and organizational effectiveness. She has led large-scale Human Resources Information System (HRIS) implementations, supported organizational redesign and job architecture realignment, and guided organizational and business process improvement initiatives. Known for her collaborative, coaching-focused approach, Hope helps organizations improve performance, strengthen culture, and implement sustainable change.

EXPERIENCE

BerryDunn (12/2019 to present)

Guam Department of Public Health and Social Services (DPHSS)

Guam-Engagement Portfolio Management Office (EPfMO) - Client Success and Growth – Process Documentation (09/2025 to present)

Hope serves as the Services Lead for Process Documentation for Guam's Medicaid agency, DPHSS. Hope leads a team in developing standard operating procedures (SOPs) and documenting current and future-state workflows, overseeing planning, task coordination, and quality review to support process improvement initiatives for the Guam project.

West Virginia Bureau for Medical Services (BMS)

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Reporting Project (07/2024 to present)



Serving as 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.



Collaborating on various projects, she innovatively designed employee benefit programs tailored to meet the needs of both employees and client employers. Additionally, she collaborated with fellow leaders to identify and implement a multi-client HRIS platform, while maintaining a focus on initiatives aimed at enhancing organizational effectiveness.

NGK Sparkplugs (04/2007 to 03/2010)

In her role as an HR administrator for a global manufacturer, Hope managed recruitment efforts and payroll administration, and drove enhancements in HR processes. She played an active role in employee engagement initiatives and supported training and development programs in West Virginia operations. Engaging with Kaizen groups, she focused on improving organizational effectiveness. Notably, her pivotal involvement in relocating import operations from Detroit, MI to Charleston, SC underscored her ability to liaise effectively between U.S. and Japan operations. Additionally, she conducted meticulous audits and data analysis and aided in implementing a new inventory platform. Hope's unwavering dedication to continuous improvement, particularly through her engagement with Kaizen programs, epitomized her commitment to operational excellence.

IT Alliance of Appalachian Ohio (04/2003 to 04/2007)

Hope worked as an executive assistant and HR generalist for a non-profit focused on improving IT awareness for the southeastern Ohio region. She managed staff and independent contractors for special events tied to IT initiatives. She was responsible for managing HR and payroll responsibilities and grant management. Special projects Hope led for this initiative included creating and managing a job board for interns and professionals entering the IT profession and coordinating events for the IT sector.



Ben Giesser

CPACC

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE	RELEVANT EXPERIENCE
Project Management Support Staff	2 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, English and Economics, Colby College
- Certified Professional in Accessibility Core Competencies (CPACC)

Ben is a consultant within BerryDunn’s Government Assurance Practice Group. His work with compliance and risk management has ranged from programmatic audits and attestation engagements to accessibility reviews and assessments of elections procedures. Ben’s strengths include written analysis, Microsoft Office, financial modeling, and accessibility remediation planning. He has experience working in HTML, R, Python, SQL, and Stata.

EXPERIENCE

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

Maricopa County Board of Supervisors

Election Comprehensive Review (07/2025 to present)

Ben is on the team that conducted a variety of assessment procedures in review of the Maricopa County Elections practices. This review included in-person observations across multiple elections and reviews of thousands of pages of documentation related to chain of custody. The review procedures also included interviews with personnel from multiple departments, including the Recorder’s Office, the Elections Department, and other relevant stakeholders.

Detroit Wayne Integrated Health Network (DWIHN)

Medicaid Billing Auditing Services (04/2025 to 10/2025)

Ben was on the team performing a program integrity audit of Medicaid claims processed within the DWIHN system. This included review of progress notes, assessment of documentation against applicable requirements, and inspection of metadata and other areas of interest.

State-Based Health Insurance Exchanges

Programmatic Audits (07/2023 to present)

Ben is on the team that provides the annual programmatic audits for 11 state-based health insurance exchanges (HIXs): California, Illinois, Kentucky, Maine, Massachusetts, Minnesota, Nevada, Pennsylvania, Rhode Island, Vermont, and Washington. The programmatic audits assess compliance with federal requirements of the Affordable Care Act contained in 45 CFR



155. These audits are conducted in accordance with American Institute of Certified Public Accountants (AIPCA) Standards and Government Auditing Standards. Ben helps to provide the public-facing documents related to these programmatic audits in a manner that is accessible in compliance with WCAG 2.1 Level AA requirements.

West Virginia Bureau for Medical Services (BMS)

Information Technology Control Environment Review (07/2024 to 04/2025)

Ben supported West Virginia's single State Medicaid Agency as a consultant on the project reviewing the IT control environment of the Medicaid Management Information System (MMIS) program. BerryDunn conducted interviews of key personnel, and reviewed policy and procedure documents related to the governance of the MMIS, with a focus on the review of the System and Organization Controls (SOC) report, access controls, and configuration management controls. This review resulted in assisting WV BMS to develop policies and procedures to address identified control gaps.

Scientific Games

Accessibility Assurance (06/2023 to 08/2023)

Ben worked as the lead analyst on BerryDunn's team that assessed and reported compliance with digital accessibility standards required as a supplier of lottery services to a state government. The reports assessed compliance with WCAG 2.1 Level AA. The digital platforms within the engagement scope included, but were not limited to in-person kiosks, mobile phone applications, internal websites, and external websites.

City of Reno, NV

Employee Benefits Review (07/2024 to 12/2024)

Ben worked on BerryDunn's team to assist the City of Reno with testing to determine if employee benefits were administered in accordance with applicable regulations, policies, and procedures. The team also helped to assess the effectiveness and efficiency of the benefits management process. This included consideration of internal controls for approvals, permissions, and segregation of duties. The team's engagement activities concluded by providing recommendations in a written report.

Colby Student Investment Association (09/2021 to 06/2024)

As an analyst, Ben led two successful stock purchase proposals, achieving a majority vote of support from a mix of students and select faculty members. These resulted in investments within a student fund of Colby's endowment. Ben's role included instructions to undergraduate students in areas such as Excel, PowerPoint, portfolio management, and financial modeling.

Choose Apprentice (06/2022 to 12/2022)

As the corporation's first undergraduate engagement manager, Ben delegated tasks among handpicked teams of two to eight college students. This involved hosting weekly meetings and monitoring the progression of each project to inform reports to clients and internal leadership. Part of this role included producing final reports to demonstrate the impact of each team.



Appendix B: Deliverable Dictionary

Table 4: Deliverable Dictionary

Deliverable ID	Deliverable Name	Deliverable Description
D01	Commissioner Briefing	A monthly status update delivered to the BMS Commissioner.
D02	Monthly Status Report	A monthly status update delivered to the project sponsor(s) and project lead(s).
D03	Project Timeline	A high-level timeline showing key deliverables, workstreams, and dates anticipated throughout the 13-month duration of this project's scope of work.
D04	Action Item, Risk, Issues, and Decision Log	This repository log will contain information on the project's action items, risks, issues, and decisions throughout the project lifecycle. This log will be a live document updated and used throughout the project's duration.
D05	Monitoring Reports	CMS requires states to submit Annual Monitoring Reports for 1115 Demonstration waivers. BerryDunn will continue to support BMS with the compilation of the Report and help ensure it is submitted to federal partners in a timely manner.
D06	Updated 1115 Deliverables	As needed, the project team will help BMS update prior submitted 1115 waiver deliverables under CMS review, per CMS feedback once given. The project team will provide direct support for updates to deliverables BerryDunn developed, such as the Implementation Plans, and will provide coordination support for other deliverables such as those in evaluation and budget neutrality topic areas.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EDS	Enterprise Data Solution
EM	Engagement Manager
GPM	General Project Manager
IAPD	Implementation Advanced Planning Document
IOP	Intensive Outpatient Program
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
QRT	Quick Response Team
RRSS	Recovery Residence Support Services
SME	Subject Matter Expert
SOW	Scope of Work
SS	Project Management Support Staff
STCs	Special Terms and Conditions
SUD	Substance Use Disorder
WV, State	West Virginia

"BerryDunn" is the brand name under which Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP, independently owned entities, provide professional services in an alternative practice structure in accordance with the AICPA Code of Professional Conduct. BDMP Assurance, LLP is a licensed CPA firm that provides attest services, and Berry, Dunn, McNeil & Parker, LLC, and its subsidiary entities provide tax, advisory, and consulting services.

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.

The entities falling under the BerryDunn brand are independently owned and neither entity is liable for the services provided by the other entity. Our use of the terms "our Firm" and "we" and "us" and terms of similar import denote the alternative practice structure of Berry, Dunn, McNeil & Parker, LLC and BDMP Assurance, LLP.

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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: June 24, 2026

TO: Crystal Hustead
Senior Buyer
State of West Virginia Purchasing Division

FROM: Althea Greenhowe *Althea Greenhowe*
Procurement Specialist, Senior
Office of Shared Administration/Purchasing

RE: PF 1973457, CDO BMS26*43
Dept 0511

The West Virginia Bureau for Medical Services (BMS) respectfully requests the approval of the above-referenced CDO for services to be performed by Berry Dunn McNeil & Parker LLC under PF 785940, CMA HHR21*03.

These services are for project management support of implementation, monitoring maintenance, systems process and procedures oversight for the WV 1115 Demonstration.

The service period is 06/15/2026 - 06/14/2027.

The total cost is \$1,130,810.00.

Please feel free to contact me if additional documentation or details are needed. I can be reached at 304-352-3924 or althea.m.greenhowe@wv.gov. Thank you for your time and consideration in this matter.





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

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 1973457, CDO BMS26*43
Dept 0511

The West Virginia Bureau for Medical Services (BMS) is submitting this funding memo related to the above-referenced delivery order. BMS anticipates making payments for Month 1-11 is 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 143 hours @ \$215	\$30,745.00	Lead Project Manager 26 hours @ \$215	\$5,590.00
Engagement Manager 44 hours @ \$270	\$11,880.00	Engagement Manager 8 hours @ \$270	\$2,160.00
Lead MMIS Project Manager 55 hours @ \$205	\$11,275.00	Lead MMIS Project Manager 10 hours @ \$205	\$2,050.00
General Project Manager 3707hours @ \$190	\$704,330.00	General Project Manager 674 hours @ \$190	\$128,060.00
Project Management S upport Staff 2485 hours @ \$80	\$198,800.00	Project Management S upport Staff 449 hours @ \$80	\$35,920.00
	\$957,030.00		\$173,780.00
		Grand Total:	\$1,130,810.00



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](#)

Revolutionary FAR Overhaul Impacts to SAM.gov [Show Details](#)
Aug 15, 2025



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Search

All Words

e.g. 1606N020Q02

Filter By

Keyword Search

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

Simple Search

Search Editor

- ☐ Any Words 
- ☐ All Words 
- ☐ Exact Phrase 

e.g. 123456789, Smith Corp

"berry dunn mcneil& parker llc" 

Entity

Location

Status

- ☒ Active
- ☐ Inactive

Reset 

Entity Information ^



All Entity Information

Entities

Disaster Response Registry

Responsibility / Qualification

E



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Business and Licensing

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Business Organization Detail

NOTICE: The West Virginia Secretary of State's Office makes every reasonable effort to ensure the accuracy of information. However, we make no representation or warranty as to the correctness or completeness of the information. If information is missing from this page, it is not in the The West Virginia Secretary of State's database.

BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit				

Organization Information			
Business Purpose	5412 - Professional, Scientific and Technical Services - Professional, Scientific and Technical Services - Accounting/Tax Prep/Bookkeeping/Payroll Services (CPAs)		Capital Stock
Charter County	Kanawha	Control Number	0
Charter State	ME	Excess Acres	
At Will Term	A	Member Managed	MBR
At Will Term Years		Par Value	
Authorized Shares		Young Entrepreneur	Not Specified

Addresses	
Type	Address
Designated Office Address	209 WEST WASHINGTON STREET CHARLESTON, WV, 25302
Notice of Process Address	URA SERVICES, INC. 5098 WASHINGTON STREET W. SUITE 407 CHARLESTON, WV, 25313
Principal Office Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Principal Office Mailing Address	2211 CONGRESS STREET PORTLAND, ME, 04102 USA
Type	Address

Officers	
Type	Name/Address

Member	SETH E. WEBBER 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	KATHY PARKER, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	SARAH BELLIVEAU, C.P.A. 2211 CONGRESS STREET PORTLAND, ME, 04102
Member	JASON FOURNIER, CPA 2211 CONGRESS STREET PORTLAND, ME, 04102
Type	Name/Address

DBA			
DBA Name	Description	Effective Date	Termination Date
BERRY DUNN	TRADENAME	3/21/2011	
BERRY, DUNN, MCNEIL & PARKER, PLLC	TRADENAME	11/5/2019	
DBA Name	Description	Effective Date	Termination Date

Annual Reports
Filed For
2026
2025
2024
2023
2022
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2019
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2012
2011
2010
2009
Date filed

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

Thursday, June 25, 2026 — 1:14 PM

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