



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: 06-12-2026

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 BMS2600000049 1	Change Order No:	Procurement Folder:	1984732	
Document Name:	WV Resource Integration Solutions for Enrollees Phase III			Reason for Modification:	
Document Description:	WV Resource Integration Solutions for Enrollees Phase 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				
Free on Board:	FOB Dest, Freight Prepaid			Master Agreement Number: CMA 0511 HHR2100000003 1	

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: \$2,037,925.00

PURCHASING DIVISION AUTHORIZATION
DATE: 6/17/26
ELECTRONIC SIGNATURE ON FILE

ENCUMBRANCE CERTIFICATION
DATE: 6-17-26
ELECTRONIC SIGNATURE ON FILE

Extended Description:

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project Phase III.

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

Total: \$2,037,925.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
1	80101600	0.00000		\$0.0000	\$322,500.00
Service From	Service To	Manufacturer		Model No	Delivery Date
2026-06-15	2027-06-14				

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

Extended Description:

Lead Project Manager: Optional Renewal Year Three

Hourly Rate: \$215.00

Estimate: (1) 2000 Hours

1,500 Hours @ \$215.00 - \$322,500.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
2	80101600	0.00000		\$0.0000	\$114,750.00
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

425 Hours @ \$270.00 = \$114,750.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
3	80101600	0.00000		\$0.0000	\$52,685.00
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

257 Hours @ \$205.00 = \$52,685.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
4	80101600	0.00000		\$0.0000	\$1,385,670.00
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

7,293 Hours @ \$190.00 = \$1,385,670.00

Line	Commodity Code	Quantity	Unit	Unit Price	Total Price
5	80101600	0.00000		\$0.0000	\$162,320.00
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

2,029 Hours @ \$80.00 = \$162,320.00



May 28, 2026

To Whom It May Concern:

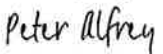
Berry, Dunn, McNeil & Parker, LLC (BerryDunn) submitted a Staffing Plan and Scope of Work (SOW) document to assist the West Virginia Department of Human Services, Bureau for Medical Services by providing support for the West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance 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 13 months. BerryDunn agrees to a SOW start date effective June 15, 2026

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

Please let me know if you have any questions or if you would like to discuss the content in this SOW.

We are pleased to have the opportunity to provide these important services to the State of West Virginia.

Best Regards,

DocuSigned by:

2DAAA44ADB3A477

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

Ok




West Virginia Department of Human Services, Bureau for Medical Services

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance 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

Brandon Milton, Principal

Berry, Dunn, McNeil & Parker, LLC
bmilton@berrydunn.com

Peter Alfrey, Principal

Berry, Dunn, McNeil & Parker, LLC
palfrey@berrydunn.com

Submitted On:

May 28, 2026



Staffing Plan and Scope of Work for the West Virginia Department of Human Services, Bureau for Medical Services and the West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance 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 the West Virginia Resource Integration Solution for Enrollees (WV RISE) Procurement Assistance Phase III project (hereinafter "WV RISE Project"). The work completed under the WV RISE Project will be completed in accordance with the terms and conditions of the Centralized Master Agreement (CMA) HHR 21*03 BMS Project Management Services contract between BerryDunn and the WV BMS.

1.0 Introduction

The intent of this document is to help ensure common expectations for deliverables and services BerryDunn will provide under this Staffing Plan and SOW. BerryDunn considered the following information in preparing this SOW. BerryDunn will support BMS with drafting State outcomes and metrics, solution specifications, and requirements for an outcomes-based request for proposal (RFP). Through this RFP, BMS aims to obtain competitive proposals—in accordance with technical and cost-evaluation criteria—to modernize its WV Medicaid and Children's Health Insurance Program (CHIP) modular Medicaid Management Information System (MMIS). As of the date of submitting this SOW, the system will consist of the following five modules:

- Provider Management
- Member Management
- Customer Service (call center and member/provider portal)
- Claims and Encounters
- Finance
- Pharmacy

1.1 Key Information

The objective of this project is to provide project and procurement management services and support to BMS, including the development of a modernized outcomes-based WV RISE RFP. This SOW will support the following activities:

- Continue coordinating joint requirements planning (JRP) sessions to confirm specifications and requirements for the modernized WV RISE and to inform the development of an outcomes-based RFP based upon the agency's selection of an alternative from the previously completed alternatives analysis, cost benefit analysis, and feasibility study
- Continue creating evaluation, scoring, and training documentation to aid BMS staff in evaluating vendor responses



- Maintain and manage the integrated RFP development schedule, including key milestones, dependencies, and timelines for all procurement activities
- Develop all required RFP components, including service level agreements (SLAs), deliverable dictionary, procurement library, detailed specifications and requirements, and defined State outcomes and performance metrics, to support issuance of a competitive solicitation aligned with technical and cost evaluation criteria
- Deliver a completed RFP to BMS and assist BMS in its review processes, internal and external, to present a completed RFP to the external vendor community
- Create an Implementation Advance Planning Document (IAPD) for submission to the Centers for Medicare & Medicaid Services (CMS) to help fund implementation costs for the modernized WV RISE
- The WV RISE Project will also help the State meet Medicaid Information Technology Architecture (MITA)-specific goals, such as the following:
 - Improve BMS' effectiveness and 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 laws and regulations (e.g., Patient Protection and Affordable Care Act [PPACA], State Medicaid Manual, HIPAA)
 - Ensure program quality
 - Enhance and improve efficiency, effectiveness, and meaningfulness of outreach and communication
 - Enhance the security, timeliness, and accuracy of data exchanged with authorized and authenticated business partners
 - Improve healthcare outcomes for members
 - Enhance BMS' ability to monitor contractor performance against approved measures
 - Assist BMS in requesting automation of business processes where appropriate and cost effective
 - Improve interoperability for eligibility and enrollment management
 - Improve access to information necessary for financial management
 - Improve operational efficiency and reduce costs in the healthcare system
 - Improve provider access to real-time data
 - Improve effectiveness and efficiency of the performance management function



- Enhance BMS' ability to analyze the effectiveness of potential and existing benefits/policies
- Improve consistency of plan management processes and effective communication of policy
- Simplify process for submission of provider information

1.2 Assumptions

Estimates for this SOW are based on the following assumptions:

- The State leadership team will consist of Sarah Young, BMS Deputy Commissioner of Policy and Operations, as the BMS project sponsor and Diana Bossie as BMS project lead.
- The State project lead will provide timely decision-making and responses to information requests from the BerryDunn project team.
- State staff with the required knowledge base to support the WV RISE Project will attend project-related meetings, including JRP sessions. If these individuals are unavailable or do not participate in the JRP sessions, the project schedule, scope, and cost might be impacted.
- The BerryDunn leadership team will consist of Brandon Milton, Engagement Manager, (EM), Emily McCoy, Lead MMIS Project Manager (LMPM), Alex Tannenbaum, Program Manager (PgM), Nolan Cyr, Deputy Program Manager (DPgM), Renzo Del Castillo, Lead Project Manager (LPM), and Rick Hayward, Deputy Project Manager (DPM).
- BerryDunn and the State will explore strengthening WV partnerships with states and other territories, such as the United States Virgin Islands (USVI), 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 stored in an agreed-upon SharePoint location and will be brought to the attention of the BMS project sponsor and lead.
- This work will begin with approval of this SOW and a mutually agreed-upon date and is projected to continue for 13 months.

1.3 Project Funding

The State intends to utilize the WV RISE Planning Advance Planning Document (PAPD) for this SOW. The WV RISE PAPD was submitted to CMS on March 24, 2026, with approval expected by May 23, 2026. The Advance Planning Document (APD) requested amount for this project is \$3,216,862, and the estimated cost under this SOW is \$2,037,925. Any expansion of scope may require an update to the WV RISE PAPD 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. 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 the project closeout meeting and acceptance of the final monthly status report (MSR) by the project sponsor or their designee.	Brandon Milton Peter Alfrey Shea Berry-Brennan Nicole Becnel Ed Daranyi Emily McCoy Alex Tannenbaum Renzo Del Castillo	629
2.0	Project Execution and Control <i>Service Approach</i> BerryDunn's leadership will meet with the project sponsor to discuss project status and issues affecting timely completion of the work and oversee BerryDunn staff, services, and deliverables. Project Execution and Control will also include: - Facilitating meetings, preparing meeting materials, and taking notes for BerryDunn-, State-, and vendor-owned meetings as needed - Preparing biweekly and 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	Renzo Del Castillo Alex Tannenbaum Lorrie Davenport Rick Hayward Mary Stewart Alison Barnett MaryLou Banker Marnie Hudson Hope Connard Matt Oatten AJ Mong Stephanie Duncan Kortney Ester Shelly Schram Charles "Tom" Hunter Cate Poling	1,468



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	• Partnership Planning and Design: Providing resources with relevant subject matter and implementation expertise to support BMS in facilitating, planning, and designing partnerships • Facilitate Leverage and Reuse: Supporting leverage and reuse efforts by coordinating with the sponsoring state and other willing states and territories to identify opportunities for shared solutions, knowledge transfer, and collaboration • Targeted Implementation Support: Providing assistance with additional limited implementation-related tasks for BMS projects, as defined and prioritized by the project sponsor(s), to support successful project outcomes • Maintaining the procurement schedule and related deliverables <i>Deliverable(s)</i> • D02: MSR • D03: Procurement Schedule <i>Completion Criteria</i> All parties will deem Project Execution and Control complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Sam Kessler Hailey Holden Alycia Minshall Caitlin Cabral Carole Ann Guay Jonathan Williams Jordan Ramsey Megan Hamilton Grace Min Grady Black Katie McDonald	
3.0	Operational Report Workbook (ORW) Services <i>Service Approach</i> BerryDunn will support the State in ORW reports for the West Virginia Project Portfolio. ORW Services includes the following activities: • ORW Governance and Planning • Metric and Data Analysis • ORW Development and Maintenance • Stakeholder Coordination and Review • CMS Submission and Support <i>Completion Criteria</i> All parties will deem Operational Report Workbook (ORW) Services complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Emily McCoy Shelly Schram Marnie Hudson	419



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
4.0	RFP Development Services <i>Service Approach</i> BerryDunn will support the State in the development of a modernized outcomes-based RFP to solicit competitive proposals and meet solution outcomes, specifications, and requirements according to technical and cost-evaluation criteria. RFP Development Services includes the following activities: - Updating the WV RISE Strategic Plan based on the alternatives analysis - Preparing for JRP sessions by researching requirements specific to the proposed modules to confirm specifications and requirements for the modernized WV RISE and to inform the development of the RFP - Facilitating internal requirements sessions with BerryDunn team members who have experience with current BMS policies and Medicaid Enterprise Systems (MES) as well as documenting the as-is and to-be state of the current enterprise, including the inventory, review, and analysis of current reports, interfaces, and policy manuals to identify necessary updates - Supporting the State with development of SLAs, deliverable dictionary, procurement library, and State outcomes and metrics - Engaging the USVI, under the guidance of BMS, in procurement planning activities such as soliciting requirements to fit USVI needs; providing requirements for review and approval; including requirements in JRP sessions and procurement development; and incorporating USVI feedback into the procurement - Developing an RFP for BMS review - Providing support for State and federal reviews of the RFP - Developing a Q&A Addendum for tracking vendor questions and BMS responses - Facilitating responses for vendor questions and responses - Developing evaluation, scoring, and training documentation to aid BMS staff in evaluating	Brandon Milton Shea Berry-Brennan Renzo Del Castillo Alex Tannenbaum Lorrie Davenport Crystal Fox Rick Hayward Kortney Ester Shelly Schram Charles "Tom" Hunter Marvin "Ed" Crawford Mary Stewart Jeffrey Stoddard Alison Barnett MaryLou Banker Elizabeth "Liz" Vose Marnie Hudson Matt Oatten AJ Mong Stephanie Duncan Hope Connard Megan Blount Adam Bowman Jim Downie Alex Lyubarov Payton Waybright Kristine West AnnaBella Hyre Ben Giesser Colin Buttarazzi Nolan Cyr Kourtney Kirk Sarah Vintorini Morgan Kreiger Kevin Chartrand	8,882



Ref	Deliverable/Service, Approach, and Acceptance Criteria	Responsible	Hours Estimate
	vendor responses - Developing oral presentation packets <i>Deliverable(s)</i> - D04: Updated Strategic Plan - D05: RFP - D06: RFP Change Log - D07: Q&A Addendum - D08: Proposal Evaluation Packets - D09: Oral Presentation Packets <i>Completion Criteria</i> All parties will deem RFP Development Services complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.		
5.0	APD Support <i>Service Approach</i> BerryDunn will develop and help facilitate the approval of the planning and implementation APDs (Annual APD, Planning Advance Planning Document Update [PAPDU]) to help ensure the project continues to maintain buy-in and financial backing from relevant federal partners. <i>Completion Criteria</i> All parties will deem APD Support complete upon completion of the project closeout meeting and acceptance of the final MSR by the project sponsor or their designee.	Dawn Webb Crystal Fox Rick Hayward Mary Stewart MaryLou Banker Marnie Hudson AJ Mong	106
Total Hours			11,504
Total Not-To-Exceed Cost Estimate			\$2,037,925



3.0 Project Resources and Hours

Table 2 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	Brandon Milton	425	\$114,750
20	LPM	\$215	Renzo Del Castillo	1,500	\$322,500
22	LMPM	\$205	Emily McCoy	257	\$52,685
23	GPM	\$190	Peter Alfrey	77	\$14,630
23	GPM	\$190	Shea Berry-Brennan	115	\$21,850
23	GPM	\$190	Alex Tannenbaum	350	\$66,500
23	GPM	\$190	Nolan Cyr	300	\$57,000
23	GPM	\$190	Nicole Becnel	26	\$4,940
23	GPM	\$190	Ed Daranyi	26	\$4,940
23	GPM	\$190	Rick Hayward	639	\$121,410
23	GPM	\$190	Crystal Fox	50	\$9,500
23	GPM	\$190	Alison Barnett	50	\$9,500
23	GPM	\$190	MaryLou Banker	815	\$154,850
23	GPM	\$190	Marnie Hudson	655	\$124,450
23	GPM	\$190	Kortney Ester	662	\$125,780
23	GPM	\$190	Shelly Schram	226	\$42,940



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
23	GPM	\$190	Charles "Tom" Hunter	118	\$22,420
23	GPM	\$190	Colin Buttarazzi	17	\$3,230
23	GPM	\$190	Jeffrey Stoddard	55	\$10,450
23	GPM	\$190	Marvin "Ed" Crawford	25	\$4,750
23	GPM	\$190	Mary Stewart	595	\$113,050
23	GPM	\$190	Dawn Webb	85	\$16,150
23	GPM	\$190	Lorrie Davenport	1,046	\$198,740
23	GPM	\$190	Elizabeth "Liz" Vose	45	\$8,550
23	GPM	\$190	Megan Blount	139	\$26,410
23	GPM	\$190	Hailey Holden	177	\$33,630
23	GPM	\$190	Adam Bowman	8	\$1,520
23	GPM	\$190	Jim Downie	8	\$1,520
23	GPM	\$190	Alex Lyubarov	116	\$22,040
23	GPM	\$190	Payton Waybright	31	\$5,890
23	GPM	\$190	Kristine West	31	\$5,890
23	GPM	\$190	Cate Poling	55	\$10,450
23	GPM	\$190	Sam Kessler	31	\$5,890
23	GPM	\$190	Kourtney Kirk	100	\$19,000
23	GPM	\$190	Sarah Vintorini	11	\$2,090
23	GPM	\$190	Morgan Kreiger	60	\$11,400
23	GPM	\$190	Kevin Chartrand	100	\$19,000
23	GPM	\$190	Katie McDonald	196	\$37,240
23	GPM	\$190	Grady Black	253	\$48,070
24	SS	\$80	Hope Connard	153	\$12,240
24	SS	\$80	Ben Giesser	17	\$1,360
24	SS	\$80	AnnaBella Hyre	153	\$12,240
24	SS	\$80	Alycia Minshall	68	\$5,440
24	SS	\$80	Caitlin Cabral	68	\$5,440
24	SS	\$80	Carole Ann Guay	68	\$5,440



CL	Role	Rate	Project Resources	Total Est. Hours	Total Est. Cost
24	SS	\$80	Jonathan Williams	68	\$5,440
24	SS	\$80	Jordan Ramsey	68	\$5,440
24	SS	\$80	Megan Hamilton	68	\$5,440
24	SS	\$80	Grace Min	65	\$5,200
24	SS	\$80	Matthew Oatten	573	\$45,840
24	SS	\$80	AJ Mong	264	\$21,120
24	SS	\$80	Stephanie Duncan	396	\$31,680
Totals				11,504	\$2,037,925



4.0 Project Hours and Cost Per Month

Table 3 below displays an overview of the project hours and estimated costs per month over the project lifetime.

Table 3: Estimated Project Costs by Month

Month #	EM	LPM	LMPM	GPM	SS	Est. Hours Per Month	Est. Cost Per Month
	Hours	Hours	Hours	Hours	Hours		
Month 1	20	63	15	327	88	513	\$91,190
Month 2	35	125	21	654	178	1013	\$179,130
Month 3	35	125	21	661	183	1025	\$180,860
Month 4	35	125	21	658	183	1022	\$180,290
Month 5	35	125	21	647	178	1006	\$177,800
Month 6	35	125	21	621	175	977	\$172,620
Month 7	35	125	21	610	172	963	\$170,290
Month 8	35	125	21	584	163	928	\$164,630
Month 9	35	125	20	569	163	912	\$161,575
Month 10	35	125	20	568	158	906	\$160,985
Month 11	35	125	20	551	156	887	\$157,595
Month 12	35	125	20	541	153	874	\$155,455
Month 13	20	62	15	302	79	478	\$85,505
Total	425	1,500	257	7,293	2,029	11,504	\$2,037,925



5.0 High-Level Timeline

Figure 1 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 ORW Services													
4.0 RFP Development Services													
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
2DAAA44467B36477

Signature

5/29/2026

Date

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

Sarah Young
Signature

6/5/2026
Date



Appendix A: Resumes

Brandon Milton

MBA, PMP®, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Engagement Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

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

EXPERIENCE

BerryDunn (07/2011 to present)

West Virginia Department of Human Services (DoHS)

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

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



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

Iowa Department of Health and Human Services (IA HHS)

Medicaid Modernization Effort (5/2022 to present)

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

Alaska Division of Health Care Services (HCS)

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

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

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

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

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

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

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

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

West Virginia Bureau for Medical Services (BMS)



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

Brandon served in the role of project manager for the development of an 1115 Waiver to create a continuum of care for Medicaid beneficiaries with a SUD in West Virginia. He led a team of policy experts and actuarial analysts to develop the concept for the delivery system and determine the budget neutrality for the waiver services. His work also included the development of an implementation plan for the waiver. The waiver received CMS approval in fall of 2017.

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

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

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

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

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

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



feeds. In addition, he developed test cases for User Acceptance Testing (UAT) to provide end users with assurance that the system processes information according to requirements.

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

Brandon provided project management support for the design, development, and implementation of a provider enrollment application and business process redesign for the provider enrollment and validation processes. The provider enrollment application allowed for online processing of Medicaid provider applications. His role was that of project contributor and business analyst. He created status reporting deliverables, assisted the project manager in executing the project according to the project management plan.

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

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

PUBLICATIONS

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



Renzo Del Castillo

PMP®, CSP-SM, SSM6, SA6, PAHM

Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Lead Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

12 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MA, Mass Communication, University of Florida
- BA, English, University of Florida
- Certified Project Management Professional (PMP®), Project Management Institute
- Six Sigma White Belt, The Council for Six Sigma Certification (CSSC)
- SAFe 6 Agilist Certified, Scaled Agile, Inc.
- SSM 6 Certified, Scaled Agile, Inc.
- CSP-SM Certified, SCRUM Alliance
- PAHM Certified, AHIP
- CSM Certified, SCRUM Alliance
- Advisory Board Member, Spring Street Exchange 2018 – 2024

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

EXPERIENCE

BerryDunn (07/2025 to present)

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

West Virginia Department of Human Services (DoHS)

WV RISE Procurement Assistance Project Phase III | May 28, 2026



Lead Project Manager (07/2025 to present)

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project Phase II (07/2025 to present)

Renzo supports West Virginia's MMIS modernization efforts through development of the Analysis of Alternatives (AoA), Cost Benefit Analysis (CBA), and Feasibility Study (FS). His work focuses on structuring evaluation methodologies, validating assumptions, and integrating technical, operational, and financial inputs to produce clear, defensible analyses aligned with CMS guidance and State strategic goals.

CastleBridge Solutions (05/2024 to 02/2026)

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

Optum Rx (12/2023 to 05/2024)

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

Change Healthcare (12/2016 to 12/2023)

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



achieved 90% OKR completion. Renzo also served as project manager and PMO Leader across multiple state agencies, overseeing end-to-end implementations of PBM solutions.

Mississippi Division of Medicaid (DOM)

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

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

Vermont Agency of Human Services, Department of Vermont Health Access (DVHA)

PMO Leader (12/2016 to 05/2024)

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

Illinois Department of Healthcare and Family Services (HFS)

PMO Leader (12/2016 to 05/2024)

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

Pennsylvania Office of Medical Assistance Programs (OMAP)

PMO Leader (12/2016 to 05/2024)

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

Sovereign States Drug Consortium (SSDC)

PMO Leader (12/2016 to 05/2024)

Renzo supported the Supplemental Drug Rebates Project.

Wyoming Department of Health – Medicaid Division

PMO Leader (12/2016 to 05/2024)

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

Ohio Department of Medicaid (ODM)

PMO Leader (12/2016 to 06/2023)

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

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

PMO Leader (01/2017 to 05/2024)

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



Ohio Bureau of Workers' Compensation (BWC)

PMO Leader (11/2019 to 05/2024)

Renzo supported the Workers Comp – Pharmacy Benefits Management Project.

West Virginia Bureau for Medical Services (BMS)

PMO Leader (12/2016 to 05/2024)

Renzo supported PDL/PPL/SMAC Programs.

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

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

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

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

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

Renzo supported Florida's single State Medicaid Agency the Agency for Healthcare Administration, as project manager for meal preparation and delivery services.



Emily E. McCoy

RN, BSN, PMP®

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

PROPOSED PROJECT ROLE

Lead MMIS Project Manager

KEY QUALIFICATIONS

- More than four years supporting and leading Medicaid policy for long-term care (LTC), Pre-Admission Screening and Resident Review (PASRR), hospice, and home health programs
- Over two years of experience leading the Transformed Medicaid Statistical Information System (T-MSIS) efforts as the WV state representative
- Design, development, and implementation (DDI) experience with large-scale Medicaid Management Information Systems (MMIS) implementations, in various roles,
- Three years of project management experience with West Virginia's large-scale integrated eligibility system, WV, People's Access to Help (PATH)
- Over 20 years of experience interacting and collaborating with federal agencies
- Experience leading enterprise-wide portfolio management
- Over 15 years of experience with Minimum Data Set (MDS) coordination, including the use of MDS assessments and Resource Utilization Groups (RUGs) in Medicaid rate setting and claims processing
- Served on the Outcomes-Based State Self-Assessment (SSA) Workgroup through the Private Sector Technology Group (PSTG)

MEDICAID EXPERIENCE

22 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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



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



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 Reprocurement Assistance (06/2025 to present)*
- *Transformed Medicaid Statistical Information System (T-MSIS) Support Project (06/2025 to present)*
- *Electronic Visit Verification (EVV) Reprocurement (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.



Peter Alfrey

MBA, MA, PMP®, LSSGB, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

12 year(s)

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Organizational Management, Husson University
- MA, History, Providence College
- BA, Journalism and Communication, Spanish Minor, University of Oregon
- Certified Project Management Professional® (PMP®)
- Lean Six Sigma Green Belt (LSSGB)
- Prosci® Certified Change Practitioner

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

EXPERIENCE

BerryDunn (03/2014 to present)

Peter is a principal and project manager supporting WV DoHS and BMS, performing duties that include, but are not limited to coordinating communications across the BerryDunn portfolio management office, helping ensure resolution of project-related issues, and disseminating necessary information to the project team(s) and escalating appropriately to the engagement's portfolio manager, and/or program managers.



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.



Shea Berry-Brennan

Ph.D., MBA, MBTI Certified Practitioner, PMP®, Prosci® CCP

Principal | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Over 12 years of experience supporting the success of state HHS and Medicaid agency clients
- Extensive experience with business process redesign and policy management—including Medicaid Management Information Systems (MMIS), integrated eligibility, and additional social service programs
- Experience in the development of Medicaid enterprise approaches, strategies, and governance
- Over 5 years' experience supporting the State of Hawaii

MEDICAID EXPERIENCE

12 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Ph.D., University of Charleston
- MBA, University of Charleston
- BS, English, The Ohio State University
- Certified Project Management Professional® (PMP®)
- Prosci® Certified Change Practitioner
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)
- MBTI Certified Practitioner

Shea Berry-Brennan is a principal in BerryDunn's Consulting Services Team, focused on providing project management support, research, and analysis services. Shea has over 12 years of project management experience, including experience working with state agencies on Independent Verification & Validation (IV&V), project management, strategic planning, contract management, organizational development, and procurement assistance projects. Shea has developed focused Medicaid experience, developing her subject matter expertise in organizational development and training, Centers for Medicare & Medicaid Services (CMS) certification, modular procurements, Medicaid Enterprise Systems (MES) modernization, provider management, and contract management.

EXPERIENCE

BerryDunn (05/2013 to present)

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

Portfolio Manager (6/2025 to present)

Shea serves as the Client Success & Growth Portfolio manager for the WV client and provides strategic planning and oversight for the Medicaid Information Technology Architecture (MITA) project and has supported the Advance Planning Document and Procurement Support project.



In addition, Shea is providing strategic planning and oversight for the WV **Resource Integration Solutions for Enrollees (RISE) Procurement Assistance project.**

Partnership Management (PM) Support Project (12/2023 to present)

Shea provides executive oversight for the partnership management work provided between West Virginia and partnering states and territories.

Provider Management Support Project (06/2018 to 06/2019)

Shea served as the program manager for the provider management program for West Virginia, overseeing multiple projects that interact with the provider management Medicaid Information Technology Architecture (MITA) business area in the West Virginia Medicaid Enterprise. As the program manager, Shea lead multiple individual projects, each with its own project manager and dedicated team. Shea was responsible for managing all resources, budgets, deliverables, service level agreements, and risks and issues for all projects in the provider management program. Shea oversaw the following projects:

- Provider Enrollment (PEA) Year 2 Project
- Access to Care Monitoring
- Provider Incentive Payment (PIP) Audit Year 7 Project

Provider Enrollment Application (PEA) Project (08/2014 to 12/2016)

Shea was the project manager on the provider enrollment project and responsible for maintaining and monitoring the project risks and issues log, project issue escalation process, and prove overall health status.

Project Management of MMIS Procurement, DDI, and Certification (08/2013 to 12/2015)

Shea served as the project management lead on the Bureau's MMIS implementation. She maintained the project risk and issue log and oversaw the process by which they were escalated to the client. She was also a liaison between the State and the vendor to address and remediate issues. This required that she facilitate executive level stakeholder meetings with the State, the MMIS vendor, and CMS. Shea also served as a design track lead for the utilization management, care management, provider management, and general/technical tracks. For each track, she was responsible for managing the repository of action items, organizing resources, and tracking decisions. She is also responsible for analyzing vendor deliverables aligned with her tracks to help ensure the correct project documentation has been provided and is available for future use.

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

Organizational and Business Process Redesign (10/2019 to present)

Shea serves as BerryDunn's Program Executive Director supporting Hawai'i's single state Medicaid agency, the Department of Human Services. Shea is supporting a business process redesign effort for the customer-facing sections of Hawai'i's MQD. Her work includes identifying opportunities for the State to leverage its Medicaid eligibility determination system to improve efficiency and the customer experience. Before becoming the Program Executive Director, Shea also served as an IT project strategist, where she provided assessments and support in



strategic planning of the current business models, providing recommendations for possible IT improvements.

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)

Strategic/Operations Planning (06/2024 to 12/2024)

BerryDunn was contracted as a follow-up to the Leadership Training with the OHHS leadership team to provide Operations and Strategic Planning support for the Coordination and Administration Oversight (CAO) team. This included interviews with key stakeholders, document review, and a full-day strategic operations planning session with leaders to support the vision of OHHS and their leadership to find actionable steps to improve project management and coordination across departments and branches.

Training and Leadership Development (12/2023 to present)

In collaboration with the NESCO, the BerryDunn team developed a leadership development training program tailored to address the unique needs of Maine's Medicaid system focusing on the OMS. Additionally, the BerryDunn team worked with the state of Rhode Island's OHHS.

The initial request was focused on matrix organization project management training to enhance cross-collaborative processes and align the states' Medicaid systems with evolving requirements.

BerryDunn introduced and implemented the following methodologies and tools in the process:

- Lean Six Sigma principles and methodology: Define, Measure, Analyze, Improve, Control (DMAIC)
- The VOICE (Valuable Organizational Insights on Culture and Engagement): BerryDunn's proprietary assessment to drive continuous improvement and increase employee engagement.
- Kaizen events: a structured approach to process improvement that encourages teams to work together to identify problems, develop solutions, and implement changes.

The training resulted in actionable recommendations to improve OMS and OHHS's Medicaid systems' operations related to enhanced matrix functions, process improvement culture, formalized project procedures, and improved employee engagement efforts.

Missouri Office of Administration, IT Services Division

State Medicaid IT Assessment Project (07/2019 to present)

Shea serves as the consulting manager for the Missouri State Medicaid IT Assessment Project. For this project, Shea is leading the assessment of the State's current IT governance approaches and the development of short- and long-term recommendations. Ultimately, BerryDunn will develop a recommended future IT Governance Model. Shea is also responsible for managing all resources, the budget, all deliverables, service level agreements, and risks and issues.

Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitation Consultant Services (09/2020 to 02/2021)



The BerryDunn team worked closely with Alaska's single state Medicaid agency with visioning, researching, and developing a future MMIS solicitation, including vendor transition support. This included an extensive current state assessment, including staff assessments, web-based research, options analysis, competitive analysis, and cost research; and a final MMIS Modernization Recommendations Report was provided. Shea was the lead reviewer of this report, which ultimately provided multiple future strategic Medicaid Enterprise System (MES) modernization options.

Massachusetts HIX/IES Entities

IV&V Services (10/2018 to 09/2019)

BerryDunn provided IV&V services for implementation of the Massachusetts Health Insurance Exchange and Integrated Eligibility System. Shea served as the temporary project manager for BerryDunn's IV&V engagement, overseeing project work and activities. Services included deliverable reviews; verification and validation of automated code review and continuous integration results; cost allocation and financial status reports; review of expected and delivered reusability; independent assessment of implementation readiness; and issue and risk management.

New Hampshire Department of Health and Human Services (DHHS)

MMIS and Fiscal Agent Services Assessment and Strategy Project (03/2018 to 09/2018)

Shea served as the lead senior consultant supporting New Hampshire's single state Medicaid agency, the Department of Health and Human Services. Shea supported the MMIS and Fiscal Agent Services Assessment and Strategy Project. For this project, she led a team that assessed the performance and capabilities of the State's MMIS and fiscal agent services relative to current industry systems and standards and developed potential MMIS re-procurement options. Additionally, Shea led the deliverable's development for this project, including the final assessment and options report, which included a SWOT analysis and a strategic assessment of the current Medicaid landscape, focusing on significant advancements in new Medicaid enterprise systems and the move to updated approaches and strategies for MMIS procurement.

Ohio Department of Medicaid (ODM)

Ohio Medicaid Enterprise System (OMES) IV&V Services (12/2016 to 02/2018)

Shea served as the CMS certification lead supporting Ohio's single state Medicaid agency, the Department of Medicaid. Shea provided IV&V services to ODM on their new modular MMIS procurement project. She managed CMS communications, focused on client relations, and led the IV&V team's certification process. Additionally, Shea helped 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.

West Virginia Department of Human Services (DoHS)

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

Shea served as the project lead for the DoHS Office of Management and Information Services' (MIS') eligibility and enrollment vendor transition project. West Virginia had a condensed time frame to transition the maintenance and operations of its existing eligibility system from one



vendor to another. Shea led and facilitated key knowledge transfer and the resolution of critical project issues. Additionally, she managed a team of five in supporting MIS in deliverable review, risk and issue tracking and mitigation, and executive status reporting.

Eligibility and Enrollment Request for Proposal (RFP) Development Assistance (10/2015 to 01/2016)

Shea served as the requirements manager for this project. As a member of the project management team, Shea supported the development of the approach to gather requirements from the state agencies that are targeted for inclusion in the RFP, including the Child Care system, the Statewide Automated Child Welfare Information System (SACWIS) system, the Child Support System, and the core eligibility and enrollment solution that services a variety of assistance programs including Medicaid, CHIP, SNAP, TANF, LIEAP, and other West Virginia-specific assistance programs. Shea led the requirements development process, facilitated Joint Requirements Planning (JRP) sessions, and escalated risks and issues to impacted stakeholders. Shea developed responses to vendor questions, and created the final question and answers procurement document for the engagement. She also led the development of the evaluation materials and scoring methodology for the procurement, and led and facilitated the evaluation committee during scoring sessions. Finally, Shea led the team in supporting the State with the development of the final procurement packages, including providing consulting services to both the State and the federal partners during the review of the final selection.

CIMCO Building Services (06/2012 to 05/2013)

Shea focused on strengthening the company's ties to their clients by performing site visits, carefully watching safety compliance, and helping to ensure quality work. From March 2013 to August 2013, she focused on project management by reviewing cost and inflation, performing quality checks, managing risks, and controlling project deadlines. In this position, she obtained extensive project management experience.

Before moving to her project management position, Shea worked as a service coordinator, focusing on dispatch, billing, drafting letters, QA, and recruiting new work. In this position, she learned many skills pertaining to interacting with clients and project coordination.



Alex Tannenbaum



Manager | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

5 years

KEY QUALIFICATIONS

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

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Clemson University

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

EXPERIENCE

BerryDunn (09/2020 to present)

West Virginia Department of Human Services (DoHS)

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

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

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



- *Transformed Medicaid Statistical Information System (T-MSIS) Project Management (08/2025 to present)*
- *Electronic Visit Verification (EVV) Procurement Support (08/2025 to present)*
- *Child Welfare Communication Implementation (CWCI) (05/2025 to present)*

Iowa Department of Health and Human Services (IA DHHS)

Alex supported Iowa's single state Medicaid agency, IA DHHS, as a project manager.

Eligibility Integration Application Solution (ELIAS) Phase II Governance and Project Support (10/2024 to 10/2025)

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

Supplemental Nutrition Assistance Program (SNAP) Procurement (10/2024 to 09/2025)

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

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

As project manager, Alex led project oversight and coordination, delivering strategic planning, quality assurance, and project management services. Alex spearheaded the development of a multiyear project plan and Project Management Plans, helping ensure effective implementation and system enhancements of Iowa's Medicaid and CHIP Eligibility system (ELIAS), while supporting an overall strategy to streamline operations and reduce costs.

West Virginia Bureau for Medical Services (BMS)

APD Assistance (05/2023 to 08/2025)

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

West Virginia Department of Human Services (DoHS)



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

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

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

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

TEKsystems (06/2016 to 09/2020)

Alex managed over six enterprise accounts concurrently, generating over \$6M in revenue. He managed project deliverables and timelines, as well as negotiated terms, conditions, and pricing. He was responsible for working with key IT stakeholders, C-level executives, and clinical leaders to identify upcoming business initiatives and establish and implement solution strategies. He solutioned in areas of traditional software development (systems development life cycle [SDLC] and Agile), cloud enablement, data analytics, DevOps and automation, and digital experience. Industries supported included healthcare (Medicaid, IES, EMR, and insurance), pharmaceutical/ life science, and state/local government.

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

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



Nolan Cyr

MA

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Supported the development of 50+ Advanced Planning Document (APD) submissions across several states and territories, including Delaware, Iowa, West Virginia (WV), Puerto Rico, Alaska, Guam and the U.S. Virgin Islands
- Experience providing direct support to State agencies, defining strategic priorities, outcomes, and metrics for health and human service (HHS) agency projects in eight different states and territories

MEDICAID EXPERIENCE

4 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Graduate Certificate, Organizational Development, University of Southern Maine
- MA, Leadership Studies, University of Southern Maine
- BS, Leadership and Organizational Studies, University of Southern Maine
- Certificate in Instructional Design and e-Learning, University of Georgia

Nolan Cyr is a highly dependable and innovative consultant with experience in both organizational development and Medicaid. He has extensive knowledge of organizational systems and culture, data collection and analysis strategies, and training design, development, and implementation. Specific to Medicaid, Nolan specializes in APD development, including extensive knowledge of APD financials.

EXPERIENCE

BerryDunn (06/2022 to present)

West Virginia Department of Human Services (DoHS)

Deputy Program Manager – Enterprise Systems & Strategy Portfolio (10/2025 to present)

Nolan oversees and coordinates a portfolio of technology-related initiatives, helping ensure alignment with organizational goals, fostering collaboration across projects and portfolios, and driving successful delivery through strategic planning and interested and invested party engagement. Specific projects include:

Child Welfare Communication System Implementation (CWCI) (10/2025 to present)

Child Welfare Initiatives (CWI) Project Management (10/2025 to present)

Electronic Visit Verification (EVV) Procurement Support (10/2025 to present)

Enterprise Data Solution (EDS) Project Management (10/2025 to present)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (10/2025 to present)

Resource Integration Solutions for Enrollees (RISE) Procurement Assistance (10/2025 to present)



Third Party Liability (TPL) and Recovery Audit Contractor (RAC) Procurement Assistance (10/2025 to present)

Transformed Medicaid Statistical Information System (T-MSIS) Support (10/2025 to present)

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

West Virginia Bureau for Medical Services (BMS)

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

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

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

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

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

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

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

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

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

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

Iowa Department of Health and Human Services (IA HHS)

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

Nolan served as the project manager for BerryDunn where he supported Iowa's single state Medicaid agency, IA HHS. As project manager, Nolan assists the state with the implementation



of its overall QMS solution, which includes strategic planning, requirement development, interested and invested party engagement, solicitation development, APD and financial funding, evaluation support, vendor onboarding, and Centers for Medicare & Medicaid Services (CMS) certification support. In addition, Nolan manages a team of nine resources and oversees BerryDunn's implementation of an agile, interim QMS solution that leverages the State's existing infrastructure to deliver results while a long-term solution is designed, developed, and implemented.

Medicaid Enterprise Modernization Effort (09/2023 to present)

As an organizational change management (OCM) SME, Nolan assists IA HHS in establishing a portfolio management office and strategic planning for Medicaid Enterprise System Modernization efforts.

Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)

Nolan served as an APD SME for BerryDunn where he supported Puerto Rico's Medicaid agency, PRMP. As an APD SME, Nolan is a part of the team supporting the PRMP EOMC Services project, which includes developing, updating, and tracking of PRMP APDs. In his role, Nolan provides strategic input to inform the design and drafting of APD documents, Medicaid Detailed Budget Table (MDBT) files, and project templates.

United States Virgin Islands (USVI) Department of Human Services (DHS)

Enterprise Portfolio Management Office (EPfMO) Project (09/2023 to 2/2025)

Nolan served as an APD SME for BerryDunn where he supported USVI's Medicaid agency, DHS. As an APD SME, Nolan supported the development, updating, and tracking of USVI APDs. In his role, Nolan drafted APD documents and budgets and assured project goals and objectives were met. In addition, he helped identify and track project risks, issues, decisions, and action items for state leadership.

Hawai'i Department of Human Services Med-QUEST Division

Organizational and Business Process Redesign (11/2022 to 05/2024)

Nolan served as a learning platform administrator for BerryDunn where he supported Hawai'i's single state Medicaid agency. As a learning platform administrator, Nolan worked with the job skills development team to help design, develop, and deliver over 30 comprehensive training courses and programs through BerryDunn's MLC. While supporting this project, he has established over 250 state employees on the platform who completed more than 4,000 courses and 6,000 hours of training.

Oregon Health Authority, Health Promotion Chronic Disease Prevention (HPCDP) Section

Culture Change Management with Trauma-Informed Approach Project (11/2022 to 03/2024)

As a change management SME and business analyst, Nolan supported the HPCDP Section in building and maintaining an inclusive environment by engraining culture changes into defined strategic priorities and goals. His role included the development and facilitation of agile and



inclusive workshops, data collection and analysis, deliverable development, and meeting facilitation.

Delaware Department of Health and Social Services (DHSS)

DMMA APD Consulting Services (07/2022 to present)

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

BerryDunn MLC (07/2022 to present)

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

MaineHealth (05/2019 to 06/2022)

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

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

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

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

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

PUBLICATIONS



- *Co-Presenter – Even Covid Couldn't Stop Us: How Hawai'i Switched Gears and Created Virtual Self-Paced Job Skills Development Courses During a Global Pandemic*, Presentation for Medicaid Enterprise Systems Conference 2023, 8/24/2023.
- *Co-Presenter – Equity Focused Strategic Planning: How Two States Balanced Priorities*, Presentation for Medicaid Enterprise Systems Conference 2024, 8/14/2024.



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 CSED 1915(c) waiver.

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

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

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

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



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

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

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

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

Nicole served as project manager for the successful implementation of the 5010/D.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



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 trainings for systems such as prior authorization processes and customer service, and human resources related trainings for the pharmacies affiliated with GHS.

Iowa Department of Human Services (DHS)

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

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

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

Maine DHHS

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



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

Electronic Data Systems (1985 to 1988)

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

PUBLICATIONS AND PRESENTATIONS

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



Rick Hayward

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Experience with Medicaid Management Information System (MMIS) operations activities
- Experience in major system procurement and upgrade planning, including defining contract modifications, setting performance Service Level Agreements (SLAs), outreach to states, and system demonstration planning
- Experience with Protech Good Grid collaboration tool
- Experience supporting and managing IT and executive branch and health and human services (HHS) organizations' needs.

MEDICAID EXPERIENCE

4 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- AS, Math, Butler County Community College
- Certified The Open Group Architecture Framework (TOGAF) Business Architect

Rick Hayward has over 39 years of experience in various roles in the IT industry, including over 21 years working with IT projects related to HHS projects. His experience includes MMIS operations oversight, leading Affordable Care Act (ACA) system modifications, Operations Change Management support, and MMIS Request for Proposal (RFP) development. His experience managing IT projects for Medicaid and HHS gives him insight into the unique risks and challenges associated with delivering these projects on time and within budget.

EXPERIENCE

BerryDunn (12/2023 to Present)

Rick serves as senior consultant for BerryDunn, where he supports West Virginia's single state Medicaid agency, the Bureau for Medical Services (BMS). He supports data governance and change management activities and serves as deputy project manager supporting Medicaid and Children's Health Insurance Program [WVCHIP] West Virginia Resource Integration Solutions for Enrollees (WVRISE) procurement and planning.

West Virginia Bureau for Medical Services (BMS)

WV RISE Procurement Assistance Project (04/2024 to Present)

First as a subject matter expert (SME), and most recently as deputy project manager, Rick leverages technical system and operational MMIS experience to aid in developing the MCES outcomes-based RFP and reviewing functional and technical requirements for security, disaster



recovery, interface, change management, data management, and MMIS modules. Rick brings organizational and facilitation skills to collaborate with vendor and state staff in reviewing these unique requirements.

Systems Development Life cycle (SDLC) Coordination Project (06/2024 to 6/2025)

As a project manager, Rick provided support to state change management staff and provided recommendations for potential process changes to enhance vendor oversight and improve the state's system support.

MCES Data Integration Hub (04/2024 to 8/2024)

As a SME with system technical and MMIS operational experience, Rick provided support to the Data Integration Hub team to align vendor implementation schedules with the Data Integration Hub, bringing Medicaid Information Technology Act (MITA) and MMIS operations knowledge to support the Data Integration Hub technical development team. He also leveraged his knowledge as deputy project manager overseeing the WV RISE project supporting procurement activities to upgrade and/or replace the current MMIS system.

Data Improvement Project (DIP) Phase IV (12/2023 to 06/2024)

Rick supported DIP activities as a SME. The state requested BerryDunn to provide SDLC coordination services for the MCES to aid the Bureau in vendor change management oversight. Rick worked closely with the state and vendors to support the state as it works to evaluate, refine, and gather information related to current SDLC processes and procedures. His work included assessment of existing processes, procedures, and systems, conducting gap analyses, and drafting and presenting documentation in support of SDLC activities.

Maine Department of Health and Human Services (DHHS) (05/2021 to 12/2023)

Rick served as the Maine Integrated Health Management Solution (MIHMS) operations manager for Maine's single state Medicaid agency, Maine DHHS. He provided oversight of the day-to-day MMIS operations activities of the state's fiscal agent. In this position, Rick addressed system operations, system change management, user acceptance testing (UAT), department communications concerning change management, state and federal audit responses, and vendor oversight. His responsibilities include managing issues by using the change request process, managing multiple system projects, and managing day-to-day operational activities to help ensure claims were processed appropriately to meet the business needs of multiple units. He was responsible for helping ensure vendor accountability for operational system performance standards, defining performance service level agreements (SLAs), and adhering to contractual obligations. Rick also assisted in major system procurement and upgrade planning including, but not limited to, defining contract modifications, setting performance SLAs, outreach to other states, system demonstration planning, research on customization carry-forward and discussions with the Centers for Medicare & Medicaid Services (CMS) on upgrade planning and certifications.

Protech Solutions (10/2019 to 04/2021)

Rick used the Protech Good Grid collaboration tool to oversee the implementation of Good Grid in New England to bring disparate groups of service providers and consumers together with non-profits, for-profits, and state agencies. He worked closely with the MPRN (Maine Prisoner



Re-Entry Network) and those in recovery to bring consumers and providers together to be effective and improve outcomes.

State of Maine (09/1996 to 10/2019)

Director of Applications (04/2014 to 10/2019)

Rick supported the IT needs of a portfolio of 17 state agencies, 200+ applications, and an approximate \$40 million budget using a team of 77 staff in Agile software development projects in this position reporting directly to the Chief Information Officer (CIO). His experience included overseeing change management for the IT organization, managing risks, decommissioning of multiple legacy systems, and managing business and technical requirements related to system changes.

IT Manager (04/2005 to 04/2014)

In this role, Rick supported Medicaid and human services systems – Automated Client Eligibility System (ACES) and Enterprise Information System (EIS) used by the Behavioral Health and Eligibility units including oversight responsibilities, data analytics, deployments of system enhancements, multiple vendor relationship management, and technical and change management team leadership. He also led the state development team during the ACA implementation for the State of Maine partnering with the state DHHS business management to change the Medicaid Eligibility system to meet federal guidelines for Maine's leverage of and interaction with the federal exchange.

Systems Team Lead (09/1996 to 04/2005)

As systems team lead, Rick led projects supporting applications serving DHHS Substance Abuse, Adult Mental Health, and Mental Retardation Bureaus and the two state psychiatric hospitals, including a \$5 million enterprise information system.

Atlantic Computer Technologies, Inc. (09/1986 to 09/1996)

As owner and CEO, Rick focused on all aspects of the business that sold computer hardware and peripherals in a retail setting as well as consulting services to support business customers.

Supreme Slipper Manufacturing (Mfg.), Inc. (09/1983 to 09/1986)

Rick supported manufacturing operations for large shoe manufacturers employing hundreds of production and distribution workers.

United States Air Force (11/1972 to 12/1981)

Rick served in the 197th U.S. Air Force as an inventory management specialist supporting aircraft and missile supply needs while stationed at various bases stateside and overseas.



Crystal Fox

Prosci® CCP

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



PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

20 years

KEY QUALIFICATIONS

- 13 years of MMIS operations and implementation experience
- 19 years of Medicaid-related experience working directly with single state Medicaid agencies

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)
- Prosci® Certified Change Practitioner (CCP)

Crystal Fox, a technical engineer and systems analyst, is a senior consultant in BerryDunn's Medicaid Consulting Group. Crystal provides project management services for West Virginia's Payment Error Rate Measurement (PERM) and Resource Integration Solutions for Enrollees (RISE) Procurement Assistance projects. Crystal has experience with financial system processing and requirements development and analysis. Crystal brings knowledge of Medicaid eligibility and enrollment criteria, and Medicaid Management Information System (MMIS) financial and claims processing systems from a technical and business perspective from both her consulting work and 13 years of experience working at DXC Technology, formerly Molina Healthcare. Crystal has helped clients achieve their project objectives in her roles as a subject matter expert (SME) and business analyst on MMIS operations and implementation.

EXPERIENCE

BerryDunn (10/2019 to present)

West Virginia Bureau for Medical Services (BMS)

RISE Procurement Assistance Project (08/2024 to present)

Crystal began the RISE project as a SME, before her current role as project manager, supporting the Bureau of Medical Services, West Virginia's (WV's) single state Medicaid agency. As a project manager, Crystal is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Crystal tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. This project includes project management support, subject matter expertise, procurement advisory services, Advance Planning Document (APD) development, and purchasing contract management support.

APD Assistance (06/2020 to 08/2020; 05/2023 to present)



Crystal serves as a SME for the APD Consulting Services project, supporting the strategic planning of APDs. In this role, Crystal 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), supporting the development, updates, and management of multiple APDs in support of funding for new Department of Human Services (DoHS) systems projects.

Previously, Crystal served as a business analyst for MMIS APD development and updates by updating expenditures and budget based on the previous prior requests to calculate a request for the current and upcoming years.

PERM Project (10/2019 to present)

Crystal began the PERM project as a SME, before her current role as project manager. As a project manager, Crystal is responsible for the management of project objectives and resources and serves as a primary point of contact for project constraints that require escalation. Crystal tracks the budget, project status, risks, and issues; she develops monthly status reports and mitigation strategies to keep the client informed and to help ensure the project meets its goals and objectives. Crystal drives milestone completion with consistent outreach to stakeholders and close monitoring of the project schedule and timeline. This project includes support throughout all pre-cycle activities, validating claims payment or eligibility errors, researching error remedies, providing oversight for resolution of PERM errors cited for WV, and supporting the Medicaid Eligibility Quality Control (MEQC) portion of the PERM review.

MMIS Fee Schedule and Edit Quality Review (10/2019 to 04/2023)

Crystal served as a project SME. Crystal reviewed documents and information compiled from policy as well as claim-related stored procedures and desk-level procedures (DLPs) to help ensure compliance with the State Medicaid Plan and State Medicaid provider manuals. Crystal also performed multi-state analysis of Medicaid policies and State Medicaid Plans/Amendments to identify opportunities for WV to expand covered services, reviewed the current MMIS configuration to support the Medicaid National Correct Coding Initiative (NCCI) editing, and reviewed MMIS system configuration to identify where the system does not match the current State Plan or Medicaid policy. Crystal also developed research summaries that provided the client with the findings of the reviews and recommendations to remediate.

Medicaid Enterprise System (MES) Modernization Strategy and Procurement (MSP) Project (02/2021 to 05/2022)

Crystal served as a project SME and research analyst, researching various states' Medicaid Module implementations and contracts. Crystal served on a team analyzing Vendor Request for Information (RFI) responses to provide estimated outcomes for the MES MSP team's strategic plan presented to the State.

Public Health Emergency Support Project (03/2020 to 06/2020)

Crystal served as a business analyst by researching the waivers and flexibilities implemented under the Coronavirus Aid, Relief, and Economic Security (CARES) Act during the Public Health Emergency (PHE). Crystal prepared summaries that project leads used to incorporate the research findings into presentations presented to the client.



Mountain Health Promise (MHP) Procurement Assistance (12/2019)

Crystal served as a project SME. Crystal supported the Operational Readiness Review (ORR) by performing secondary evidence review for the financial management section of the Request for Proposal (RFP) to help ensure that scoring, determinations, and findings were complete, accurate, and corroborated.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (08/2020 to 02/2021)

Crystal served as a project SME for financial management and Flexi financial module reviews by providing insight into the Flexi functionality and feedback based on the scheduled deployment approach of the vendor.

Child Welfare Initiatives Project Management Services (06/2020 to 08/2020)

Crystal supported this project and served as a business analyst and project coordinator. Crystal scheduled meetings, captured notes during meetings, researched requirements for the development of a performance-based contract RFP for the Bureau for Children and Families' child placing agencies, and updated the RFP document based on reviews and feedback received during the requirement gathering sessions for the project.

West Virginia Children's Health Insurance Program (WVCHIP)

CHIP Out-of-Pocket Maximum (MOOP) Project (02/2021 to 10/2023)

Crystal served as the project manager for the MOOP project, assisting the State team with the planning activities for the MOOP solution. In this role, Crystal communicated with the State and vendor partners, reviewed deliverable documents, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remained compliant with federal and State regulations.

Managed Care Organization (MCO) Transition Planning Project (02/2021 to 04/2023)

Crystal served as the project manager for the MCO Transition Planning project where she assisted the State team in the daily operations and oversight of the MCOs that are transitioning the CHIP fee-for-service population to an MCO-based population. In this role, Crystal communicated with the State and vendor partners regularly, reviewed deliverable documents, analyzed enrollment reports, and facilitated meetings between the organizations. Crystal managed budgets, timelines, and project resources to help ensure the project remained compliant with federal and State regulations.

Colorado Office of the State Auditor (OSA)

Medicaid Recovery Audit Contractor (RAC) Program Evaluation (08/2023 to 03/2024)

Crystal served as a project SME providing research assistance to evaluate the design and operation of the RAC program for compliance with applicable federal requirements. Crystal reviewed other states' RAC programs policies and state plans to identify program features in comparison to the Colorado program.



Arizona Health Care Cost Containment System (AHCCCS)

Forensic Auditing and Accounting (04/2023 to 12/2023)

Crystal served Arizona's state Medicaid agency as a lead for claims analysis of claims processes and procedures and potential program integrity risks and review of payment activity post reimbursement to providers. Crystal provides analysis of findings to provide process recommendations for process improvements and timely detection and prevention of fraud waste and abuse.

Puerto Rico Medicaid Program (PRMP)

Enterprise Objective Monitoring and Control (EOMC) Services (08/2020)

Crystal served Puerto Rico's state Medicaid agency as a business analyst for the Medicaid Enterprise Organizational Structure (MEOS) sub-project by reviewing other agencies' Medicaid population and organizational structures and comparing them to the proposed organizational structure for Puerto Rico to support BerryDunn's recommendations.

DXC Technology/Molina Healthcare (MMS)/Unisys (04/2006 to 06/2019)

Svc Info Developer III (06/2016 to 06/2019)

Crystal served New Jersey's single state Medicaid agency, the Department of Human Services (DHS) by translating business requirements to system functionality. Crystal developed use case elaborations and business rules using industry best practices and designed unit test cases to help ensure the system was compliant with business rules and requirements. Crystal managed changes to base lined system requirements using established project change control processes and tools. Crystal wrote and executed SQL queries to validate data and troubleshoot results where applicable.

MITA Financial Systems Analyst III (02/2011 to 06/2016)

Crystal served WV's single state Medicaid agency (BMS), New Jersey's single state Medicaid agency (DHS), and Idaho's single state Medicaid agency (the Department of Health and Welfare) by collaborating with teams to analyze financial business processes. Crystal designed and documented system functionality using industry standard use cases. Crystal specialized in all phases of financial processes including, but not limited to; accounts payable/receivable, general ledger, claim payment, 1099 processing. Crystal managed changes to system requirements using established project change control processes and tools to include, but not limited to Application Lifecycle Management (ALM).

Systems Analyst 5-Financial Analyst (04/2006 to 02/2011)

Crystal served WV's single state Medicaid agency (BMS) by supporting the operational financial processing and reporting. Crystal collaborated closely with the client to understand the business needs and gather requirements/specifications for the project. Crystal designed and implemented enhancements/modifications for the HealthPAS-Financial system to include conducting research and analysis on testing results to help ensure accuracy. Crystal resolved production support issues for the HealthPAS-Financials system as needed.



Alison Barnett

CAPM®, ITIL (F)

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 20+ years of Medicaid pharmacy benefits administration operations, development, implementation, certification, and oversight experience, including support of state Medicaid agencies
- 20+ years' expertise in providing technical assistance on PBA administration to single state Medicaid agencies

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- Information Technology Infrastructure Library (ITIL) Foundation Certification
- Certified Associate in Project Management® (CAPM)®

Alison Barnett brings over 25 years of experience in various roles in the pharmacy industry, including over 20 years working with IT projects related to pharmacy programs, specifically Medicaid. Her project management experience includes drafting Requests for Proposals (RFPs); vendor procurement and management through traditional RFP or National Association of State Procurement Officials (NAPSO) contracting vehicles; implementation project management on both the state and vendor sides; leading Joint Application Development (JAD)/Requirements Validation (RV) sessions; developing, executing, and validating testing; risk management; and creating and facilitating training and managing resources. Her experience managing IT pharmacy projects specifically for Medicaid gives her insight into the unique risks and challenges associated with delivering these projects on time and meeting client expectations.

Alison led Indiana, Ohio, Illinois, and Wyoming in their Pharmacy Benefit Manager (PBM) module certifications and is familiar with the Centers for Medicare & Medicaid Services (CMS) Outcomes-Based Certification (OBC) process. She brings knowledge of drug pricing methodologies, National Council for Prescription Drug Programs transaction sets, Health Insurance Portability and Privacy Act (HIPAA) policies, and associated industry standard transaction sets.

EXPERIENCE

BerryDunn (11/2022 to present)

West Virginia Department of Human Services (DoHS)

Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (06/2021 to present)



Alison works directly with the business and technical subject matter experts (SMEs) in DoHS and Bureau for Medical Services (BMS) who currently manage the day-to-day operations of the pharmacy benefits for the West Virginia Medicaid program. Alison is currently leading the draft of the pharmacy requirements for the upcoming procurement.

She also aids in the Streamlined Modular Certification (SMC) process, helping to ensure that the required CMS Outcomes are met.

Alaska Department of Health and Human Services (DHHS)

Pharmacy Module replacement (11/2024 to present)

Alison serves as a SME on pharmacy requirement elicitation and is familiar with the NAPSO (NASPO) value-based purchasing contracting vehicle. Alison completed a gap analysis of the current pharmacy contract to the proposed NASPO agreement. She works with stakeholders to develop Service Level Agreements (SLAs), performance measures, and deliverables for State review. Alison is also familiar with the Streamlined Medicaid Certification process and OBC, including developing state Outcomes. She leads pharmacy meetings with State staff, tracks all action items to completion, and maintains the Work Breakdown Structure (WBS) project plan.

Iowa Department of Health and Human Services (DHHS)

Medicaid Procurement of Acquisition Support Services (MES) (11/2022 to present)

Supporting IA's single state Medicaid agency, DHHS, Alison works directly with the business and technical SMEs who manage the day-to-day work of the pharmacy and procurement teams to draft a new RFP to procure pharmacy benefit management and clinical management services, including prior authorization, for Iowa Medicaid. Alison contributes knowledgeable content in terms of requirements development and performance measures while also weaving in the CMS Outcomes Measures for SMC.

Alison also manages and mitigates the risks related to procurement and contracting of the PBM system.

Change Healthcare (01/2017 to 11/2022)

As a CMS certification lead and project manager, contracted with Ohio (OH) Department of Job and Family Services, Illinois (IL) Department of Healthcare and Family Services, and Wyoming (WY) Department of Health, the single state Medicaid agencies for OH, IL, and WY, Alison supported the Evidence Development process for WY PBM CMS certification, as well as led the on-site review with CMS and their partner MITRE for OH, IL, and WY. She also led the Medicaid Information Technology Architecture (MITA) third-party assessment of Change Healthcare processes/platforms and the R3 Milestone review for the IL PBM module.

Advocate Solutions (8/2014 to 01/2017)

Alison served as a solutions professional and project manager for the Ohio Department of Medicaid. She wrote an RFP for new PBM services, containing over 700 requirements, and served as a key contributor to the CMS Implementation Advanced Planning Document (IAPD) for new PBM services. She then managed the implementation of new PBM for the Ohio Department of Medicaid, as well as the CMS certification of the new PBM solution on State side using MECT 2.0 toolkit.



Catamaran (formerly SXC) (06/2012 to 08/2014)

As a Pharmacy Claims Manager for Indiana Medicaid, Alison managed all project activities throughout implementation including risk management. She spearheaded the CMS certification process for the newly implemented PBM system and served as a key player in the PBM implementation project. In addition, Alison was responsible for claims processing system maintenance including additions of edits, utilization management criteria, and prior authorization criteria for the system upon request, as well as the interface between the drug rebate system and claims processing system including experience with both federal and supplemental rebate programs. She developed business requirements for the NCPDP D.0 transition, business design and system specifications for claims processing, test plans and over 1,000 test cases, and end-user training documentation.

Fusion Alliance (10/2010 to 05/2011)

As a business consultant, Alison worked with Liberty Mutual to lead JAD sessions to develop and document technical and business requirements, risk assessments, mitigation strategies, and system design. She translated end-user business requirements to technical specifications for implementation of new call tracking software; improved business process to address inefficiencies in the claim intake process, resulting in improved response time from an average of 18 hours to less than 4 hours; and evaluated commercial off-the-shelf (COTS) software for call tracking tools for intake call center for both cost efficiency and functionality.

HP Enterprise Services (formerly EDS) (08/ 2007 to 10/2010)

As the Director of Pharmacy Claims Processing, Alison was responsible for project management throughout the systems design life cycle (SDLC) for over 50 pharmacy IT related projects. This included all aspects of pharmacy business, including managing 11 employees, budgeting, and department profit/loss statements. She contributed to the success of several high-profile projects for Indiana Medicaid including the pharmacy benefit consolidation, which placed all PBM activities for 800,000 managed care members under the fee-for-service delivery system. This provided Indiana with the ability to collect drug rebates for all claims for Managed Care Organization (MCO) members, resulting in a significant increase in drug rebate revenue. She also managed four large-scale project implementations, including a new pharmacy claims processing system implementation, Pharmacy Benefits Consolidation (Carve-Out), collecting National Drug Codes on physician-administered drugs for the purpose of drug rebate in accordance with the Deficit Reduction Act, and update to pricing methodology for physician-administered drugs.

Electronic Data Systems (EDS) (9/2004 to 8/2007)

Alison supported business design for system changes by leading the design, development, and implementation (DDI) of the Pharmacy Claims Adjudication system for Indiana Medicaid. This included configuring and maintaining the Preferred Drug List (PDL) and benefit plan design, delivering provider and employee training for pharmacy-related Indiana Medicaid policy, and leading user acceptance test case development and execution of over 5,000 test cases.

ACS State Healthcare PBM (07/2003 to 09/2004)



As a client relations specialist, Alison maintained PDL and benefit plan configuration for Indiana Medicaid. She also delivered provider and employee training for pharmacy-related Indiana Medicaid policy.

Health Care Excel-PBM (08/2002 to 09/2003)

At Health Care Excel, an agency contracted to administer the Indiana Medicaid Rational Drug Program, Alison served as a clinical criteria reviewer, applying clinical criteria and working with the claims processing system extensively to override claims for providers and assist them in processing online Medicaid pharmacy claims.

Wal-Mart Pharmacy (08/1993 to 12/1999)

Alison served as the head pharmacy technician, handling billing for Medicare and Medicaid including the CMS 1500 form and pharmacy paper claims.



MaryLou Banker

CAPM®, CLSSGB

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

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

EXPERIENCE

BerryDunn (03/2013 to Present)

West Virginia Bureau of Medical Services (BMS)

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

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



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

As a senior business analyst MaryLou helps in market research to develop a reporting summary intended to inform the EVV re-procurement strategy and to help ensure compliance and alignment with federal and State regulations.

Mountain Health Promise (MHP) Support Project Phase II (05/2025 to present)

As a senior business analyst, MaryLou manages the requirements tracking matrix and assists in preparing **joint requirement sessions by researching MHP-specific requirements.**

Advanced Planning Document (APD) Consulting Services (05/2025 to present)

As a senior business analyst MaryLou updates APDs to help ensure prompt annual revisions to secure funding for new system initiatives.

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

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

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

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

West Virginia Department of Health Facilities (DHF)

Contract Labor Management Services (CLMS) RFP Development (05/2024 to 04/2025)

As a SME, MaryLou developed an RFP to obtain a single vendor for managing contracted labor across State-owned hospitals, conducted research, facilitated joint requirement sessions, and created scoring tools for vendor evaluation.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (07/2020 to 11/2023)

As a lead business analyst, MaryLou facilitated weekly meetings with project leads, maintained an ALM-based action item tracker, reviewed functional design documents, mapped requirements to certification criteria, identified requirement gaps and supported CMS certification readiness, and delivered weekly status reports addressing project health, configuration progress, and risk mitigation

Puerto Rico Medicaid Program (PRMP)

MaryLou served as general project manager for PRMP where she supported Puerto Rico's single state Medicaid agency, Puerto Rico Department of Health.

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



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

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

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

As an IV&V analyst and project coordinator, MaryLou produced IV&V monthly assessment reports, dashboards, and risk analysis, monitored system stability, contractual compliance, and active work-arounds, participated in CMS Blueprint testing, test case verification, and submission of results for approval, coordinated User Acceptance Testing (UAT) and delivered traceability reports.

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

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

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

MaryLou managed coordination and supply chain operations, ensuring prompt delivery of housing units and commodities and oversaw the asset visibility tracking, compliance inspections, and procurement of mission-critical materials.

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

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

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

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



Marnie Hudson

Prosci® CCP, MMIS Level II, Medicaid MMIS Level I

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Successfully managed oversight of over 2,700 requirements to support the on-time and on-budget implementation of an integrated eligibility system (IES) consisting of multiple state programs (including Medicaid, Supplemental Nutrition Assistance Program [SNAP], Temporary Assistance for Needy Families [TANF], Child Support, Child Welfare)
- Experience supporting interested and invested parties in identifying functional gaps in requirements design for an IES consisting of 16 state social services programs
- Experience developing and facilitating collaborative working sessions with interested and invested parties, vendors, and the State Project Management Office (PMO) to gather design criteria for implementation of program business rules into an IES to support business needs
- Experience developing innovative and new process improvement procedures to create a more efficient and effective approach to gathering policy documentation and business rules to support system design

MEDICAID EXPERIENCE

7+ years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Computer Information Systems, Strayer University
- AS, Computer Science Information Systems, Delaware Community College
- Prosci® Certified Change Practitioner
- MMIS Level II – Claims Certification
- Medicaid MMIS Level I Certification

Marnie Hudson is an experienced business and quality assurance (QA) analyst with a developer background and more than 16 years of experience assisting with the implementation of state Medicaid Management Information Systems (MMIS). Her background includes leadership roles on five MMIS implementations and one IES consisting of multiple state social services. In her roles, she managed on-site and offshore teams to successfully develop, implement, and test the design of requirements. Her developer background helps to clarify design of requirements and how they should be implemented to support the client's business needs.



EXPERIENCE

BerryDunn (11/2017 to present)

New Jersey Department of Human Services (NJ DHS), Division of Medical Assistance and Health Services (DMAHS)

MMIS Modernization Project (05/2024 to present)

As the requirements lead assisting with the MMIS Modernization Project, Marnie supports DMAHS, NJ's single state Medicaid agency, with support services for the Provider Module Medicaid Enterprise Systems (MES) Modernization Project. In this role, Marnie is assisting with development of the Requirement Traceability Matrix (RTM) from a National Association of State Procurement Officials (NASPO) procurement contract, including establishing the RTM in a Jira® environment for successful tracking and monitoring of 758 requirements during design, development, and implementation (DDI). Marnie's responsibilities include review of client and vendor requirement correspondences, participation in client meetings, Jira® configuration sessions, mapping requirements to deliverables, and categorization of deliverables. In addition, she supports the development of the stakeholder analysis, including, but not limited to, identifying potential stakeholders, stakeholder project needs, categorization of stakeholders, identifying the degree of influence, influence levels, communication needs, training needs, and contract information.

MMIS Implementation and Certification Leverage and Reuse Project (11/2017 to 01/2018)

As a PMO and user acceptance testing (UAT) subject matter expert (SME), Marnie supported testing activities as part of the West Virginia/New Jersey Leverage and Reuse Project and worked collaboratively with the New Jersey Replacement MMIS Implementation Team Office. She provided key input into the preparation of UAT planning activities, provided support with project activities associated with MMIS system interfaces, and conducted testing related research as needed to support project activities/testing efforts. Marnie successfully collaborated with the state of New Jersey to help create multiple responsibility assignment matrix charts identifying state roles and more than 70 testing tasks and assigning resources as responsible, accountable, consulted, and informed.

West Virginia Department of Human Services (DoHS)

*Medicaid and Children's Health Insurance Program (CHIP) Enterprise System (MCES)
Procurement Assistance Project (04/2023 to present)*

As the advanced planning document (APD) lead of this project, Marnie supports the development of the Implementation APD (IAPD) and Operational APD (OAPD) to obtain federal funding for a new modernized MES and ongoing operational projects. She leads a small team to help gather project information to support development of the APDs. In this role, she helps to ensure the team is collaboratively working together to obtain the appropriate information by way of client input, research and analysis, and PMO asset documents. Marnie also helps to ensure her team is equipped with the knowledge and tools for successful development of the APD. She helps ensure procedures are followed, including facilitating team meetings and working sessions, and seeks SMEs as needed.



In addition, Marnie supports the development of the MCES RFP with research and analysis as needed, including leading the efforts for gathering and confirming the service level agreements (SLA) for the RFP.

Marnie also supports the development of the MCES requirements with review and cleanup of requirements gathered and facilitation of Joint Requirements Planning (JRP) sessions with the client.

Marnie is currently assisting the agency with developing a strategic plan for identifying outcomes and metric data sources that support their MMIS for Centers for Medicare and Medicaid Services (CMS) compliance. Her efforts include collaborating with stakeholders to define measurable objectives and ensuring alignment with federal reporting requirements. This work is essential for enabling the DoHS to track progress effectively and demonstrate compliance with CMS standards.

Eligibility and Enrollment Implementation Assistance (02/2018 to 05/2024)

As a requirements lead on the People's Access to Help (PATH) project, Marnie supported the success of West Virginia's IES project to consolidate and integrate DoHS program service systems into a single enterprise. She managed and tracked the PATH RTM to help ensure each project release supported DoHS program business needs. She participated in configuration design sessions to help ensure the vendor was accurately understanding and capturing stakeholders' business needs and supporting business rules. In addition, she reviewed and provided input on project deliverables, and she assisted with project activities associated with requirements, including the review and validation activities for the document inventory (forms, letters, notices) of all legacy systems. Marnie also provided monthly and periodic status reports for requirements and design, including the readiness of each project release. In addition to Marnie's requirements lead role, she provided support developing APD for MES modernization projects.

S2Tech/Conduent (07/2016 to 05/2017)

As a senior business analyst, Marnie drove the implementation of the New York MMIS (NYMMIS) under the NY State Department of Health, NY's single state Medicaid agency. This included mapping eMedNY legacy data for financial and claims appropriately to the database fields in new system, conducting table level analysis on both NYMMIS tables and legacy MMIS tables, and leading the data conversion component for the financial subsystem for the new NYMMIS.

S2Tech/Xerox (02/2013 to 07/2016)

Mississippi Modernized Medicaid Eligibility Determination System (03/2015 to 07/2016)

In her role with a company contracted with Mississippi Division of Medicaid, Mississippi's single state Medicaid agency, Marnie tested interface components, trained and led team members to help ensure the proper conduct of testing methodologies and procedures, helped ensure accurate creation and execution of ~300 complex test script scenarios, successfully led the testing team through execution of test scripts across 16 different interfaces/batch processes to support the eligibility determination requirements for approval or denial of Medicaid benefits, and documented and managed testing defects.

**North Dakota MMIS (NDMMIS) (02/2013 to 03/2015)**

Marnie acted as a SME for the implementation of the NDMMIS. She helped ensure all testing efforts were developed and conducted to satisfy the Service Authorization and Electronic Document Management System functional area requirements, helped ensure the successful execution of ~400 test script scenarios, conducted concept sessions to discuss system functionality, and managed testing defects.

Independence Blue Cross (IBC) (06/2012 to 01/2013)

As a senior business analyst, Marnie maintained compliance with Centers for Medicare and Medicaid Services (CMS) mandates and initiatives through various programs in Medicare, including Medicare Part D and the summary of benefits for products. She compiled requirements for improved operational process of monitoring Medicare client's maximum out-of-pocket threshold via the creation of an Access database and conducted concept sessions with product owners to capture business needs for improvements to Access databases.

Hewlett Packard Enterprise Services (01/2004 to 06/2012)

Marnie served as chief liaison as well as directed all operational and technical communication activities between Health Plan Enrollment Systems (HPES) (internal and external), the Delaware Medical Assistance Program management team, CMS, and the Delaware Prescription Drug Plans. She also served as a functional developer lead of the MMIS. This included leading the design and development of Medicare Part D System changes using Systems Development Life Cycle (SDLC) methodologies, serving as a SME in the Provider and Third-Party Liability Sub-Systems, and implementing CMS annual Federal Regulations in the Delaware MMIS for the reference subsystem.

PUBLICATIONS

- *What vendors want: Vendor decision process in answering requests for services*, a BerryDunn blog, 10/2020



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 Reprourement 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.



Shelly Schram

CAPM®

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 20 years of healthcare and non-profit experience
- 10+ years of project management experience
- Six years of Medicaid consulting experience
- Managed major gift (\$10M+) prospects for special projects

MEDICAID EXPERIENCE

7 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BBA, Computer Technology, University of Nebraska at Omaha
- Certified Associate in Project Management® (CAPM®), Project Management Institute®
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)

Shelly Schram is a senior consultant in BerryDunn's Medicaid Practice Group (MPG) with excellent organizational, problem-solving, and analytical skills. She brings over 20 years' experience optimizing productivity, efficiency, and service quality across various environments. Shelly provides business analysis, research, requirements definition, fact-finding, procurement support, and project coordination for state and local agency projects to promote project success.

EXPERIENCE

BerryDunn (01/2019 to present)

West Virginia Department of Human Services (DoHS)

Medicaid Enterprise Data Solution (EDS) Implementation and Centers for Medicare & Medicaid Services (CMS) Certification (06/2021 to present)

Shelly provides federal regulatory and certification subject matter expertise on the project. Her work entails reviewing deliverables, including business/technical design documents and system specifications, for quality, compliance with contractual requirements, and alignment with industry standards and best practices and identifying issues and providing recommendations for remediation; in support of the State's preparation of CMS Streamlined Modular Certification (SMC).

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (06/2020 to 06/2024)

Shelly supported the project activities related to the new West Virginia Integrated Eligibility Solution (IES) to consolidate and integrate DoHS program service systems into a single



enterprise. She assisted with requirements definition, design (configuration), testing, and the certification and compliance teams.

West Virginia Bureau for Medical Services (BMS)

Payment Error Rate Measurement (PERM) Project (06/2019 to present)

Shelly serves as a subject matter expert (SME) for the project. She focuses on identified error life cycles, tracking requests, data analysis, corrective actions, and Corrective Action Plans (CAPs). Shelly also works closely with the Medicaid Eligibility Quality Control (MEQC) team, developing and maintaining the pilot planning document for the State to identify vulnerable or error-prone areas. In addition, she tracks errors identified in PERM "off-years" through the MEQC review process and helps identify corrective measures and tracks implementation before PERM reviews begin. Shelly has developed many proactive processes to streamline PERM and MEQC tasks to assist the State with tracking errors and case level data entry.

Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Reprocurement (April 2025 – present)

Shelly serves as a SME for the WV TPL/RAC project, leading research and analysis of federal and collaborative procurement requirements and conducting comparative assessments to guide Request for Proposal (RFP) development. Facilitates stakeholder engagement, oversees project documentation, and supports compliance validation for vendor contracts. Provides strategic insights on emerging technologies and best practices in TPL operations to help ensure alignment with program integrity objectives.

TPL Options Analysis and Procurement Assistance Project (04/2019 to 03/2022)

Shelly served as the project SME for the TPL project. She focused on business analysis, project coordination, and management tasks. As a SME, Shelly supported deliverable development, requirements definition, conducted research on federal and state guidance, and performed gap analysis between the RFP and State-identified requirements.

Enterprise Program Management Office (EPMO) (01/2019 to 10/2021)

Shelly supported the EPMO project with business analysis, project coordination, and management tasks. She worked with the State to maximize productivity and developed State-approved templates used across the engagement. Shelly also worked as a SME for Advance Planning Documents (APDs) in development and updated project narratives and timelines.

Puerto Rico Medicaid Program (PRMP)

TPL Implementation (12/2024 to present)

Shelly serves as the SME for the TPL project. She focuses on business analysis, project coordination, and management tasks. As a SME, Shelly supports deliverable development and requirements definition. She also conducts research on federal and state guidance.

Enterprise Data Warehouse (EDW)/Business Intelligence (BI) Project (02/2024 to present)

Shelly serves as a certification SME for the project. She leads the certification process, helping ensure compliance with data governance, security, and regulatory requirements. Shelly



collaborates with cross-functional teams, including data architects and business analysts to define certification criteria and help ensure alignment with business objectives.

New Jersey Department of Division of Medical Assistance & Health Services (DMAHS)

Provider Management Module (12/2022 to present)

Shelly is a business analyst and SME on the certification team working alongside NJ's single state Medicaid agency, in collaboration with the New Jersey Implementation Team Organization (ITO), for the provider module. Her main focus is providing specialized knowledge and expertise to the State relating to CMS SMC.

CHI Health Foundation (08/2018 to 01/2019)

As the Foundation coordinator, Shelly led the coordination and management of projects, campaigns, and events from inception to successful completion. She analyzed gifts to determine appropriate campaigns, funds, and appeals for each processed gift, as well as processed daily gift batches and produced gift receipts and acknowledgment letters. Additional responsibilities included working with the National Office to research local high-profile donors who align with the Foundation's core values and directing aspects of the fund development database (Raiser's Edge).

Father Flanagan's Boys Home (04/2008 to 08/2018)

Development Project Specialist (01/2016 to 08/2018)

In this role, Shelly developed, maintained, and monitored detailed project schedules, including timelines, workflow, budgets, personnel, and resources. She researched high-profile donors via online data sources for the executive director and Senior Vice President of Development, and coordinated events hosted by National Development. During this time, Shelly also began integration of the Blackbaud Luminate Online system. For this project, she coordinated and took lead in helping to ensure timely completion. In addition to integration, she began the process of building online campaigns with matching appeals.

Training and Evaluation Data Specialist (05/2013 to 01/2016)

Shelly managed data files to help ensure accuracy and security. She summarized the results of training and evaluation activities; organized and prepared high-quality reports, graphs, and charts of departmental activities; and constructed and maintained staff evaluation and program fidelity instruments.

Project Support Specialist (12/2011 to 05/2013)

Shelly assisted with the migration of three databases into one newly created customer relationship management (CRM), assisting with accurately mapping data fields and migrating 7.3 million donor records. She researched foundations, organizations, and individuals using several online databases to compile into a constituent report.

Data Analyst (04/2008 to 12/2011)

Shelly evaluated data collected through research, task analysis, business processes, surveys, and workshops. She updated and maintained consumer contact and other data through web-



based portals and other databases; updated and maintained lists of materials, contracts, and departmental data in a central location; and utilized online systems to send and track marketing campaigns.



Charles “Tom” Hunter

ITIL(F)

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 14+ years of experience with Medicaid and Medicaid Management Information Systems (MMIS) projects
- 15+ years of experience in managing IT data centers
- 15+ years of experience in designing IT systems and programming to include Visual Basic and Report Program Generator (RPG) computer languages
- Microsoft Access Database Architect and Programmer
- Subject matter expert (SME) and lead tester for West Virginia People's Access To Help (PATH) Medicaid system Implementation
- JIRA® Tracking Software Administrator and support
- Power Query and Power BI Development and Support

MEDICAID EXPERIENCE

14 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- 80 Credit Hours in Pascal Programming Language, C++ Programming Language, and Accounting, Morris Harvey College and West Virginia University
- IBM® Course Work: Telecommunications, Programming, and New Technology (NT) administration and taken technical classes through Computer Associates and New Horizons Computer Learning Center
- Information Technology Infrastructure Library (ITIL) Foundation Certification
- Microsoft SharePoint 2010

Tom Hunter is a senior consultant with BerryDunn's Government Consulting Group. He has 30+ years of experience as a database analyst (DBA), system designer, computer programmer, analyst, project manager, and trainer in the healthcare and natural gas industries. Tom has strong analytical skills combined with experience in object-oriented programming techniques, database design, and legacy programming languages. He has 10+ years of experience with Excel creating Visual Basic for Applications (VBA) macros to extend Excel's capabilities. Recently, he has been assisting BerryDunn personnel with the Advance Planning Document (APD) process to include project budgeting and narratives. He has also developed and updated Power BI Dashboards using input from MS Project. He is a team leader competent in complete project cycles, testing, final implementation, and documentation with excellent communication skills.

EXPERIENCE

BerryDunn (07/2011 to present)

West Virginia Bureau for Medical Services (BMS)

WV RISE Procurement Assistance Project Phase III | May 28, 2026



Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (06/2016 to present)

Tom serves the MITA project as a business analyst providing database experience and expertise to complete an Access database to store and report business process capability maturity levels for the 2016 SS-A. The project involves restructuring and importing several MS Excel spreadsheets from the 2014 assessment into the database along with validating the results of the imports. "Scorecard" reports to submit the data to the Centers for Medicare & Medicaid Services (CMS) were designed and created along with data entry forms to also record the information through a graphical user interface. Tom is the Administrator of the MITA Database and provides guidance and support to database users.

Project Management of MMIS Procurement, Design, Development, and Implementation (DDI), and Certification (05/2014 to 05/2016)

Tom joined the MMIS project in May 2014 as a SME for the provider enrollment sub-system leading the deliverable review effort of several provider documents for the new system. He also was the lead User Acceptance Testing (UAT) tester of the Provider's On-line Portal for Provider Enrollment, providing valuable input to the vendor for defect resolution and enhancements.

Provider Enrollment Application (PEA) Project (08/2013 to 05/2014)

Tom was the lead project manager assisting BMS with weekly status meeting facilitation and reporting. He was the lead UAT tester for BerryDunn, coordinating the BMS resources to provide accurate and prompt testing results on the PEA project. In addition, Tom has critiqued several desk level procedures from BMS' fiscal agent and offered many updates resulting in improvements to their documentation.

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

Tom participated on the Medicaid 5010 Refresh Project as a lead tester and support analyst assisting BMS in several ways. He wrote user documentation for the BMS testers, created MS Excel spreadsheets and SharePoint lists to facilitate defect reporting, and managed the day-to-day UAT efforts at the fiscal agent's office for BMS. He participated in daily triage meetings during UAT and provided valuable assistance with his background in medical claims billing and processing.

Data Warehouse / Decision Support System (DW/DSS) Project Management (07/2011 to 10/2011)

Tom worked on the DW/DSS project after joining BerryDunn in July 2011. His initial duties were meeting facilitation and deliverable reviews. His background provided much-needed expertise with the numerous technical documents that were presented as part of the early stages of the project.

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

Organizational and Business Process Redesign (04/2022 to 12/2024)

Tom began working with the Hawai'i Department of Human Services (DHS), Hawai'i's State Medicaid Agency, in April 2022 to assist with UAT planning and writing UAT scripts for various



software releases. In October of 2022, he was tasked with locating an issue tracking product and was instrumental in selecting the Jira® application. He has implemented the software for Hawai'i and is the main administrator and maintains the system daily. His other duties include reviewing design specification documents (DSDs), business requirements, software release notes, release planning, and UAT support.

R.L. Laughlin & Co., Inc. (12/2002 to 07/2011)

As an IT DBA, analyst, and programmer for this West Virginia-based natural gas measurement and field services company, Tom provided programming, database design/administration, and system design functions on a variety of platforms and programming languages. He administered MS SQL databases, including transactional replication of production database to off-site backup server; wrote, tested, and debugged ad hoc queries, user-defined functions, and stored procedures; created and maintained tables, including indexes and triggers; developed program specifications and documentation; developed and maintained operational procedures. He has written programs to provide custom file formats and reports; migrated software to a client-server platform; provided new software development and support; and managed teams of software development subcontractors.

Charleston Area Medical Center (CAMC) (09/1992 to 12/2002)

As Director of IT from 1992 to 2002, Tom managed the 200+ server data center at CAMC, which had 15 staff and operated 24/7. He also managed the Network and Private Branch Exchange (PBX) departments (staff of 25) and help desk (staff of 12) during various periods. He participated in IT project management at the department level, attended Six Sigma training sessions, and facilitated management development classes. He was a member of a focus group comprised of hospital managers/employees, physicians, and community members tasked with creating a Health Maintenance Organization (HMO) chartered by CAMC, which became Carelink.

Strategic Ventures, Inc. (SVI) (08/1987 to 09/1992)

As Director of IT, Tom planned and implemented the consolidation of the SVI data center into the CAMC's data center; managed a medical billing department of 15 employees and an IT staff of four, providing IT services to seven corporate entities. In addition, he migrated an IBM® System 36 computer to an IBM® AS/400 system; wrote and maintained RPG programs on AS/400; and planned and implemented the installation of an Hewlett Packard (HP) computer to provide computer services to Carelink HMO.



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



Jeffrey Stoddard

Prosci® CCP

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 20+ years' experience leading complex healthcare systems development teams and initiatives
- 20+ years' experience designing data management systems and reporting architecture to support big data initiatives
- Experience leading state data improvement and encounter data quality initiatives
- Experience leading state usability and evaluation of Medicaid Management Information Systems (MMIS) and Data Warehouse/Decision Support Systems

MEDICAID EXPERIENCE

6 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Management of Information Systems, University of Vermont
- Prosci® Certified Change Practitioner
- Health Leadership Development Program, Daniel Hanley Center for Health Leadership

Jeff Stoddard is an accomplished strategic leader in healthcare technology and analytics, with a demonstrated track record in spearheading system development initiatives centered around Medicaid, Medicare, and commercial data. His adeptness in engaging with a wide array of stakeholders, fostering consensus, and cultivating productive relationships stands as a testament to his interpersonal competence. Jeff's unwavering commitment to project objectives is consistently underscored by his ability to deliver results punctually and within budget constraints, consequently aiding clients in optimizing operational efficiencies, enhancing care quality, and reducing costs.

EXPERIENCE

BerryDunn (12/2019 to present)

As a senior manager specializing in data management and strategy, Jeff works with state healthcare agencies, nonprofit and commercial healthcare organizations to assist in system, data, and analytic projects to achieve program objectives related to improving healthcare outcomes and reducing costs.

Guam Department of Public Health and Social Services (DPHSS)

Data Integration Hub (DIH) Project (10/2025 to present)



Jeff provides technical leadership, cloud infrastructure design, system design, and analysis to assist the Territory in developing a system's integration solution. The DIH will connect the department's disparate existing enterprise systems with new modules as they are implemented.

Integrated Eligibility and Enrollment and Medicaid Enterprise Strategy Projects (10/2025 to present)

Jeff provides project leadership to assist the Territory in evaluating, procuring, and implementing new enterprise systems to modernize their operations.

Iowa Department of Health and Human Services

Quality Management System (08/2024 to present)

Jeff serves as a subject matter expert (SME) for Iowa's single State Medicaid agency, the Department of Health and Human Services. Jeff offers subject matter expertise in systems design and analysis to aid the State in developing a quality management system utilizing their Microsoft SQL Server environment. The project encompasses the creation of long-term services and support (LTSS) measures and dashboards to inform program quality initiatives, as well as the data ingestion and data warehousing components necessary to support these measures and dashboards.

West Virginia Bureau for Medical Services (BMS)

T-MSIS Support Project (06/2025 to present)

Jeff supports the ongoing T-MSIS operational processes to help ensure Centers for Medicare & Medicaid Services (CMS) compliance with T-MSIS reporting.

System Development Life Cycle (SDLC) Coordination Project (06/2024 to 06/2025)

Jeff provides technical leadership and support to assist the State in maturing their SDLC processes to improve operational efficiencies including the implementation of an Atlassian Jira® system.

Data Integration Hub (6/2024 to 11/2024)

Jeff provided technical leadership, cloud infrastructure design, system design, and analysis to assist the State in developing a system's integration proof of concept. The project included deploying a secure Amazon Web Services (AWS) cloud infrastructure with single-sign-on (SSO) capabilities, securing the environment based on NIST 800-53 controls, and building data pipelines to exchange data between Medicaid data vendors.

Data Improvement Project (12/2019 to 06/2024)

Jeff provided technical leadership and analytic support for the project that assists the State in understanding and addressing data quality and usability issues affecting its Medicaid program.

Managed Care Organization (MCO) Encounter Data Quality (EDQ) Project (06/2020 to 03/2022)

Jeff provided technical leadership and guidance in supporting West Virginia's initiative to optimize MCO encounter data processes for its risk-based managed care programs.

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



Jeff provided technical leadership and business analysis support to BMS for the implementation of the State's COVID-19 contact tracing resource allocation dashboard and COVID-19 testing estimator tool.

New Jersey Department of Human Services

MMIS Modernization (11/2023 to present)

Jeff serves as a SME for New Jersey's single State Medicaid agency, the Department of Human Services. Jeff provides technical leadership, analysis, and support to assist the State with the implementation and operation of a Tableau dashboard system to report on MMIS operational metrics. The system utilizes automated AWS data pipelines, Snowflake, and Tableau.

Puerto Rico Medicaid Program (PRMP)

Enterprise Data Warehouse (EDW) Business Intelligence (BI) Project (09/2023 to present)

Jeff serves as a SME for Puerto Rico's Medicaid program, PRMP. Jeff provides subject matter expertise and support to assist Puerto Rico in implementing their multi-source data warehouse solution.

Portland Public Schools, ME

Data Reconciliation Project (11/2024 to present)

Jeff is providing technical leadership to assist the school district with reconciling data between internal systems.

Minnesota Department of Public Safety Driver and Vehicle Services (DVS)

Data Analysis Project (01/2025 to 06/2025)

Jeff provides project leadership to support the State in identifying improvements for operational metric reporting.

Financial Analysis Project (08/2024 to 12/2024)

Jeff provides data ingestion and analysis subject matter expertise to assist the State in analyzing their FAST vehicle services data.

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

Universal Data Warehouse Project (10/2024 to 12/2025)

Jeff serves as a SME for USVI's Medicaid agency, the Department of Human Services. Jeff provides Centers for Medicare & Medicaid Services (CMS) core measure set and data warehouse subject matter expertise and support to the USVI.

Missouri Department of Labor and Industrial Relations

Tips and Complaints Portal (08/2024 to present)

Jeff provides technical leadership and analysis to assist the State with identifying operational metrics and dashboards to implement with their future tips and complaints portal system.

West Virginia Department of Human Services (DoHS)



Medicaid and Children's Health Insurance Program (WVCHIP) Enterprise System (MCES) Procurement Assistance Project (06/2020 to 06/2021)

Jeff provides subject matter expertise and architectural support to assist the State in developing a long-term Medicaid enterprise strategy and request for proposal to support the strategy.

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification (06/2020 to 06/2024)

Jeff provides subject matter expertise and analytic support to assist the State in implementing their multi-source data warehouse solution.

New Mexico Finance Authority (NMFA)

Document and Data Management Consulting Services (10/2023 to 06/2024)

Jeff provided data management and data governance subject matter expertise to support the NMFA in developing data classification policies and procedures and providing recommendations for improving their data management practices.

Beacon Health/Northern Light Health

Data Analytics Project (04/2020 to 12/2023)

Jeff provided technical leadership and project management services to support the Beacon Health Accountable Care Organization (ACO) with decision support reports to provide operational and program evaluation insights.

Onpoint Health Data (08/2013 to 07/2019)

As Onpoint's chief information officer, Jeff was a member of the senior leadership team driving both the strategic direction of the company and day-to-day operations, leading technology functions including systems development, infrastructure, and data security.

Data System Development

Jeff led a diverse team of more than 10 system developers and contractors responsible for building and maintaining the systems used for ingesting, processing, and warehousing all payer claims data. Under Jeff's leadership, the Onpoint system was enhanced to manage healthcare data for over 50 million members and calculate more than 150 healthcare cost, utilization, and quality measures, including CMS, ACO, and National Committee for Quality Assurance (NCQA) Healthcare Effectiveness Data and Information Set (HEDIS) measures.

Analytic Enclave Implementation

Jeff was the primary architect and responsible for the successful implementation of the Onpoint Analytic Enclave, a new service offering that enabled users to log in to a secure, performant, cloud-based analytic environment where they could directly access and work with all payer claims data using the tools of their choice. Through the Analytic Enclave, users were empowered to generate analytics and reports to inform healthcare policy, measure program efficacy, and report on state healthcare costs and utilization.

Development and Implementation of a More Robust Information Security Program



Jeff led Onpoint through enhancing its data security policies, procedures, and controls, which resulted in achievement of HITRUST security certification, the gold standard security certification in the healthcare industry.

Arcadia Solutions (04/2012 to 07/2013)

As a principal consultant for Arcadia Solutions, Jeff led and managed multiple projects and teams to transform the data warehouse and BI capabilities for a community health network in the State of Washington, building an integrated claims and clinical data warehouse with a user interface to be used for population health management. The project was delivered on schedule and within budget.

Health Dialog (09/2004 to 04/2012)

As senior director of operations for Health Dialog, Jeff led a large team of developers, quality assurance analysts, and business analysts responsible for the acquisition, transformation, and quality of healthcare data from many of the largest health plans in the United States. These data were used to drive the disease management function of the business, which resulted in better management of the highest-risk populations, which in turn lead to better health outcomes and a reduction in health plan costs.



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.



Mary Stewart

MS

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Experience in leading Medicaid Management Information System (MMIS) Modernization efforts for State Medicaid agencies in Kansas, Iowa, New Mexico, Alaska, and West Virginia
- Experience in onboarding multiple Managed Care Organizations (MCOs), including writing MCO Request for Proposals (RFPs), and participating in the evaluation/selection process for contract awards
- Oversight of MCO contracts and mitigating steps when out of compliance. Lead readiness reviews and on-site desk audits for MCO program areas, including Provider Network Adequacy, Long Term Services and Supports (LTSS), Claims Adjudication, and financial reporting
- Worked alongside state contracted actuaries in the development and negotiation process of managed care capitation rate setting
- Led Centers for Medicare & Medicaid Services (CMS) 372 reporting for home and community-based services (HCBS), writing and supporting policy alignment across waiver programs, and collaborating with vendors on validating Healthcare Effectiveness Data and Information Set (HEDIS)[®] and Consumer Assessment of Healthcare Providers and Systems (CAHPS)[®] data

MEDICAID EXPERIENCE

22 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MS, Management, Baker University
- BBA, Baker University

Mary Stewart is a seasoned health and human services (HHS) professional with over 20 years of Medicaid experience, bringing a breadth of knowledge across managed care, fee-for-service (FFS), and HCBS programs. She has worked extensively in claims analysis, encounter data, policy and pricing development, quality reporting, and MMIS migration from legacy systems to enterprise platforms. Mary also has significant experience with RFP processes and vendor procurements and has played key roles in



MMIS modernization efforts, MCO evaluations, Incident and Case Management System (ICMS) development, and managed care oversight in several states.

EXPERIENCE

BerryDunn (10/2022 to present)

Alaska Division of Health Care Services (HCS)

Mary provides support as a subject matter expert (SME), working alongside Alaska's single state Medicaid agency to support the following critical MMIS projects:

MMIS Fiscal Agent Scope of Work (SOW) Amendment (10/2025 to present)

Mary is leading the effort to update and align the current Fiscal Agent SOW with responsibilities required by the Fiscal Agent. This entailed performing a gap-analysis on original SOW language to amendments, change requests, RFP, etc., and updating/adding language. Mary also coordinates efforts with other BerryDunn team members and Alaska state staff.

Advance Planning Documents (APD) (10/2025 to present)

Mary is working with the Alaska client on requirements gathering for APD submissions. She currently assists with compiling and developing APD language and budgetary numbers.

MMIS System Support Vendor Project (12/2024 to present)

As an MMIS vendor Service Level Agreement (SLA), compliance analyst, Mary reviews monthly SLAs to help ensure the vendor is compliant with the contract.

Alaska Pharmacy Module Replacement Procurement (11/2024 to present)

Mary serves as a SME on pharmacy requirement elicitation and is familiar with the National Association of State Procurement Officials (NASPO) value-based purchasing contracting vehicle. She creates SLAs, performance measures, and deliverables for state review. Mary is also familiar with the Streamlined Medicaid certification process and outcomes-based certification, including state and federal outcomes. She leads pharmacy meetings with state staff, tracks all action items to completion, and maintains the work breakdown structure (WBS) project plan.

MMIS Fiscal Agent Solicitations Consulting Services (10/2022 to present)

As a SME, Mary reviews monthly SLAs to help ensure the vendor is compliant with the contract. In addition, she reviews the monthly vendor invoice for accuracy.

Alaska Division of Health Care Services (DHS) Drafting Service Authorization (SA) Request for Proposal (RFP) (3/2025 to 8/2025)

Mary assisted the BerryDunn team on drafting SA RFP. She provided draft versions of the SLA Requirements Traceability Matrix (RTM), and Mandatory Requirements. Mary worked on aligning the RFP language, participated in client meetings to obtain requirements, and attended working sessions with Alaska state staff on reviews of RFP sections.

West Virginia Bureau for Medical Services (BMS)



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

Mary provides assistance for the Quality Management Plan. She performs research of other state's reporting measures and aligns best practices for the West Virginia HCBS programs.

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

Mary supports BMS with policy research, development, quality, reporting, and curriculum development.

Medicaid and Children's Health Insurance Program (WVCHIP) Resource Integration Solutions for Enrollees Project (WV RISE) (01/2023 to present)

Mary serves as an SME to procure a new modernized MMIS platform. She supports all aspects of the project pertaining to soliciting a new vendor through an RFP process. Mary is also the lead on the development of the RTM, Deliverable Dictionary, and Strategic Plan.

Medicaid Enterprise System (MES) Incident and Case Management System (ICMS) Procurement Assistance Project (05/2023 to 04/2024)

Mary served the ICMS project as a SME supporting research support, specifically on the ICMS forms and reports analysis.

Mountain Health Trust (MHT) MCO Procurement Assistance Project (01/2023 to 06/2024)

Mary served as a managed care SME on the MHT re-procurement project. She researched other state methods regarding contract oversight.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (11/2023 to 01/2024)

As a SME working, Mary was charged with prioritizing change requests for the Child Support module, based on the State determining level of severity.

Rose International (10/2021 to 10/2022)

Mary served as a business analyst for the New Mexico's State Medicaid agency, the Human Services Department to assist with the implementation of the Electronic Visit Verification (EVV) system for the Self-Directed Community-Based (SDCB) population. She edited business requirement documents, wrote change requests and confirmed their completion, and attended change request requirement sessions. She also reviewed all training materials and attended training courses to help ensure end-users understand the new system. Mary provided feedback to leadership on ways to streamline current processes. She collaborated with the Provider Management team on streamlining current database processes and reviewed MCO contracts for compliance with the 21st Century Cures Act.

Iowa Department of Human Services (DHS) (10/2019 to 09/2021)

Mary served as managed care oversight and support bureau chief for Iowa's State Medicaid agency to lead a \$5+ billion managed care and dental wellness program with the mission to



improve member health outcomes, improve program efficiency, and help ensure program sustainability. She supervised 12 direct hires primarily responsible for contract compliance oversight, remediation of compliance and performance issues, managed care oversight, actuarial rate setting, quality improvement, encounter data submission accuracy, and data analytics. Mary led strategic planning related to regulatory implementation, onboarding of new programs and services, alignment of best practices, and continuous program and process improvement. She also collaborated with internal and external entities on aspects tied to fiscal oversight, actuarial rate development, and information technology systems. Mary provided relevant feedback on modernization for the current MMIS system including collaboration with multiple stakeholders on the creation of user stories relevant to the Iowa Medicaid program.

Centene Corporation (12/2018 to 10/2019)

Mary served as a claims management manager with 16 direct hires responsible for the daily operations of accurate claims processing. She worked with Provider Relations Contracting Department to help ensure contract requirements aligned with the claims system, assisted Operations Director with the encounter/eligibility file transfer process, and identified and implemented operational efficiencies, process improvements and developed policies and procedures. Mary also analyzed provider/member impacts and responded to complex escalated claims processing issues to help ensure that provider/member expectations were met.

Conifer Health Solutions (02/2018 to 12/2018)

Mary served as a claims denial prevention analyst to provide solutions to hospital departments on eliminating/reducing denials; analytics on all department denials; and coordinated resources to meet department specific needs.

Kansas Department of Health and Environment (01/2002 to 02/2018)

Division of Health Care Finance (DHCF)

Mary held several roles in her tenure with the DHCF, KS's single state Medicaid agency, with responsibilities as listed below:

Data Analytics/Business Analyst Manager (05/2014 to 02/2018)

Mary managed a team of eight healthcare data analysts responsible for all reporting requirements. She managed and delivered all legislative and internal/external policy fiscal impacts. She defined data reporting needs for the implementation of the modernized eligibility system, collaborated with the operations team on validation and accuracy of the HIPAA 837, 834 and 820 transaction files with the MCO, and utilized Agile-waterfall hybrid methodology for the modernization of the Kansas MMIS data warehouse, beneficiary, provider, and claims/encounters modules. She led requirement verification sessions, gathered business requirements, and wrote business requirement documents for the Medicaid modernization project, as well as participated in the DDI sessions. Mary also created, performed, and audited all User Acceptance Testing (UAT) for the implementation of the MMIS modernized data warehouse.

Fiscal Analyst/Business Analyst Manager (10/2002 to 5/2014)



Mary was responsible for requests and statistical measures of Medicare/Medicaid data through the application of quantitative and qualitative analyses. She updated all monthly/quarterly expenditure reports for CMS; provided Kansas legislature and health professionals with monthly trend reports; developed and set policy for agency medical programs; and was instrumental in implementing IBM® Watson Health's reporting tool, Advantage Suite. She held a vital role in writing sections of RFP for procuring MCO, a new MMIS vendor, and actuarial contracts. Mary was also part of the team that reviewed, evaluated, and scored submitted RFPs.

Bureau of Remediation

Business Analyst/Lead Researcher (01/2002 to 10/2002)

Mary serviced and tracked loans for the revolving federal loan fund program. She also redesigned and maintained the Bureau's website and worked with a team of colleagues to create an on-line web-based grant writing application.



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.

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

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

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

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

Acordia National (12/1994 to 05/1996)

Dawn began her career as a medical claims examiner.

PUBLICATIONS AND PRESENTATIONS

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



Lorrie Davenport

MBA, CPUR

Consultant | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 30+ years of experience supporting Medicaid and Medicare program initiatives and working with single State Medicaid agencies
- 30+ years of experience providing team-centered leadership, critical thinking, and complex problem solving
- 25+ years of experience with Centers for Medicare & Medicaid Services(CMS) certification
- Extensive experience in gathering, managing, and documenting, regulatory, business, and functional requirements
- Extensive experience in leading teams through organizational change management (OCM)

MEDICAID EXPERIENCE

24 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Southwest Texas State University
- BBA, Concordia University
- Bachelor's, Psychology, Texas A&M University
- Certified Professional in Utilization Review (CPUR)

Lorrie Davenport brings more than 30 years of healthcare and IT experience including stakeholder and provider relations for Medicaid and Medicare programs, executive oversight, complex and large-scale technology implementations, hospital administration, fraud and abuse, utilization review, and operations management. She is experienced in facilitating the translation of business needs into technical specifications and documentation while serving as the business liaison and solution architect for the overall solution design.

EXPERIENCE

BerryDunn (08/2013 to present)

Lorrie supports BerryDunn's Medicaid State agency clients with Health and Human Services (HHS) initiatives and projects while serving as a general project manager.

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

WV Resource Integration Solutions for Enrollees (RISE) Procurement Assistance (11/2025 to present)

Lorrie provides project management, subject matter expertise, and advisory support to WV HHR for the RISE Procurement Project. These services include an Analysis of Alternatives (AoA), a cost-benefit analysis (CBA), refine requirements, develop the procurement library, and support



the State Medicaid Management Information System (MMIS) modernization goals. Throughout the engagement, Lorrie collaborates closely with State leadership and the RISE Project Team.

Project Management of Medicaid Management Information System (MMIS) Procurement, Design, Development, and Implementation (DDI), and Certification (08/2013 to 10/2016)

Lorrie provided project management, subject matter expertise, and thought leadership on the MMIS DDI project. She drew upon her extensive experience with MMIS implementations to share lessons learned and best practices that aid in risk identification and strategies for mitigation, resulting in time and resource efficiency. She drove many key project management strategies for the MMIS that resulted in improved quality deliverables, increased oversight in requirement traceability, and additional dashboard reporting for the Bureau. She was an important player in identifying and developing acceptance criteria for deliverables and milestones and acted as a reviewer of Molina Healthcare deliverables. With a knowledgebase flexible enough to allow her the ability to 'get into the weeds' in design documents and DDI discussions, Lorrie provided input into CMS certification and engaged at executive levels regarding risk/issue/mitigation and project management oversight. Lorrie worked with Molina as a Subject Matter Expert (SME) on identifying artifacts to meet CMS certification checklist criteria during each phase of the pilot. She assisted with State SME and leadership preparations for CMS demonstrations and on-site visits.

Iowa Department of Health and Human Services (IA HHS)

Eligibility Integration Application Solution (ELIAS) Phase II Governance and Project Support (02/2023 to 10/2025)

Lorrie supported Iowa's single State Medicaid agency, IA HHS, as a project manager.

providing subject matter expertise, thought leadership and advisory support to Iowa HHS for the ELIAS Project. These services were designed to strengthen project governance, promote transparency, and support progress toward ELIAS modernization goals. Throughout the engagement, Lorrie collaborates closely with State leadership, the ELIAS Project Team, and the system vendor to maintain an accurate and prioritized project plan, facilitate key governance meetings, and produce required reporting to federal and State partners. She collaborated closely with the vendor and the State Business Leads to implement the critically recommended changes for governance and release management.

West Virginia Department of Human Services (DoHS)

People's Access to Help (PATH) DDI Project Management (02/2018 to 02/2023)

Lorrie provided project management, subject matter expertise, and thought leadership in multiple roles across the PATH DDI project. Lorrie and her teams oversaw deliverables for the DDI project to help ensure compliance and deliver a quality product to the State. As the OCM and training team manager, Lorrie provided oversight and compliance for vendor training activities, including strict monitoring and adherence to project timelines and critical path dates in the schedule. Lorrie supported development of the OCM Plan deliverable and managed the activities and tasks of the OCM Plan, such as administering Awareness, Desire, Knowledge, Ability, and Reinforcement (ADKAR) surveys across all project releases for the State and DoHS. Lorrie also served as the State Project Management Office (PMO) Child Welfare Release Manager for the system that was successfully implemented in January 2023. She collaborated



closely with the vendor and the State Business Coordinators on meeting critical project milestones, identifying risks/issues associated with the schedule, and mitigating the impact on the project. Lorrie also assisted the State with oversight of the Maintenance & Operations (M&O) phase for PATH go-live activities.

New Jersey Division of Medical Assistance and Health Services

MMIS Implementation and Certification Leverage and Reuse Project (11/2016 to 01/2018)

Lorrie served as a project manager providing subject matter expertise, and thought leadership on the MMIS DDI project, working with NJ's single State Medicaid agency. Lorrie leveraged her WV MMIS certification experience and brought lessons learned to the NJ MMIS DDI project. Coming off a successful pilot certification with CMS in WV with the shared vendor, Molina Healthcare, Lorrie was able to share the nuances and steps taken to achieve a successful certification.

Hewlett Packard (HP) Enterprise Services (formerly Electronic Data Systems) (11/1996 to 06/2012)

Lorrie worked on the following projects and internal initiatives while employed with HP Enterprise Services:

HP Plano Support Center (05/2010 to 06/2012)

Lorrie served as an MMIS Solution Architect, Healthcare Consultant, and Business Process Optimization SME, for the MMIS DDI Interchange product project, working with Texas' single State Medicaid agency

Lorrie contributed to HP's enterprise architecture strategy, applications, and Commercial off-the-shelf software (COTS) design; led a team of 30 solutions professionals in tasks such as gap analysis, business process review, mapping of requirements for traceability and solution input, and oversaw technical architecture, design, hardware/software components, resources, and interoperability during the end-to-end solution integration. Her work with HP provided experience with large-scale databases such as member eligibility, provider, claims engines, Data Warehouse, and tools such as Microsoft SQL and Oracle, as well as experience designing solutions for SOA, n-Tier architecture, and UNIX environments.

Connecticut MMIS interChange Implementation (10/2005 to 05/2010)

Lorrie served as the Implementation and Operations Provider Services Manager, Lorrie worked directly with Connecticut's single State Medicaid agency, Connecticut Department of Social Services, to lead provider relations, publications, Internet portal, provider and client call centers, electronic data interfaces, quality assurance, and training of 6,000 providers and 250 state employees annually. She directed operational readiness testing and preparation for CMS certification and developed and implemented the State's first online secure web portal, enrollment wizard, and member toll free call center. This position gave her experience in solution and project designs in accordance with CMMI, PMI®, PMBOK®, Project Life Cycle (PLC), software development life cycle (SDLC), Microsoft Project, and the International Organization for Standardization (ISO). She served as a SME in web portal design, call center technology, business process optimization services, back-office support, print/imaging, workflow, and Customer Relationship Management (CRM), and consulted as a provider and



member data and business process SME for new and add-on logos. Her expertise in HIPAA, ANSI ASC X12 EDI Transaction Set Standards is bolstered by experience with healthcare informatics solutions for the ACA, ACO, HL7, and EMR.

Account Operations for Medicare Part B (09/2001 to 10/2005)

As the Northern Operations Site Manager, Lorrie monitored Electronic Data Systems contract for adherence to CMS requirements and collaborated with external and internal customers, including CMS, the Office of Inspector General, the Office of the Attorney General, the U.S. DHHS, the Social Security Administration, providers, vendors, and beneficiaries. She directed activities of the tri-states Maine, Vermont, New Hampshire provider call center and quad-state Maine, Vermont, New Hampshire and Massachusetts beneficiary call center, implemented an enhanced voice-response system, developed and implemented a call center training program that blended provider and beneficiary skill sets to maximize resources while reducing training time from ten to five weeks, and implemented a training program for a customer service organization, in preparation for a successful ISO certification.

Account Operations – Fiscal Agent, Medicaid (11/1996 to 09/2001)

Lorrie supported the Texas Health and Human Services Commission, Texas's State Medicaid Agency as the Provider Services Director for the State's fiscal agent in Austin, Texas. Lorrie oversaw design and managed provider legislative projects and managed a budget of \$6.5 million for education and outreach to 75,000 providers of Medicaid and chronically ill and disabled children. She worked with associations and key provider communities to complete the legislative reenrollment mandate; provided status reports to the State Medicaid Director, Medicaid Bureau Chief, and legislative offices; was a frequent guest speaker at the Texas Medical Association, Texas Hospital Association, and Mental Health and Mental Retardation meetings; designed specifications and testing plans for implementing National Provider Identifier (NPI); piloted an electronic enrollment and reenrollment application on the Medicaid website; and successfully directed the provider enrollment, provider file maintenance, policy, publications, and provider outreach teams.

Lorrie also served as a Quality Analyst for the State of Texas Access Reform (STAR) Managed Care Program (Medicaid) roll out. In this position, she designed, implemented, and analyzed the results of a provider satisfaction survey for Quality Assurance Reform Initiative (QARI) standards; analyzed healthcare data; and served as an auditor on the State's readiness committee that determined Health Maintenance Organization (HMO) plans' status and capabilities before entering the HMO STAR Medicaid network.

Magellan Health Care /Hospital Division (05/1986 to 11/1996)

Lorrie served in several senior leadership roles during her ten-year tenure with Magellan Health, including Deputy Hospital Director, Joint Commission Accreditation Lead, Director of Utilization Review/Case Management/Medical Records, and Cognitive Behavioral Therapist.



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 Reprocare 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.



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.



Hailey Holden



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

PROPOSED PROJECT ROLE

General Project Manager

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

MEDICAID EXPERIENCE

3.5 years

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.



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.



Jim Downie

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



PROPOSED PROJECT ROLE

General Project Manager

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

MEDICAID EXPERIENCE

34 year(s)

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



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.



Payton Waybright

BA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

5.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

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

EXPERIENCE

BerryDunn (08/2020 to present)

Payton is a staff consultant with BerryDunn's Medicaid Practice Group. Payton provides support to the Bureau for Medical Services (BMS), West Virginia's single state Medicaid agency, as well as other state departments and agencies that work closely with Medicaid and Integrated Eligibility Services.

West Virginia Department of Human Services (DoHS)

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

Payton is the resource and reporting lead coordinator for the PATH project. She manages the day-to-day coordination of a 40+ member team. She has a variety of responsibilities, which include facilitating daily meetings for team organization, overseeing daily project coordination



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.



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.



Cate Poling

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Extensive experience with drafting, preparation of, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Over four years' experience providing research and business analysis support to a single state Medicaid agency for large-scale enterprise system implementation and maintenance and operations projects

MEDICAID EXPERIENCE

4.5 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

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



EXPERIENCE

BerryDunn (06/2021 to present)

As a consultant, Cate supports a variety of critical state Medicaid agency projects and initiatives across various realms, such as project management, project coordination, subject matter expertise, and enterprise operational process oversight assistance. Additionally, she helps support the West Virginia Operations Process Improvement Team in its efforts to develop, streamline, and circulate new and improved business processes specific to West Virginia's needs and deliverables.

Iowa Health and Human Services (HHS)

Eligibility Integration Application Solution (ELIAS) (01/2025 to 10/2025)

As the schedule management project manager, Cate supported the State, BerryDunn, and Accenture project team throughout the enhancement of Iowa's eligibility system change management and System Development Life Cycle (SDLC) processes and procedures, utilizing Azure DevOps (ADO). She facilitated weekly and ad hoc schedule management meetings and supported tracking and closure of schedule management related tasks. She maintained open cross-project and cross-team communications and developed training materials to support adoption of enhanced schedule management processes. She assisted with drafting and delivery of key project deliverables, such as the Schedule Management Playbook and the ELIAS FFY2026-27 APD. Cate also provided research support to help create status reports inclusive of updated budgetary information for initiatives.

West Virginia Bureau for Medical Services (BMS)

Transformed Medicaid Statistical Information System (T-MSIS) Support Project (06/2025 to present)

As project manager, Cate supports the State and Vendor team engaged in extracting and submitting BMS's required T-MSIS reporting data. She facilitates team meetings to review and report on T-MSIS progress and updates, drafts and delivers MSRs, and engages the BerryDunn Health Analytics Practice Group (HAPG) team as needed for State data quality research and reporting requests. She monitors CMS and other federal updates related to T-MSIS, attends monthly and quarterly T-MSIS support calls with federal partners and Mathematica, and supports other projects with T-MSIS related needs. Additionally, she supports development of the yearly T-MSIS APD.

APD and Procurement Project Phase III (01/2026 to present)

Third-Party Liability (TPL) and Recovery Audit Contractor (RAC) Procurement Assistance Project Phase II (01/2026 to present)

Electronic Visit Verification (EVV) Reprocurement Project (01/2026 to present)

Cate supports the APD and Procurement Project Phase III, TPL and RAC Procurement Assistance Project Phase II, and Electronic Visit Verification (EVV) Reprocurement Project by providing coordination and documentation support, scheduling and facilitating meetings, maintaining RAID logs, conducting research, reviewing deliverables, analyzing solution alternatives, and performing quality control to support project execution and informed decision-making.



MITA SS-A Annual Update 2024 Project (10/2025 to present)

As a project SME, Cate supports collection, review, and documenting of updates related to BMS's MITA maturity within all business process areas and architecture domains, with the ultimate goal of creating an enhanced, actionable MITA growth Roadmap for BMS.

SDLC Coordination Project (06/2024 to 06/2025)

As project manager, Cate supported the transition of the Data Improvement Project (DIP) body of work, working with the technical advisory and change management team subject matter experts (SMEs) to help align SDLC activities across all BMS vendors and data suppliers. Cate facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviews meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate managed the project team working together to support the State's use of an integrated change management tracking tool and to help promote efficiency and transparency in enterprise SDLC activities by establishing an orderly and effective procedure for tracking the submission, coordination, review, evaluation, and implementation of all system-related changes.

DIP Phase IV (06/2023 to 06/2024)

As a project manager, Cate assisted with refining, expanding, and initiating the DIP SDLC body of work and preparing for the transfer of the work to the SDLC Coordination project. She oversaw the successful closure of the project, for which she had oversight responsibilities including organizing project timelines, arranging meetings with sponsors and vendors to communicate and understand deliverable expectations and enhanced change management processes, creating reference materials, and establishing document repositories and process workflows. She facilitated meetings between BerryDunn, State, and vendors to help track DIP efforts, including those related to T-MSIS needs and State reporting needs, reviewed meeting notes, agendas, and monthly status reports, and helped draft and refine project deliverables. Cate also assisted with WV engagement hours and resource planning oversight within this role.

West Virginia Department of Human Services (DoHS) (06/2021 to present)

Medicaid and Children's Health Insurance Program (WVCHIP) Resource Integration Solutions for Enrollees Project (WV RISE) (06/2023 to present)

Cate provides subject matter expertise to assist in development and refinement of technical requirements to support the State in defining desired outcomes for MCES module procurement(s), including specifications related to systems privacy and security compliance and technical and organizational processes.

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (06/2021 to present)

As a consultant for the PATH project, Cate has a variety of responsibilities, which include providing project coordination support, researching and developing process flows, following up on action items, assisting with change management processes and procedures, scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract Service-Level Agreements (SLAs).



Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (06/2021 to present)

As a project coordinator and consultant for the EDS project, Cate has a variety of responsibilities, which include organizing daily meetings, overseeing daily project coordination activities, researching and developing process flows and scheduling meetings to help ensure adherence to project schedule, and providing quality control for meeting materials to satisfy the contract SLAs. As the primary coordinator for EDS security and privacy related work, Cate communicates with the project team to organize and facilitate meetings between vendors and helps to research, document, track, and address security-related items, deliverables, and workflows per CMS Streamlined Modular Certification (SMC) guidance.

Business Intelligence (BI) and EDS Independent Security Assessment Project (05/2023 to 10/2023)

As an intermediary consultant, Cate coordinated appropriate communication and sharing of sensitive information between project parties, helping to ensure adherence to the established project time frame and documentation needs.

Jackson County Solid Waste Authority (SWA) (09/2024 to present)

As a County-Commission elected appointee, Cate sits on the Jackson County, WV SWA board, established by WV Code §22C-4-3 to help protect public health and welfare by establishing a comprehensive program of solid waste collection, processing, recycling, and disposal. Cate works alongside SWA board members to evaluate key County SWA issues, outreach needs, and project initiatives, including those related to staffing sourcing and maintenance, community engagement, and grant program funding evaluation and application, especially as relates to the County's recycling program management and community waste collection initiatives.

Mountain State Eye Associates (04/2017 to 06/2021)

Cate was a certified ophthalmic assistant who provided direct assistance to MDs and ODs in a busy ophthalmic practice with providers who diagnose and treat ocular diseases, provide in-office minor surgical procedures, and provide pre- and post-op care for cataract surgery patients. She performed extensive, thorough patient histories. This position involved heavy documentation/note-taking requiring measurements and special testing prior to patient-doctor encounters, including triaging, refractometry, checking visual acuity, visual field testing, checking intraocular pressure, and administering ophthalmic medications to patients.

She worked directly with Medicare, Medicaid, and commercial plans to help ensure patient coverage for medications and procedures and assisted in providing cost-reducing programs to patients; provided patients prescriptions through e-prescribing and via telephone and fax; arranged pertinent diagnostic and medical procedures for patients, including obtaining prior authorizations and scheduling, and necessary transportation assistance within required time frames. Cate provided scheduling support and patient flow management; helped ensure all patients had updated, accurate HIPAA-compliant registration forms on file; and helped ensure all electronic medical record (EMR) systems reflected correct patient information. She assisted with administrative, clerical, patient service, and operational support duties daily.



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.



Kourtney Kirk

BS

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Extensive experience with preparation, review cycles, and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Statements of Work (SOWs), Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Three years of expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

MEDICAID EXPERIENCE

3 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

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

Kourtney Kirk is an experienced project coordinator and consultant with an extensive knowledge of documentation, communications, and scheduling needs related to Medicaid Enterprise Systems (MES) development. Her attention to detail and complex organization skill sets have allowed her to be a valuable team member across multiple projects, with the ability to assist in drafting contract deliverables, tracking action items, risk, and issues, developing and distributing project agendas and meeting materials, as well as aiding in the creation of SOWs, and project budgets. She has a proficiency in customer resource management systems, such as the Microsoft and Atlassian Suites. Kourtney has a history of working in data analysis, graphic design and advertising, event planning, and communication and sales. She has strong leadership skills, the ability to work under pressure and deadlines, and confidence in speaking, working on a team, and understanding new concepts.

EXPERIENCE

BerryDunn (10/2022 to present)

Kourtney is a senior consultant with BerryDunn's Medicaid Practice Group. Kourtney provides support to the Bureau for Medical Services (BMS), West Virginia's single state Medicaid agency, as well as other State departments and agencies that work closely with Medicaid and Integrated Eligibility Services.

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

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



As the deputy project manager, Kourtney supports planning and initiation of a new statewide EVV solution by coordinating project activities, supporting partner engagement, assisting with requirements gathering, and helping develop project plans, timelines, and governance structures to help ensure alignment with federal and state Medicaid requirements.

Transformed Medicaid Statistical Information System (T-MSIS) Support Project (06/2025 to present)

As the lead coordinating consultant, Kourtney assists with facilitating meetings between BerryDunn, State, and vendors, and develops and distributes meeting materials. Additionally, she is responsible for creating monthly status reports and project deliverables, tracking action items and decisions.

Business Intelligence (BI) and Enterprise Data Solution (EDS) Independent Security Assessment Project (05/2023 to 10/2023; 11/2024 to 06/2025)

As the lead coordinating consultant, Kourtney assisted with facilitating meetings between PMO, State, and vendors, and develops and distributes meeting materials. Additionally, she was responsible for creating monthly status reports and project deliverables, tracking action items and decisions, and helped ensure adherence to the project timeline and sensitive documentation and communication needs.

West Virginia Department of Human Services (DoHS)

Medicaid Enterprise Data Solution (EDS) Implementation and CMS Certification Project (10/2022 to present)

As a project coordinator and business analyst supporting the project, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract Service Level Agreements (SLAs). She maintains project information, tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the Project Management Office (PMO), client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (10/2022 to present)

As a project coordinator and business analyst supporting DoHS, Kourtney has a wide range of project duties. She creates agendas, maintains meeting schedules, and provides quality control for meeting materials to satisfy contract SLAs. She maintains project information and tracks action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes. As the lead coordinator for the EDS Project, she assists in the creation and maintenance of APDs, project deliverables, and budgets, creates monthly status reports, and maintains project rosters for the PMO, client, and vendors. As a project consultant, she assists with research communication needs across various project workstreams.

West Virginia Department of Health Facilities (DHF)



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

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

Tek Systems (03/2021 to 01/2022)

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

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

Kourtney created agendas and maintained meeting schedules for WV DoHS, IBM® Watson Health, and BerryDunn. She created agendas and maintained meeting schedules and provided quality control for meeting materials to satisfy contract SLAs. She maintained project information and tracked action items, risks, issues, and decisions, in addition to developing and distributing meeting minutes.

N3 (03/2018 to 11/2018; 08/2019 to 08/2020)

Business Development Representative and Scheduling Coordinator (08/2019 to 08/2020)

Kourtney worked on the Microsoft Software Asset Management + Compliance Campaign to support Microsoft account executives and clients, scheduled meetings between clients and Microsoft to upgrade their software products and contact potential clients through phone calls and emails. She sent meeting invites, action items, and follow-ups to the account executive and clients, utilized Teams for virtual meetings and conference bridges for phone meetings, and completed each meeting with follow-up summary.

Business Development Representative (03/2018 to 11/2018)

Kourtney worked directly with Microsoft as an inside sales account executive for Unified Support Gained on a full cycle sales experience with Microsoft's new support services. She displayed interpersonal skills and a positive attitude toward clients and coworkers, successfully communicated with contacts via the phone dial, and identified the key aspects of potential leads, including need, budget, and time frame. Kourtney obtained general knowledge of the IT industry, with the capacity to learn about individual systems and products quickly and accurately for marketing purposes. She met with regular quotas of calls and qualified leads, communicated information about calls accurately and effectively to management and clients, effectively managed time and worked well independently or under supervision, and managed client relationships.

Total Quality Logistics (11/2018 to 08/2019)

Kourtney served as a logistics account manager who was the primary contact for clients and independent freight carriers. She presented sales presentations to prospective clients, created a list of ongoing business accounts via prospecting networking and referrals, and managed daily



shipments and confirmed pick-up and delivery of shipments. She communicated proactively with customers and freight carriers daily, provided clients with the highest level of customer service and support to retain their business, and enacted responsive customer service to resolve client issues quickly and efficiently.

Glenville State College (GSC) (08/2017 to 12/2017)

Kourtney served as the student intern, responsible for filing any donations made to the college. She used Razor's Edge and Blackbaud technology systems, communicated directly with GSC alumni to request donations to the GSC Foundation, and prepared presentations and marketing advertisements for the Foundation. She served as executive assistant to Call Stars program and assisted in the hiring process, entered contact information into contact management systems, and maintained tracking reports of public relations activity. Kourtney also performed analysis of donations made by alumni and businesses and represented the goodwill of GSC.



Sarah Vintorini

BS

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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

6 years

KEY QUALIFICATIONS

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

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Business Administration and Marketing, West Virginia State University
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT & MCMP II)

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

EXPERIENCE

BerryDunn (11/2019 to present)

West Virginia Department of Health Facilities (DHF)

Contract Labor Management Services (CLMS) Request for Proposals (RFP) Development (08/2024 to 04/2025)

Sarah provided project management services for the CLMS RFP Project. Sarah managed a team that developed and released a detailed RFP, and she facilitated the group scoring process to help ensure the team adhered to State procurement procedures for the proposal throughout the process.

West Virginia Bureau for Medical Services (BMS)

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



Sarah provides project management support for the APD project, overseeing the development and management of all APDs for WV's single state Medicaid agency, BMS. She maintains the APD tracker and schedule to help ensure federal funding for all aligned state projects.

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

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

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

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

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

Sarah provided business analyst support and deliverable review and development for MES. Sarah developed the As-Is environment deliverable and supported the development of the To-Be environment deliverable. She also developed graphics and presentations to support the project.

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

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

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

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

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

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

West Virginia Department of Human Services (DoHS)



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

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

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

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

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (12/2019 to 03/2021)

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

Alaska Division of Health Care Services (HCS)

MMIS Fiscal Agent Solicitations Consulting Services (09/2020 to 10/2021)

Sarah provided project coordination and business analysis support by developing and distributing a fact-finding survey to gather meaningful input from key stakeholders and analyzed the results to inform recommendations for project decision-making. She supported the development of project deliverables and presentations, and proactively tracked and managed project action items to maintain momentum and ensure timely progress.

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

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



based software systems to handle registration, automatic emails, bulk text messaging, and social media.

KISRA (2012 to 2018)

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

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

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

The Salvation Army (2001 to 2003)

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



Morgan Krieger



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

PROPOSED PROJECT ROLE

General Project Manager

MEDICAID EXPERIENCE

4+ years

KEY QUALIFICATIONS

- Over four years of experience supporting a single state Medicaid agency with large scale integrated systems implementation and operations

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Journalism, West Virginia University

Morgan Krieger is a professional with expertise in Medicaid health system implementation and proficiency in management and stakeholder involvement. She is competent in doing extensive research and assessment to support evidence-based policy decisions. She can work well within a team to establish trust and help ensure project success with a variety of stakeholders and brings over five years' experience applying these skills to project teams.

EXPERIENCE

BerryDunn (10/2021 to present)

Child Welfare Communication System Implementation (02/2025 to present)

Morgan is serving as a child welfare subject matter expert (SME) to support the implementation of a communication system focused on aiding Bureau for Social Services (BSS) caseworkers and interested parties to support children and their families involved in the child welfare system. Morgan assists with project management activities and coordinates with key client stakeholders, in addition to multiple technical solution vendors involved in the project, to successfully implement work outlined in WV HB4975.

West Virginia Department of Human Services (DoHS)

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (03/2022 to present)

Morgan is the project manager of a large-scale system implementation project that directly impacts four agencies in West Virginia. Morgan oversees over 20 people on a team managing a service approach for the PATH project. This includes oversight, monthly project reporting, project management support, requirements management, deliverable management and review, federal review and certification support, testing support, organizational change management (OCM) support, and project closeout.



From 2024 to 2025, Morgan worked as the M&O manager for the PATH project's BSS. She also served as the M&O manager cross-release for a brief period prior to her current role as project manager. While in these roles, Morgan established and enforced standards of conduct for her team of subject matter experts. She served as the primary liaison to third-party vendors' implementation teams and coordinated completion of tasks among cross-functional stakeholders. She communicated complex technical and functional concepts diplomatically and effectively with diverse audiences, individuals, and teams, including third-party vendors, project management, and senior leadership within DoHS. Morgan oversaw technical expertise and guidance on Medicaid eligibility and enrollment strategies focused on optimizing Medicaid health systems within BSS. She helped form collaborative project teams and developed and executed plans and strategies which successfully implemented processes that supported the success of PATH M&O.

From 2022 to 2024, Morgan worked as the release coordinator for the WV PATH project's BSS release, overseeing the management of the BSS team through key stages, including design configuration, system and user testing, and the implementation of a new IES. She worked closely with cross-functional teams to align the design, implementation, and oversight of initiatives related to Medicaid eligibility, enrollment, and coverage. Morgan facilitated meetings with client stakeholders, provided comprehensive written and verbal status reports on the child welfare project to leadership, and assisted with task coordination based on management directives and project plans. Her responsibilities included monitoring project progress, helping to ensure adherence to Medicaid regulations and fostering communication between stakeholders to achieve project goals on schedule and within scope.

Eligibility and Enrollment Implementation Assistance (10/2021 to 03/2022)

Morgan worked as a project coordinator in support of the WV Children's Health Insurance Program (WVCHIP) and PATH projects. Morgan assisted with Medicaid projects, where she helped follow initiatives related to Medicaid eligibility, enrollment, and coverage. She worked with teams to track progress and keep communication clear to meet project goals on time. She assisted in the organization of and preparation for meetings, attended meetings both on behalf of the client and in conjunction with the client and maintained a written record of discussions, and oversaw daily project coordination activities. Morgan developed and documented process flows to enhance project management processes and facilitated meetings to streamline the review process for deliverable materials. Morgan also provided quality control for meeting materials to satisfy the service level agreements (SLAs).

Shuman McCuskey Slicer (11/2019 to 10/2021)

Morgan worked as a marketing coordinator to develop and maintain the firm's internet presence through rebranding, web redevelopment, social media, and biographical enhancements on third-party websites. Her role required meticulous documentation, coordination, and scheduling, and she oversaw all firm public relations, including announcements, advertisements, community involvement, charitable contributions, and sponsorship on behalf of the firm and members. She identified and arranged speaking engagements, seminars, conferences, and continuing legal education classes to help attorneys market their area of expertise and prepared visual and handout materials for these events. Morgan also conducted professional development opportunities for attorneys and developed, managed, and distributed targeted emails, quarterly



electronic newsletters, client surveys, and other promotional activities for current, former, and potential clients.

Capitol Market (01/2019 to 11/2019)

Morgan worked as a marketing manager and project coordinator to plan and manage content, graphics, and production of marketing, fundraising, and campaign materials. She wrote and edited compelling communication materials, including internal communications with the board of directors, and external marketing documents, website, and social media aimed at donors, volunteers, and other external audiences, which entailed heavy documentation. Morgan coordinated the annual signature event that raised \$75,000 and attracted 150 attendees, helped create, expand, and/or coordinate approximately 15 events for donors and/or the public, and managed day-to-day operations.

I Love Nice People, Inc. (08/2016 to 01/2020)

Morgan was the co-founder of a 501(c)3 non-profit social awareness clothing brand. She managed all documentation/coordination needs and designed a line of ethically made trademarked apparel and accessories. She directed business activities pertaining to production, pricing, marketing, sales, and distribution of products while also developing and maintaining an internet presence through social media and an e-commerce shop.

Charleston Area Alliance (05/2017 to 01/2018)

Morgan worked as a marketing and communications assistant to write and edit brochures, postcards, profiles, newsletter content, and email campaigns. She managed social networking accounts and collaborated with designers, printers, and other vendors to carry jobs from design to completion. Morgan also assisted with research, analysis, and planning that helped the organization better communicate with its demographic.

Dorie Simmonds Literary Agency (01/2016 to 05/2016)

Morgan worked as a literary intern that communicated findings of unpublished works and authors with agents. She evaluated writers' work to determine its value for representation and insightfully selected manuscripts from unknown authors with trending concepts, popular topics, and quality writing.



Kevin Chartrand

MBA, CPHIMS, PMP®, SAFe PO/PM

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



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- 18 years' experience performing in program management and strategic planning domains across 20 states and territories
- 18 years' experience performing the role of subject matter expert across the country and for over two years for Puerto Rico Medicaid Program (PRMP)
- 25+ years IT development and implementation experience
- 18 years in the healthcare/health and human services industry, including Medicaid Enterprise Systems (MES)
- 15+ years' experience in Medicaid Information Technology Architecture (MITA), including designing and running MITA State Self-Assessments
- 15+ years' experience providing Independent Verification and Validation (IV&V) and project oversight, health assessment, and audit services

MEDICAID EXPERIENCE

7 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Strategic Management, University of California at Davis Graduate School of Management
- BS, Materials Science and Engineering, University of Pittsburgh
- Certificate in Health Informatics, University of California at Davis
- Certified Project Management Professional® (PMP®)
- Certified Professional in Healthcare Information Systems (CPHIMS) from Health Information and Management Systems Society (HIMSS)
- Product Owner/Product Manager (PO/PM in Scaled Agile Framework (SAFe))
- AWS Certified Cloud Practitioner
- TensorFlow Developer Professional Certificate
- Machine Learning, Stanford / Coursera
- Information Technology Infrastructure Library (ITIL) Foundation Certification

Kevin Chartrand leads BerryDunn's Medicaid Practice Group Research & Development team as the Lead Innovator. This entails partnering with clients and project teams to improve the quality and efficiency of BerryDunn's work. Much of this work has been channeled through Transform Health and Human Services (tHHS), a platform that enables next-generation consulting services. He developed and continues to support the platform.

Kevin is a passionate problem-solver with a desire to transform client support through automation, advanced technology, and modern teaming approaches. Kevin has demonstrated experience working with all levels of organizations, from executive to frontline staff, and is a subject matter expert in public sector health and human services.



Kevin has state consulting experience in enterprise governance and systems design; program establishment and operations; full life cycle procurement planning and support including requirements development, proposal evaluation, and quality assurance / independent verification & validation; data management and analytics; financial and competitive analysis; program and project management; process, benefits, and asset modeling. Kevin has also been involved in dozens of startups in various roles in the past two decades.

EXPERIENCE

BerryDunn (02/2024 to present)

Puerto Rico Medicaid Program (PRMP)

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

Kevin served multiple roles while supporting this project, including Program Management Office (PgMO) support director, solution architect, portfolio advisor, integrated MES program management (IMES) team lead, and outcomes-based procurement team lead. Additionally, he served as a specialist for BerryDunn's support of PRMP's program-based approach to the MES, outcomes life cycle management, MES roadmap definition and management, and other focus areas. Key elements of these roles included defining PgMO, Executive Steering Committee, and PgMO Support functions; development and maintenance of the MES and Program Management Roadmaps; development of the MES Outcomes Management Plan, tailoring the approach to be outcomes-focused; updating the MITA State Self-Assessment methodology to be outcomes-focused in alignment with the Centers for Medicare & Medicaid Services (CMS)-approved Investment Management Toolkit; procuring 5+ contracts, several of which were outcomes-based, introducing standardized project reporting to the PgMO, and implementing MES performance dashboards.

Iowa Department of Health and Human Services (IA DHHS)

Provider Outcomes Project Support (10/2022 to present)

Kevin supported this project as a core team member for the strategic planning of the MES, including definition and implementation of the #EpicShift principles. Additionally, he was a primary architect of the outcomes-based strategic planning effort.

SPM Research Group, home of TransformHHS (10/2019 to 02/2024)

As founder and CEO, Kevin leveraged his experience as a strategic consultant for state Health and Human Services (HHS) agencies to develop an online platform that allows states to share planning and execution information with each other, manage their communications with CMS and other stakeholders, and manage their own MES program from defining their roadmap to developing their Advance Planning Documents (APD) to monitoring and reporting their performance metrics. He led a pilot with five states in partnership with Elena Nicolella of New England States Consortium Systems Organization (NESCO). Now open to all states, tHHS Insights (tHHS' first product) now houses over 10,000 documents, focusing on contract, procurement and APD documentation. Kevin also serves on the CMS MITA Governance Board, MITA NextGen Redefinition Working Group as a Medicaid and MITA Subject Matter Expert.



Chartrand LLC (06/2021 to 02/2024)

Puerto Rico Medicaid Program (PRMP)

Kevin served multiple roles while supporting this project, including PgMO support director, solution architect, portfolio advisor, integrated MES program management (IMES) team lead, and outcomes-based procurement team lead. Additionally, he served as a specialist for BerryDunn's support of PRMP's program-based approach to the MES, outcomes life cycle management, MES roadmap definition and management, and other focus areas. Key elements of these roles included defining PgMO, Executive Steering Committee, and PgMO Support functions; development and maintenance of the MES and Program Management Roadmaps; development of the MES Outcomes Management Plan, tailoring the approach to be outcomes-focused; updating the MITA State Self-Assessment methodology to be outcomes-focused in alignment with the CMS-approved Investment Management Toolkit; procuring 5+ contracts, several of which were outcomes-based, introducing standardized project reporting to the PgMO, and implementing MES performance dashboards.

Iowa Medicaid Enterprise Modernization Effort (MEME)

Serving as the subject matter expert, strategic planning expert, procurement support, Kevin provided subject matter expertise and thought leadership for strategic planning and module procurement. Specific efforts included: the development of an iterative "rolling wave" approach to strategic planning for the enterprise; the application of the approach to develop the initial set of initiatives; and support for the acquisition of a Provider Management module vendor through a National Association of State Procurement Officials (NASPO) contract mechanism.

California Department of Health Care Services

Kevin served as an enterprise architect focused on defining the MES Modernization Roadmap through IT Product Delivery (ITPD) and developing a performance management approach for Streamlined Modular Certification outcomes-based projects.

Elyon Enterprise Strategies, Inc. (01/2020 to 01/2022)

Kevin worked as the senior director and led the "Elyon 2.0" practice, crafting and creating foundation and stabilizing capabilities, structures, and processes and designed and led the strategic planning and acceleration plans for the group for rapid growth. He also led Elyon's initiative to prepare the firm for large-scale growth including implementation, configuration and administration of Salesforce as a business development platform, standardizing collaborative workspaces and processes, and leading strategic growth initiatives. Through Salesforce Kevin extended core objects; developed and implemented new and third-party objects for recruiting, onboarding, and project tracking; established role-based dashboarding and reporting; and trained staff on optimal use. The Salesforce org was credited with supporting an immediate three-fold increase in proposal volume, with a significant increase in quality. His project delivery and roles included:

- Engagement Manager, primary Subject Matter Expert, MITA Document Specialist, and APD development lead for the State of California Department of Healthcare Services (DHCS)
- Engagement Manager and Subject Matter Expert for the State of California Department of Justice IT Strategic Planning / Agency Information Management Strategy (AIMS) project



- Medicaid and HHS Subject Matter Expert for State of North Dakota Department of Human Services legacy, custom-built (GOTS) system to Commercial Off-The-Shelf (COTS) Feasibility Assessment
- HHS Subject Matter Expert for State of Oklahoma Department of Health Implementation Project Health Check
- Engagement Manager for two concurrent Franchise Tax Board systems implementation / upgrade projects
- Engagement Manager for Oregon Higher Education Coordinating Committee (HECC) Stage Gate 2 Planning

Gartner Consulting (07/2008 to 10/2019)

As a senior director, Kevin was an engagement lead for Gartner's state, federal and local health and human services clients covering strategic planning, program and project management establishment, full procurement life cycle, quality assurance and IV&V, and business analysis. At the 2014 MES Conference, Kevin partnered with a client to present "Using the MITA SS-A to Align Procurements with Your Future State," discussing successes in leveraging the national standard to develop client-oriented and business-driven system procurements that is easily understandable by vendors. Example Work in this role includes:

- Developed Gartner Consulting's MITA State Self-Assessment (SS-A) Methodology, Approach, Collaboration tool, and Artifacts which was used on all SS-A's performed while at Gartner
- Facilitated MITA State Self-Assessments for the State of Connecticut Department of Social Services and Vermont Agency of Human Services in support of a strategic MITA roadmap for the Agency. Developed interview and analysis tools, identified strategic intra-Departmental initiatives, and managed disparate groups of stakeholders to achieve a complete modernization roadmap
- Engagement manager and key resource for the strategic planning process for the Delaware Health Information Network, a national leader in Health Information Exchange
- Engagement manager and key resource for the development of the Federal Integrated Advance Planning Document (IAPD) for Tennessee Department of Human Services' (TDHS') Enterprise Systems Modernization, including Child Support Enforcement; Supplemental Nutrition Assistance Program (SNAP); Temporary Assistance for Needy Families (TANF); Child Care and other TDHS programs and services; development of the go-to-market procurement strategy
- Project managed and contributed to the strategy development and quality assurance and independent verification and validation (QA / IV&V) for the County of San Diego Health and Human Services Agency Knowledge Integration Project, and adaptation of the Accountable Care Organization for communities and local governments
- Project managed and developed the value creation and financial sustainability models for the Statewide Health Information Exchange (HIE) for the State of Connecticut Department of Public Health, and for the State of Arkansas Office of Healthcare Information Technology. This model included a review of system and organization costs based on local and national industry trends, calculation of quantifiable value based on state-specific healthcare metrics, and recommended detailed immediate and near-term, and potential long-term funding strategies
- Developed an extensive IT scenario-based cost model for a large national commercial healthcare client, including definition of current/future cost drivers. The model provided a seven-year view of a multibillion-dollar IT department and included extensive metric projections based on known IT drivers matched with company-specific and industry guided cost drivers. The model provided both detailed expectations of cost in specific IT 'towers' as well as executive-ready budget projects and predictive analytics with adjustable sensitivity analyses



- Developed the State HIE Strategic and Operational Plans for the State of Connecticut Department of Public Health. The 190-page plan included a deep understanding of the status of Health Information Technology (HIT) in the State as well as guidance for the future of Electronic Health Record (EHR) adoption through the development of an HIE in the State. The project was completed with large amount of interaction between Gartner, the Department of Public Health, the Department of Social Services (Medicaid) and the assigned Regional Extension Center
- Developed the State Medicaid HIT Plan (SMHP) and IAPD detailing Medicaid EHR Incentive Program requirements and strategy for the State of Connecticut Department of Social Services. This project further enhanced communication and collaboration between the three Federal grantees for HIT in the State and harmonized the collaboration to help ensure the most effective development of HIT in the State

RelayHealth / McKesson (2007 to 2008)

As Project Manager I, Kevin managed the integration through project business case stage of two software packages providing secure online communication between three key stakeholders in patient care; successfully completed business case, receiving recognition from upper management for quality of presentation.

Scuba Discounters (2003 to 2008)

As Founder and General Manager, Kevin designed, implemented, supported and ran an e-commerce extension of the business, growing the online presence from initiation to over \$1M in sales annually.

Dolphin Scuba Center (2001 to 2006)

Kevin served as IT Director, Assistant Sales Manager, and Scuba Instructor.

International Business Machines (IBM®) (1999 to 2000)

Kevin served as a Surface, Materials, and Failure Analysis Laboratory Intern.



Katie McDonald

MBA, PMP®, LSSGB

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Extensive experience with drafting review cycles and submission of key client service deliverables, including executive and Centers for Medicare & Medicaid Services (CMS) status reports, Scopes of Work (SOWs), Advance Planning Documents (APDs), and Requests for Proposals (RFPs)
- Three years of expertise in cultivating, coordinating, and managing relationships between interested and invested parties to help secure successful project outcomes

MEDICAID EXPERIENCE

3 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- MBA, Healthcare Administration, Marshall University
- BA, Communication Studies, focus on Organizational Communication, Marshall University
- Certified Project Management Professional® (PMP®)
- Lean Six Sigma Green Belt Certification (LSSGB)

Katie McDonald is a consultant with extensive knowledge in communication skills, including collaborative engagement, professional presentations, superior-subordinate communication, intercultural communication, leadership and group communication, research, theory, and rhetoric. She has developed foundational knowledge in marketing principles, public relations, economics, sales, and workplace language. Through her work she has refined superior organizational skills, detail-oriented problem-solving abilities, and has become a successful and confident communicator. She is particularly adept at supporting and promoting collaborative communication processes, streamlining solutions, enhancing process awareness and engagement, and developing and reviewing project-specific documentation such as deliverables, presentations, and business process improvement flows. Katie works closely with state Medicaid agencies throughout the entire project life cycle, from project planning and development to implementation and closeout, to help states and agencies achieve successful project outcomes.

EXPERIENCE

BerryDunn (05/2022 to present)

Guam Department of Public Health and Social Services (DPHSS)

EPfMO Services (08/2025 to present)

Katie serves as a Senior APD analyst for BerryDunn where she supports Guam's single state Medicaid agency, DPHSS. Katie supports APD narratives and budgets. Katie assists with planning, developing, and helping to manage the APD funding process. Katie helps with



preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

United States Virgin Islands (USVI) Department of Human Services (DHS)

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

Katie serves as deputy project manager for BerryDunn where she supports USVI's single state Medicaid agency, DHS. Katie oversees Engagement Process Management, Risks and Issues, and Priority Status Reporting. Katie also serves as the project manager for the USVI EPfMO APD workstream, Federal Partner Collaboration Support workstream, and Project Management Office (PMO) Support workstream. Katie provides business analyst support to the Eligibility and Enrollment (E&E) System Support workstream, Contract Management workstream, Corrective Action Plan (CAP) Support workstream, and Core Set Reporting workstream.

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

APD Consulting Project (05/2024 to present)

Katie serves as a Senior APD analyst for BerryDunn where she supports DE's single state Medicaid agency, DMMA. Katie supports APD narratives and budgets. Katie assists with planning, developing, and helping to manage the APD funding process. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

West Virginia Department of Human Services (DoHS)

Partnership Management (12/2023 to present)

Katie provides project coordination assistance to DoHS, supporting planning, developing, and management of the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI and Guam. Katie helps with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

PATH Minimum Acceptable Risk Standards for Exchanges (MARS-E) Security Assessment (11/2023 to 03/2024)

Katie provided project coordination assistance to DoHS with planning and helping to manage the PATH MARS-E Security Assessment project. Katie helped with developing and reviewing project deliverables for various project-related activities and tasks.

Project Management Organization Services for the West Virginia Medicaid People's Access To Help (03/2023 to 11/2024)

Katie provided project coordinator assistance with implementing the PATH system. Katie helped with taking notes and developing and reviewing project deliverables for various project-related activities and tasks.

Child Welfare Initiative Project Management Services (05/2022 to 07/2024)

Katie provided project coordinator assistance with implementing its five-year plan to improve the continuum of care for children and families, pursuant to DoHS's agreement with the DOJ. Katie



helped with preparing presentations, developing, and reviewing project deliverables, and conducting research and analysis for various project-related activities and tasks.

West Virginia Bureau for Medical Services (BMS)

IT Control Environment Review (07/2024 to 11/2024)

Katie provided project coordination assistance with planning, developing, and helping to manage the review of the BMS IT control environment. Katie helped with developing and reviewing project deliverables for various project-related activities and tasks.

Provider Management Support Project (08/2023 to 10/2023)

Katie provided project coordinator assistance with planning, development, and helping to manage the Multistate Collaborative Meeting and various tasks for the Leverage and Reuse process for the USVI. Katie helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

Medicaid Information Technology Architecture (MITA) 3.0 State Self-Assessment (SS-A) Maintenance and Annual Update Assistance Project (07/2023 to 06/2025)

Katie assisted with MITA life cycle maintenance activities, including developing new business process improvement flows and updating MITA-related reports.

APD Assistance (05/2023 to 12/2025)

Katie provided business analyst assistance with APD budgets and narratives. Katie previously provided project coordinator assistance with planning, developing, and helping to manage the APD funding process. Katie has also helped with preparing presentations and developing and reviewing project deliverables for various project-related activities and tasks.

Sedgwick Claims Management Services (08/2017 to 05/2022)

Katie worked as a claims assistant in charge of managing the mailed claims, attending to medical and legal bill payments, and taking claimant and provider phone calls. Her responsibilities included meticulous claims data entry and verification and helping to ensure the accuracy and timeliness of information critical to the processing pipeline. Collaborating closely with teams, she identified process bottlenecks and areas for improvement, actively participating in discussions to optimize the claims administration workflow. Some tasks this affected were the workflow for processing subpoenas for claims records and the workflow for processing settlement agreements.



Grady Black

BS

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

General Project Manager

KEY QUALIFICATIONS

- Languages/Applications: SQL, SQL Server Management Studio, Snowflake, SAS, R, Python, Excel, Tableau, Power BI
- Experience in data quality reviews and quality control measures to highlight discrepancies in healthcare data
- Skilled in data visualization for data-driven decision-making

MEDICAID EXPERIENCE

3 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Data Analytics, Bentley University

As a data analytics professional, Grady brings a variety of skills in database management, programming, statistics, and regression analysis. Upon starting at BerryDunn in the summer of 2022, Grady has worked in data engineer, data analyst, and data developer roles to support various projects.

EXPERIENCE

BerryDunn (06/2022 to present)

Grady works with BerryDunn's Health Analytics Practice Group, within the Data Management and Strategy practice. Grady often uses various coding languages and statistical software such as Python, SQL, and SAS, as well as data visualization tools like Tableau, Power BI, and Excel. Providing technical support for the team, Grady engages in data profiling, data quality analysis, and data visualization. Grady also focuses on quality control and assists in database development.

West Virginia Department of Human Services (DoHS)

Child Welfare Initiative (CWI) Project Management Services (07/2022 to present)

Grady supports the CWI project by gathering relevant requirements, creating data dictionaries, generating visuals to describe pertinent trends in CWI data, developing dynamic dashboards to automate manual reports, and addressing data quality issues. The child welfare effort requires cross agency collaboration with the Bureau for Social Services (BSS), Bureau for Medical Services (BMS), and the Bureau for Behavioral Health (BBH). Grady generates and manages reports involving Residential Mental Health Treatment Facilities (RMHTF), Qualified Independent Assessments (QIA), Automated Placement Referrals (APR), and Children with Serious Emotional Disorder (CSED).



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

Data Integration Hub (06/2024 to 11/2024)

Grady engaged in developing database objects and Extract-Transform-Load (ETL) mechanisms in the cloud computing platform Snowflake. Grady was exposed to Amazon Web Service (AWS) programs and services like Simple Storage Service (S3) and Lambda functions. Using both Python and SQL coding languages, Grady developed data quality check functions and performed data quality analyses.

Data Improvement Project (05/2022 to 01/2025)

Grady assisted in developing mapping documents, running ad hoc analyses, and developing data profiling reports.

Iowa Department of Health and Human Services (HHS) - Division of Medicaid

Quality Management System (QMS) (12/2024 to present)

Grady supports the QMS project by developing quality measures and interactive, client-facing dashboards. BerryDunn and Iowa HHS have identified common beneficiary journeys in which the quality of care needs to be assessed. Quality measures have been identified to help guide the assessment of care. Grady helps develop SQL objects that service as the underlying population of these quality measures. The measures are aggregated and visualized using Power BI, in which Grady leads the development effort for the client-facing dashboards.



Hope Connard

BA, PHR, SHRM-CP, ECCP

Manager | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

- 30 years' Strategic HR Leadership Experience
- 20 years' Organizational Effectiveness
- 20 years' Change Management Leadership

MEDICAID EXPERIENCE

2 years

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

Project Management Support Staff

RELEVANT EXPERIENCE

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 (AICPA) 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.



AnnaBella Hyre

BBA, BLA

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

MEDICAID EXPERIENCE

1.5 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



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

Project Management Support Staff

RELEVANT EXPERIENCE

21 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BS, Accounting, University of Southern Maine

Carole Ann Guay is a manager for BerryDunn's Consulting Services Project Support group. She has over eight years' experience as a project coordinator, technical analyst and workflow developer. She has provided support services such as workflow and dataflow diagrams, document requests, status reports, meeting requests, and data management. She has also worked to help ensure business assessments are compliant with federal regulations and provided documentation and deliverable assistance on numerous projects.

EXPERIENCE

BerryDunn (10/2014 to present)

Puerto Rico Medicaid Program

Enterprise Objective Monitoring and Control (EOMC) Services (09/2023 to present)

Carole Ann assists with review and updates of deliverables.

Maine Department of Corrections (DOC)

Offender Management System (OMS) Consulting Services (11/2021 to 02/2022)

Carole Ann developed high-level workflow diagrams for the BerryDunn team assessing business processes, crafting cost benefit analyses, developing a Request for Proposal (RFP), and assisting the DOC with its selection of a new OMS.

Ellis County, TX

Justice and Public Safety Systems Replacement Initiative (06/2021 to present)

Carole Ann coordinates document request items, status reports, meeting requests, and data management and has been involved in all phases of the project.

Vermont Department of Vermont Health Access

Vermont Health Connect Financial and Programmatic Audit (01/2016 to present)



BerryDunn has performed the State's financial and programmatic audit of its health insurance exchange since 2016. Carole Ann currently serves as the project coordinator on this audit to determine whether the Exchange is in material compliance with 45 CFR 155.

Minnesota Health Benefit Exchange (MNSure)

Programmatic Audit (10/2015 to present)

BerryDunn is performing the programmatic audit for the State's health insurance exchange. Carole Ann is the project coordinator for BerryDunn's audit team assessing whether MNSure's program is compliant with all federal requirements.

Monroe County, FL

Clerk and Court Business Process Review (02/2023 to 02/2024)

Carole Ann developed high-level workflow and dataflow diagrams for the BerryDunn team assisting the County Clerk's Office with documenting its business processes for the purposes of identifying and removing barriers to efficiency. At the project's outset, there was a gap in institutional knowledge and a lack of formalized and documented administrative and court processes. BerryDunn helped to bridge that gap by holding cross-divisional meetings with stakeholders to openly discuss process challenges and increase communication.

City of St. Charles, MO

Enterprise Resource Planning (ERP) System Selection Project (09/2023 to 10/2023)

Carole Ann assisted in the analysis of vendor proposals and requirements analysis to assist in vendor selection.

Arizona Department of Agriculture (AZDA)

Assessment of Current Licensing System and Development of a Transition Scope of Work (12/2022 to 07/2023)

Carole Ann developed high-level workflow diagrams for the BerryDunn team performing an assessment of AZDA's licensing systems. The study concluded with a report which outlined the current state of the licensing system, analyzed the current landscape of agricultural licensing systems and peer states' approaches, provide recommendations for next steps, laid out an implementation roadmap, and provided a task order scope of work for AZDA's IT Modernization Strategic Initiative.

Montana Department of Corrections (MDOC)

OMS Procurement (01/2023 to 07/2023)

Carole Ann assisted with the development of high-level workflow diagrams for the BerryDunn team providing a review of MDOC's business processes and technology. By the end of the project, the MDOC had a clear vision of how to improve the technology and business processes for a modern offender management solution.

Metropolitan Government of Nashville and Davidson County (Metro), TN

Information Security Program Development (05/2016 to 04/2021)



For Metro's development of their Information Security Management Program, Carole Ann worked as a project coordinator, assisting in the development of findings reports. In addition, she served as part of the team performing a Payment Card Industry (PCI) Readiness Assessment. These activities included identifying Metro's current state of PCI, identifying where PCI data resides and where it traverses the network.

New Mexico Corrections Department (NMCD)

Commercial Off-the-Shelf (COTS) OMS Replacement (11/2016 to 06/2020)

Carole Ann compiled weekly status reports and participated in interviews as well as survey analysis for the BerryDunn team providing high-level requirements gathering and definition services. BerryDunn also assisted with developing and managing the RFP process through vendor negotiation and facilitated developing detailed OMS requirements with NMCD staff and the selected OMS vendor.

Oregon Enterprise Technology Services (OR ETS)

Integrated IT Service Management (ITSM) (03/2018 to 03/2019)

Carole Ann developed workflow and dataflow diagrams through on-site meetings as well as conference call sessions for the BerryDunn team providing business analysis services in support of its ITSM system project. The purpose of the ITSM system project was to provide efficiency and effectiveness enhancements that could lead to the OR ETS providing greater value to its customers.

Colorado Office of the State Auditor

IT Evaluation (09/2017 to 02/2019)

Carole Ann coordinated document request items, status reports, meeting requests, and data management for the BerryDunn team evaluating the State's IT programs, processes, and resources. The BerryDunn team's recommendations served to help the State's IT program align its centralized structure with the General Assembly's goals for daily IT operations, improve the process for evaluating and prioritizing IT projects, increase opportunities to interface with Colorado citizens through existing and new technologies, interface with additional agencies, and understand the level of satisfaction and improved services to customers.

Sacramento Municipal Utility District (SMUD)

Information Security Audit (08/2016 to 12/2017)

Carole Ann provided documentation support and deliverable assistance for SMUD's Information Security Audit.

West Virginia Department of Human Services

Eligibility and Enrollment (E&E) Independent Security and Privacy Controls Assessment (01/2017 to 07/2017)

Carole Ann served as an analyst for West Virginia E&E Independent Security and Privacy Assessment project. The independent assessment was completed against the CMS MARS-E v2.0 framework.



Massachusetts State Ethics Commission

Case Management System Planning and Implementation Services (04/2017 to 06/2017)

Carole Ann provided deliverable support, as well as data gathering and organization for this project. She also participated in on-site fact-finding meetings.

Washington State Auditor's Office (SAO)

Local Government IT Security Audits (11/2014 to 06/2017)

Carole Ann served as a technical analyst assisting in the performance of information security audits for various municipalities throughout the State of Washington, sponsored by the SAO, conducting assessment activities and analysis of current environments. The team assisted in identifying threats, vulnerabilities, and risks, in addition to providing recommendations for remediation.

Webber Energy Fuels (2004 to 2014)

As the office coordinator, Carole Ann oversaw several operations, including payroll for office staff of 30 employees, Daily Product Control of fleet deliveries, the balancing and reconciling of previous day's postings, credit checks and opening of all new accounts, and the cash drawer and accounts receivable. She worked directly with sales and service, helping ensure new customer satisfaction, and directly assisted the branch manager in all daily office operations.



Jonathan 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.



Matthew Oatten

BA

Consultant | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

- 7+ years of project management experience
- 3+ years of experience writing, reviewing, and submission of status reports, Statements of Work (SOWs), Requests for Proposals (RFPs), and Advanced Planning Documents (APDs).

MEDICAID EXPERIENCE

4 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- BA, Communication, Michigan State University
- Medicaid Learning Center (MLC) Certified Medicaid Professional (HIT + MCMP-II)



Matthew Oatten is a problem-solving, results-oriented project manager with seven years of experience managing multiple projects while maintaining deadlines, project budgets, and providing consistent communication to clients. He has proven to take the initiative to generate more efficient practices, and retains strengths in time management, maintaining client relationships, and organizational skills. Matthew provides dedicated and outstanding service to clients through effective interpersonal communication, exceeding expectations, and continually developing professionally.

EXPERIENCE

BerryDunn (07/2022 to present)

West Virginia Bureau for Medical Services (BMS)

Advanced Planning Document (APD) Assistance (06/2025 to present)

Matthew serves the APD Assistance project by providing business analysis (BA) support. Matthew provides support to the APD team by managing the full APD lifecycle. He leads APD submission efforts by writing narrative language, coordinating stakeholder input, ensuring compliance with program requirements, helping to ensure project budgets are accurate, and preparing the APD package for State submission to Centers for Medicare & Medicaid Services (CMS).

Payment Error Rate Measurement (PERM) Project (11/2024 to present)

Matthew serves the PERM project providing BA and project coordination (PC) support. Matthew provides support in various areas, including meeting notes, artifact research, tracking project milestones, action items, risks/issues, and decisions. He also assists on project duties surrounding Data Processing (DP) and Medical Records (MR) by tracking and progressing Additional Documentation Requests (ADRs) from the Review Contractor (RC) and Statistical Contractor (SC) through to completion.



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

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

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

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

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

Arizona Health Care Cost Containment System (AHCCCS)

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

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

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

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

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

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



Department safety protocols. He facilitated travel, sporting, marketing, and community events to engage athletes, donors, and fans nationwide.

Michigan State University (MSU) (03/2014 to 05/2017)

Matthew served as resident assistant to mentor and support a floor of over 90 on-campus residents. He enforced high standards of safety protocol, policy, and accountability while managing interpersonal relationships. He created, facilitated, and assessed programs to support residents' growth and development both academically and socially.



Adam “AJ” Mong

M.Ed.

Consultant | Berry, Dunn, McNeil & Parker, LLC



PROPOSED PROJECT ROLE

Project Management Support Staff

KEY QUALIFICATIONS

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

MEDICAID EXPERIENCE

3 years

EDUCATION, CERTIFICATIONS, AND MEMBERSHIPS

- M. Ed., Lancaster Bible College & Graduate School
- BS, Lancaster Bible College & Graduate School

AJ Mong is a flexible and forward-thinking professional with more than three years of Medicaid experience backed by 15 years of combined experience in mental health, education, and customer service fields. He has developed expertise in written and oral expression, data collection and analyzation, improvement planning, and team leadership. He enjoys and excels at helping clients and co-workers create visual data analyses to help drive decision-making and create measurable progress.

EXPERIENCE

BerryDunn (07/2022 to present)

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

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

AJ serves as a workstream lead for the Contractor Management business areas within the MITA framework. AJ works as an assessor to conduct stakeholder interviews, complete Business Process (BP) assessments, perform gap analysis and update capability matrices, and contribute to the SS-A report and roadmap. AJ also works to align MITA findings across related projects within the WV portfolio.

Home and Community-Based Services (HCBS) Quality Initiative (QI) Project, Phase II and III (07/2025 to present)

AJ serves as a workstream lead for the Quality Management Plan and supports project coordination and planning. He aids in creating client deliverables with a focus on data presentation that drives project success.

West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Project, Phase II (07/2025 to present)



AJ serves the WV RISE Project by providing business analysis and project coordination support. AJ provides support in areas including data analysis and deliverable creation, budget tracking, and documentation support. AJ assisted in the completion of the project Analysis of Alternatives (AoA).

Take Me Home (TMH) Home and Community-Based Services (HCBS) Quality Initiative (QI) Project, Phase I (08/2024 to 06/2025)

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

Medicaid and Children's Health Insurance Program Enterprise System (MCES) Procurement Assistance Project (02/2024 to 07/2025)

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

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

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

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

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

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

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

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

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

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

AJ served as an elementary school counselor with the school leadership team and Focus School Improvement Team to take FDES from one of the bottom 5% performing schools in the state to a nationally recognized Blue Ribbon School. He collaborated with stakeholders to identify areas of improvement and implement data collection and analyzation processes that



would lead to measurable system-wide changes. He developed the Reflection Room suite to service mental health needs for all students with a focus on proactive vs. reactive procedures, trained staff on data entry, and maintained schoolwide behavior database for all professionals to utilize for student growth. Additionally, he worked at the state level as a lead mentor and partnered with other counselors from around the state to score and provide feedback for school counseling plans following the American School Counselors Association model.

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

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

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

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

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

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



Stephanie Duncan

BA

Project Coordinator | Berry, Dunn, McNeil & Parker, LLC

PROPOSED PROJECT ROLE

Project Management Support Staff

RELEVANT EXPERIENCE

10+ year

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.



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	Procurement Schedule	The procurement schedule will assist the BMS Procurement Office with planning and tracking procurement operations. The procurement schedule will include tasks, timelines, dependencies, resources, milestones, and contingencies to help minimize missed opportunities, help ensure compliance and optimize resource utilization.
D04	Updated Strategic Plan	The Strategic Plan for the WV RISE Procurement will be the main source for determining project direction and objectives. It will include a determination of which modules to procure, their timelines, and the anticipated outcome of each module. In addition, the plan will inform the procurement strategy as well as the organization's strategy for achieving defined outcomes.
D05	RFP	RFP to solicit competitive proposals to meet modular solution outcomes, specifications and requirements according to technical and cost-evaluation criteria.
D06	RFP Change Log	Change log that documents all modifications made to the RFP detailing what was changed, when, and by whom.
D07	Q&A Addendum	Addendum containing the questions submitted by Vendors and the written answers from the BMS. BerryDunn will assist the State with facilitating responses for up to two rounds of vendor Q&A.
D08	Proposal Evaluation Packets	Proposal evaluation packets to assist the Evaluation Team during evaluation meetings and scoring sessions.
D09	Oral Presentation Packets	Oral presentation packet to assist the Evaluation Team with documenting vendor demonstrations and feedback during vendor oral presentations.



Appendix C: Acronyms/Abbreviations

Table 5: Acronyms/Abbreviations

Acronym/Abbreviation	Definition
APD	Advanced Planning Document
BerryDunn	Berry, Dunn, McNeil & Parker, LLC
BMS	Bureau for Medical Services
CFR	Code of Federal Register
CL	Commodity Line
CMA	Centralized Master Agreement
CMS	Centers for Medicare & Medicaid Services
DoHS	Department of Human Services
EM	Engagement Manager
GPM	General Project Manager
HIPAA	Health Insurance Portability and Accountability Act
IAPD	Implementation Advance Planning Document
JRP	Joint Requirement Planning
LCWPM	Lead Child Welfare Project Manager
LMPM	Lead MMIS Project Manager
LPM	Lead Project Manager
MES	Medicaid Enterprise Systems
MITA	Medicaid Information Technology Architecture
MMIS	Medicaid Management Information System
MSR	Monthly Status Report
PAPD	Planning Advance Planning Document
PPACA	Patient Protection and Affordable Care Act
Q&A	Questions and Answers
RFP	Request for Proposal
SLA	Service Level Agreement
SOW	Scope of Work
SS	Project Management Support Staff
State, WV	West Virginia
USVI	United States Virgin Islands
WV RISE	West Virginia Resource Integration Solution for Enrollees

"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.

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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 5, 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 1984732, CDO BMS26*49
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 with the West Virginia Resource Integration Solutions for Enrollees (WV RISE) Procurement Assistance Phase III.

The service period is 06/15/2026 - 06/14/2027.

The total cost is \$2,037,925.00.

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.





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 ⁱ
- ☐ All Words ⁱ
- ☐ Exact Phrase ⁱ

e.g. 123456789, Smith Corp

"berry dunn mcneil & parker llc" ×

Entity

Location

Status

- ☒ Active
- ☐ Inactive

[Reset](#)

[Entity Information](#)



[All Entity Information](#)

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Business and Licensing

Online Data Services Help

Business Organization Detail

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BERRY, DUNN, MCNEIL & PARKER, LLC

Organization Information									
Org Type	Effective Date	Established Date	Filing Date	Charter	Class	Sec Type	Termination Date	Termination Reason	
LLC Limited Liability Company	1/8/2008		1/8/2008	Foreign	Profit				

Organization Information			
Business Purpose	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
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2021
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2019
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2012
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2010
2009
Date filed

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

Tuesday, June 16, 2026 — 9:39 AM

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