

Program Management Medicaid IT Case Study

Overview

A state Medicaid agency partnered with Monterey to provide program management support during the planning and implementation of Medicaid Expansion. The initiative required rapid coordination across policy, finance, technology, and vendor teams to deliver new system capabilities while maintaining compliance with federal funding and CMS requirements.

Monterey supported this effort by providing embedded program management and acquisition support focused on execution, alignment, and risk management across multiple IT workstreams. Our role ensured that policy objectives translated into deliverable system outcomes without disruption to ongoing Medicaid operations.

Challenge

Medicaid Expansion introduced complex operational and technical requirements that had to be implemented on aggressive timelines. The state needed to design, fund, and deploy new IT modules while coordinating multiple vendors, internal program teams, and oversight bodies.

At the same time, all work had to align with Advance Planning Documentation requirements to secure federal match funding and withstand CMS review. Any misalignment across requirements, schedules, funding, or governance approvals risked delays, rework, or loss of federal funding.

The agency needed experienced program management support to keep the initiative coordinated, compliant, and moving forward.

Monterey's Role

Monterey served as an embedded program management partner supporting the Medicaid Expansion initiative, with a focus on IT implementation and cross functional coordination. Our team performed hands on program management activities that connected policy intent, technical execution, and funding strategy.

Supporting the planning, coordination, and rollout of new IT modules required for Medicaid Expansion.

Facilitating requirements gathering sessions with business and technical teams to ensure policy goals were accurately translated into system requirements.

Developing and reviewing functional and non functional specifications and overseeing

creation of design documents, interface control documents, and testing plans.
Contributing to the development, submission, and ongoing updates of Advance Planning Documentation, including cost allocation, schedules, and resource planning.
Aligning program scope and implementation plans with APD funding structures to enable federal match and maintain CMS compliance.
Participating in analysis of alternatives to evaluate feasibility, cost, risk, and strategic alignment of potential solutions.
Conducting gap analyses to identify differences between existing system capabilities and expansion requirements and supporting prioritization of remediation efforts.
Supporting governance and approval processes by preparing materials for Executive Review Committee review and coordinating with the Strategic Technical Office.
Assisting with development and maintenance of master schedules to track milestones, dependencies, and cross workstream alignment.
Helping define service level agreements and key performance indicators and monitoring vendor performance against established metrics.
Serving as a liaison between technical teams, program staff, finance, and leadership to ensure consistent communication and alignment.
Identifying risks and issues early and working with stakeholders to mitigate them before they impacted timelines or compliance.

Results

Through Monterey's program management support, the Medicaid agency maintained momentum on its Expansion initiative while managing complexity across systems, vendors, and governance bodies.

Coordinated implementation of Medicaid Expansion IT modules aligned with policy and compliance requirements.
Advance Planning Documentation that supported federal match funding and reflected realistic scope, cost, and timelines.
Clear traceability between policy goals, system requirements, and delivered functionality.
Improved visibility into schedules, dependencies, and risks across multiple workstreams.
Stronger governance support and more informed executive decision making.
Reduced risk of delays, rework, or funding challenges during a critical transformation effort.

Why It Matters

Medicaid Expansion is not just a policy change. It is a large scale operational and technical transformation that directly affects eligibility, enrollment, and service delivery for vulnerable populations.

Monterey's program management approach brings structure, discipline, and coordination to these efforts. By embedding experienced professionals who understand Medicaid policy,

IT implementation, and federal funding requirements, Monterey helps agencies execute complex initiatives with confidence.

The result is systems that work, funding that remains secure, and programs that deliver on their promise to the people they serve.