

Medicare Special Needs Plan Participation and Enrollment Trends, 2010-2018

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Introduction

- This edition of the 5 Slide Series explores the national progression of Medicare Special Needs Health Plans (SNPs) and their collective enrollment between December of 2010 and January of 2018.
- SNPs are part of the Medicare Advantage program – plans enter the program by successfully completing a non-competitive application process.
- Medicare SNPs fall into three plan type categories:
 - C-SNP: these SNPs focus on at least one severe or disabling chronic condition from a predefined CMS list, although multiple commonly co-morbid and clinically-linked chronic conditions can be combined under the same C-SNP
 - D-SNP: these plans coordinate Medicaid and Medicare services for persons dually eligible for Medicaid and Medicare
 - I-SNP: provide Medicare services to individuals who require, or are expected to need, institutional (LTC/SNF) care for at least 90 days

Overall SNP Enrollment by Plan Type, 2010-2018

- SNP enrollment is currently at an all-time high with over 2.5 million Medicare beneficiaries
- Between 2010 and 2018, overall SNP enrollment grew by 86%
 - D-SNPs' enrollment doubled and C-SNP enrollment increased by 51%
 - I-SNPs *shrank* by 24% from 2010-2018, mostly due to a recategorization of one California health plan's membership. In all other states, I-SNP enrollment has increased each year since 2012.
- D-SNPs have accounted for over 80% of all SNP enrollees from 2011 forward. Enrollment in D-SNPs has increased every year during this period.
- The January 2018 figures suggest this will likely be a high-growth year for SNP enrollment.

Enrollment by SNP Type, 2010 - 2018				
Time Period	SNP Enrollment			
	C-SNP	D-SNP	I-SNP	Total
Dec '10	230,612	1,047,519	94,495	1,372,626
Dec '11	196,423	1,159,077	78,209	1,433,709
Dec '12	232,530	1,303,408	49,714	1,585,652
Dec '13	297,901	1,527,676	51,769	1,877,346
Dec '14	312,280	1,738,363	53,266	2,103,909
Dec '15	341,503	1,755,163	53,714	2,150,380
Dec '16	351,424	1,892,613	63,458	2,307,495
Dec '17	352,370	2,093,059	69,795	2,515,224
Jan '18	347,509	2,129,837	72,235	2,549,581
Overall % Change Dec '10 to Jan '18	51%	103%	-24%	86%
Average Annual % Change	7%	10%	-3%	9%
2017-2018 % Change	-1%	2%	3%	1%
% of Overall SNP Pop 2010	17%	76%	7%	100%
% of Overall SNP Pop 2013	16%	81%	3%	100%
% of Overall SNP Pop 2018	14%	84%	3%	100%

Number of Participating SNPs, 2010-2018

- After a volatile stretch from 2010-2014, health plan participation in the SNP program has stabilized.
 - 641 SNPs are currently in operation. This is just under the program's highest level of 644 during 2013.
 - More D-SNPs and I-SNPs are in operation during 2018 than in any prior year.
 - The number of participating C-SNPs declined each year from 2013-2017. However, C-SNP entities increased by 7% between 2017 and 2018.
- Nearly two-thirds of SNPs are D-SNPs. I-SNPs overwhelmingly serve dual eligible enrollees as well; therefore, roughly 80% of SNPs focus entirely or predominantly on the dual eligible population.

Number of Health Plans by SNP Type, 2010 - 2018				
Time Period	Number of Different Plans			
	C-SNP	D-SNP	I-SNP	Total
Dec '10	153	335	74	562
Dec '11	92	298	65	455
Dec '12	115	322	70	507
Dec '13	214	362	68	644
Dec '14	152	353	61	566
Dec '15	148	336	57	541
Dec '16	139	350	79	568
Dec '17	123	377	83	583
Jan '18	132	412	97	641
Overall % Change Dec '10 to Jan '18	-14%	23%	31%	14%
Average Annual % Change	3%	2%	3%	2%
2017-2018 % Change	7%	9%	17%	10%
% of Total SNPs	21%	64%	15%	100%

Average per Plan SNP Enrollment, 2010-2018

- Enrollment has been modest on a per-SNP basis throughout the program's history. Nationwide enrollment per SNP has averaged approximately 4,000 during the past several years.
- D-SNPs' average enrollment is currently 5,170, versus 2,633 for C-SNPs and 745 for I-SNPs.

Time Period	Avg Enrollment per Plan			
	C-SNP	D-SNP	I-SNP	Overall
Dec '10	1,507	3,127	1,277	2,442
Dec '11	2,135	3,890	1,203	3,151
Dec '12	2,022	4,048	710	3,128
Dec '13	1,392	4,220	761	2,915
Dec '14	2,054	4,925	873	3,717
Dec '15	2,307	5,224	942	3,975
Dec '16	2,528	5,407	803	4,062
Dec '17	2,865	5,552	841	4,314
Jan '18	2,633	5,170	745	3,978
Overall % Change Dec '10 to Jan '18	75%	65%	-42%	63%
Average Annual % Change	13%	9%	-4%	9%
2017-2018 % Change	-8%	-7%	-11%	-8%

5 Slide Series Overview

Our 5 Slide Series is a monthly publication whereby we briefly discuss/address a selected topic outside the confines of our client engagements.

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