

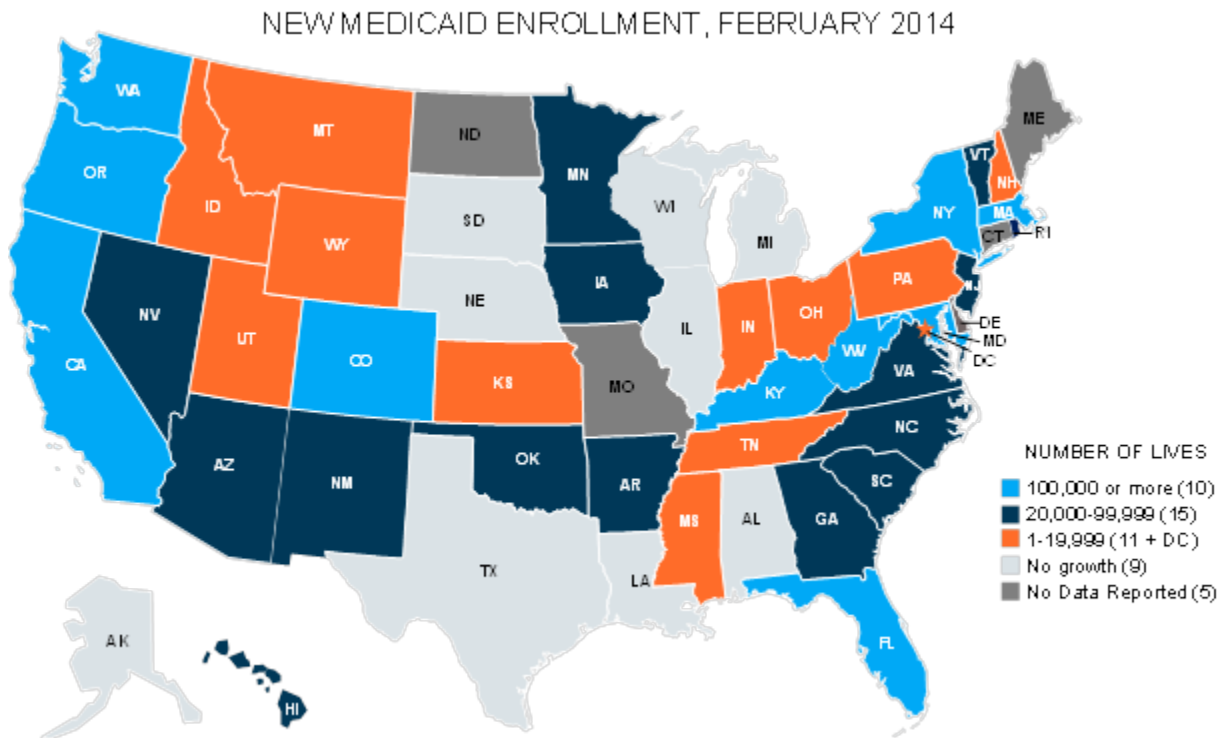


AVALERE ANALYSIS: 10 STATES DRIVING NEW MEDICAID ENROLLMENT

Potential for 700K to 1.3M Additional Medicaid Enrollees through March, If Current Trends Continue

According to a new Avalere analysis, 10 states accounted for more than 80 percent of the 3 million new Medicaid enrollees under the Affordable Care Act (ACA) as reported by the Centers for Medicare and Medicaid Services (CMS). From October through February, California, Florida, Oregon, and Washington enrolled the most new participants.

“We continue to see dramatic variations across the states in terms of enrollment into new coverage programs,” said Jenna Stento, senior manager at Avalere Health. “While some differences may be a result of state decisions to expand Medicaid, certain non-expansion states are also seeing large increases in Medicaid enrollment.”



Florida is the only non-expansion state that has seen new Medicaid enrollment numbers greater than 100,000, an 8.2 percent increase over summer 2013 levels.

The Congressional Budget Office estimates that the ACA will result in 8 million new Medicaid enrollees in 2014. To date, CMS has reported 3 million new enrollees through February 2014. If March enrollment increases at the rate of Medicaid sign-ups observed between January and February, total enrollment could reach 3.7 million by the end of March.

However, March and April figures could bring more dramatic increases if outreach and enrollment efforts targeting the end of exchange open enrollment translate into new Medicaid enrollees. Specifically, if Medicaid sign-ups follow a similar pattern as exchanges, new Medicaid enrollees could reach 4.3 million by the end of March. In addition, recent figures released by CMS do not account for individuals assessed eligible for Medicaid through HealthCare.gov who have yet to be determined eligible by states.

“In March, enrollment in exchange plans surged dramatically as individuals signed up for coverage at more than twice the February rate of enrollment,” said Dan Mendelson, Avalere Health CEO. “Medicaid enrollment could increase at a similar rate in March, and April could see another bump as individuals assessed eligible for Medicaid by the federal exchange undergo determination by state Medicaid agencies.”

There is no open enrollment period for the Medicaid program; therefore, enrollment will continue year round.

New Enrollment in Medicaid, Through February 2014

<i>Expansion States</i>		<i>Non-Expansion States</i>	
State	New Medicaid Enrollment	State	New Medicaid Enrollment
Arizona	33,000	Alaska ¹	0
Arkansas ¹	82,000	Alabama	0
California	842,000	Florida	245,000
Colorado	179,000	Georgia	24,000
Connecticut	Not Reported	Idaho	17,000
Delaware	Not Reported	Indiana	0
District of Columbia	2,000	Kansas	17,000
Hawaii	25,000	Louisiana	0
Illinois	0	Maine	Not Reported
Iowa	64,000	Missouri	Not Reported
Kentucky	141,000	Mississippi	6,000
Maryland	178,000	Montana	10,000
Massachusetts	157,000	North Carolina	42,000
Michigan ¹	0	Nebraska	0
Minnesota	65,000	Oklahoma	25,000
Nevada	72,000	Pennsylvania	13,000

New Hampshire ¹	6,000	South Carolina	29,000
New Jersey	78,000	South Dakota	0
New Mexico	30,000	Tennessee	11,000
New York	146,000	Texas	0
North Dakota	Not Reported	Utah	8,000
Ohio	20,000	Virginia	30,000
Oregon	218,000	Wisconsin	0
Rhode Island	34,000	Wyoming	0
Vermont	41,000		
Washington	252,000		
West Virginia	119,000		
Total: 3,020,000²			

¹Medicaid estimates in Arkansas include premium support/private option lives. Michigan began enrolling expansion lives April 1, 2014 and New Hampshire will begin July 1, 2014. Note that Alaska reports household data, but has not seen an uptick in sign-ups.

²Figures do not sum due to rounding and treatment of states that did not see enrollment growth. CMS deducts states that saw enrollment declines from the total.

Methodology: For this analysis, Avalere Health utilized data from CMS Medicaid and the Children’s Health Insurance Program (CHIP) enrollment reports and the Assistant Secretary for Planning and Evaluation (ASPE) exchange enrollment reports. We compared the monthly enrollment reported in February to the monthly enrollment reported from the July-September 2013 time period. To estimate the number of potential new Medicaid and CHIP enrollees in March 2014, we used two rates: 1) lower bound rate, based on growth in Medicaid enrollment January to February 2014; and 2) upper bound rate, based on growth of exchange enrollment from February 2014 to March 2014. Exchange enrollment growth is based on 7.1M estimate announced by President Obama on April 1. Official enrollment estimates have not yet been published and are subject to change.

Sources: CMS February Medicaid and CHIP Monthly Applications and Eligibility Determinations Report, Released April 4, 2014; Accessed: <http://www.medicaid.gov/AffordableCareAct/Medicaid-Moving-Forward-2014/Downloads/February-2014-Enrollment-Report.pdf>; ASPE Health Insurance Marketplace: March Enrollment Report For the period: October 1, 2013 – March 1, 2014; March 11, 2014; Accessed: http://aspe.hhs.gov/health/reports/2014/MarketPlaceEnrollment/Mar2014/ib_2014mar_enrollme nt.pdf