

State-Specific Analysis

Arizona

Medicaid Expansion Status: Expanded January 1, 2014

Enrollment in Arizona's ALTCS (Arizona's Managed Long Term Care) program has continued to grow through the end of 2015 and into 2016, primarily in the state's Acute Care managed care program. Through Q1 of 2016, Arizona's MCO enrollment stands at around 1.56 million, which represents an addition of more than 40,000 members in the past six months. Overall, March 2016 enrollment is up more than 12 percent year-over-year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Acute Care	1,473,082	1,486,073	1,502,960	1,502,031	1,492,112	1,503,359
ALTCS	57,558	57,692	57,684	57,775	57,710	57,736
Total Arizona	1,530,640	1,543,765	1,560,644	1,559,806	1,549,822	1,561,095
+/- m/m	11,879	13,125	16,879	(838)	(9,984)	11,273
% y/y	9.8%	11.5%	12.3%	12.4%	12.8%	12.4%

California

Medicaid Expansion Status: Expanded January 1, 2014

Medi-Cal managed care enrollment data through March 2016 shows continued enrollment growth, with membership up more than 430,000 over the last six months. As of March 2016, enrollment in managed care topped 10.4 million, an 11.2 percent increase over the previous year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Two-Plan Counties	6,446,794	6,492,354	6,540,360	6,562,628	6,661,840	6,674,880
Imperial/San Benito	79,384	79,682	79,913	79,986	80,297	80,299
Regional Model	291,366	292,667	294,341	295,635	297,799	297,790
GMC Counties	1,076,145	1,091,255	1,102,804	1,096,382	1,097,114	1,095,932
COHS Counties	2,162,665	2,176,064	2,190,182	2,170,875	2,169,956	2,139,703
Duals Demonstration	117,179	116,538	115,743	125,257	124,292	126,100
Total California	10,173,533	10,248,560	10,323,343	10,330,763	10,431,298	10,414,704
+/- m/m	189,913	75,027	74,783	7,420	100,535	(16,594)
% y/y	17.6%	16.4%	15.5%	13.3%	13.4%	11.2%

Florida

Medicaid Expansion Status: Not Expanded

Although not electing to expand Medicaid, Florida's statewide Medicaid managed care program continues to grow. As of March 2016, enrollment has surpassed 3.3 million, up more than 6 percent from a year ago. (Note that the managed LTC enrollment figures listed below are a subset of the Managed Medical Assistance (MMA) enrollments and are included in the MMA number and are not separately added to the total to avoid double counting).

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
MMA	2,934,211	2,953,982	2,958,416	2,956,843	3,008,367	3,015,186
LTC (Subset of MMA)	89,829	90,877	90,964	90,841	90,920	90,656
SMMC Specialty Plan	138,350	138,062	139,284	135,844	151,190	152,397
FL Healthy Kids	159,468	156,716	155,242	151,931	152,403	157,003
Total Florida	3,232,029	3,248,760	3,252,942	3,244,618	3,311,960	3,324,586
+/- m/m	(15,619)	16,731	4,182	(8,324)	67,342	12,626
% y/y	9.6%	9.9%	8.8%	6.8%	7.4%	6.4%

Georgia

Medicaid Expansion Status: Not Expanded

As of January 2016, Georgia Medicaid managed care enrollment stands at more than 1.3 million, roughly flat from a year prior. Georgia has not reported enrollment figures for Q1 2016 beyond January.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Georgia	1,301,208	1,302,835	1,307,161	1,309,916		
+/- m/m	(10,656)	1,627	4,326	2,755		
% y/y	-0.2%	0.3%	0.4%	1.2%		

Hawaii

Medicaid Expansion Status: Expanded in 2014

On January 1, 2015, Hawaii implemented its integrated Medicaid managed care program, combining QUEST managed Medicaid and QUEST Expanded Access (QExA), which provides managed Medicaid to the aged, blind, and disabled (ABD) populations. Through March 2016, enrollment in the new program stands at 328,500, down 1.9 percent from the prior November.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Hawaii	338,010	329,463	343,285	345,837	338,111	328,484
+/- m/m	(467)	(8,547)	13,822	2,552	(7,726)	(9,627)
% y/y	8.0%	2.7%	4.5%	5.1%	0.9%	-1.9%

Illinois

Medicaid Expansion Status: Expanded January 1, 2014

Illinois enrollment across the state's three managed care programs sits at more than 2 million as of March 2016, up 9.1 percent from March 2015. The significant growth due to managed care expansion has leveled off, with enrollment actually declining in each of the last six months.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Family Health Program	1,940,633	1,917,955	1,904,762	1,900,568	1,896,329	1,887,993
Integrated Care Program	120,561	118,982	118,847	118,656	119,761	120,317
Duals Demonstration	48,779	54,520	54,770	47,340	49,238	47,888
Total Illinois	2,109,973	2,091,457	2,078,379	2,066,564	2,065,328	2,056,198
+/- m/m	(4,066)	(18,516)	(13,078)	(11,815)	(1,236)	(9,130)
% y/y	226.7%	138.5%	78.1%	35.3%	19.3%	9.1%

Indiana

Medicaid Expansion Status: Expanded in 2015 through HIP 2.0

As of February 2016, enrollment in Indiana's managed care programs (Hoosier Healthwise, Hoosier Care Connect, Care Select, and Healthy Indiana Program (HIP)) is approaching 1.1 million, up 29.7 percent from the prior year. In the first half 2015, Indiana launched the Hoosier Care Connect program for ABD Medicaid recipients and also began Medicaid expansion enrollment into the HIP 2.0 waiver program.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Hoosier Healthwise	605,046	602,986	599,366	593,180	602,158	
Hoosier Care Connect	97,673	97,755	97,733	97,510	97,840	
Care Select	NA	NA	NA	NA	NA	
HIP	330,486	340,924	360,913	372,218	370,342	
Indiana Total	1,033,205	1,041,665	1,058,012	1,062,908	1,070,340	
+/- m/m	12,443	8,460	16,347	4,896	7,432	
% y/y	34.5%	36.5%	37.3%	38.5%	29.7%	

Kentucky

Medicaid Expansion Status: Expanded January 1, 2014

As of March 2016, Kentucky enrolled nearly 1.2 million beneficiaries in risk-based managed care. Total enrollment is up 5 percent from a year prior.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Kentucky	1,227,121	1,234,332	1,230,745	1,210,546	1,190,940	1,198,425
+/- m/m	2,153	7,211	(3,587)	(20,199)	(19,606)	7,485
% y/y	19.6%	17.5%	15.6%	11.4%	5.8%	5.0%

Louisiana

Medicaid Expansion Status: Expansion Authorized by Governor

Medicaid managed care enrollment in the state's Bayou Health program increased in 2015 and into 2016, adding more than 110,000 enrollees in the last six months. March 2016 data shows total managed care enrollment at nearly 1.1 million, up 14.9 percent from the previous year. Louisiana's newly-elected Governor has authorized the expansion of Medicaid in 2016.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Louisiana	978,195	978,022	1,092,468	1,087,308	1,088,918	1,086,071
+/- m/m	2,906	(173)	114,446	(5,160)	1,610	(2,847)
% y/y	6.3%	5.9%	18.2%	18.3%	16.4%	14.9%

Maryland

Medicaid Expansion Status: Expanded January 1, 2014

Medicaid managed care enrollment declined in 2015, although enrollment has been up over the past six months. As of March 2016, enrollment stands at just over 1 million, down 7.1 percent from the prior year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Maryland	1,009,600	998,960	998,786	1,013,963	1,016,129	1,026,852
+/- m/m	23,958	(10,640)	(174)	15,177	2,166	10,723
% y/y	-1.1%	-3.9%	-5.8%	-7.1%	-7.4%	-7.1%

Michigan

Medicaid Expansion Status: Expanded April 1, 2014

Michigan Medicaid managed care enrollment has increased by more than 62,000 over the past six months, continuing growth trends in 2015 due to the continued Medicaid expansion impact and the launch of the state's dual eligible financial alignment demonstration. As of March 2016, managed care enrollment has surpassed 1.7 million, up 6.8 percent from the previous year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Medicaid	1,601,012	1,612,476	1,626,652	1,650,824	1,654,498	1,683,445
Total MI Health Link	37,072	36,335	34,858	34,297	32,735	32,040
Total Michigan	1,638,084	1,648,811	1,661,510	1,685,121	1,687,233	1,715,485
+/- m/m	(15,006)	10,727	12,699	23,611	2,112	28,252
% y/y	12.6%	7.7%	11.1%	10.3%	6.4%	6.8%

Minnesota

Medicaid Expansion Status: Expanded January 1, 2014

As of March 2016, enrollment across Minnesota's multiple managed Medicaid programs sits at just over 860,000, up 8.2 percent from the prior year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Parents/Kids	530,725	535,551	517,696	497,495	497,879	511,381
Expansion Adults	167,316	167,028	159,406	149,613	145,712	150,686
Senior Care Plus	13,050	13,854	13,609	13,677	13,555	13,473
Senior Health Options	35,068	35,361	35,251	35,291	35,324	35,221
Special Needs BasicCare	50,565	50,926	50,119	50,542	50,455	50,501
PIN Program	411	411	398	402	402	402
Minnesota Care	113,737	118,013	121,068	76,613	86,849	98,764
Total Minnesota	910,872	921,144	897,547	823,633	830,176	860,428
+/- m/m	6,947	10,272	(23,597)	(73,914)	6,543	30,252
% y/y	14.6%	15.9%	12.9%	3.6%	4.4%	8.2%

Mississippi

Medicaid Expansion Status: Not Expanded

MississippiCAN, the state's Medicaid managed care program grew significantly in 2015. An expansion of the program began in May 2015, adding more than 300,000 enrollees to the program. Despite a leveling off of enrollment growth, Medicaid managed care membership stands at more than 507,000 as of March 2016, up nearly 150 percent from last year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Mississippi	496,137	496,156	498,302	503,347	506,798	507,404
+/- m/m	(1,971)	19	2,146	5,045	3,451	606
% y/y	211.7%	210.1%	168.9%	167.6%	166.3%	146.1%

Missouri

Medicaid Expansion Status: Not Expanded

Missouri managed care enrollment in the Medicaid and CHIP programs combined sits at nearly 489,000 as of March 2016. Although not expanding Medicaid at this time, Missouri has seen steady growth in managed care membership, with March 2016 up 11 percent from the previous year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Medicaid	449,355	454,003	460,017	465,455	469,382	472,086
Total CHIP	17,251	17,118	16,814	16,520	16,694	16,631
Total Missouri	466,606	471,121	476,831	481,975	486,076	488,717
+/- m/m	3,701	4,515	5,710	5,144	4,101	2,641
% y/y	16.6%	13.6%	13.4%	14.4%	12.8%	11.1%

New Mexico

Medicaid Expansion Status: Expanded January 1, 2014

As of March 2016, the state's Centennial Care program enrolled more than 666,000 members, with steady enrollment growth throughout 2015 and into 2016, an 8 percent increase over the prior year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total New Mexico	647,275	649,599	649,606	655,365	661,772	666,204
+/- m/m	1,630	2,324	7	5,759	6,407	4,432
% y/y	11.3%	10.8%	9.1%	8.8%	8.3%	8.0%

New York

Medicaid Expansion Status: Expanded January 1, 2014

New York's Medicaid managed care programs collectively enrolled more than 4.64 million beneficiaries as of March 2016, down slightly over the previous year. After positive enrollment growth throughout 2015, the first quarter of 2016 has seen three consecutive months of declining enrollment.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Mainstream MCOs	4,653,437	4,657,187	4,640,405	4,487,098	4,463,963	4,442,285
Managed LTC	136,383	140,328	143,196	146,276	148,682	151,492
Medicaid Advantage	9,568	9,564	9,477	9,626	8,294	8,313
Medicaid Advantage Plus	6,210	6,231	6,240	5,625	5,573	5,661
HARP	8,572	19,394	37,105	36,349	35,803	35,349
FIDA (Duals Demo)	9,942	8,005	6,811	6,242	6,029	5,801
Total New York	4,824,112	4,840,709	4,843,234	4,691,216	4,668,344	4,648,901
+/- m/m	13,993	16,597	2,525	(152,018)	(22,872)	(19,443)
% y/y	7.4%	7.2%	5.9%	1.9%	0.6%	-0.5%

Ohio

Medicaid Expansion Status: Expanded January 1, 2014

Ohio's Medicaid managed care enrollment has seen significant growth in the past two years, due to Medicaid expansion (Group 8 enrollees) and the launch of MyCare Ohio, the state's dual eligible financial alignment demonstration. After a full quarter of declining enrollment at the end of 2015, Q1 2016 has produced three consecutive months of growth, with total enrollment passing 2.4 million, up just under a percent from the prior year.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
CFC Program	1,606,648	1,599,261	1,572,312	1,583,314	1,612,658	1,620,431
ABD Program	140,629	139,604	131,744	130,206	126,567	124,197
Group 8 (Expansion)	585,948	589,216	583,962	590,166	599,446	608,597
MyCare Ohio (Duals)	92,724	92,341	90,190	91,089	91,316	92,495
Total Ohio	2,425,949	2,420,422	2,378,208	2,394,775	2,429,987	2,445,720
+/- m/m	(4,940)	(5,527)	(42,214)	16,567	35,212	15,733
% y/y	5.9%	3.4%	-0.4%	-1.1%	-0.7%	0.7%

Pennsylvania

Medicaid Expansion Status: Expanded as of 2015

As of Q1 2016, Pennsylvania's Medicaid managed care enrollment sits at nearly 2.7 million, with nearly 100,000 new members over the past five months (Pennsylvania has not reported data through March 2016 at this time).

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Pennsylvania	2,093,384	2,108,626	2,127,718	2,151,262	2,170,713	
+/- m/m	17,023	15,242	19,092	23,544	19,451	
% y/y	24.8%	25.6%	26.7%	30.7%	31.0%	

South Carolina

Medicaid Expansion Status: Not Expanded

South Carolina's Medicaid managed care program saw consecutive months of declining enrollment in Q3 2015 before ending with two positive months of growth to close out the year. March 2016 enrollment stands at nearly 720,000, down just slightly from last year. South Carolina has so far seen only limited enrollment in the state's duals demonstration program.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Medicaid	681,066	689,586	702,073	703,455	714,151	717,303
Total Duals Demo	1,355	1,359	1,331	1,689	1,364	1,824
Total South Carolina	682,421	690,945	703,404	705,144	715,515	719,127
+/- m/m	(22,592)	8,524	12,459	1,740	10,371	3,612
% y/y	-9.6%	-9.4%	-8.4%	-5.3%	-1.6%	-0.6%

Tennessee

Medicaid Expansion Status: Not Expanded

As of March 2016, TennCare managed care enrollment totaled more than 1.52 million, up 9.9 percent from the prior year. TennCare enrollment has grown consistently, adding more than 65,000 members in the past six months.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Tennessee	1,469,556	1,480,974	1,489,279	1,499,545	1,514,993	1,525,548
+/- m/m	9,462	11,418	8,305	10,266	15,448	10,555
% y/y	11.8%	11.8%	12.8%	14.1%	10.2%	9.9%

Texas

Medicaid Expansion Status: Not Expanded

As of January 2016, Texas managed care enrollment stands at more than 3.8 million across the state's five managed care programs, up roughly 2 percent from last year. Enrollment reporting in Texas continues to be intermittent and delayed.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
STAR	2,887,411	2,892,410	2,878,620	2,858,917		
STAR+PLUS	531,461	534,461	529,758	534,611		
STAR HEALTH	31,030	30,812	30,528	30,619		
CHIP	379,603	381,142	54,438	51,200		
Duals Demo	56,737	52,232	378,158	378,144		
Total Texas	3,886,242	3,891,057	3,871,502	3,853,491		
+/- m/m	81,890	4,815	(19,555)	(18,011)		
% y/y	1.7%	1.9%	3.5%	2.1%		

Washington

Medicaid Expansion Status: Expanded January 1, 2014

Washington's Medicaid managed care enrollment has mostly continued to increase on a month-to-month basis, with February 2016 enrollment totaling nearly 1.48 million, up 8.3 percent from the prior year. Washington has yet to report March data at this time.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total Washington	1,445,769	1,452,366	1,474,911	1,463,649	1,478,633	
+/- m/m	3,977	6,597	22,545	(11,262)	14,984	
% y/y	12.9%	12.2%	11.2%	9.4%	8.3%	

West Virginia

Medicaid Expansion Status: Expanded January 1, 2014

As of December 2015, West Virginia's managed care program enrolled more than 367,000 members, an increase of more than 86 percent over the prior year, adding nearly 150,000 members in Q3 2015. This enrollment spike was expected after a court ruling early this year allowed the state to proceed with plans to expand managed care enrollment without competitively rebidding contracts. West Virginia has yet to report data for the first quarter of 2016, and the availability of future data is unclear at this time.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
Total West Virginia	366,684	370,381	367,658			
+/- m/m	2,203	3,697	(2,723)			
% y/y	83.2%	83.5%	86.7%			

Wisconsin

Medicaid Expansion Status: Not Expanded

Across the state's three managed care programs, March 2016 enrollment totals more than 806,000, up 5.5 percent from the year before.

	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16
BadgerCare+	715,191	713,336	713,067	707,429	713,328	723,770
SSI	36,098	36,132	36,145	36,045	36,029	36,227
LTC	45,880	46,062	46,355	46,309	46,385	46,537
Total Wisconsin	797,169	795,530	795,567	789,783	795,742	806,534
+/- m/m	8,982	(1,639)	37	(5,784)	5,959	10,792
% y/y	12.3%	9.8%	8.6%	7.3%	5.8%	5.5%