

Texas

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1. MANAGED CARE OPPORTUNITY ASSESSMENT (UPDATED 3-11-24)

Texas is planning to reprocure all its Medicaid managed care contracts by the end of 2024, including State of Texas Access Reform (STAR) for traditional Medicaid members; STAR+PLUS for aged and disabled; STAR Kids for individuals under age 20 with disabilities; and STAR Health for foster children.

Texas Medicaid Managed Care Programs				
Program	Population	Carved In (Y/N)		
		Behavioral	LTSS	Pharmacy
STAR	Traditional Medicaid	Y	N	Y
STAR Kids	Children/Adults with disabilities age 20 and younger	Y	Y	Y
STAR+PLUS	Individuals with disabilities or age 65 or older	Y	Y	Y
STAR Health	Children who receive Medicaid through the Texas Dept. of Family and Protective services, including foster kids	Y	N	Y
CHIP	Children from birth to age 18 for families who earn too much to qualify for Medicaid but cannot afford private insurance	Y	N	Y
Duals	Medicare/Medicaid dual eligibles	Y (Medicare)	Y	Y (Medicare)

STAR and CHIP. The new procurement for the STAR and Children’s Health Insurance Program (CHIP) Medicaid managed care program was released on December 7, 2022. STAR, which serves pregnant women and children as well as SSI adults in Medicaid Rural Service Areas and not on Medicare, is the state’s largest Medicaid managed care program, with close to 5 million members. STAR and CHIP incumbents are Elevance/Amerigroup, Community Health Choice, Molina, Texas Children’s Health Plan, UnitedHealthcare Community Plan, Parkland Community Health Plan, Driscoll, Centene/Superior, CVS/Aetna, Cook Children’s Plan, Community First, Scott and White, Blue Cross Blue Shield of Texas, Dell Children’s Health Plan of Texas, and El Paso First.

On March 7, 2024, the state announced its intent to award STAR and CHIP managed care program contracts to Molina Healthcare of Texas, Blue Cross and Blue Shield of Texas, CVS/Aetna, UnitedHealthcare Community Plan of Texas, Elevance/Amerigroup/Wellpoint, Dell Children’s Health Plan, Centene/Superior HealthPlan, Humana, El Paso First Health Plans, Community Health Choice Texas, Community First Health Plans, Scott and White Health Plan/Baylor Scott & White, and Parkland Community Health Plan.

The state had previously announced that it would not award more than seven regions to any single managed care organization, which impacts three of the incumbents currently operating in more than seven regions. The notice of intent to award shows Molina with awards in seven regions (down from eight), Amerigroup in six regions (down from 11) and Superior in three regions (down from 13). Three incumbents were not listed in the notice of intent to award, Texas Children’s Health Plan, Driscoll Health Plan, and Cook Children’s Health Plan. Pending the outcome of any protests that may be filed, the awards will result in a significant shift in health plan market share within and across the regions.

The STAR and CHIP notice of award announcement is expected in the first quarter of state fiscal year (SFY) 2025 (September 1 - November 30, 2024). Contracts will run for six years, with three two-year renewal options, not to exceed a total contract term of 12 years. Implementation of the new contracts is scheduled for the first quarter of SFY 2026 (September 1, 2025 - November 30, 2025).

HMA Managed Medicaid Opportunity Assessment for Texas

Positive Metrics	Strong Indicators
<ul style="list-style-type: none"> • Texas has been a large managed Medicaid state for years, with more than 5.8 million in Medicaid managed care. 	<ul style="list-style-type: none"> • The re-procurement of contracts presents opportunities for growth in market share for incumbent and new applicant health plans. • HHSC limited to seven the number of plans per region that could win STAR and CHIP contracts, which is an opportunity for growth in market share for some plans. • Starting March 1, 2024, the state extended Medicaid postpartum coverage to 12 months.
Negative Metrics	Weak Indicators
<ul style="list-style-type: none"> • Between April 1, 2023, and Feb. 20, 2024, the state terminated coverage for an estimated 2.1 million Texans, following the end of the COVID-19 PHE. • The 2022 American Community Survey found fewer than 4.9 million Texas were uninsured. Prior to the COVID-19 Medicaid continuous coverage policy, an estimated 5.2 million Texans were uninsured. 	<ul style="list-style-type: none"> • Pending the outcome of the awards, the re-procurements could result in incumbents losing market share. • Limitations on the number of awardees per region could result in decreased market share for some plans. • Texas is not an expansion state. • HHSC’s transition of the Dual Eligible Integrated Care Demonstration Program, will require beneficiaries to choose how they will receive their Medicare benefits (D-SNP, Medicare Advantage plan, or Traditional Medicare).
<p><i>Source: HMA</i></p>	

STAR Kids. A new STAR Kids procurement is expected to be released in the third quarter of SFY 2024. The state released a request for information related to establishing an accountable care organization or other value-based alternative payment model for this population. Awards are expected in the first quarter of SFY 2026, and implementation is expected in the first quarter of SFY 2027. In May 2020, Texas awarded Aetna Better Health a contract for the Dallas Service Area of STAR Kids, a program that serves a total of 170,000 individuals with disabilities age 21 or younger statewide. Anthem also holds a STAR Kids contract for the Dallas Service Area.

Texas received approval from the Trump administration for a 10-year renewal of its 1115 Medicaid waiver, which was set to expire September 30, 2022. The Biden administration initially rescinded the approval citing issues with the public notice process; however, they ultimately approved the 10-year renewal with technical corrections. The waiver includes funding for uncompensated care in the absence of a Medicaid expansion program.

Among other programs, Texas awarded children’s dental service contracts to DentaQuest, MCNA Insurance Company, and United Healthcare in October 2019 for an initial contract period of three years. The state also released in February 2019 its IDD strategic plan update to guide development of new interventions, models of care and best practices for individuals with developmental disabilities. Texas also has a dual eligible demonstration.

STAR Health. The state awarded a contract for the STAR Health managed care program for foster children to Centene/Superior Health Plan in September 2021. Implementation began September 1, 2023. Texas STAR Health serves 47,500 children who receive Medicaid through the Texas Department of Family and Protective Services.

STAR+PLUS. The state announced its notice of award for new STAR+PLUS contracts to United Healthcare Community Plan of Texas, Molina Healthcare of Texas, Centene/Superior HealthPlan, Elevance/Amerigroup Insurance Company, Community First Health Plans, El Paso Health, and Community Health Choice Texas. Implementation is scheduled to begin September 1, 2024. The current STAR+PLUS plans are Amerigroup/Anthem, Centene, Molina, and UnitedHealthcare; Cigna previously held one of the contracts, but Molina acquired Cigna's Texas Medicaid contracts effective January 1, 2022.

If Texas were to implement the Affordable Care Act's Medicaid expansion option, the state could add 1.7 million Medicaid lives. Texas continues to have one of the highest uninsured rates in the nation.

2. MANAGED MEDICAID PLAN FINANCIALS

Medical loss ratio at 16 Texas Medicaid plans was 88.8% in 2022. Per member per month Medicaid premiums averaged \$554. (Note: Financial metrics and comparisons presented in this overview are based on health plan NAIC filings in the state. Measures like per member per month premiums and medical loss ratios may vary greatly by plan and by state depending on the mix of business (e.g., TANF, ABD, etc.), scope of the state's Medicaid benefit package, geographic variations in the cost of care, and other factors.)

Texas Medicaid Managed Care Plan Financials, 2022							
Plan	Publicly Traded	Enrollment	Member Months	PMPM	Premiums Earned (000)	Medical Costs (000)	MLR ⁽¹⁾
Anthem	Y	1,048,706	11,995,224	\$597.48	\$7,166,958	\$6,460,696	90.1%
Baylor/Scott & White Health Plan/SHA	N	193,052	2,158,799	\$354.53	\$765,350	\$657,465	86.1%
Bexar County/Community First	N	184,241	2,088,367	\$464.24	\$969,501	\$718,461	87.7%
Centene/Bankers/Superior	Y	1,321,560	15,104,824	\$581.85	\$8,788,677	\$7,946,276	90.3%
Community Health Choice Inc.	N	403,943	4,622,460	\$448.91	\$2,075,056	\$1,625,453	87.6%
Cook Children's Health Plan	N	178,154	2,050,108	\$448.28	\$919,022	\$801,820	87.7%
CVS Health/Aetna Better Health	Y	157,306	1,730,067	\$506.66	\$876,556	\$751,434	85.7%
Driscoll Children's Hlth Plan	N	265,323	3,035,257	\$421.42	\$1,279,113	\$1,127,339	88.0%
El Paso First Health Plans Inc	N	102,187	1,142,237	\$339.27	\$387,531	\$340,281	87.9%
HCSC/BCBS-TX	N	71,142	812,677	\$541.26	\$439,866	\$396,959	90.2% ⁽²⁾
Molina Healthcare Inc.	Y	273,251	3,172,430	\$1,235.10	\$3,918,283	\$3,486,799	88.9%
Parkland Community Health Plan ⁽³⁾	N	239,776	2,761,559	\$391.47	\$1,081,061	\$950,501	89.0%
Prominence HealthFirst of TX	N	831	8,787	\$1,509.04	\$13,260	\$10,927	82.8%
Seton Health Plan Inc.	N	45,768	513,523	\$237.46	\$121,942	\$96,616	79.4%
Texas Children's Health Plan ⁽³⁾	N	596,009	6,806,053	\$441.34	\$3,003,786	\$2,583,889	86.0%
UnitedHealth Group Inc.	Y	362,025	4,080,788	\$639.39	\$2,609,225	\$2,282,195	87.7%
Total, TX plans		5,443,274	62,083,160	\$554.34	\$34,415,186	\$30,237,110	88.8%

(1) After reinsurance recoveries. (2) Before reinsurance recoveries. (3) Premiums represent "premiums written."

Source: S&P Global Market Intelligence, NAIC, HMA.

Texas Medicaid Managed Care Plan Financials, 2021

Plan	Publicly Traded	Enrollment	Member Months	PMPM	Premiums Earned (000)	Medical Costs (000)	MLR ⁽¹⁾
Anthem	Y	944,039	10,750,154	\$492.31	\$5,292,402	\$4,476,997	84.6%
Baylor/Scott & White Health Plan/SHA	N	164,095	1,862,236	\$270.97	\$504,606	\$416,203	82.2%
Bexar County/Community First	N	162,845	1,825,363	\$377.30	\$688,714	\$506,878	82.5%
Centene/Bankers/Superior	Y	1,132,391	13,576,480	\$500.07	\$6,789,250	\$5,892,948	86.8%
Cigna Corp./HealthSpring	Y	48,476	591,768	\$1,591.85	\$942,006	\$823,607	87.3%
Community Health Choice Inc.	N	360,230	4,066,341	\$370.62	\$1,507,084	\$1,165,556	87.3%
Cook Children's Health Plan	N	162,180	1,820,104	\$366.32	\$666,742	\$542,206	81.6%
CVS Health/Aetna Better Health	Y	130,121	1,416,508	\$444.28	\$629,319	\$527,045	84.0%
Driscoll Children's Hlth Plan	N	235,665	2,701,765	\$352.23	\$951,648	\$788,898	82.8%
El Paso First Health Plans Inc	N	88,976	1,002,558	\$250.34	\$250,980	\$213,938	85.1%
HCSC/BCBS-TX	N	64,371	741,560	\$461.39	\$342,149	\$295,636	86.4% ⁽²⁾
Molina Healthcare Inc.	Y	209,941	2,423,960	\$967.08	\$2,344,159	\$2,039,036	87.0%
Parkland Community Health Plan ⁽³⁾	N	213,048	2,430,735	\$311.86	\$758,049	\$557,927	78.0%
Seton Health Plan Inc.	N	39,540	435,979	\$165.21	\$72,026	\$57,831	79.8%
Texas Children's Health Plan ⁽³⁾	N	527,862	6,001,347	\$373.24	\$2,239,928	\$1,891,672	84.4%
UnitedHealth Group Inc.	Y	316,270	3,564,592	\$657.47	\$2,343,615	\$2,000,010	85.2%
Total, TX plans		4,800,050	55,211,450	\$476.76	\$26,322,676	\$22,196,387	84.3%

(1) After reinsurance recoveries. (2) Before reinsurance recoveries. (3) Premiums represent "premiums written."

Source: S&P Global Market Intelligence, NAIC, HMA.

3. RFP DEVELOPMENTS AND ANALYSIS

STAR+PLUS. The state announced its intent to award new STAR+PLUS contracts to United Healthcare Community Plan of Texas, Molina Healthcare of Texas, Centene/Superior HealthPlan, Elevance/Amerigroup Insurance Company, Community First Health Plans, El Paso Health, and Community Health Choice Texas. Implementation is expected to begin September 1, 2024.

STAR+PLUS bidders also had to submit a notice of intent to apply for a Dual-Eligible Special Needs Plan contract to the Centers for Medicare & Medicaid Services by November 2022 or a notice of intent to apply for a Dual Eligibles Medicare-Medicaid Plan contract. The state plans to implement a voluntary pilot program in STAR+PLUS to test person-centered strategies and improvements for covering intellectual and developmental disabilities (IDD) waiver services under a capitated model. The new pilot program, STAR+PLUS Pilot Program will carve long term services and supports into the STAR+PLUS program for people with IDD, traumatic brain injuries, acquired brain injuries, and similar functional needs in one of the service areas (either Bexar, Medicaid Rural Service Area Northeast or Tarrant). It will operate for two years beginning September 1, 2024, and will be evaluated. Pilot Program participation will be limited to one or two STAR+PLUS MCOs. The last contract award was vacated because of discrepancies in the scoring of the bids. The current STAR+PLUS plans are Amerigroup/Anthem, Centene, Molina, and UnitedHealthcare; Cigna previously held one of the contracts, but Molina acquired Cigna's Texas Medicaid contracts effective January 1, 2022.

STAR HEALTH. The state awarded a contract for the STAR Health managed care program for foster children to Centene/Superior Health Plan in September 2021. Implementation began September 1, 2023. Texas had previously released a request for public comment regarding proposed criteria for the upcoming procurement to use in the evaluation and selection of a successful bidder. Texas STAR Health serves 47,500 children who receive Medicaid through the Texas Department of Family and Protective Services.

STAR and CHIP. The new procurement for the STAR and CHIP programs was released on December 7, 2022. STAR, which serves pregnant women and children as well as SSI adults in Medicaid Rural Service Areas and not on Medicare, is the state's largest Medicaid managed care program, with close to 5 million members. CareSource and Legacy Community Health, a Federally Qualified Health Center serving Texas, had formed a joint venture with the intent to bid on the STAR & CHIP program.

On March 7, 2024, the state announced its intent to award STAR and CHIP managed care program contracts to Molina Healthcare of Texas, Blue Cross and Blue Shield of Texas, CVS/Aetna, UnitedHealthcare Community Plan of Texas, Elevance/Amerigroup/Wellpoint, Dell Children's Health Plan, Centene/Superior HealthPlan, Humana, El Paso First Health Plans, Community Health Choice Texas, Community First Health Plans, Scott and White Health Plan/Baylor Scott & White, and Parkland Community Health Plan.

The state had previously announced that it would not award more than seven regions to any single managed care organization, which impacts three of the incumbents currently operating in more than seven regions. The notice of intent to award shows Molina with awards in seven regions (down from eight), Amerigroup in six regions (down from 11) and Superior in three regions (down from 13). Three incumbents were not listed in the notice of intent to award, Texas Children's Health Plan, Driscoll Health Plan, and Cook Children's Health Plan.

The STAR and CHIP notice of award announcement is expected in the first quarter of state fiscal year (SFY) 2025. Contracts will run for six years, with three two-year renewal options, not to exceed a total contract term of 12 years. Implementation of the new contracts is scheduled for the first quarter of SFY 2026. The Texas SFY runs September 1 through August 30.

Program	RFP Release	Award	Implementation
STAR Health (Foster)	October 2021	September 2022	September 1, 2023
STAR+PLUS (ABD)	March 31, 2022	January 2023	September 1, 2024
STAR & CHIP (Medicaid/CHIP)	December 7, 2022	Q1 SFY 2025 (Sep-24 - Nov-24)	Q1 SFY 2026 (Sep-25 - Nov-25)
STAR Kids (Children/adults age ≤ 20 with disabilities)	Q3 SFY 2024 (Mar-24 - May-24)	Q1 SFY 2026 (Sep-25 - Nov-25)	Q1 SFY 2027 (Sep-26 - Nov-26)

STAR Kids. In May 2020, Texas awarded Aetna Better Health a contract for the Dallas Service Area of STAR Kids, a program that serves a total of 170,000 individuals with disabilities age 21 or younger statewide. The procurement followed the exit of Children’s Medical Center, which covered approximately 9,000 STAR Kids members. Anthem also holds a STAR Kids contract for the Dallas Service Area. A new procurement for the entire STAR Kids program is expected to be released in the third quarter of SFY 2024, and the state has released a Request for Information related to establishing an accountable care organization or other value-based alternative payment model for this population.

Among other programs, Texas awarded children’s dental service contracts to DentaQuest, MCNA Insurance Company, and United Healthcare in October 2019 for an initial contract period of three years.

Texas Medicaid Managed Care RFP Calendar		
Contract	Key Dates	# of Beneficiaries
CHIP (Rural Service Area)	Draft RFP Released January 2017 RFP Released: February 21, 2017 Awards Announced: March 2018 Awards Cancelled: April 2018	~67,000
STAR+PLUS	RFP Release: December 2017 Anticipated Start Date: Sept. 1, 2019 Cancelled: July 5, 2018 Reposted: July 23, 2018 Cancelled: October 1, 2018 Reposted: October 1, 2018 Awards Announced: October 29, 2019 Cancelled: March 2020 RFP Released: March 31, 2022 Anticipated Awards: March 2023 Anticipated Start Date: September 1, 2024	~580,000
STAR and CHIP Managed Care Services	Draft RFP Released: January 2018 RFP Release: April 6, 2018 Anticipated Start Date: January 2020 Cancelled: October 1, 2018 Reposted: October 1, 2018 Cancelled: March 2020 RFP Release: Dec. 7, 2022 Anticipated Awards: Q1 SFY 2025 Anticipated Start Date: Q1 SFY 2026	~5 million

STAR Health	Draft RFP Released: June 2019 Responses Due: July 5, 2019 RFP Release: October 4, 2021 Awarded: September 13, 2022 Start Date: September 1, 2023	48,000
STAR Kids	Anticipated RFP Release: Q3 SFY 2024 Anticipated Awards: Q1 SFY 2026 Anticipated Start Date: Q1 SFY 2027	~170,000
Dental Managed Care	Draft RFP Released: April 2018 RFP Release: June 18, 2018 Anticipated Start Date: January 2020 Cancelled: October 1, 2018 Reposted: October 1, 2018 Awards Announced: October 14, 2019	3 million+

Note, the Texas State Fiscal Year runs September through August.

Source: TX Health and Human Services Commission, HMA

The state also canceled a managed care pilot program for individuals with intellectual and developmental disabilities (IIDD) after awarding contracts to Molina and United in June 2017.

STAR Kids Managed Care Organizations	
STAR Kids MCO	Service Area
Aetna Better Health of Texas, Inc.	Tarrant
Anthem/Amerigroup	Dallas, El Paso, Harris, Lubbock, MRSA West
Blue Cross and Blue Shield	MRSA Central, Travis
Community First Health Plans	Bexar
Cook Children's Health Plan	Tarrant
Driscoll Health	Hidalgo, Nueces
Centene/Superior Health Plan	Bexar, El Paso, Hidalgo, Lubbock, MRSA West, Nueces, Travis
Texas Children's Health Plan	Harris, Jefferson, MRSA Northeast
UnitedHealthcare	Harris, Hidalgo, Jefferson, MRSA Central, MRSA Northeast

Source: Texas Health and Human Services Commission website

4. MANAGED CARE ENROLLMENT UPDATE

Medicaid managed care enrollment at five major programs in Texas was down 20.8% in November 2023 compared to year-end 2022, after increasing 10.6% in 2022, increasing 10.7% in 2021, increasing 13.1% in 2020, decreasing 3.2% in 2019, and increasing 1.7% in 2018. The programs are STAR, which serves the state's TANF population, pregnant women, infants and SSI adults in Medicaid Rural Service Areas and not on Medicare; STAR+PLUS, which is for individuals with disabilities age 65 or older; STAR Health, which is for children who receive Medicaid through the Texas Dept. of Family and Protective services, including foster kids; STAR Kids, which is for individuals with disabilities age 21 or younger; CHIP; and the state's duals demonstration. Molina acquired Cigna's Texas Medicaid contracts effective January 1, 2022.

Texas Managed Care Enrollment by Program, 2017-22¹, November 2023

Program	2018	2019	2020	2021	2022	Nov-23
STAR KIDS	162,646	159,586	168,921	168,925	170,220	150,358
STAR	3,010,752	2,916,687	3,517,955	4,167,120	4,748,821	3,603,217
STAR+PLUS	526,768	527,437	534,417	545,337	568,456	532,879
STAR HEALTH	33,752	33,263	39,682	45,210	46,228	24,970
Duals	42,178	39,468	38,009	36,757	33,673	25,451
CHIP	443,115	408,278	319,938	149,868	85,774	140,494
Total Texas	4,219,211	4,084,719	4,618,922	5,113,217	5,653,172	4,477,369
<i>+/- between reporting periods</i>	72,481	(134,492)	534,203	494,295	539,955	(1,175,803)
<i>% chg. between reporting periods</i>	1.7%	-3.2%	13.1%	10.7%	10.6%	-20.8%

1. Annual enrollment based on November data.

Source: TX Health and Human Services Commission, HMA

Enrollment in Texas Integrated Managed Care Plans, 2017-22¹, November 2023

Plan Name	2018	2019	2020	2021	2022	Nov-23
CVS/Aetna						
STAR	75,538	71,737	88,172	114,904	142,461	110,247
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	11,023	10,450	8,701	4,850	3,031	5,176
STAR KIDS	4,927	4,706	5,142	12,699	13,048	11,439
Total Aetna	91,488	86,893	102,015	132,453	158,540	126,862
<i>+/- between reporting periods</i>	3,333	(4,595)	15,122	30,438	26,087	(31,678)
<i>% chg. between reporting periods</i>	3.8%	-5.0%	17.4%	29.8%	19.7%	-20.0%
<i>% of total</i>	2.2%	2.1%	2.2%	2.6%	2.8%	2.8%
Anthem/Amerigroup						
STAR	548,218	532,179	652,604	777,283	879,871	658,667
STAR+PLUS	131,437	130,658	129,785	131,670	135,351	126,617
STAR HEALTH	0	0	0	0	0	0
Duals	13,709	12,769	11,937	11,302	10,198	7,133
CHIP	72,144	65,306	50,487	23,773	13,357	21,904
STAR KIDS	27,419	26,505	28,841	28,891	28,613	24,791
Total Amerigroup	792,927	767,417	873,654	972,919	1,067,390	839,112
<i>+/- between reporting periods</i>	(32,551)	(32,550)	(32,550)	(32,550)	(32,550)	(32,550)
<i>% chg. between reporting periods</i>	-2.5%	-3.2%	13.8%	11.4%	9.7%	-21.4%

<i>% of total</i>	18.8%	18.8%	21.4%	23.8%	26.1%	20.5%
Blue Cross Blue Shield of Texas						
STAR	28,825	30,979	42,016	51,235	59,192	44,314
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	6,290	6,254	5,353	2,777	1,667	2,429
STAR KIDS	7,836	7,908	8,645	8,759	8,968	7,919
Total Blue Cross Blue Shield	42,951	45,141	56,014	62,771	69,827	54,662
<i>+/- between reporting periods</i>	4,408	2,190	10,873	6,757	7,056	(15,165)
<i>% chg. between reporting periods</i>	11.4%	5.1%	24.1%	12.1%	11.2%	-21.7%
<i>% of total</i>	1.0%	1.1%	1.2%	1.2%	1.2%	1.2%
CHRISTUS Health Plan						
STAR	2,218	0	83	0		
STAR+PLUS	0	0	0	0		
STAR HEALTH	0	0	0	0		
CHIP	194	0	177	0		
Total CHRISTUS	2,412	0	260	0		
<i>+/- between reporting periods</i>	(3,546)	(2,412)	260	(260)		
<i>% chg. between reporting periods</i>	-59.5%	-100.0%	NM	-100.0%		
<i>% of total</i>	0.1%	0.0%	0.0%	0.0%		
Texas HealthSpring/ Bravo						
STAR	0	0	0	0	0	
STAR+PLUS	49,796	49,129	47,843	47,555	0	
STAR HEALTH	0	0	0	0	0	
Duals	1,844	1,962	1,944	1,705	0	
CHIP	0	0	0	0	0	
Total Cigna/HealthSpring	51,640	51,091	49,787	49,260	0	
<i>+/- between reporting periods</i>	(31)	(549)	(1,304)	(527)	(49,260)	
<i>% chg. between reporting periods</i>	-0.1%	-1.1%	-2.6%	-1.1%	-100.0%	
<i>% of total</i>	1.2%	1.3%	1.1%	1.0%	0.0%	
Centene/Superior Health Plan						
STAR	739,646	720,053	858,475	997,359	1,125,161	851,744
STAR+PLUS	139,367	138,778	141,313	144,002	152,475	143,120
STAR HEALTH	33,752	33,263	39,682	45,210	46,228	24,970
Duals	9,123	8,511	8,664	8,640	8,164	6,155
CHIP	105,330	102,103	81,237	34,964	18,443	34,387
STAR KIDS	28,737	27,894	30,381	30,756	31,640	28,649
Total Centene/Superior Health Plan	1,055,955	1,030,602	1,159,752	1,260,931	1,382,111	1,089,025
<i>+/- between reporting periods</i>	35,427	(25,353)	129,150	101,179	121,180	(293,086)
<i>% chg. between reporting periods</i>	3.5%	-2.4%	12.5%	8.7%	9.6%	-21.2%
<i>% of total</i>	25.0%	25.2%	25.1%	24.7%	24.4%	24.3%
Community First Health Plan						
STAR	108,230	107,762	127,660	152,693	175,119	131,412
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	18,343	17,392	13,241	5,624	2,863	4,875
STAR KIDS	7,919	7,709	7,797	7,835	7,793	6,670
Total CFHP	134,492	132,863	148,698	166,152	185,775	142,957

<i>+/- between reporting periods</i>	2,395	(1,629)	15,835	17,454	19,623	(42,818)
<i>% chg. between reporting periods</i>	1.8%	-1.2%	11.9%	11.7%	11.8%	-23.0%
<i>% of total</i>	3.2%	3.3%	3.2%	3.2%	3.3%	3.2%
Community Health Choice						
STAR	250,488	244,450	303,075	358,225	402,414	301,915
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	34,758	30,166	23,139	10,672	6,426	10,654
Total CHC	285,246	274,616	326,214	368,897	408,840	312,569
<i>+/- between reporting periods</i>	5,412	(10,630)	51,598	42,683	39,943	(96,271)
<i>% chg. between reporting periods</i>	1.9%	-3.7%	18.8%	13.1%	10.8%	-23.5%
<i>% of total</i>	6.8%	6.7%	7.1%	7.2%	7.2%	7.0%
Cook Children's Health Plan						
STAR	108,393	104,380	125,733	149,347	168,570	123,084
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	23,057	21,707	16,700	7,118	3,763	6,167
STAR KIDS	9,329	9,321	10,043	9,798	9,773	8,404
Total Cook CHP	140,779	135,408	152,476	166,263	182,106	137,655
<i>+/- between reporting periods</i>	7,437	(5,371)	17,068	13,787	15,843	(44,451)
<i>% chg. between reporting periods</i>	5.6%	-3.8%	12.6%	9.0%	9.5%	-24.4%
<i>% of total</i>	3.3%	3.3%	3.3%	3.3%	3.2%	3.1%
Driscoll Children's Health Plan						
STAR	155,839	158,205	192,797	225,404	255,173	202,438
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	7,759	6,925	5,471	2,312	1,199	2,308
STAR KIDS	10,410	10,213	10,615	10,632	10,751	9,475
Total Driscoll CHP	174,008	175,343	208,883	238,348	267,123	214,221
<i>+/- between reporting periods</i>	6,764	1,335	33,540	29,465	28,775	(52,902)
<i>% chg. between reporting periods</i>	4.0%	0.8%	19.1%	14.1%	12.1%	-19.8%
<i>% of total</i>	4.1%	4.3%	4.5%	4.7%	4.7%	4.8%
El Paso First						
STAR	66,583	65,346	75,821	88,946	101,561	76,724
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	10,567	9,354	7,368	3,393	1,891	3,365
Total El Paso First	77,150	74,700	83,189	92,339	103,452	80,089
<i>+/- between reporting periods</i>	(380)	(2,450)	8,489	9,150	11,113	(23,363)
<i>% chg. between reporting periods</i>	-0.5%	-3.2%	11.4%	11.0%	12.0%	-22.6%
<i>% of total</i>	1.8%	1.8%	1.8%	1.8%	1.8%	1.8%
Molina						
STAR	98,452	93,014	105,942	122,412	140,526	108,686
STAR+PLUS	87,203	86,485	85,912	86,079	132,343	122,585
STAR HEALTH	0	0	0	0	0	0
Duals	12,474	11,628	11,016	10,796	11,438	9,291

CHIP	31,431	27,986	21,374	12,983	8,987	11,775
Total Molina	229,560	219,113	224,244	232,270	293,294	252,337
<i>+/- between reporting periods</i>	<i>(2,468)</i>	<i>(10,447)</i>	<i>5,131</i>	<i>8,026</i>	<i>61,024</i>	<i>(40,957)</i>
<i>% chg. between reporting periods</i>	<i>-1.1%</i>	<i>-4.6%</i>	<i>2.3%</i>	<i>3.6%</i>	<i>26.3%</i>	<i>-14.0%</i>
<i>% of total</i>	<i>5.4%</i>	<i>5.4%</i>	<i>4.9%</i>	<i>4.5%</i>	<i>5.2%</i>	<i>5.6%</i>
Parkland Community Health Plan						
STAR	168,275	157,803	181,536	213,114	240,588	178,447
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	27,993	25,626	19,348	8,847	5,451	8,234
Total Parkland Community Health	196,268	183,429	200,884	221,961	246,039	186,681
<i>+/- between reporting periods</i>	<i>123</i>	<i>(12,839)</i>	<i>17,455</i>	<i>21,077</i>	<i>24,078</i>	<i>(59,358)</i>
<i>% chg. between reporting periods</i>	<i>0.1%</i>	<i>-6.5%</i>	<i>9.5%</i>	<i>10.5%</i>	<i>10.8%</i>	<i>-24.1%</i>
<i>% of total</i>	<i>4.7%</i>	<i>4.5%</i>	<i>4.3%</i>	<i>4.3%</i>	<i>4.4%</i>	<i>4.2%</i>
Scott and White Health Plan²						
STAR	45,528	124,246	136,573	163,565	190,845	143,113
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	0	5,065	3,596	1,505	714	1,367
Total Scott and White Health Plan	45,528	129,311	140,169	165,070	191,559	144,480
<i>+/- between reporting periods</i>	<i>228</i>	<i>83,783</i>	<i>10,858</i>	<i>24,901</i>	<i>26,489</i>	<i>(47,079)</i>
<i>% chg. between reporting periods</i>	<i>0.5%</i>	<i>184.0%</i>	<i>8.4%</i>	<i>17.8%</i>	<i>16.0%</i>	<i>-24.6%</i>
<i>% of total</i>	<i>1.1%</i>	<i>3.2%</i>	<i>3.0%</i>	<i>3.2%</i>	<i>3.4%</i>	<i>3.2%</i>
Seton Health Plan/Dell Children's Health Plan						
STAR	19,904	22,958	30,605	38,922	45,348	34,418
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	7,500	7,950	6,124	3,492	2,100	2,563
Total Seton Health Plan	27,404	30,908	36,729	42,414	47,448	36,981
<i>+/- between reporting periods</i>	<i>1,473</i>	<i>3,504</i>	<i>5,821</i>	<i>5,685</i>	<i>5,034</i>	<i>(10,467)</i>
<i>% chg. between reporting periods</i>	<i>5.7%</i>	<i>12.8%</i>	<i>18.8%</i>	<i>15.5%</i>	<i>11.9%</i>	<i>-22.1%</i>
<i>% of total</i>	<i>0.6%</i>	<i>0.8%</i>	<i>0.8%</i>	<i>0.8%</i>	<i>0.8%</i>	<i>0.8%</i>
Texas Children's Health Plan						
STAR	358,014	344,085	418,869	495,670	564,644	440,909
STAR+PLUS	0	0	0	0	0	0
STAR HEALTH	0	0	0	0	0	0
CHIP	67,672	61,353	48,931	22,650	12,739	20,406
STAR KIDS	25,993	26,240	29,726	30,190	30,569	27,771
Total TX Children's	451,679	431,678	497,526	548,510	607,952	489,086
<i>+/- between reporting periods</i>	<i>19,097</i>	<i>(20,001)</i>	<i>65,848</i>	<i>50,984</i>	<i>59,442</i>	<i>(118,866)</i>
<i>% chg. between reporting periods</i>	<i>4.4%</i>	<i>-4.4%</i>	<i>15.3%</i>	<i>10.2%</i>	<i>10.8%</i>	<i>-19.6%</i>
<i>% of total</i>	<i>10.7%</i>	<i>10.6%</i>	<i>10.8%</i>	<i>10.7%</i>	<i>10.8%</i>	<i>10.9%</i>
UnitedHealthcare						
STAR	139,271	139,490	177,994	218,041	257,348	197,099
STAR+PLUS	118,965	122,387	129,564	136,031	148,287	140,557
STAR HEALTH	0	0	0	0	0	0
Duals	5,028	4,598	4,448	4,314	3,873	2,872

CHIP	11,902	10,641	8,691	4,908	3,143	4,884
STAR KIDS	30,671	30,276	30,324	29,365	29,065	25,240
Total UnitedHealth	305,837	307,392	351,021	392,659	441,716	370,652
<i>+/- between reporting periods</i>	21,382	1,555	43,629	41,638	49,057	(71,064)
<i>% chg. between reporting periods</i>	7.5%	0.5%	14.2%	11.9%	12.5%	-16.1%
<i>% of total</i>	7.2%	7.5%	7.6%	7.7%	7.8%	8.3%
Children's Medical Center³						
STAR KIDS	9,405	8,814	7,407	0		
Total Children's Medical Center	9,405	8,814	7,407	0		
<i>+/- between reporting periods</i>	1,373	(591)	(1,407)	(7,407)		
<i>% chg. between reporting periods</i>	17.1%	-6.3%	-16.0%	-100.0%		
<i>% of total</i>	0.2%	0.2%	0.2%	0.0%		
FirstCare⁴						
STAR	87,081	0				
STAR+PLUS	0	0				
STAR HEALTH	0	0				
CHIP	5,256	0				
Total FirstCare	92,337	0				
<i>+/- between reporting periods</i>	(5,796)	(92,337)				
<i>% chg. between reporting periods</i>	-5.9%	-100.0%				
<i>% of total</i>	2.2%	0.0%				
Sendero Health Plans⁵						
STAR	10,249	0				
STAR+PLUS	0	0				
STAR HEALTH	0	0				
CHIP	1,896	0				
Total Sendero Health Plans	12,145	0				
<i>+/- between reporting periods</i>	(3,439)	(12,145)				
<i>% chg. between reporting periods</i>	-22.1%	-100.0%				
<i>% of total</i>	0.3%	0.0%				
Total Texas by Program						
STAR	3,010,752	2,916,687	3,517,955	4,167,120	4,748,821	3,603,217
STAR+PLUS	526,768	527,437	534,417	545,337	568,456	532,879
STAR HEALTH	33,752	33,263	39,682	45,210	46,228	24,970
Duals	42,178	39,468	38,009	36,757	33,673	25,451
CHIP	443,115	408,278	319,938	149,868	85,774	140,494
STAR KIDS	162,646	159,586	168,921	168,925	170,220	150,358
Total Texas	4,219,211	4,084,719	4,618,922	5,113,217	5,653,172	4,477,369
<i>+/- between reporting periods</i>	72,481	(134,492)	534,203	494,295	539,955	(1,175,803)
<i>% chg. between reporting periods</i>	1.7%	-3.2%	13.1%	10.7%	10.6%	-20.8%

1. Annual enrollment based on November data

2. Prior to 2019, Scott and White Health Plan included RightCare enrollment only. Starting January 1, 2019, with the acquisition of FirstCare, enrollment includes both RightCare and FirstCare members.

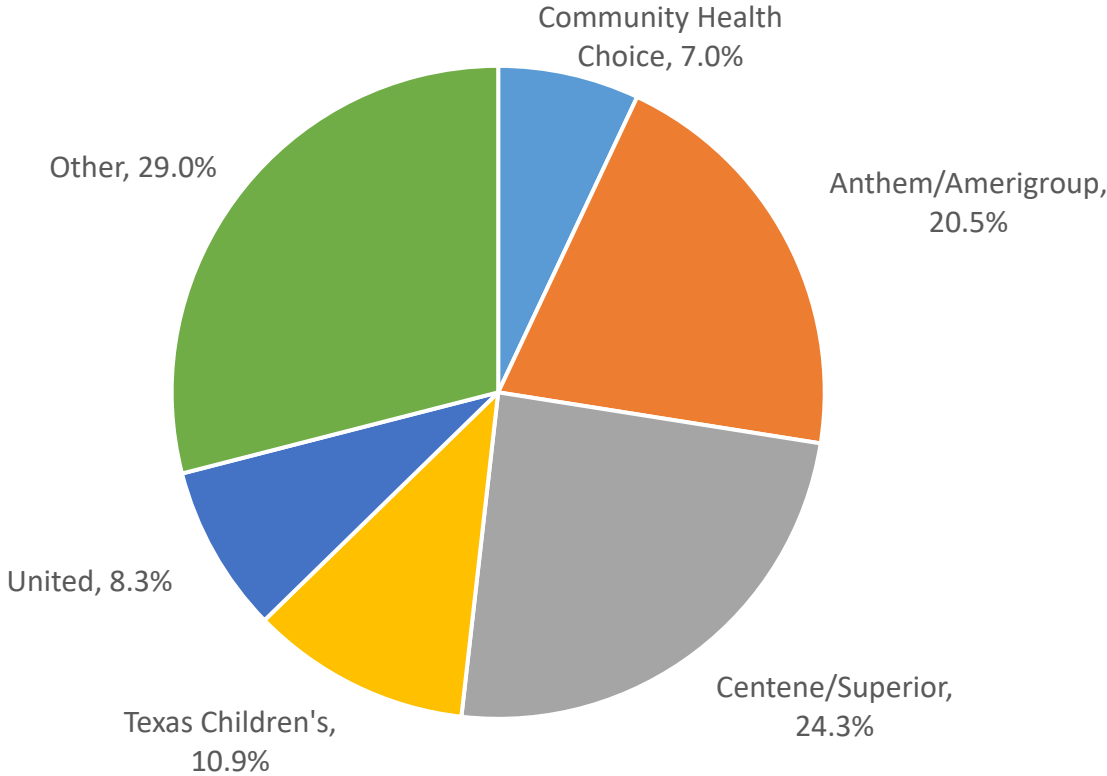
3. Children's Medical Center exited the STAR KIDS program in 2020.

4. FirstCare was acquired by Scott and White Health Plan as of January 1, 2019, and their enrollment is included in the Scott and White totals.

5. Sendero Health Plan withdrew from the STAR and CHIP programs in 2018.

Source: TX Health and Human Services Commission, HMA

Texas Managed Medicaid Market Share by Total Enrollment, Top 5 Plans, November 2023



Source: TX Health and Human Services Commission, HMA

5. MEDICAID FEE FOR SERVICE VS. MANAGED CARE PENETRATION

Total Medicaid enrollment in Texas was 5.7 million in 2022. About 98.4% of Medicaid beneficiaries were enrolled in a managed care plan. The remainder are in fee-for-service Medicaid. Total Medicaid expenditures in Texas were \$54.9 billion in 2022, with about 72% through managed care and the rest through fee-for-service.

Texas Expenditures and Enrollment for Total Medicaid vs. Medicaid Managed Care, 2014-22

Year	Total Medicaid Expenditures	Medicaid Managed Care Expenditures ⁽¹⁾	Medicaid Managed Care Expenditures as % of Total	Total Medicaid/CHIP Enrollment	Medicaid MCO Enrollment	Medicaid MCO Enrollment as % of Total
2022 ⁽²⁾	\$54,941,921,302	\$39,537,877,564	72.0%	5,746,388	5,653,172	98.4%
2021 ⁽³⁾	\$45,280,678,937	\$31,665,279,151	69.9%	5,241,375	5,113,217	97.6%
2020 ⁽⁴⁾	\$41,798,895,649	\$26,454,973,588	63.3%	4,810,748	4,618,922	96.0%
2019 ⁽⁵⁾	\$40,025,676,488	\$24,220,612,815	60.5%	4,152,401	4,027,313	97.0%
2018	\$37,585,413,327	\$23,415,949,295	62.3%	4,282,676	4,219,211	98.5%
2017 ⁽⁶⁾	\$35,644,874,349	\$21,426,296,467	60.1%	4,792,589	4,103,857	85.6%
2016	\$39,563,147,154	\$19,378,851,060	49.0%	4,801,395	3,890,195	81.0%
2015	\$34,691,253,016	\$17,495,868,425	50.4%	4,684,783	3,887,051	83.0%
2014 ⁽⁷⁾	\$31,385,332,042	\$13,632,017,713	43.4%	4,651,139	3,910,447	84.1%

(1) Includes evaluation and management, vaccine codes, Community First Choice, and preventive services Grade A or B, ACIP vaccines and their administration, Prepaid Ambulatory Health Plans, and Prepaid Inpatient Health Plans.

(2) MCO Enrollment as of November 2022

(3) MCO Enrollment as of November 2021.

(4) MCO Enrollment as of November 2020.

(5) MCO Enrollment as of November 2019.

(6) MCO Enrollment as of February 2017.

(7) MCO Enrollment as of February 2015.

Sources: CMS64 for expenditures. CMS for total Medicaid/CHIP enrollment. States, NAIC for Medicaid managed care enrollment.

6. SNPs AND DUAL ELIGIBLE

Starting in April 2015, Texas began operating a Dual Eligibles Integrated Care Demonstration Project which builds off the STAR+PLUS Medicaid program for the aged, blind, and disabled. The demonstration's Medicare-Medicaid Plans (MMPs) are operated by the same five MCOs in the STAR+PLUS program.

The Dual Eligibles Integrated Care Demonstration Project will end on December 31, 2025. New enrollment into the MMPs ended on Dec. 31, 2023. Superior MMP in Bexar County and all Amerigroup MMPs will continue operating and serving their current members through Dec. 31, 2024. By January 2025, members in these MMPs must transition to another MMP, if available in their county, or a STAR+PLUS managed care organization in their service area. The state is transitioning the MMP demonstration plans to integrated Dual Eligible Special Needs Plans (D-SNPs) by Jan. 1, 2026, consistent with integrated D-SNPs rules in the federal Contract Year 2023 Medicare Advantage and Part D Final Rule.

The Superior MMPs in Dallas and Hidalgo counties along with all Molina MMPs and UnitedHealthcare MMPs will continue operating the demonstration program through Dec. 31, 2025. The state has not yet decided when new enrollment into these MMPs will end. By January 2026, members in these MMPs must transition to a STAR+PLUS MCO in their service area. When MMP members transition to a STAR+PLUS MCO they must choose between a Medicare Advantage plan, D-SNP or fee-for-service Medicare.

As of November 2023, enrollment was 25,451, representing a 24.4% decrease from year-end 2022. Approximately 165,000 people are eligible. Texas had 456,989 SNP members as of March 2023.

Texas Dual Demonstration Enrollment by Plan, 2018-22 ¹ , November 2023					
Plan	2019	2020	2021	2022	Nov-23
Amerigroup	11,913	11,937	11,302	10,198	7,133
<i>+/- between reporting periods</i>	<i>(194)</i>	<i>24</i>	<i>(635)</i>	<i>(1,104)</i>	<i>(3,065)</i>
<i>% chg. between reporting periods</i>	<i>-1.6%</i>	<i>0.2%</i>	<i>-5.3%</i>	<i>-9.8%</i>	<i>-30.1%</i>
<i>% of total</i>	<i>31.8%</i>	<i>31.4%</i>	<i>30.7%</i>	<i>30.3%</i>	<i>28.0%</i>
Molina Healthcare	11,062	11,016	10,796	11,438	9,291
<i>+/- between reporting periods</i>	<i>(106)</i>	<i>(46)</i>	<i>(220)</i>	<i>642</i>	<i>(2,147)</i>
<i>% chg. between reporting periods</i>	<i>-0.9%</i>	<i>-0.4%</i>	<i>-2.0%</i>	<i>5.9%</i>	<i>-18.8%</i>
<i>% of total</i>	<i>29.5%</i>	<i>29.0%</i>	<i>29.4%</i>	<i>34.0%</i>	<i>36.5%</i>
Superior (Centene)	8,340	8,664	8,640	8,164	6,155
<i>+/- between reporting periods</i>	<i>227</i>	<i>324</i>	<i>(24)</i>	<i>(476)</i>	<i>(2,009)</i>
<i>% chg. between reporting periods</i>	<i>2.8%</i>	<i>3.9%</i>	<i>-0.3%</i>	<i>-5.5%</i>	<i>-24.6%</i>
<i>% of total</i>	<i>22.3%</i>	<i>22.8%</i>	<i>23.5%</i>	<i>24.2%</i>	<i>24.2%</i>
UnitedHealthcare	4,171	4,448	4,314	3,873	2,872
<i>+/- between reporting periods</i>	<i>(246)</i>	<i>277</i>	<i>(134)</i>	<i>(441)</i>	<i>(1,001)</i>
<i>% chg. between reporting periods</i>	<i>-5.6%</i>	<i>6.6%</i>	<i>-3.0%</i>	<i>-10.2%</i>	<i>-25.8%</i>
<i>% of total</i>	<i>11.1%</i>	<i>11.7%</i>	<i>11.7%</i>	<i>11.5%</i>	<i>11.3%</i>
HealthSpring (Cigna)	1,992	1,944	1,705	0	
<i>+/- between reporting periods</i>	<i>122</i>	<i>(48)</i>	<i>(239)</i>	<i>(1,705)</i>	
<i>% chg. between reporting periods</i>	<i>6.5%</i>	<i>-2.4%</i>	<i>-12.3%</i>	<i>-100.0%</i>	
<i>% of total</i>	<i>5.3%</i>	<i>5.1%</i>	<i>4.6%</i>	<i>0.0%</i>	
Total	37,478	38,009	36,757	33,673	25,451
<i>+/- between reporting periods</i>	<i>(197)</i>	<i>531</i>	<i>(1,252)</i>	<i>(3,084)</i>	<i>(8,222)</i>
<i>% chg. between reporting periods</i>	<i>-0.5%</i>	<i>1.4%</i>	<i>-3.3%</i>	<i>-8.4%</i>	<i>-24.4%</i>

1. Annual enrollment based on November data.

Source: CMS, HMA

Texas SNP Enrollment by Plan, March 2023

Plan	Total SNPs	DSNPs	CSNPs	ISNPs	Share
UnitedHealthcare	301,558	219,773	80,790	995	66.0%
Cigna	37,130	37,130			8.1%
Elevance	35,712	34,082	1,544	86	7.8%
Centene	34,303	33,754	549		7.5%
Humana	23,059	20,979	2,080		5.0%
CVS Health	13,037	13,037			2.9%
Molina Healthcare	4,368	4,368			1.0%
Texas Independence Health Plan	1,819			1,819	0.4%
Provider Partners Health Plan	1,693			1,693	0.4%
Devoted Health Plan	1,455		1,455		0.3%
Prominence HealthFirst	1,037	1,037			0.2%
American Health Plan	680			680	0.1%
Procure Advantage/Cantex	567			567	0.1%
Community Health Choice	250	250			0.1%
GlobalHealth	98	13	85		0.0%
HCSC/GHS	90	90			0.0%
El Paso First Health Plans	84	84			0.0%
Memorial Hermann	35	35			0.0%
Imperial Insurance Co. of Texas	14	14			0.0%
Total	456,989	364,646	86,503	5,840	100.0%

Source: CMS, HMA