

Minnesota

1. HMA Managed Medicaid Opportunity Assessment for Minnesota
2. Medicaid Plan Financials
 - a. Minnesota Medicaid Managed Care Plan Financials, 2022
 - b. Minnesota Medicaid Managed Care Plan Financials, 2021
3. RFP Developments and Analysis
4. Medicaid Plan Enrollment Update
 - a. Enrollment in Minnesota Managed Medicaid, 2016-22, Aug-23
 - b. Enrollment in Minnesota Managed Medicaid by Plan, 2016-22, Aug-23
 - c. Minnesota Medicaid Market Share by Total Enrollment, August 2023
5. Medicaid Fee For Service vs. Managed Care Penetration
 - a. Minnesota Fiscal Expenditure and Enrollment, 2014-22
6. SNPs and Dual Eligibles
 - a. Minnesota SNP Enrollment by Plan, March 2023

1. MANAGED CARE OPPORTUNITY ASSESSMENT (UPDATED 11-07-23)

Minnesota awarded Medicaid managed care contracts for the 80 counties outside the metro Twin Cities area for the Medical Assistance (MA), the state’s traditional Medicaid managed care program, and MinnesotaCare, the state’s Basic Health Program, as well as its Minnesota Senior Health Options (MSHO)/Minnesota Senior Care Plus (MSC+) program, to Blue Plus, HealthPartners, Itasca Medical Care, Medica, PrimeWest Health, South Country Health Alliance, UCare, and United Healthcare Community Plan of Minnesota in October 2022. The state also awarded contracts for its Special Needs BasicCare (SNBC) program to HealthPartners, Hennepin Health, Medica, PrimeWest Health, South Country Health Alliance, UCare, and United Healthcare Community Plan of Minnesota. Implementation for all programs began on January 1, 2023.

MSHO is the state’s dual demonstration program. MSC+ provides MA coverage for individuals who may also have Medicare coverage. Incumbents are Blue Plus, HealthPartners, Itasca Medical Care, Medica, PrimeWest Health, South Country Health Alliance, UCare, and UnitedHealthcare.

SNBC and Integrated SNBC cover individuals with disabilities age 18 to 64 who are enrolled in MA. Incumbents are Hennepin Health, HealthPartners, Medica, PrimeWest Health, South Country Health Alliance, UCare, and UnitedHealthcare.

Minnesota awarded Medicaid managed care contracts for the Twin Cities area to Blue Plus, HealthPartners, Hennepin Health, Medica, UCare, and UnitedHealthcare in November 2021. Contracts cover the state’s Families and Children Medical Assistance (MA) and MinnesotaCare Basic Health programs in seven counties serving nearly 600,000 members: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, and Washington. Incumbents were Blue Plus/BCBS of Minnesota, Health Partners, Itasca, Metropolitan/Hennepin Health, PrimeWest Health, South Country Health Alliance, and UCare Minnesota.

| HMA Managed Medicaid Opportunity Assessment for Minnesota | |
|---|---|
| Positive Metrics | Strong Indicators |
| <ul style="list-style-type: none"> Medical loss ratio among Minnesota Medicaid managed care plans was 84.3% in 2022. | <ul style="list-style-type: none"> UnitedHealthcare is the first for-profit health maintenance organization to be awarded a Medicaid managed care contract in Minnesota. |
| Negative Metrics | Weak Indicators |
| <ul style="list-style-type: none"> Annual net margins for Medicaid plans typically average 1% to 2%. | <ul style="list-style-type: none"> The Medicaid managed care market in Minnesota is locked in for six years, starting on January 1, 2023, if all five optional years are utilized. <p><i>Source: HMA</i></p> |

Minnesota also released an RFP in July 2023 for provider organizations to serve in the Integrated Health Partnerships (IHP) Demonstration, an accountable care model that serves Medicaid and MinnesotaCare enrollees under a total cost of care and risk/gain sharing payment arrangement. The contract is anticipated to run from January 1, 2024, to December 31, 2026, with the option to extend up to five years. Minnesota currently has 28 IHPs providing care to over 520,000 individuals.

Any organization with an HMO license in the state is, with few exceptions, required to submit a good-faith bid to participate in Medicaid. Plans that serve state employees are also required to serve Medicaid members.

| Minnesota Medicaid Managed Care Programs | | | | |
|---|---|---------------------------|---|----------|
| Program | Population | -----Carved In (Y/N)----- | | |
| | | Behavioral | LTSS | Pharmacy |
| Families and Children Medical Assistance and MinnesotaCare Basic Health | Traditional Medicaid, CHIP | Y | N/A | Y |
| Minnesota Care | Residents with incomes above 138 percent of poverty, up to 200 percent of poverty. | Y | N/A | Y |
| Special Needs BasicCare | Highly Integrated Dual Eligible Special Needs Plan (and Medicaid program) for people who are disabled and under age 65. Some LTSS services are in SNBC and some are in FFS. | Y | Y- for those eligibles except for some IDD services | Y |
| Senior Health Options (MSHO) | Fully Integrated Dual Eligible Special Needs Plan for people who are duals ages 65+. Individuals have to choose to enroll. | Y | Y- for those eligibles | Y |
| Minnesota SeniorCare Plus (MSC+) | Default Medicaid program for people over age 65+ who have Medicaid and for dual eligibles. | Y | Y- for those eligibles | Y |

2. MANAGED MEDICAID PLAN FINANCIALS

Average medical loss ratio among Minnesota Medicaid plans was 84.3% in 2022. Per member per month premiums among the five plans was \$727.42.

(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.)

| Minnesota Medicaid Managed Care Plan Financials, 2022 | | | | | | | |
|---|-----------------|------------------|-------------------|-----------------|-----------------------|---------------------|--------------------|
| Plan | Publicly Traded | Enrollment | Member Months | PMPM | Premiums Earned (000) | Medical Costs (000) | MLR ⁽¹⁾ |
| Blue Plus/BCBS-M/HMO MN | N | 375,549 | 4,384,286 | \$620.29 | \$2,719,530 | \$2,234,921 | 82.2% |
| HealthPartners Inc. | N | 233,928 | 2,730,471 | \$671.22 | \$1,832,744 | \$1,508,779 | 85.0% |
| Hennepin/Metropolitan | N | 35,992 | 414,323 | \$1,028.99 | \$426,333 | \$369,142 | 85.8% |
| Medica Health Plans | N | 19,928 | 225,171 | \$1,700.62 | \$382,929 | \$326,383 | 85.2% |
| UCare Minnesota | N | 488,135 | 5,679,331 | \$776.56 | \$4,410,313 | \$3,755,478 | 85.1% |
| Total, MN Plans | | 1,153,532 | 13,433,582 | \$727.42 | \$9,771,849 | \$8,194,704 | 84.3% |

(1) After insurance recoveries.

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

Minnesota Medicaid Managed Care Plan Financials, 2021

| Plan | Publicly Traded | Enrollment | Member Months | PMPM | Premiums Earned (000) | Medical Costs (000) | MLR ⁽¹⁾ |
|-------------------------|-----------------|------------------|-------------------|-----------------|-----------------------|---------------------|--------------------|
| Blue Plus/BCBS-M/HMO MN | N | 437,706 | 5,066,279 | \$542.26 | \$2,747,255 | \$2,419,257 | 88.1% |
| HealthPartners Inc. | N | 207,938 | 2,408,257 | \$619.75 | \$1,492,517 | \$1,301,426 | 87.7% |
| Hennepin/Metropolitan | N | 34,052 | 386,684 | \$802.55 | \$310,333 | \$288,167 | 91.3% |
| Medica Health Plans | N | 16,618 | 196,383 | \$1,538.83 | \$302,201 | \$282,488 | 93.5% |
| UCare Minnesota | N | 410,147 | 4,732,926 | \$729.07 | \$3,450,638 | \$3,096,503 | 90.0% |
| Total, MN Plans | | 1,106,461 | 12,790,529 | \$649.15 | \$8,302,944 | \$7,387,840 | 89.1% |

(1) After insurance recoveries.

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

3. RFP DEVELOPMENTS AND ANALYSIS (UPDATE 11-8-23)

Minnesota awarded Medicaid managed care contracts for the 80 counties outside the metro Twin Cities area for the Medical Assistance (MA), the state's traditional Medicaid managed care program, and MinnesotaCare, the state's Basic Health Program, as well as its Minnesota Senior Health Options (MSHO)/Minnesota Senior Care Plus (MSC+) program, to Blue Plus, HealthPartners, Itasca Medical Care, Medica, PrimeWest Health, South Country Health Alliance, UCare, and United Healthcare Community Plan of Minnesota in October 2022. The state also awarded contracts for its Special Needs BasicCare (SNBC) program to HealthPartners, Hennepin Health, Medica, PrimeWest Health, South Country Health Alliance, UCare, and United Healthcare Community Plan of Minnesota. Implementation for all programs began on January 1, 2023.

Minnesota awarded the Twin Cities metro area Medicaid managed care contracts to Blue Plus, HealthPartners, Hennepin Health, Medica, UCare, and UnitedHealthcare in November 2021. The procurement covers the state's Families and Children Medical Assistance (MA) and MinnesotaCare Basic Health programs in seven counties serving nearly 600,000 members: Anoka, Carver, Dakota, Hennepin, Ramsey, Scott, and Washington.

Minnesota Medicaid RFP Calendar

| Contract | Key Deadlines | # of Beneficiaries |
|---|---|-----------------------|
| Special Needs BasicCare (Statewide) | RFP Released: Oct. 25, 2021 Proposals Due: Feb. 18, 2022 Award Anticipated: May 9, 2022 Implementation: Jan. 1, 2023 | ~62,000 |
| Special Needs BasicCare (25 counties) | RFP Released: March 12, 2018 Proposals Due: May 23, 2018 Contract Award: June 29, 2018 Implementation: January 1, 2019. | |
| Special Needs BasicCare (3 counties) | RFP Released: March 2, 2020 Proposals Due: May 5, 2020 Implementation: July 1, 2020 RFP: Cancelled May 2020 | |
| Families and Children Medical Assistance (MA) and MinnesotaCare Basic Health (7 counties) | RFP Released: January 4, 2021 Proposals Due: March 19, 2021 Implementation: January 1, 2022 with five one-year option years Awarded: May 10, 2021 | |
| Medical Assistance (MA) Program (counties outside metro-Twin cities) | RFP Release: January 2022 Proposals Due: April 1, 2022 Awards: June 24, 2022 Implementation: January 1, 2023 | ~470,000 |
| Minnesota Integrated Health Partnerships (IHP) Program | RFP Released: July 3, 2023 Proposals Due: September 8, 2023 Awards: TBD Implementation: January 1, 2024 | ~ 445,000 individuals |

Source: HMA, MN Dep. Of Human Services

Minnesota also released an RFP in July 2023 for provider organizations to serve in the Integrated Health Partnerships (IHP) Demonstration, an accountable care model that serves Medicaid and MinnesotaCare enrollees under a total cost of care and risk/gain sharing payment arrangement. The contract is anticipated to run from January 1, 2024, to December 31, 2026, with the option to extend up to five years. Minnesota currently has 28 IHPs providing care to over 520,000 individuals.

4. MANAGED CARE ENROLLMENT UPDATE

Medicaid managed care enrollment in Minnesota increased by 0.4% in August 2023 compared to year-end 2022, after increasing 7.5% in 2022, 10.7% in 2021 and 18.7% in 2020; decreasing 2.8% in 2019 and 1.4% in 2018 and increasing 6.2% in 2017 and 0.5% in 2016. Medica has filed a lawsuit demanding that the state rebid the Medicaid and MinnesotaCare business in 2018. After losing its 2016 contract in all but one county, UCare then took over Medica's members in spring 2017.

Enrollment in Minnesota Managed Medicaid, 2013-22, August 2023

| Plan Name | 2018 | 2019 | 2020 | 2022 | Aug-23 |
|--|-----------------|-----------------|------------------|------------------|------------------|
| Total, 8 MN plans⁽¹⁾ | 945,070 | 918,816 | 1,090,954 | 1,299,194 | 1,304,443 |
| <i>+/- between reporting periods</i> | <i>(13,215)</i> | <i>(26,254)</i> | <i>172,138</i> | <i>91,198</i> | <i>5,249</i> |
| <i>% between reporting periods</i> | <i>-1.4%</i> | <i>-2.8%</i> | <i>18.7%</i> | <i>7.5%</i> | <i>0.4%</i> |

(1) Minnesota counts DSNP members as Medicaid because they integrate MLTSS

Source: MN Dept. of Human Services, HMA

Enrollment⁽¹⁾ in Minnesota Medicaid Managed Care by Plan, 2013-22, August 2023

| Plan | 2018 | 2019 | 2020 | 2021 | 2022 | Aug-23 |
|--------------------------------------|-----------------|-----------------|----------------|----------------|-----------------|-----------------|
| Blue Plus/BCBS-MN | | | | | | |
| Medical Assistance | 320,809 | 306,484 | 364,460 | 402,220 | 349,182 | 355,686 |
| Parents, Kids ⁽²⁾ | 241,103 | 231,732 | 270,539 | 291,832 | 248,494 | 250,786 |
| Childless Adults (Expansion) | 67,820 | 62,990 | 81,458 | 97,046 | 86,051 | 88,595 |
| Senior Care Plus ⁽³⁾ | 3,216 | 3,254 | 4,168 | 4,823 | 5,484 | 6,304 |
| MN Senior Health Options | 8,670 | 8,508 | 8,295 | 8,519 | 9,152 | 10,001 |
| Moving Home Minnesota (MHM) | | | | | 1 | 0 |
| Special Needs BasicCare | 0 | 0 | 0 | 0 | 0 | 0 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 34,292 | 30,585 | 32,032 | 34,347 | 25,883 | 30,585 |
| Total BCBS-MN | 355,101 | 337,069 | 396,492 | 436,567 | 375,065 | 386,271 |
| <i>+/- between reporting periods</i> | <i>(12,855)</i> | <i>(18,032)</i> | <i>59,423</i> | <i>40,075</i> | <i>(61,502)</i> | <i>11,206</i> |
| <i>% between reporting periods</i> | <i>-3.5%</i> | <i>-5.1%</i> | <i>17.6%</i> | <i>10.1%</i> | <i>-14.1%</i> | <i>3.0%</i> |
| <i>% of total</i> | <i>37.6%</i> | <i>36.7%</i> | <i>36.3%</i> | <i>36.1%</i> | <i>28.9%</i> | <i>29.6%</i> |
| HealthPartners Inc. | | | | | | |
| Medical Assistance | 137,530 | 134,707 | 163,740 | 181,723 | 207,842 | 191,128 |
| Parents, Kids ⁽²⁾ | 96,335 | 94,496 | 112,567 | 121,493 | 137,168 | 125,644 |
| Childless Adults (Expansion) | 30,254 | 28,486 | 36,988 | 44,070 | 52,106 | 48,569 |
| Senior Care Plus ⁽³⁾ | 2,393 | 2,076 | 1,991 | 2,415 | 3,382 | 3,823 |
| MN Senior Health Options | 3,129 | 3,563 | 4,443 | 5,011 | 5,520 | 5,774 |
| Special Needs BasicCare | 5,419 | 6,086 | 7,751 | 8,734 | 1 | 0 |
| Preferred Integrated Networks | 0 | 0 | | | 9,665 | 7,318 |
| Minnesota Care ⁽⁴⁾ | 22,232 | 19,456 | 22,167 | 25,674 | | |
| Total HealthPartners Inc. | 159,762 | 154,163 | 185,907 | 207,397 | 25,509 | 22,023 |
| <i>+/- between reporting periods</i> | <i>(4,773)</i> | <i>(5,599)</i> | <i>31,744</i> | <i>21,490</i> | 233,351 | 213,151 |
| <i>% between reporting periods</i> | <i>-2.9%</i> | <i>-3.5%</i> | <i>20.6%</i> | <i>11.6%</i> | <i>25,954</i> | <i>(20,200)</i> |

| <i>% of total</i> | 16.9% | 16.8% | 17.0% | 17.2% | 12.5% | -8.7% |
|---|----------------|----------------|---------------|---------------|---------------|---------------|
| Itasca Medical Care | | | | | | |
| Medical Assistance | 7,500 | 7,360 | 8,572 | 9,110 | 10,020 | 9,854 |
| Parents, Kids ⁽²⁾ | 5,152 | 5,169 | 6,017 | 6,254 | 6,819 | 6,600 |
| Childless Adults (Expansion) | 1,662 | 1,521 | 1,868 | 2,163 | 2,461 | 2,494 |
| Senior Care Plus ⁽³⁾ | 225 | 240 | 285 | 324 | 374 | 396 |
| MN Senior Health Options | 461 | 430 | 402 | 369 | 366 | 364 |
| Special Needs BasicCare | 0 | 0 | 0 | 0 | 0 | 0 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 662 | 646 | 572 | 544 | 485 | 567 |
| Total Itasca Medical Care | 8,162 | 8,006 | 9,144 | 9,654 | 10,505 | 10,421 |
| <i>+/- between reporting periods</i> | <i>(760)</i> | <i>(156)</i> | <i>1,138</i> | <i>510</i> | <i>851</i> | <i>(84)</i> |
| <i>% between reporting periods</i> | <i>-8.5%</i> | <i>-1.9%</i> | <i>14.2%</i> | <i>5.6%</i> | <i>8.8%</i> | <i>-0.8%</i> |
| <i>% of total</i> | <i>0.9%</i> | <i>0.9%</i> | <i>0.8%</i> | <i>0.8%</i> | <i>0.8%</i> | <i>0.8%</i> |
| Medica Health Plans | | | | | | |
| Medical Assistance | 26,982 | 25,644 | 26,981 | 26,840 | 29,226 | 36,185 |
| Parents, Kids ⁽²⁾ | 0 | 0 | 0 | 0 | 1,623 | 5,498 |
| Childless Adults (Expansion) | 0 | 0 | 0 | 0 | 831 | 2,646 |
| Senior Care Plus ⁽³⁾ | 3,958 | 4,040 | 4,223 | 4,711 | 5,238 | 5,090 |
| MN Senior Health Options | 10,805 | 10,436 | 10,716 | 10,238 | 9,870 | 10,016 |
| Moving Home Minnesota (MHM) | 10 | | | | 4 | 4 |
| Special Needs BasicCare | 12,209 | 11,168 | 12,042 | 11,891 | 11,660 | 12,931 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 0 | 0 | 0 | 0 | 501 | 1,728 |
| Total Medica Health Plans | 26,982 | 25,644 | 26,981 | 26,840 | 29,727 | 37,913 |
| <i>+/- between reporting periods</i> | <i>(1,505)</i> | <i>(1,338)</i> | <i>1,337</i> | <i>(141)</i> | <i>2,887</i> | <i>8,186</i> |
| <i>% between reporting periods</i> | <i>-5.3%</i> | <i>-5.0%</i> | <i>5.2%</i> | <i>-0.5%</i> | <i>10.8%</i> | <i>27.5%</i> |
| <i>% of total</i> | <i>2.9%</i> | <i>2.8%</i> | <i>2.5%</i> | <i>2.2%</i> | <i>2.3%</i> | <i>2.9%</i> |
| Metropolitan Health Plan | | | | | | |
| Metropolitan Health Plan | | | | | | |
| Medical Assistance | 0 | 0 | 0 | 0 | 0 | 0 |
| Parents, Kids ⁽²⁾ | 0 | 0 | 0 | 0 | 0 | 0 |
| Childless Adults (Expansion) | 0 | 0 | 0 | 0 | 0 | 0 |
| Senior Care Plus ⁽³⁾ | 0 | 0 | 0 | 0 | 0 | 0 |
| MN Senior Health Options | 0 | 0 | 0 | 0 | 0 | 0 |
| Special Needs BasicCare | | | | | | |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 0 | 0 | 0 | 0 | 0 | 0 |
| Hennepin Health | | | | | | |
| Medical Assistance | 23,837 | 22,615 | 29,277 | 33,804 | 35,743 | 34,261 |
| Parents, Kids ⁽²⁾ | 7,374 | 7,064 | 8,500 | 9,418 | 10,036 | 9,470 |
| Childless Adults (Expansion) | 14,473 | 13,582 | 18,633 | 22,206 | 23,529 | 22,613 |
| Senior Care Plus ⁽³⁾ | 0 | 0 | 0 | 0 | 0 | 0 |
| MN Senior Health Options | 0 | 0 | 0 | 0 | 0 | 0 |
| Special Needs BasicCare | 1,990 | 1,969 | 2,144 | 2,180 | 2,178 | 2,178 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 1,918 | 1,558 | 1,868 | 2,326 | 2,261 | 2,419 |
| Total Metropolitan/Hennepin Health | 25,755 | 24,173 | 31,145 | 36,130 | 38,004 | 36,680 |

| | | | | | | |
|--|----------------|----------------|----------------|----------------|----------------|----------------|
| <i>+/- between reporting periods</i> | (4,552) | (1,582) | 6,972 | 4,985 | 1,874 | (1,324) |
| <i>% between reporting periods</i> | -15.0% | -6.1% | 28.8% | 16.0% | 5.2% | -3.5% |
| <i>% of total</i> | 2.7% | 2.6% | 2.9% | 3.0% | 2.9% | 2.8% |
| PrimeWest Health | | | | | | |
| Medical Assistance | 38,321 | 37,436 | 43,671 | 47,255 | 50,419 | 58,172 |
| Parents, Kids ⁽²⁾ | 26,717 | 26,262 | 30,517 | 32,592 | 34,213 | 39,998 |
| Childless Adults (Expansion) | 6,534 | 6,268 | 7,809 | 9,114 | 10,293 | 11,977 |
| Senior Care Plus ⁽³⁾ | 848 | 852 | 998 | 1,126 | 1,354 | 1,454 |
| MN Senior Health Options | 1,949 | 1,885 | 1,875 | 1,888 | 1,938 | 1,977 |
| Special Needs BasicCare | 2,273 | 2,169 | 2,472 | 2,535 | 2,621 | 2,766 |
| Moving Home Minnesota | 0 | 0 | 0 | 0 | 0 | 0 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 3,394 | 3,103 | 3,020 | 3,152 | 2,890 | 4,235 |
| Total PrimeWest Health | 41,715 | 40,539 | 46,691 | 50,407 | 53,309 | 62,407 |
| <i>+/- between reporting periods</i> | (847) | (1,176) | 6,152 | 3,716 | 2,902 | 9,098 |
| <i>% between reporting periods</i> | -2.0% | -2.8% | 15.2% | 8.0% | 5.8% | 17.1% |
| <i>% of total</i> | 4.4% | 4.4% | 4.3% | 4.2% | 4.1% | 4.8% |
| South Country Health Alliance | | | | | | |
| Medical Assistance | 36,707 | 34,767 | 26,503 | 28,783 | 31,162 | 29,851 |
| Parents, Kids ⁽²⁾ | 24,703 | 23,361 | 17,254 | 18,478 | 19,758 | 19,176 |
| Childless Adults (Expansion) | 6,425 | 5,966 | 4,651 | 5,445 | 6,269 | 6,224 |
| Senior Care Plus ⁽³⁾ | 829 | 851 | 779 | 953 | 1,125 | 961 |
| MN Senior Health Options | 1,838 | 1,754 | 1,517 | 1,467 | 1,492 | 1,322 |
| Moving Home Minnesota | | 0 | 0 | 0 | 1 | 1 |
| Special Needs BasicCare | 2,912 | 2,835 | 2,302 | 2,440 | 2,517 | 2,167 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 3,477 | 3,072 | 1,973 | 2,240 | 2,089 | 2,389 |
| Total South Country Health Alliance | 40,184 | 37,839 | 28,476 | 31,023 | 33,251 | 32,240 |
| <i>+/- between reporting periods</i> | (1,520) | (2,345) | (9,363) | 2,547 | 2,228 | (1,011) |
| <i>% between reporting periods</i> | -3.6% | -5.8% | -24.7% | 8.9% | 7.2% | -3.0% |
| <i>% of total</i> | 4.3% | 4.1% | 2.6% | 2.6% | 2.6% | 2.5% |
| UCare Minnesota | | | | | | |
| Medical Assistance | 258,969 | 265,508 | 334,717 | 373,301 | 448,580 | 446,744 |
| Parents, Kids ⁽²⁾ | 171,594 | 177,305 | 221,951 | 242,531 | 288,869 | 281,842 |
| Childless Adults (Expansion) | 41,301 | 41,304 | 58,946 | 72,967 | 96,408 | 96,727 |
| Senior Care Plus ⁽³⁾ | 4,908 | 5,490 | 6,695 | 7,986 | 9,783 | 10,450 |
| MN Senior Health Options | 12,386 | 12,721 | 13,841 | 14,618 | 15,986 | 17,332 |
| Moving Home Minnesota (MHM) | 2 | 0 | 0 | 0 | 4 | 1 |
| Special Needs BasicCare | 28,778 | 28,688 | 33,284 | 35,199 | 37,530 | 40,392 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 28,440 | 25,875 | 31,401 | 36,677 | 39,243 | 40,210 |
| Total UCare Minnesota | 287,409 | 291,383 | 366,118 | 409,978 | 487,823 | 486,954 |
| <i>+/- between reporting periods</i> | 13,597 | 3,974 | 74,735 | 43,860 | 77,845 | (869) |
| <i>% between reporting periods</i> | 5.0% | 1.4% | 25.6% | 12.0% | 19.0% | -0.2% |
| <i>% of total</i> | 30.4% | 31.7% | 33.6% | 33.9% | 37.5% | 37.3% |
| UnitedHealthcare Minnesota | | | | | | |
| Medical Assistance | | | | 0 | 34,670 | 34,351 |
| Parents, Kids ⁽²⁾ | | | | 0 | 23,938 | 22,675 |

| | | | |
|---|----------|---------------|---------------|
| Childless Adults (Expansion) | 0 | 10,732 | 11,317 |
| Senior Care Plus ⁽³⁾ | 0 | 0 | 24 |
| MN Senior Health Options | 0 | 0 | 27 |
| Moving Home Minnesota (MHM) | 0 | 0 | 0 |
| Special Needs BasicCare | 0 | 0 | 308 |
| Preferred Integrated Networks | 0 | 0 | 0 |
| Minnesota Care ⁽⁴⁾ | 0 | 3,489 | 4,055 |
| Total UnitedHealthcare Minnesota | 0 | 38,159 | 38,406 |
| <i>+/- between reporting periods</i> | 0 | 38,159 | 247 |
| <i>% between reporting periods</i> | 0 | 0.0% | 0.0% |
| <i>% of total</i> | 0 | 2.9% | 2.9% |

Total Minnesota by Plan Type

| | | | | | | |
|--------------------------------------|-----------------|-----------------|------------------|------------------|------------------|------------------|
| Medical Assistance | 850,655 | 834,521 | 997,921 | 1,103,036 | 1,196,844 | 1,196,232 |
| Parents, Kids ⁽²⁾ | 572,978 | 565,389 | 667,345 | 722,598 | 770,918 | 761,689 |
| Childless Adults (Expansion) | 168,469 | 160,117 | 210,353 | 253,011 | 288,680 | 291,162 |
| Senior Care Plus ⁽³⁾ | 16,377 | 16,803 | 19,139 | 22,338 | 26,740 | 28,502 |
| MN Senior Health Options | 39,238 | 39,297 | 41,089 | 42,110 | 44,324 | 46,813 |
| Special Needs BasicCare | 53,581 | 52,915 | 59,995 | 62,979 | 66,171 | 68,060 |
| Preferred Integrated Networks | 0 | 0 | 0 | 0 | 0 | 0 |
| Moving Home Minnesota (MHM) | 12 | 0 | 0 | 0 | 11 | 6 |
| Minnesota Care ⁽⁴⁾ | 94,415 | 84,295 | 93,033 | 104,960 | 102,350 | 108,211 |
| Total Minnesota | 945,070 | 918,816 | 1,090,954 | 1,207,996 | 1,299,194 | 1,304,443 |
| <i>+/- between reporting periods</i> | <i>(13,215)</i> | <i>(26,254)</i> | 172,138 | 117,042 | 91,198 | 5,249 |
| <i>% between reporting periods</i> | <i>-1.4%</i> | <i>-2.8%</i> | 18.7% | 10.7% | 7.5% | 0.4% |

(1) Minnesota Department of Human Services includes in its Medicaid managed care total enrollment in Senior Health Options Dual Special Needs Plans.

(2) For 2013, "Parents, Kids" figure includes Non-Citizens Medical.

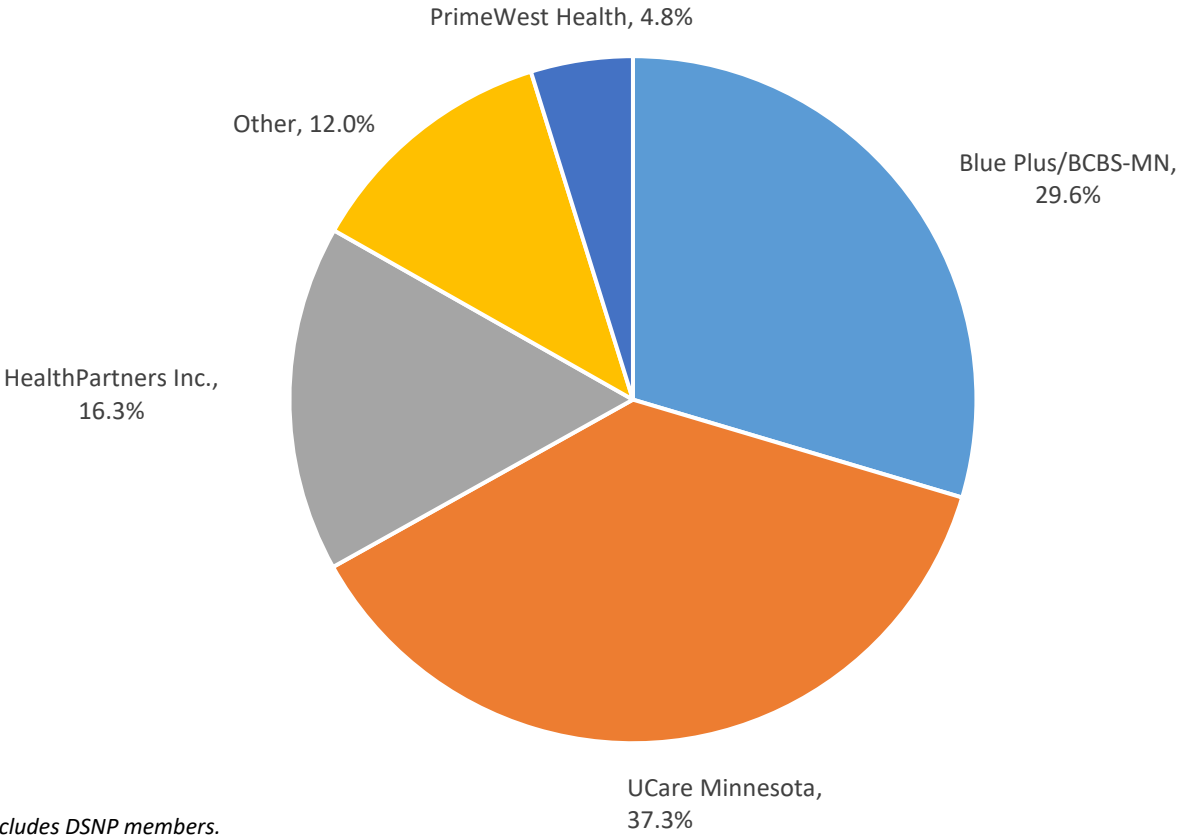
(3) Senior Care Plus is a managed care plan for seniors eligible for Medicaid who don't enroll in the Senior Health Options Dual Special Needs Plan.

(4) For families at 138% to 200% of the federal poverty level. Includes Minnesota Care and Minnesota Care Child.

(5) Medica no longer accepting enrollment for Families and Children effective May 1, 2017

Source: Minnesota Department of Human Services, HMA

Minnesota Medicaid Managed Care Market Share by Enrollment⁽¹⁾,
August 2023



(1) Includes DSNP members.
Source: MN Dept. of Human Services, HMA

5. MEDICAID FEE FOR SERVICE VS. MANAGED CARE PENETRATION

Total Medicaid enrollment in Minnesota was about 1.4 million in 2022. About 94.1% of Medicaid beneficiaries were enrolled in a managed care plan. The remainder are in fee-for-service Medicaid. Total Medicaid expenditures in Minnesota was \$16.1 billion in 2022, with about 52.2% through managed care and the rest through fee-for-service.

Minnesota Expenditures and Enrollment for Total Medicaid vs. Medicaid Managed Care, Fiscal 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 | \$16,158,756,247 | \$8,439,423,588 | 52.2% | 1,380,680 | 1,299,194 | 94.1% |
| 2021 | \$14,844,071,687 | \$7,773,452,673 | 52.4% | 1,278,802 | 1,207,996 | 94.5% |
| 2020 | \$13,611,654,951 | \$6,789,090,362 | 49.9% | 1,173,856 | 1,090,954 | 92.9% |
| 2019 | \$12,720,672,282 | \$6,067,601,416 | 47.7% | 1,020,753 | 918,816 | 90.0% |
| 2018 | \$12,324,543,789 | \$6,113,139,572 | 49.6% | 1,043,936 | 945,070 | 90.5% |
| 2017 | \$11,351,993,115 | \$5,527,509,974 | 48.7% | 1,060,478 | 958,285 | 90.4% |
| 2016 | \$10,893,812,759 | \$5,087,187,527 | 46.7% | 1,039,203 | 903,822 | 87.0% |
| 2015 | \$10,704,378,051 | \$5,370,925,138 | 50.2% | 1,013,971 | 897,547 | 88.5% |
| 2014 | \$9,834,459,896 | \$4,802,199,647 | 48.8% | 1,037,554 | 858,097 | 82.7% |

(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.

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

6. SNPs AND DUAL ELIGIBLES

Minnesota had 55,527 SNP members as of March 2023.

Minnesota SNP Enrollment by Plan, March 2023

| Plan | Total SNPs | DSNPs | CSNPs | ISNPs | Share |
|-------------------------------|---------------|---------------|----------|------------|-------------|
| UCare Minnesota | 24,276 | 24,212 | 0 | 64 | 43.7% |
| Medica Health Plans | 11,873 | 11,873 | 0 | 0 | 21.4% |
| BCBS-MN | 9,300 | 9,300 | 0 | 0 | 16.7% |
| Healthpartners, Inc. | 5,476 | 5,476 | 0 | 0 | 9.9% |
| Primewest Health System | 2,138 | 2,138 | 0 | 0 | 3.9% |
| South Country Health Alliance | 1,824 | 1,824 | 0 | 0 | 3.3% |
| Itasca Medical Care | 365 | 365 | 0 | 0 | 0.7% |
| UnitedHealthcare | 275 | 29 | 0 | 246 | 0.5% |
| Totals, 8 Plans | 55,527 | 55,217 | 0 | 310 | 100% |

Source: CMS, HMA