# Annual Medicaid MCO Survey
# Managed Long-Term Services & Supports (MLTSS)

INSTITUTE FOR MEDICAID INNOVATION

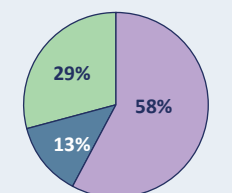**54%** of responding Medicaid health plans are responsible for managing MLTSS benefits

Note: Health plans that are not at risk for MLTSS did not respond to questions in the MLTSS section of the 2023 Annual Medicaid Health Plan survey.

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."
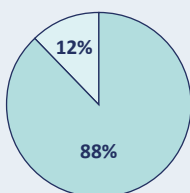
## Demographics

In its sixth year, the 2023 survey findings represent health plan data from almost every state with Medicaid managed care. The annual survey collected information at the parent company/corporate levels and is intended to equip Medicaid stakeholders with the information needed to accurately articulate the national narrative about Medicaid managed care. The survey respondents are representative of the national demographics of all Medicaid health plans.
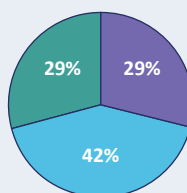
### Health Plan Tax Status
- 58% Private Nonprofit
- 13% Private For-Profit
- 29% Government or Other

### Health Plan Markets
- 88% Single State
- 12% Multistate

### Health Plan Size
- 29% Small Health Plan (<250K Covered)
- 29% Medium Health Plan (250K–1 Million Covered)
- 42% Large Health Plan (>1 Million Covered)

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Percent of Medicaid Health Plans Experiencing Housing/Bed Availability Barriers During Member Health Care Transitions for MLTSS

| Transition | Percent |
|---|---|
| Nursing facility to home transitions | 92% |
| Hospital to home transitions | 85% |
| Hospital to nursing facility transitions | 77% |
| Home to nursing facility transitions | 62% |
| Nursing facility to hospital transitions | 31% |
| Home to hospital transitions | 23% |

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Barriers Experienced by Medicaid Health Plans When Managing MLTSS

| Barrier | Percent |
|---|---|
| Challenges related to the direct-care workforce (e.g., lack of staff, turnover, training, and qualification challenges) | 85% |
| Restrictions to in-person assessments and care delivery due to COVID-19 | 54% |
| Medicare and Medicaid misalignment creates challenges and financial disincentives | 46% |
| Waiver waitlists | 46% |
| Fragmented Medicaid benefit design (behavioral health and/or physical health benefits) limits ability to serve the whole individual | 39% |
| Churn (member or eligibility-related) | 39% |
| Institutional level-of-care requirements that do not align with state goals (e.g., ADL/IADL requirements that are too low or too high to support appropriate utilization are not enrolled in the plan) | 31% |
| State requirements for health plans to contract with specific organizations or providers for care coordination | 23% |
| State program requirements that limit the effectiveness of managed care strategies (e.g., any-willing-provider provisions, continuity-of-care provisions) | 23% |
| Operationalizing electronic visit verification requirements | 23% |
| Other* | 23% |

Note: Other* includes lack of data sharing between health plans and other state programs and inadequate resources to keep individuals in their communities (e.g., in-home support services, caregiver respite services, and dementia care).

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

# Barriers Medicaid Health Plans Encountered During Different Types of Transitions

## Nursing Facility to Home Transitions

| Barrier | % of Health Plans |
|---|---|
| Caregiver support | 100% |
| Housing/bed availability | 92% |
| Availability of in-home support | 92% |
| Coordination of community services in advance of transition | 69% |
| Data exchange | 62% |
| Availability of respite care | 62% |
| Awareness and availability of resources and support to caregivers | 62% |
| Continuity of services | 46% |
| Availability of hospice | 31% |

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Hospital to Home Transitions

| Barrier | % of Health Plans |
|---|---|
| Caregiver support | 100% |
| Housing/bed availability | 85% |
| Availability of in-home support | 85% |
| Coordination of community services in advance of transition | 77% |
| Awareness and availability of resources and support to caregivers | 69% |
| Availability of respite care | 62% |
| Continuity of services | 54% |
| Data exchange | 46% |
| Availability of hospice | 23% |

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Hospital to Nursing Facility Transitions

| Barrier | % of Health Plans |
|---|---|
| Housing/bed availability | 77% |
| Data exchange | 69% |
| Availability of in-home support | 46% |
| Coordination of community services in advance of transition | 46% |
| Caregiver support | 31% |
| Awareness and availability of resources and support to caregivers | 31% |
| Availability of respite care | 23% |
| Continuity of services | 15% |
| Availability of hospice | 15% |

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Home to Nursing Facility Transitions

| Barrier | % of Health Plans |
|---|---|
| Housing/bed availability | 62% |
| Data exchange | 54% |
| Caregiver support | 39% |
| Awareness and availability of resources and support to caregivers | 39% |
| Coordination of community services in advance of transition | 31% |
| Availability of in-home support | 23% |
| Availability of respite care | 23% |
| Continuity of services | 15% |
| Availability of hospice | 15% |

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Nursing Facility to Hospital Transitions

| Barrier | % of Health Plans |
|---|---|
| Data exchange | 77% |
| Caregiver support | 39% |
| Coordination of community services in advance of transition | 39% |
| Housing/bed availability | 31% |
| Availability of in-home support | 31% |
| Availability of respite care | 31% |
| Awareness and availability of resources and support to caregivers | 31% |
| Continuity of services | 15% |

Note: No health plan selected "availability of hospice."

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

## Home to Hospital Transitions

| Barrier | % of Health Plans |
|---|---|
| Data exchange | 54% |
| Caregiver support | 31% |
| Awareness and availability of resources and support to caregivers | 31% |
| Housing/bed availability | 23% |
| Availability of in-home support | 23% |
| Coordination of community services in advance of transition | 23% |
| Continuity of services | 8% |
| Availability of respite care | 8% |

Note: No health plan selected "availability of hospice."

Source: Institute for Medicaid Innovation. "2023 Annual Medicaid Health Plan Survey."

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