INSTITUTE FOR MEDICAID INNOVATION

Annual Medicaid Managed Care Organization Survey
Managed Long-Term Services & Supports

Demographics

In its seventh year, the 2024 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.
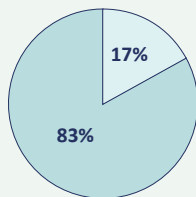
Health Plan Tax Status

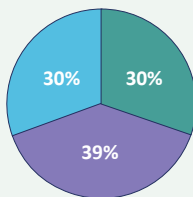- Private Nonprofit
- Private For-Profit
- Government or Other

17% 22% 61%
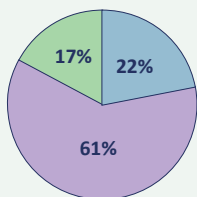
Health Plan Markets

- Single State
- Multistate

17% 83%

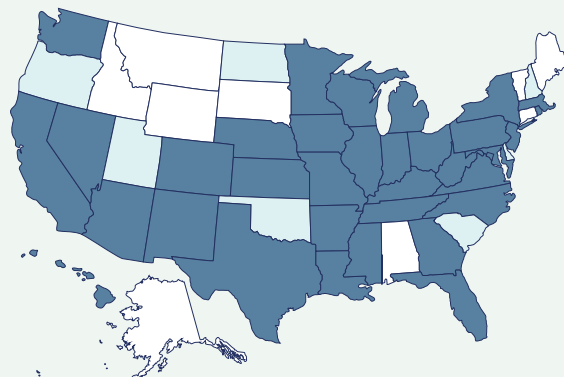### Health Plan Size

- Small Health Plans (<250K Covered)
- Medium Health Plans (250K–1 Million Covered)
- Large Health Plans (>1 Million Covered)

30% 30% 39%

Note: Percentage does not equal 100% due to rounding.

Health Plan States

- Managed Care States Represented in Findings (states with capitated managed care)
- Managed Care States NOT Represented in Findings
- States without Medicaid Managed Care

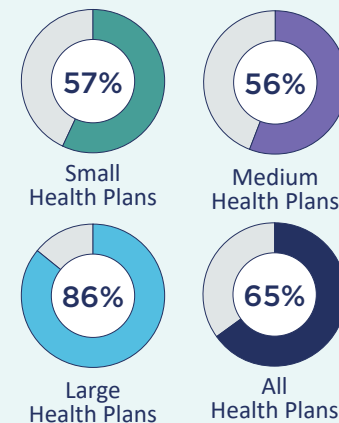Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Barriers Experienced by Medicaid Health Plans when Managing Long-Term Services & Supports

%	Barrier
93%	Challenges related to the direct-care workforce (e.g., lack of staff, turnover, training, and qualification challenges)
73%	Medicare and Medicaid misalignment and financial disincentives
53%	State program requirements that limit the effectiveness of managed care strategies (e.g., any-willing-provider provisions, continuity-of-care provisions)
53%	Waiver waitlists
40%	Fragmented Medicaid benefit design—behavioral health and/or physical health benefits—limiting the ability to serve the whole individual
40%	State requirements for health plans to contract with specific organizations or providers for care coordination
40%	Institutional level-of-care requirements that do not align with state goals (e.g., ADL or IADL requirements that are too low or too high to support appropriate utilization)
40%	Churn (member or eligibility-related)
27%	Restrictions to in-person assessments and care delivery due to COVID-19
27%	Operationalizing electronic visit verification requirements
7%	Other*
4%	Lack of data sharing of members receiving other state/waiver programs to avoid duplication when coordinating care

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Note: *Other includes lack of data sharing about members receiving other programs to avoid duplication when coordinating care.

Medicaid Health Plans at Risk for Managed Long-Term Services & Supports

57% Small Health Plans

56% Medium Health Plans

86% Large Health Plans

65% All Health Plans

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Note: Thirty-five percent (35%) of plans reported they were not at risk for MLTSS. Health plans that are not at risk for MLTSS did not respond to questions in the MLTSS section of the 2024 Annual Medicaid Health Plan Survey.

Barriers Medicaid Health Plans Encountered During...
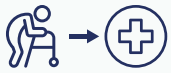
Nursing Facility to Hospital Transitions

Barrier	% of Health Plans
Data exchange	60%
Bed availability	33%
Availability of caregivers	27%
Availability of respite care	27%
Awareness and availability of resources to support caregivers	27%
Availability of in-home support	20%
Coordination of community services in advance of transition	20%
Continuity of services	13%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Note: No health plan selected "availability of hospice."
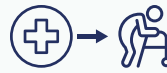
Hospital to Nursing Facility Transitions

Barrier	% of Health Plans
Bed availability	73%
Data exchange	60%
Availability of caregivers	33%
Coordination of community services in advance of transition	27%
Continuity of services	27%
Availability of respite care	27%
Awareness and availability of resources to support caregivers	27%
Availability of in-home support	20%
Availability of hospice	7%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Hospital to Home Transitions

Barrier	% of Health Plans
Housing availability	87%
Availability of caregivers	87%
Availability of in-home support	67%
Coordination of community services in advance of transition	67%
Availability of respite care	53%
Data exchange	47%
Awareness and availability of resources to support caregivers	47%
Continuity of services	33%
Availability of hospice	13%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Home to Hospital Transitions

Barrier	% of Health Plans
Data exchange	40%
Coordination of community services in advance of transition	27%
Continuity of services	27%
Bed availability	20%
Availability of caregivers	20%
Awareness and availability of resources to support caregivers	20%
Availability of in-home support	13%
Availability of respite care	13%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

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

Nursing Facility to Home Transitions

Barrier	% of Health Plans
Availability of caregivers	93%
Housing availability	80%
Availability of in-home support	73%
Coordination of community services in advance of transition	67%
Availability of respite care	60%
Data exchange	47%
Awareness and availability of resources to support caregivers	47%
Continuity of services	33%
Availability of hospice	13%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Home to Nursing Facility Transitions

Barrier	% of Health Plans
Bed availability	60%
Data exchange	47%
Availability of caregivers	27%
Coordination of community services in advance of transition	20%
Continuity of services	20%
Availability of respite care	20%
Awareness and availability of resources to support caregivers	20%
Availability of in-home support	13%

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

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

73%

of health plans reported barriers related to housing/ bed availability during member transitions **from hospital to nursing facility**.
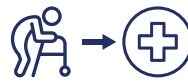
Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

60%

of health plans reported barriers related to housing/ bed availability during member transitions **from home to nursing facility**.

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

33%

of health plans reported barriers related to housing/ bed availability during member transitions **from nursing facility to hospital**.
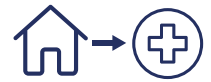
Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

20%

of health plans reported barriers related to housing/ bed availability during member transitions **from home to hospital**.

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

How State Medicaid Agencies Could Further Assist Health Plans in Addressing Managed Long-Term Services & Supports

79%	Improve the quality of data shared between state and health plans
71%	Improve data sharing between state and health plans
64%	Improve data sharing between government agencies (e.g., Office on Aging, child welfare system, criminal justice system) and health plans
64%	Improve data sharing between health plans and community-based organizations (CBOs)
57%	Improve data sharing between health plans and provider groups
50%	Increase technical assistance resources
43%	Increase resources to support the facilitation of partnerships
43%	Facilitate contracting with CBOs
36%	Streamline data sharing between providers and CBOs
57%	Address backlogged waiver approval processes
86%	Implement policies to increase long-term care and direct-care workforce
79%	Facilitate alignment of Medicare and Medicaid requirements
7%	Other*

Source: Institute for Medicaid Innovation. "2024 Annual Medicaid Health Plan Survey."

Note: *Other includes increasing reimbursement for home- and community-based services.