

Evolution of Medicare's Special Needs Plan Program Across the Past Decade

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The Menges Group

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Introduction and Overview

- A wide and growing array of *specialized* coordinated care programs serve the Medicaid and Medicare programs. The largest of these is Medicare's Special Needs Plan (SNP) program, whereby CMS contracts with health plans focusing on the following groups:
 - “C-SNPs” serve persons with chronic or disabling condition(s)
 - “D-SNPs” serve persons dually enrolled in Medicaid and Medicare
 - “I-SNPs” serve persons who are institutionalized or eligible for institutional care
- This edition conveys national trends in health plan participation in the SNP program, along with enrollment trends.
 - We tabulated data as of January 2013, January 2018, and January 2023.

The SNP Program Has Grown Sharply, Both In Health Plan Participation and Enrollment

- The number of SNPs more than doubled from 2013-2023 (increasing 107%). I-SNP participation increased most sharply, by 182%.
- SNP enrollment from 2013-2023 more than tripled, increasing 239%. D-SNP enrollment increased at the highest rate (273%).
- C-SNP health plan participation dropped off considerably from 2013-2018 but has rebounded strongly from 2018-2023.

SNP Type	# of Special Needs Plans			SNP Enrollment		
	January, 2013	January, 2018	January, 2023	January, 2013	January, 2018	January, 2023
C-SNP	214	132	320	245,501	347,509	450,398
D-SNP	362	412	823	1,311,679	2,129,837	4,888,866
I-SNP	68	97	192	49,178	72,235	106,528
Total	644	641	1,335	1,606,358	2,549,581	5,445,792

SNP Type	Percent Change In # of SNPs		Percent Increase In SNP Enrollment	
	2013 - 2018	2018 - 2023	2013 - 2018	2018 - 2023
C-SNP	-38%	142%	42%	30%
D-SNP	14%	100%	62%	130%
I-SNP	43%	98%	47%	47%
Total	0%	108%	59%	114%

Note that our count of SNPs throughout this edition represents entities operating within a single state with a distinct CMS contract and “H number” (as used by CMS to distinguish SNPs). Larger organizations operating in multiple states are typically counted as having separate SNPs in each state.

D-SNPs Represent 90% of All SNP Enrollment as of January 2023

SNP Type	% of SNPs			% of Overall SNP Enrollment		
	January, 2013	January, 2018	January, 2023	January, 2013	January, 2018	January, 2023
C-SNP	33%	21%	24%	15%	14%	8%
D-SNP	56%	64%	62%	82%	84%	90%
I-SNP	11%	15%	14%	3%	3%	2%
Total	100%	100%	100%	100%	100%	100%

- As of January 2023, D-SNPs have enrolled 40% of the nation’s dual eligible population (using MACPAC’s figure of 12.2 million dually eligible persons as the denominator).
- Beyond having by far the largest enrollment volume throughout the past decade of any SNP type, D-SNPs now represent a higher share of overall SNP enrollment (90%) than a decade ago (82%).
- While enrollment in C-SNPs and I-SNPs grew considerably across the past decade, these plan types now represent a smaller share of overall SNP enrollment than in 2013 (due to the tremendous rate of D-SNP enrollment growth that took place).

Many SNPs Have Modest Enrollment Levels

SNP Enrollment Corridor	# of Special Needs Plans			SNP Enrollment			% of SNPs			% of Overall SNP Enrollment		
	January, 2013	January, 2018	January, 2023	January, 2013	January, 2018	January, 2023	January, 2013	January, 2018	January, 2023	January, 2013	January, 2018	January, 2023
0	70	52	124	-	-	-	11%	8%	9%	0%	0%	0%
1 - 999	313	268	575	90,932	97,415	173,936	49%	42%	43%	6%	4%	3%
1,000 - 4,999	181	194	379	418,576	471,644	880,607	28%	30%	28%	26%	18%	16%
5,000 - 9,999	47	61	118	348,067	431,286	865,986	7%	10%	9%	22%	17%	16%
10,000 +	33	66	139	748,783	1,549,113	3,525,263	5%	10%	10%	47%	61%	65%
Total	644	641	1,335	1,606,358	2,549,458	5,445,792	100%	100%	100%	100%	100%	100%

- In January 2023, the 139 health plans with more than 10,000 SNP enrollees represented 10% of SNPs but held 65% of all SNP enrollment.
- Only one SNP, HealthFirst in New York, held more than 100,000 SNP enrollees in January 2023. (However, many companies operate SNPs in multiple states and/or offer multiple SNP products – and exceed this enrollment threshold at the parent entity level.)
- 52% of SNPs held fewer than 1,000 enrollees as of January 2023. These smaller plans represent a combination of entities that have recently begun SNP operations and longer-standing SNPs.

Average Enrollment Per SNP Grew From 2,494 in 2013 to 4,079 as of January 2023

SNP Type	Average Enrollment per SNP		
	January, 2013	January, 2018	January, 2023
C-SNP	1,147	2,633	1,407
D-SNP	3,623	5,170	5,940
I-SNP	723	745	555
Total	2,494	3,978	4,079

- As of January 2023, the average D-SNP had more than 4 times the enrollment of the average C-SNP and more than 10 times the average I-SNP’s enrollment.
- Average enrollment per C-SNP and per I-SNP has decreased from 2018-2023. This downward trend is likely driven by the rapid rate of new market entrants (all starting from a zero-enrollment base). However, average enrollment in D-SNPs increased from 2018-2023, despite the number of participating D-SNPs doubling during this timeframe.

5 Slide Series Overview

Our 5 Slide Series is typically a monthly publication whereby we briefly discuss/address a selected topic outside the confines of our client engagements. The Menges Group has developed a variety of datasets that we use to support our 5 Slide Series and client projects.

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