NC Medicaid and NC Health Choice Enrollment and Financial Update

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Medical Care Advisory Committee (MCAC) Meeting
December 11, 2020
Total Enrollment Based on PACs

Not including family planning
Average Annual Enrollment by PAC (in Thousands)

Medicaid average membership forecasted to grow 8% through 2021
Monthly Medicaid Enrollment by PAC (in Thousands)

- May 2020: 1,180
- Jun 2020: 1,192
- Jul 2020: 1,204
- Aug 2020: 1,216
- Sep 2020: 1,227
- Oct 2020: 1,239
- Nov 2020: 1,250

Legend:
- Other
- Family Planning
- TANF Adults
- Partial Dual
- Aged/Blind/Disabled
- Medicaid and Health Choice Children
SFY 2020-21 Expenditures Year-to-Date

Several reasons that current fiscal year spending is below projections:

• Enrollment growth lower than expected
• Continued effects of social distancing (claims low)
• COVID treatment and testing costs lower than expected
Medicaid is 12.9% below expected spend, as of 11/24.
Procedure Counts, April-November 2020

**Proc Trend - Rolling 3 Week Average**
COS: All

**Cumulative Procs by Checkwrite (selected range)**
COS: All

SFY 2019-20  SFY 2020-21
### NC Medicaid Expenditures by Service Category

<table>
<thead>
<tr>
<th>Service Category</th>
<th>SFY 2019-20</th>
<th>SFY 2020-21</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capitation (LME/MCO, PACE)</td>
<td>$1,010</td>
<td>$1,494</td>
<td>48%</td>
</tr>
<tr>
<td>Pharmacy (Gross)</td>
<td>747</td>
<td>877</td>
<td>17%</td>
</tr>
<tr>
<td>Physician</td>
<td>553</td>
<td>575</td>
<td>4%</td>
</tr>
<tr>
<td>Skilled Nursing Facility</td>
<td>548</td>
<td>899</td>
<td>64%</td>
</tr>
<tr>
<td>Hospital - Inpatient</td>
<td>374</td>
<td>443</td>
<td>19%</td>
</tr>
<tr>
<td>Hospital - Outpatient</td>
<td>227</td>
<td>269</td>
<td>19%</td>
</tr>
<tr>
<td>Personal Care Services</td>
<td>180</td>
<td>246</td>
<td>37%</td>
</tr>
<tr>
<td>Dental</td>
<td>163</td>
<td>158</td>
<td>-3%</td>
</tr>
<tr>
<td>Hospital - ER</td>
<td>140</td>
<td>147</td>
<td>5%</td>
</tr>
<tr>
<td>CAP - Disabled Adult</td>
<td>113</td>
<td>155</td>
<td>37%</td>
</tr>
<tr>
<td>CAP - Child</td>
<td>27</td>
<td>36</td>
<td>32%</td>
</tr>
<tr>
<td>Other</td>
<td>$499</td>
<td>$595</td>
<td>19%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$4,581</strong></td>
<td><strong>$5,893</strong></td>
<td><strong>29%</strong></td>
</tr>
</tbody>
</table>

Through Nov 24th
Looking Ahead to 2021-23 Biennium

As we look ahead to the budget for the next biennium, there are several factors we think will drive estimates:

• Long-term economic effects on enrollment

• Managed Care launch and claims run-out