CMS Trends and Challenges in LTSS

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We’ve Tipped the Scales!

Institutions

Community Settings
Home and Community-Based Services (HCBS) is 49.5% of LTSS

Medicaid Institutional and HCBS Expenditures as a Percentage of Total Medicaid LTSS Expenditures, FFY 1995 - 2012
Projected Distribution of LTSS Dollars in 2020 if Trends Hold

Percent of LTSS Spending

- HCBS: 63%
- Institutional: 37%
HCBS as a Percentage of LTSS by State

Medicaid HCBS Expenditures as a Percent of Total Medicaid LTSS Expenditures, by State, FFY 2012
LTSS Spending Targeted to Older People and People with Physical Disabilities by Service Category

Medicaid LTSS Expenditures Targeted to Older People and People with Physical Disabilities, by Service Category, FFY 1995–2012

[Bar chart showing Medicaid LTSS expenditures targeted to older people and people with physical disabilities by service category from FFY 1995 to 2012. The chart compares HCBS and Institutional spending.]
Ten States with the Greatest Increase in Medicaid HCBS Expenditures as a Percentage of LTSS

FFY 2010-2012

<table>
<thead>
<tr>
<th>State</th>
<th>2010 Increase</th>
<th>2012 Increase</th>
<th>Percentage Increase</th>
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</thead>
<tbody>
<tr>
<td>Virginia</td>
<td>4.4%</td>
<td>5.0%</td>
<td>5.0%</td>
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<tr>
<td>Ohio</td>
<td>5.4%</td>
<td>6.1%</td>
<td>6.1%</td>
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<td>Maine</td>
<td>5.5%</td>
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<td>Rhode Island</td>
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<td>6.9%</td>
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<td>Alabama</td>
<td>6.5%</td>
<td>7.8%</td>
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<td>Tennessee</td>
<td>6.9%</td>
<td>10.3%</td>
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<tr>
<td>Georgia</td>
<td>7.8%</td>
<td>10.9%</td>
<td>10.9%</td>
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<tr>
<td>New Hampshire</td>
<td>6.5%</td>
<td>7.8%</td>
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<tr>
<td>Massachusetts</td>
<td>7.8%</td>
<td>10.3%</td>
<td>10.3%</td>
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<tr>
<td>Delaware</td>
<td>6.9%</td>
<td>10.9%</td>
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</tbody>
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HCB Settings Challenge

Decreasing Isolation

Increasing Integrated Life
Demographics Driving Demand

Percent of US Population by Age or Severe Disability*

*US Census Bureau
Projected MLTSS Activity in 2014

- States in blue indicate MLTSS expansion expected in 2014.
- States in purple indicate first MLTSS program expected in 2014.

States with blue shading include: CA, WA, AZ, NM, TX, TN, NC, FL, WI, MI, IL, MN, OH, PA, NY, CA, and MA.

States with purple shading include: SC, VA, and OH.

Other states are not shaded and do not have projected activity in 2014.
Keys to Success

• Person Centered

• Quality and Effectiveness

• Partnerships