



Enrollment Trends

User Guide



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Tutorial: Enrollment Trends Report

Overview

This report allows you to view the enrolment trends across various level: County, Organization and Plan for your markets. The Enrolment trends report provides an option to compare the enrollment trends at a Plan and Payor organization level across years from 2017 to 2020 in an efficient and simple tabular way. You can select your view to compare the monthly or yearly enrollment trends for your plan and competitor plans.

What data is available in this report and when is it refreshed?

These report utilizes the enrolment information from the CMS Enrolment data and includes all information (Individual, group, PDP, MA-PD) for plans as of 2020. This report is refreshed every month to reflect the new enrolment numbers and can be used throughout the year. We include only the latest year plans (currently 2020) and crosswalk the enrolment numbers for previous years. In October of every year, we map the new plans and repeat the process of crosswalk.

What decisions can I make using this report?

Use this report to compare the enrolment numbers across various stakeholders (county, organization and plan) for two time frames; Year over Year and Month over Month in tabular form and and hence draw insights for the same.



How can I use Enrollment Trends?- YoY view

The default view is YoY for your organization at a State level. Follow these steps to gain insights from this report:

1

2

Enrollment Trends

For all 2020 plans in CMS enrollment file - historical data available from Jan'17 till Apr'20

3

4

5

Choose Your View

YoY

Month

Apr

Org

UnitedHealth Gr..

State

NY

d/Grp Plans

All

MA-PD+PDP

Multiple val..

SNP

All

Plan Type

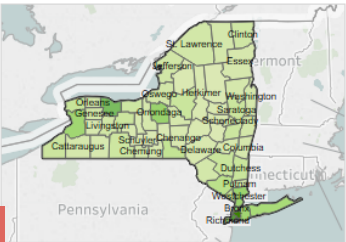
All

Marketwise Performance - UnitedHealth Group, Inc.

*Select market from map once to update data

County

All



AEP Growth

Aug'19 - Jan'20

1.99%

Market Share

Apr'20

24.54%

382,780

390,392

388,817

August2019

January2020

April2020

Market Trends - Overall

Organization

All

Year *

2020

(MoM view only)

* Year filter is applicable for Market Trends: Overall and Planwise Performance comparison in MoM view

Organization	Apr'17 (Net enr)	Apr'18 (Net enr)	Apr'19 (Net enr)	Apr'20 (Net enr)
UnitedHealth Group, Inc.	324,920 (-)	337,188 (12,268)	377,093 (39,905)	388,817 (11,724)
Healthfirst, Inc.	141,004 (-)	150,882 (9,878)	161,961 (11,079)	194,436 (32,475)
CVS Health Corporation	62,934 (-)	97,333 (34,399)	156,316 (58,983)	179,014 (22,698)
Lifetime Healthcare, Inc.	132,129 (-)	146,148 (14,019)	150,693 (4,545)	154,566 (3,873)
EmblemHealth, Inc.	114,347 (-)	127,820 (13,473)	112,833 (-14,987)	124,176 (11,343)
Centene Corporation	(-)	(-)	(-)	74,885 (-)
Anthem Inc.	69,225 (-)	70,689 (1,464)	72,119 (1,430)	74,222 (2,103)
Humana Inc.	21,961 (-)	26,882 (4,921)	46,121 (19,239)	71,636 (25,515)
Independent Health Associati..	73,237 (-)	69,053 (-3,184)	68,152 (-861)	68,040 (-112)

Planwise Performance Comparison

UnitedHealth Group, Inc. Plans

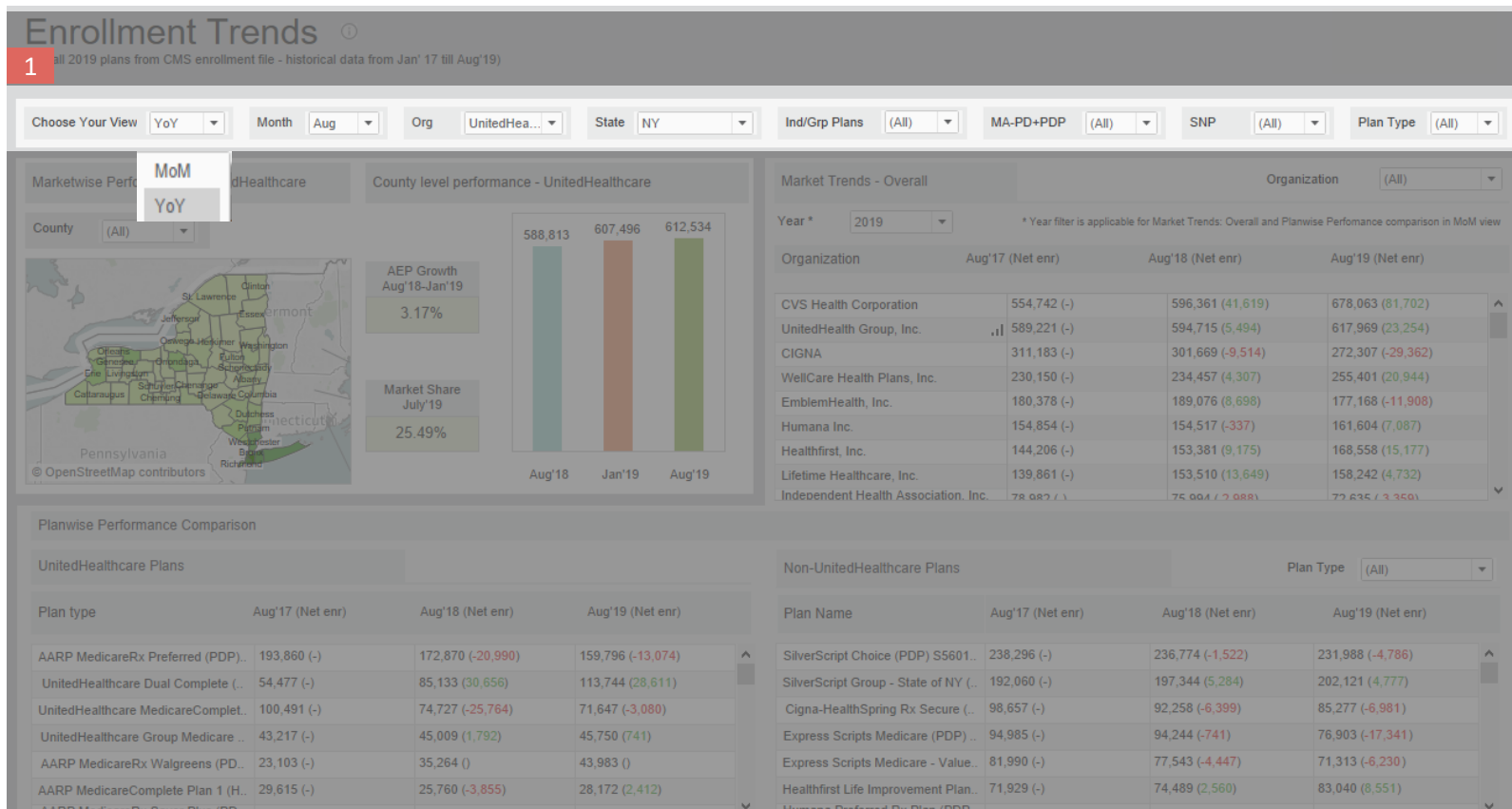
Plan Name	Apr'17 (Net enr)	Apr'18 (Net enr)	Apr'19 (Net enr)	Apr'20 (Net enr)
UnitedHealthcare Dual Complete (H..	45,946 (-)	73,470 (27,524)	106,982 (33,512)	107,522 (540)
UnitedHealthcare Medicare Advanta..	99,970 (-)	76,130 (-23,840)	72,264 (-3,866)	85,673 (13,409)
UnitedHealthcare Group Medicare A..	43,414 (-)	44,866 (1,452)	46,287 (1,421)	39,199 (-7,088)
AARP Medicare Advantage Plan 1 (..	30,089 (-)	26,353 (-3,736)	28,697 (2,344)	26,013 (-2,684)
AARP Medicare Advantage Mosaic ..	(-)	(-)	(-)	15,449 (-)
UnitedHealthcare Medicare Advanta..	18,558 (-)	15,960 (-2,598)	14,609 (-1,351)	13,578 (-1,031)
AARP Medicare Advantage Plan 1 A..	15,251 (-)	14,014 (-1,237)	13,484 (-530)	12,349 (-1,135)

Non-UnitedHealth Group, Inc. Plans

Plan Name	Apr'17 (Net enr)	Apr'18 (Net enr)	Apr'19 (Net enr)	Apr'20 (Net enr)
Healthfirst Life Improvement Plan..	72,013 (-)	74,081 (2,068)	78,158 (4,077)	105,699 (27,541)
Aetna Medicare Plan w/Rx (PPO..	10,475 (-)	10,608 (133)	42,991 (32,383)	49,129 (6,138)
Healthfirst 65 Plus Plan (HMO) H..	44,224 (-)	46,595 (2,371)	46,385 (-210)	44,763 (-1,622)
Aetna Medicare Plan (PPO) H55..	18,868 (-)	36,690 (17,822)	39,512 (2,822)	41,249 (1,737)
Fidelis Dual Advantage Flex (HM..	31,363 (-)	33,199 (1,836)	36,986 (3,787)	39,672 (2,686)
EmblemHealth VIP Essential (H..	21,269 (-)	23,786 (2,517)	31,814 (8,028)	36,387 (4,573)
Medicare Blue Choice Select (H..	22,185 (-)	35,848 (13,663)	33,904 (-1,944)	33,843 (-61)



How can I use Enrollment Trends?- YoY view

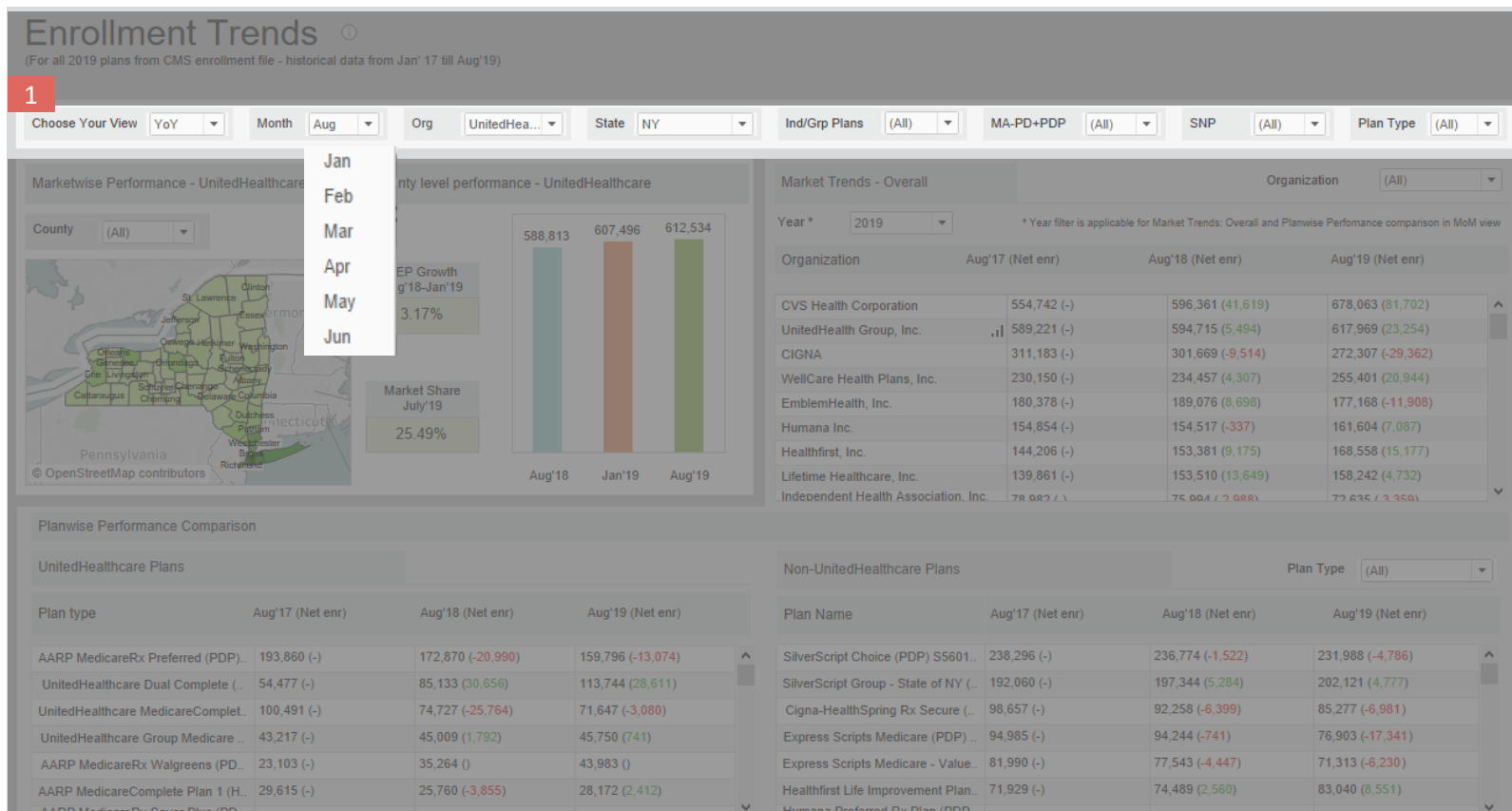


1.1 Choose your View

Select one option (Year-over-Year or Month-over-Month) by clicking on the drop-down State



How can I use Enrollment Trends?- YoY view

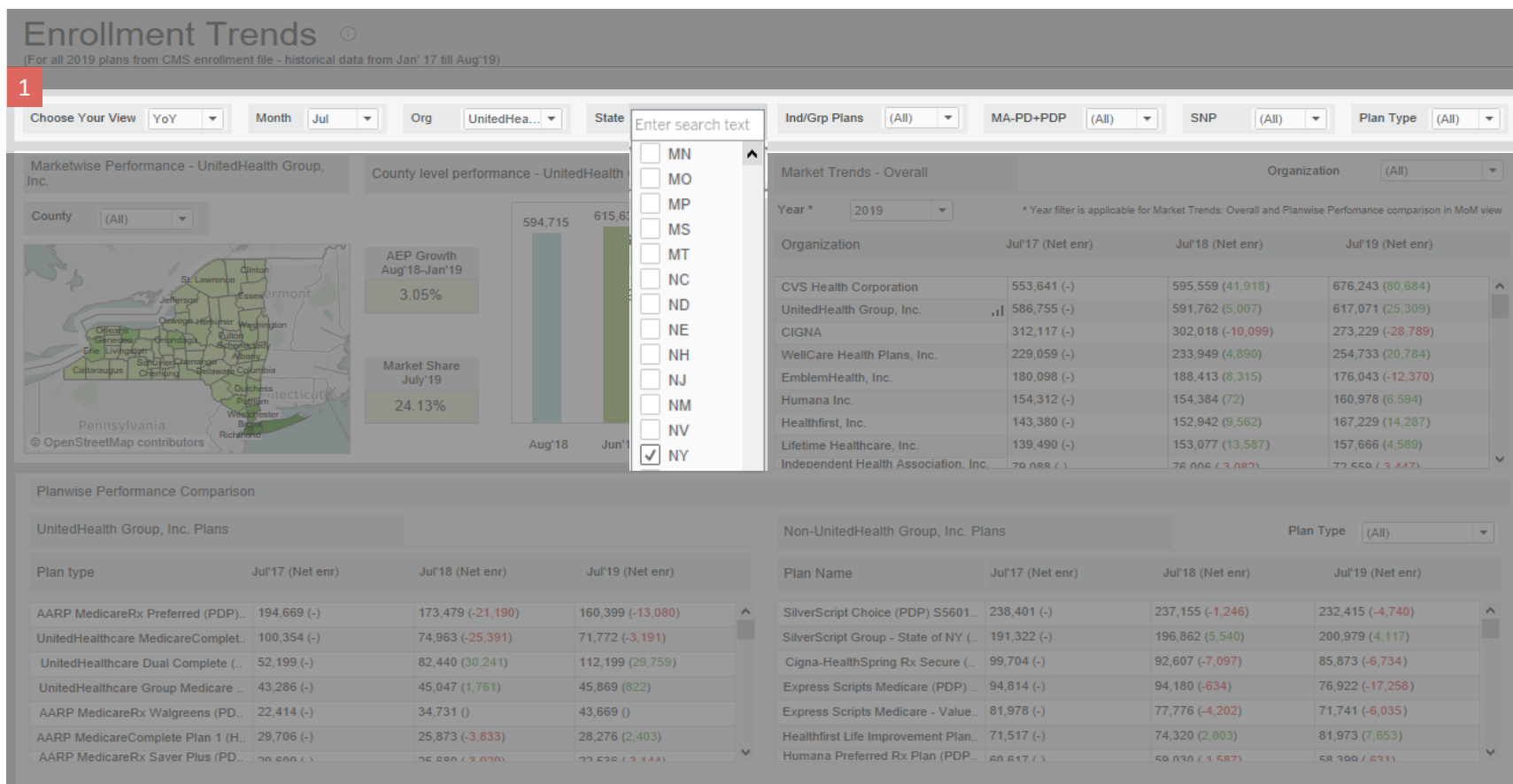


1.2 Select the Month

Select the month for which you want to view the enrollment numbers by clicking on the drop-down filter



How can I use Enrollment Trends?- YoY view



1.4 Select your State

Choose the state (where you operate or any other area) from the drop-down filter and click apply



How can I use Enrollment Trends?- YoY view

Enrollment Trends (For all 2019 plans from CMS enrollment file - historical data from Jan' 17 till Aug'19)

1

Choose Your View: YoY | Month: Aug | Org: UnitedHealthcare | State: NY | Ind/Grp Plans: (All) | MA-PD+PDP: (All) | SNP: (All) | Plan Type: (All)

Marketwise Performance - UnitedHealthcare

County: (All)

AEP Growth Aug'18-Jan'19: 3.17%

Market Share July'19: 25.49%

Planwise Performance Comparison

UnitedHealthcare Plans

Plan type	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
AARP MedicareRx Preferred (PDP)...	193,860 (-)	172,870 (-20,990)	159,796 (-13,074)
UnitedHealthcare Dual Complete (...)	54,477 (-)	85,133 (30,656)	113,744 (28,611)
UnitedHealthcare MedicareComple...	100,491 (-)	74,727 (-25,764)	71,647 (-3,080)
UnitedHealthcare Group Medicare ...	43,217 (-)	45,009 (1,792)	45,750 (741)
AARP MedicareRx Walgreens (PD...	23,103 (-)	35,264 (12,161)	43,983 (8,719)
AARP MedicareComplete Plan 1 (H...	29,615 (-)	25,760 (-3,855)	28,172 (2,412)
AARP MedicareRx Saver Plus (PD...

Market Trends - Overall

Organization: (All)

* 2019 * Year filter is applicable for Market Trends: Overall and Planwise Performance comparison in MoM view

Organization	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
Health Corporation	554,742 (-)	596,361 (41,619)	678,063 (81,702)
edHealth Group, Inc.	589,221 (-)	594,715 (5,494)	617,969 (23,254)
NA	311,183 (-)	301,669 (-9,514)	272,307 (-29,362)
Care Health Plans, Inc.	230,150 (-)	234,457 (4,307)	255,401 (20,944)
lemHealth, Inc.	180,378 (-)	189,076 (8,698)	177,168 (-11,908)
ana Inc.	154,854 (-)	154,517 (-337)	161,604 (7,087)
thfirst, Inc.	144,206 (-)	153,381 (9,175)	168,558 (15,177)
ime Healthcare, Inc.	139,861 (-)	153,510 (13,649)	158,242 (4,732)
pendent Health Association, Inc.	78,982 (-)	75,904 (-3,078)	77,635 (1,731)

UnitedHealthcare Plans

Plan Type: (All)

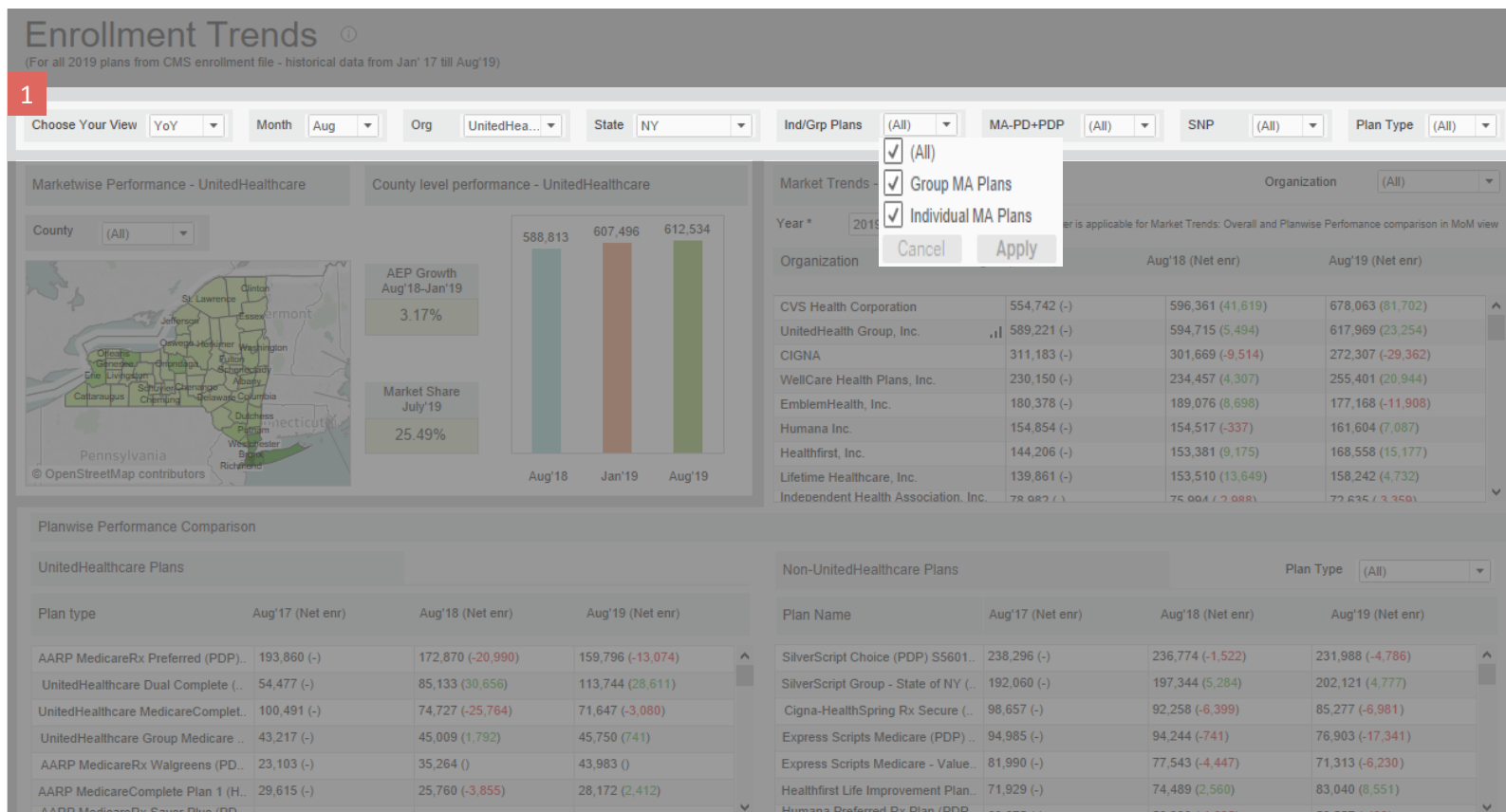
Plan Name	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
SilverScript Choice (PDP) S5601...	238,296 (-)	236,774 (-1,522)	231,988 (-4,786)
SilverScript Group - State of NY (...)	192,060 (-)	197,344 (5,284)	202,121 (4,777)
Cigna-HealthSpring Rx Secure (...)	98,657 (-)	92,258 (-6,399)	85,277 (-6,981)
Express Scripts Medicare (PDP) ...	94,985 (-)	94,244 (-741)	76,903 (-17,341)
Express Scripts Medicare - Value...	81,990 (-)	77,543 (-4,447)	71,313 (-6,230)
Healthfirst Life Improvement Plan...	71,929 (-)	74,489 (2,560)	83,040 (8,551)
Humana Preferred Rx Plan (PDP)

1.3 Select your Organization

Select the payor (Your organization or competitor) by clicking on the drop-down. The default is set for your organization



How can I use Enrollment Trends?- YoY view

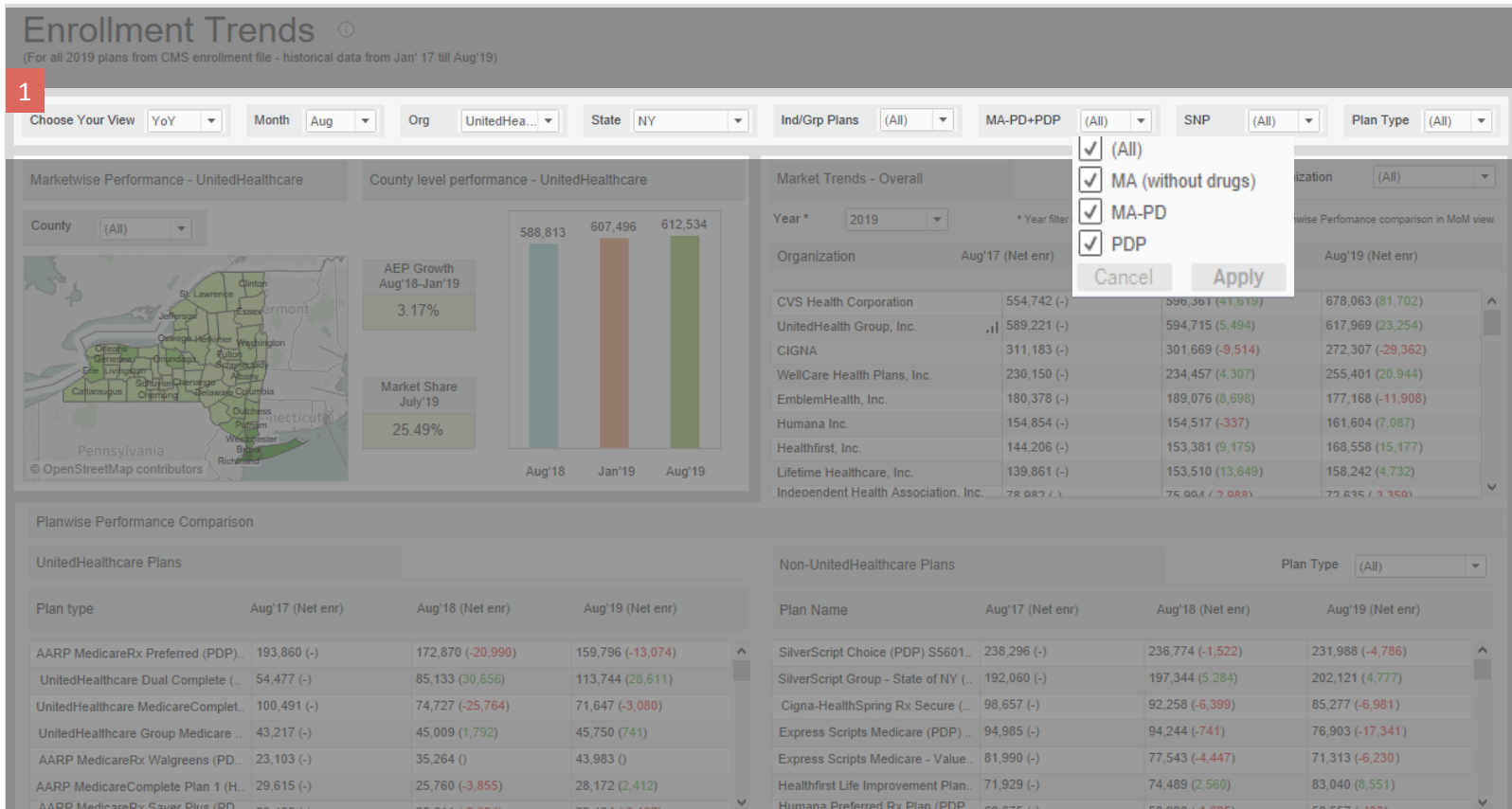


1.5 Select the plans

Choose the plans (Group MA plans or Individual MA plans) from the drop-down filter and click apply



How can I use Enrollment Trends?- YoY view

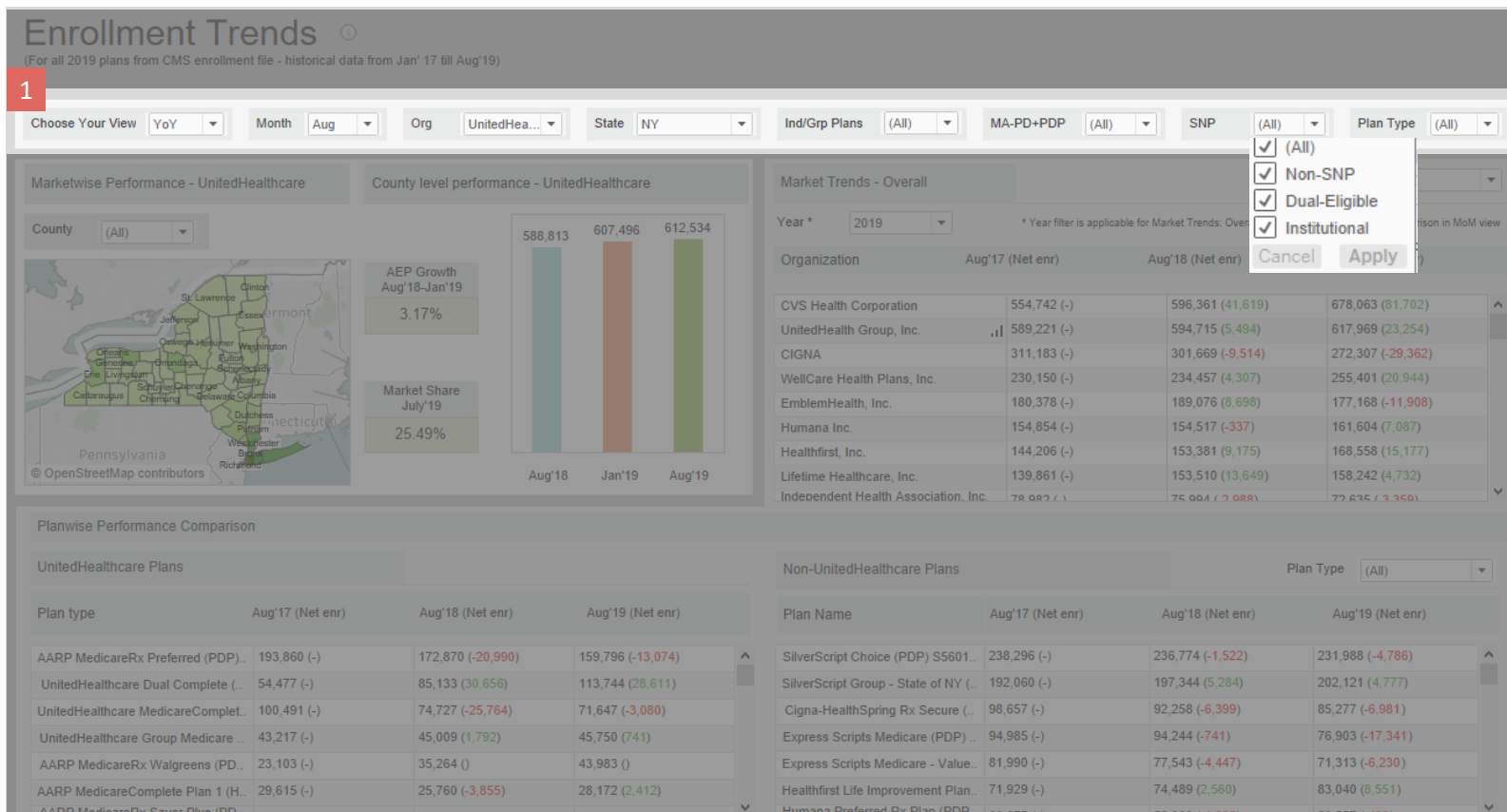


1.6 Select MA-PD/ PDP Plans

Choose the plans (MA-PD or PDP) from the drop-down filter and click apply



How can I use Enrollment Trends?- YoY view

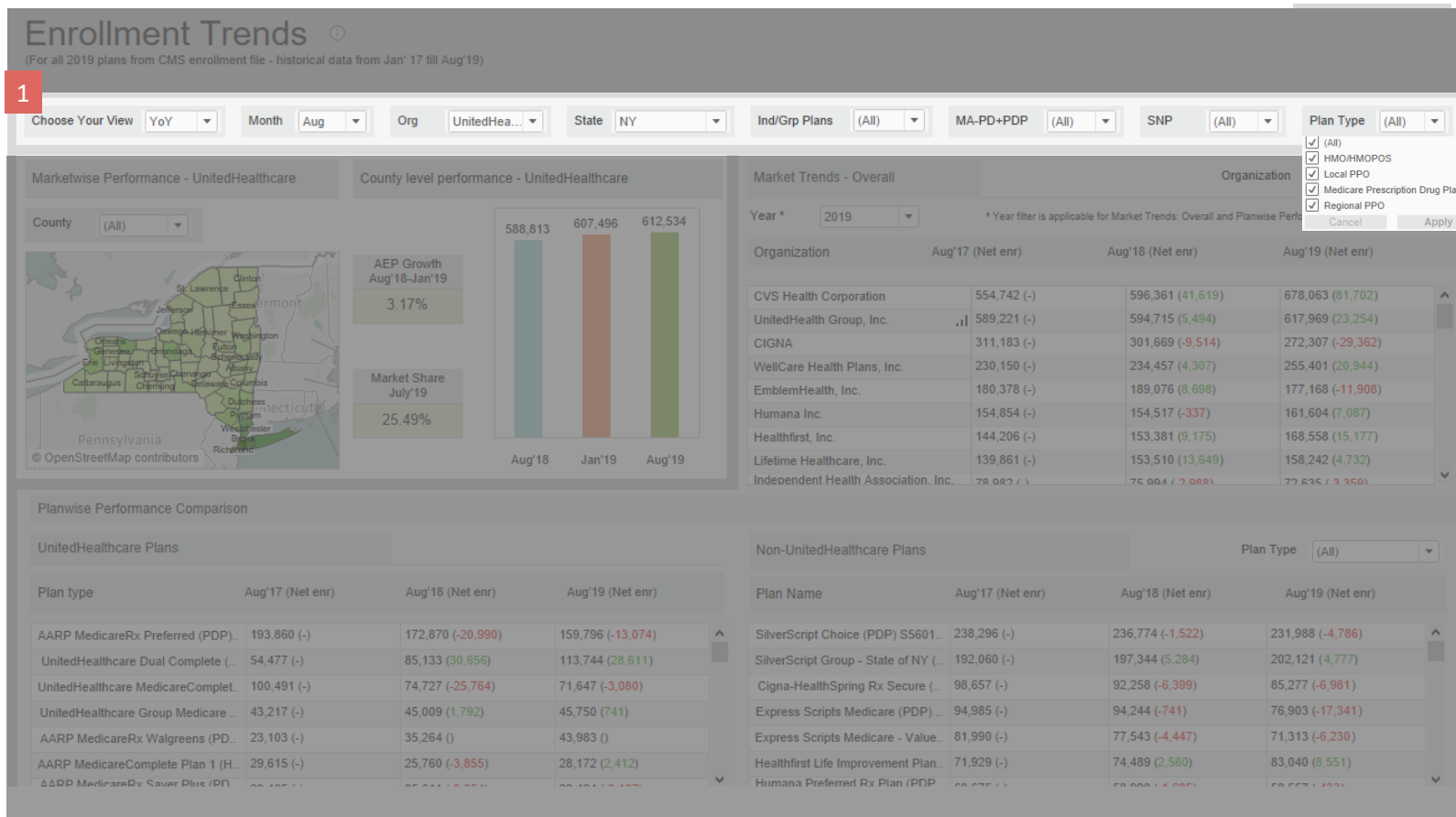


1.7 Select the SNP type

Choose the SNP plan type (Non-SNP, Dual-Eligible, Institutional) from the drop-down filter and click apply



How can I use Enrollment Trends?- YoY view

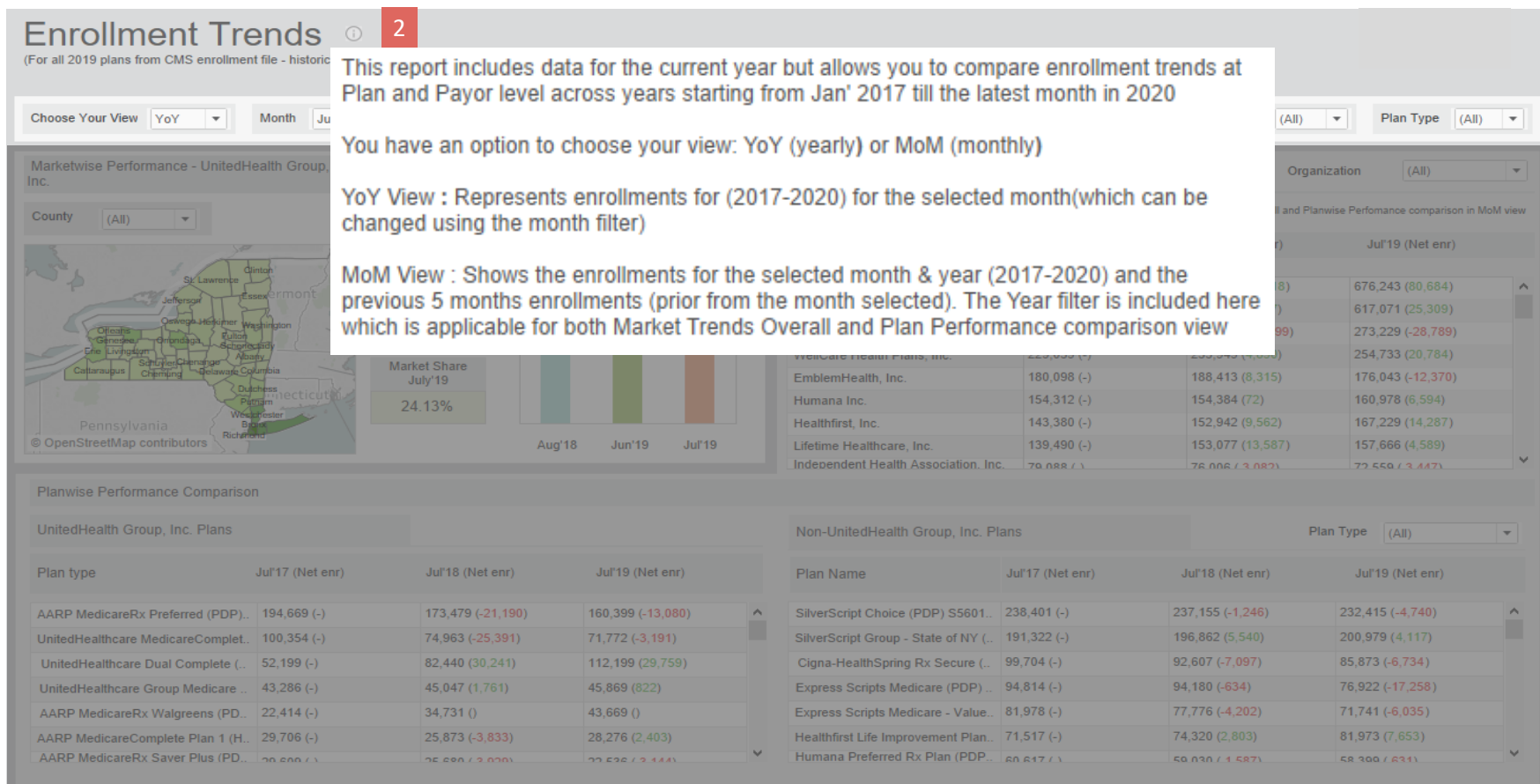


1.8 Select the Plan type

Choose the plan type from the drop-down filter and click apply



How can I use Enrollment Trends?- YoY view

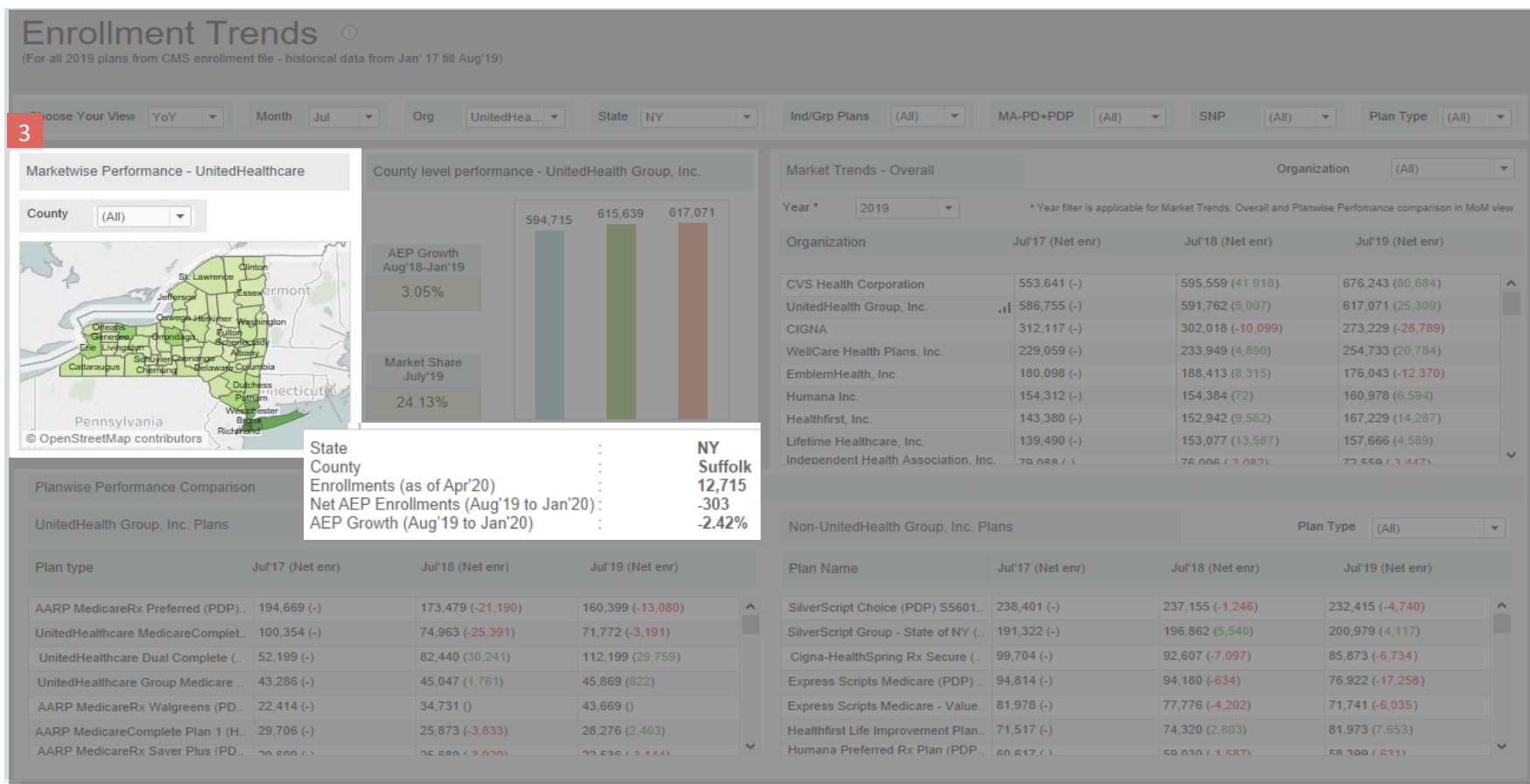


2 Information icon

Overview of the report along with the source of the data used is mentioned



How can I use Enrollment Trends?- YoY view

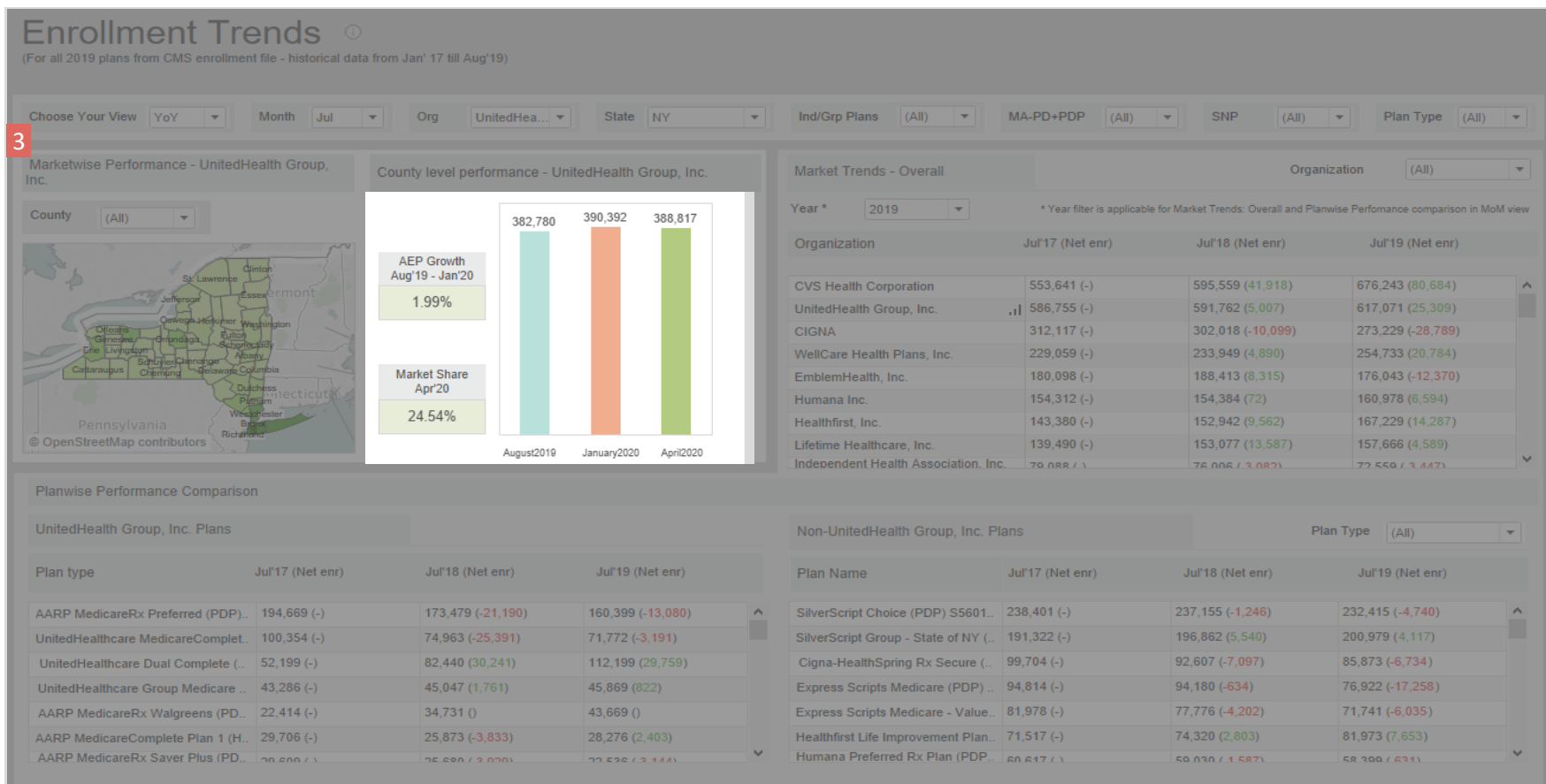


3.1 Market Performance- County view

Use the county drop-down filter or the heat map to select a county (one on multiple) to see the county level numbers along with other metrics like net AEP enrolments, AEP growth across regions



How can I use Enrollment Trends?- YoY view

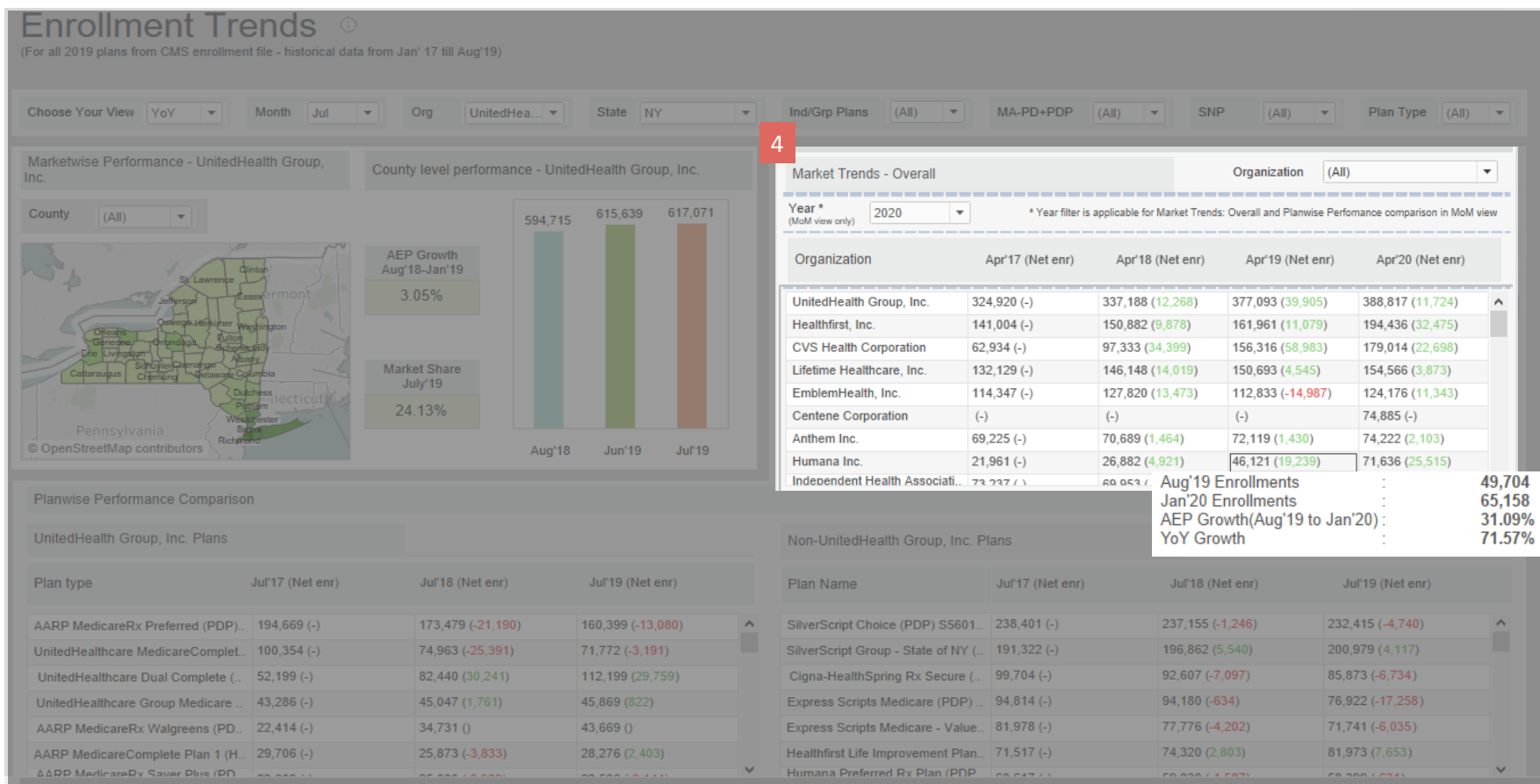


3.2 County level performance

This section gives the enrollment numbers (Aug'19, Jan'20, Current month), AEP growth (current and previous), Market share (as of current month and as of Aug'19)



How can I use Enrollment Trends?- YoY view

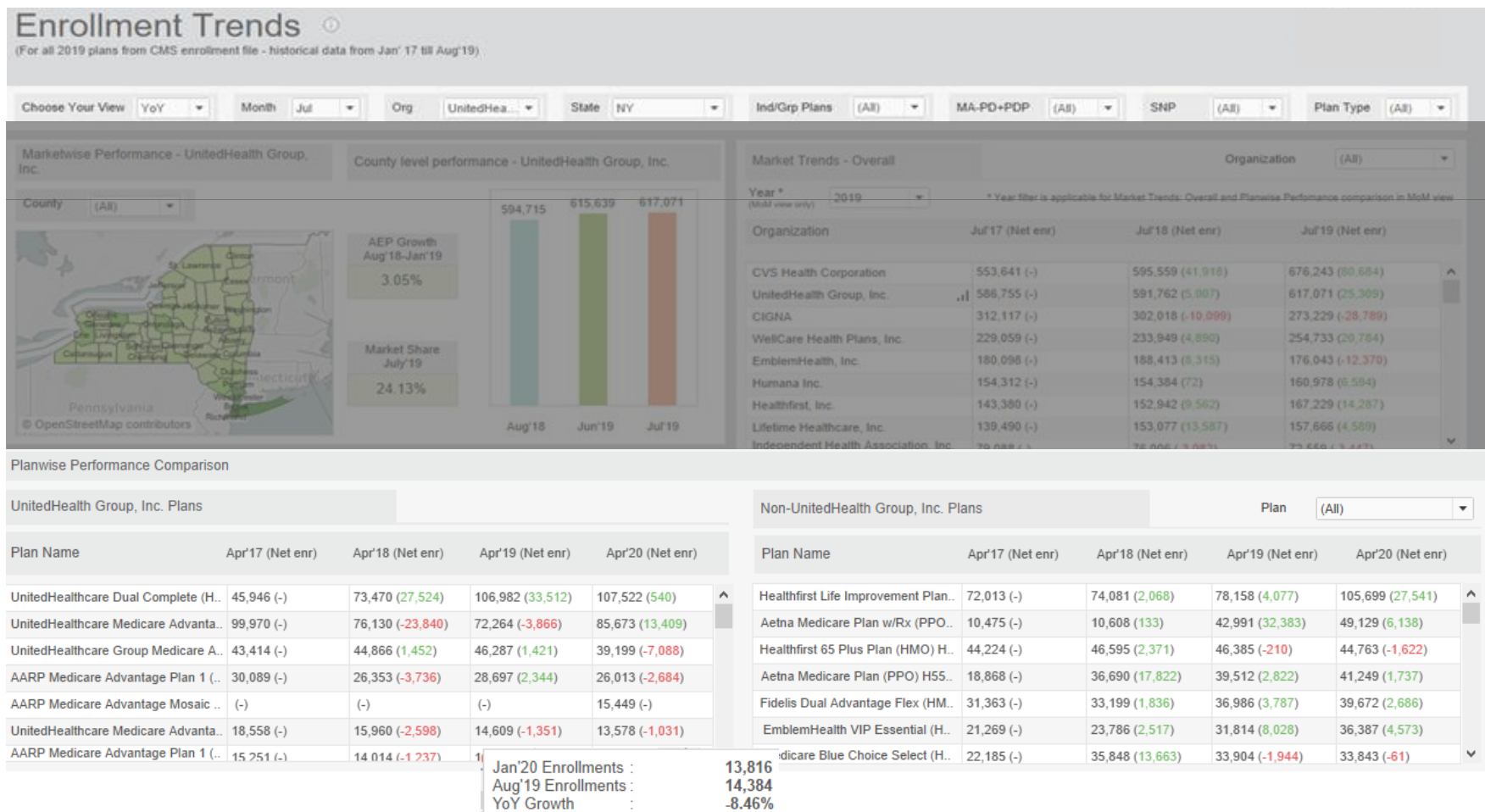


4. Market Trends- Overall

Gives Payor level trends for the years (2017-2020) and for the month selected. In addition, has Net enrollments, Aug'19 enrollments, AEP growth etc. in the tooltip. The organization filter available acts as a local filter for this table only. **Important disclaimer, the Year filter is applicable for Market Trends: Overall and Plan wise Performance comparison in MoM view only**



How can I use Enrollment Trends?- YoY view



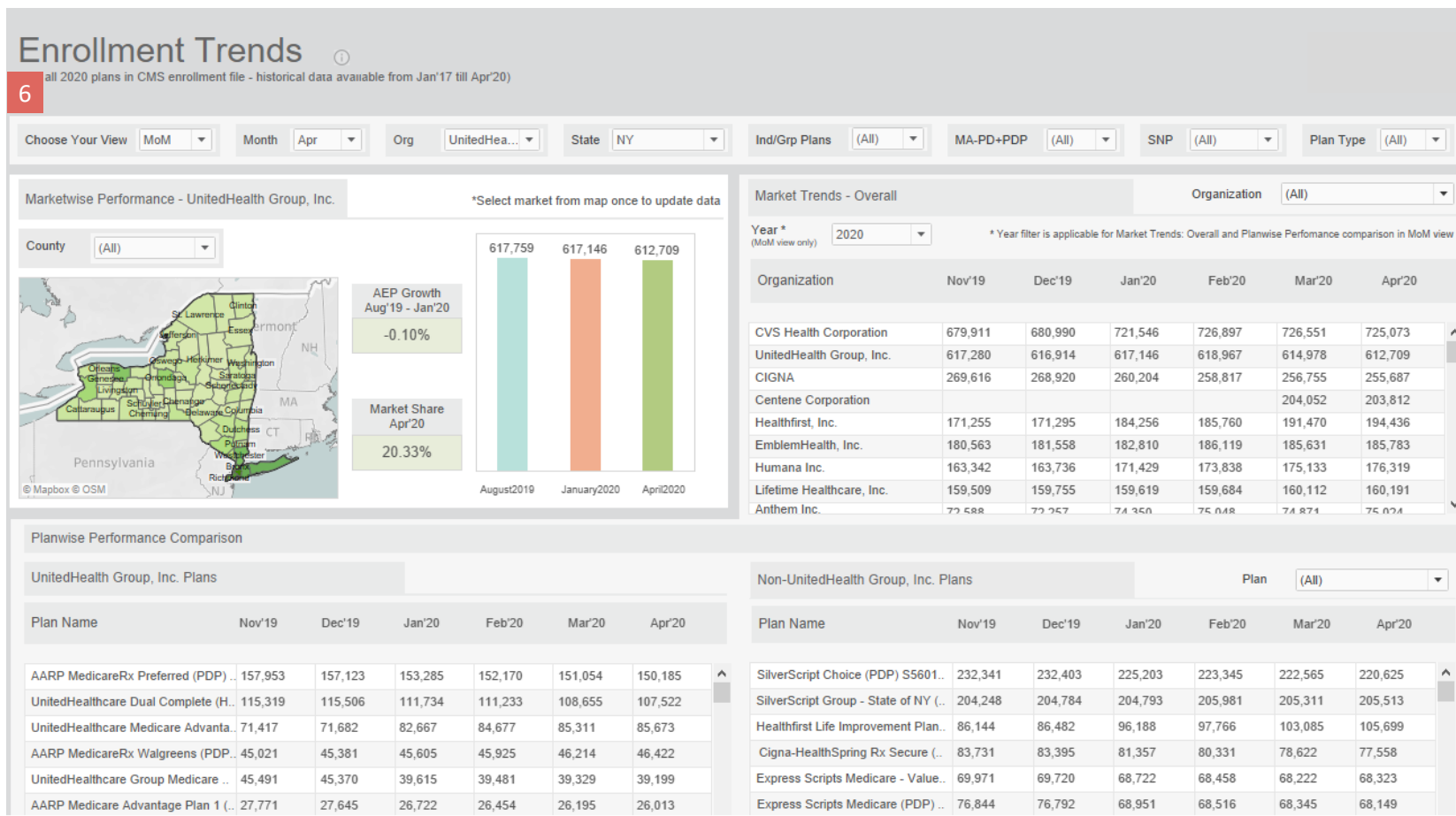
5. Plan wise performance comparison

This section allows you to view the plan level enrolment numbers for your plans vs your competitors plan (actuals and net enrolment). The plan local filter is provided to select specific competitor plans you want to look at. Information like YoY growth, net enrollments, Jan enrollments are provided in the tooltip on hover



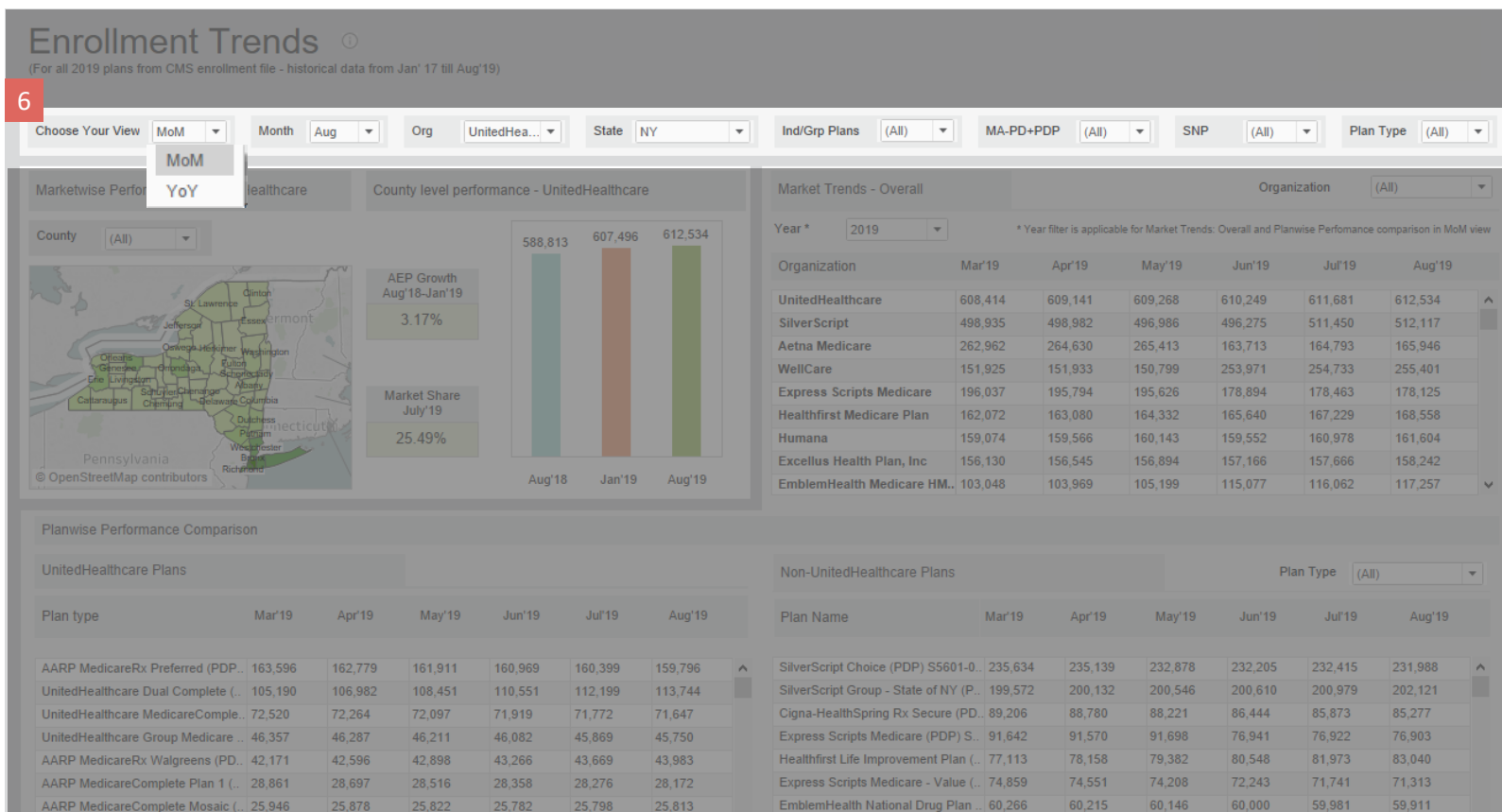
How can I use Enrollment Trends?- MoM view

The default view is YoY for your organization at a State level. Follow these steps to gain insights from this report:





How can I use Enrollment Trends?- MoM view



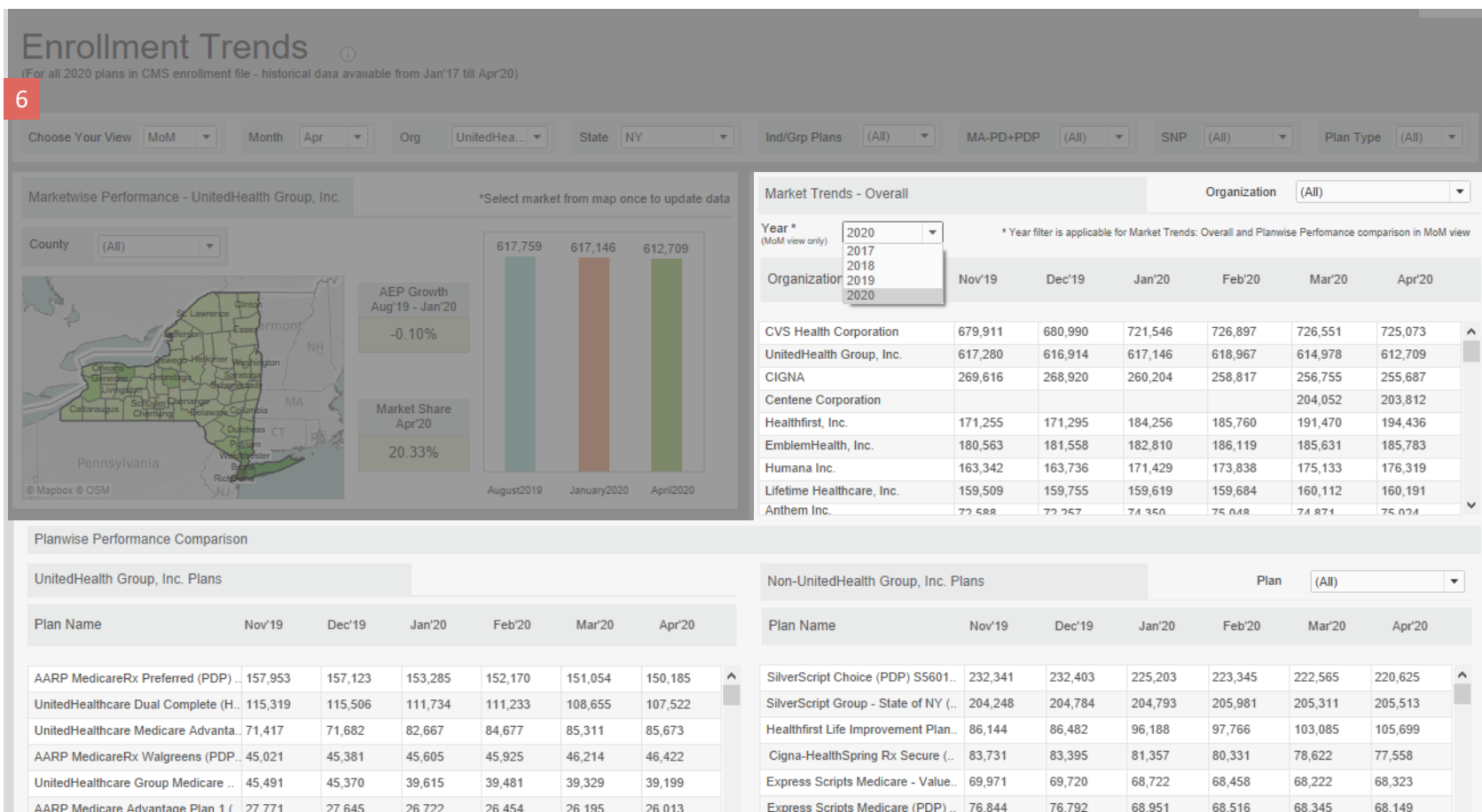
6.1 Choose your view (MoM)

Select the view as MoM and change other filters, if needed, and all the charts and numbers will be changed to MoM i.e. the month and year selected along with previous 5 months from that month



How can I use Enrollment Trends?- MoM view

6



6.2 Choose the year

Select the year from the drop-down filter (2017-2020) and this acts as local filter for Market Trends and plan wise performance comparison sections. For the year and month selected, the tables gives the enrollment numbers for that month-year and previous 5 months from that

An elderly couple is sitting on a wooden park bench. The woman on the left is wearing a grey patterned dress and is focused on reading a newspaper. The man on the right is wearing a light blue jacket, a red shirt, white trousers, a fedora, and sunglasses. He is smiling and also reading a newspaper. The background shows a park setting with trees and a path. The entire image has a semi-transparent purple overlay.

Thank You

