

September 21, 2023


Ex Parte Roundtable

Summary of state, federal, and expert viewpoints

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Medicaid and CHIP Payment and Access Commission

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Overview

- Background
- Roundtable
- Key takeaways
- Opportunities for improvement
- Developments in ex parte



Background

- States must complete redeterminations by checking available data prior to requesting information from beneficiaries, a process known as ex parte renewals
- Given the magnitude of the unwinding, the Centers for Medicare & Medicaid Services (CMS), states, and other stakeholders have renewed attention on improving ex parte renewal rates
- To better understand the barriers and possible opportunities to improve ex parte renewals, MACPAC contracted with Mathematica to conduct a roundtable

Roundtable

- The virtual roundtable was held on June 27 and 29, 2023
- Attendees included:
 - CMS representatives
 - Representatives from six state Medicaid agencies
 - Policy experts
 - Beneficiary advocates
 - IT system vendor
- MACPAC staff and Commissioners attended as observers

Key Takeaways

- States need to access a variety of data sources to successfully conduct ex parte renewals
- Ex parte renewals can be challenging for some populations in part due to eligibility criteria that are more difficult to verify electronically
- Ex parte efforts are less likely to be hindered by technological limitations than they are by limited resources and competing priorities
- The level of integration between Medicaid eligibility systems and other health and human services programs and the use of automation can create efficiencies in the process

Opportunities for Improvement

| Suggestion | CMS | States | Vendors |
|--|-----|--------|---------|
| Increasing transparency around policies, processes, and data | ✓ | ✓ | ✓ |
| Assessing current approaches for compliance | ✓ | ✓ | ✓ |
| Providing further guidance and technical assistance | ✓ | — | — |
| Supporting forums for shared learning | ✓ | — | ✓ |
| Making unwinding-related flexibilities permanent | ✓ | — | — |

Notes: CMS is Centers for Medicare & Medicaid Services

Developments in Ex Parte

- CMS letter to states highlighting the need to conduct ex parte renewals at an individual, rather than a household, level
- Future efforts from the agency may include additional technical assistance or guidance
- Staff intend to publish an issue brief with the findings from the roundtable in the coming weeks

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