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**OA/ID Number:** 52166  
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12-28-00 [Medicare - 2000]

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**Funchess, Roxy**

**From:** Sandra M. Foote [smfoote@gwu.edu]  
**Sent:** Tuesday, December 19, 2000 1:20 PM  
**To:** funchr@tirr.tmc.edu  
**Subject:** Data on < age 65 dual eligibles

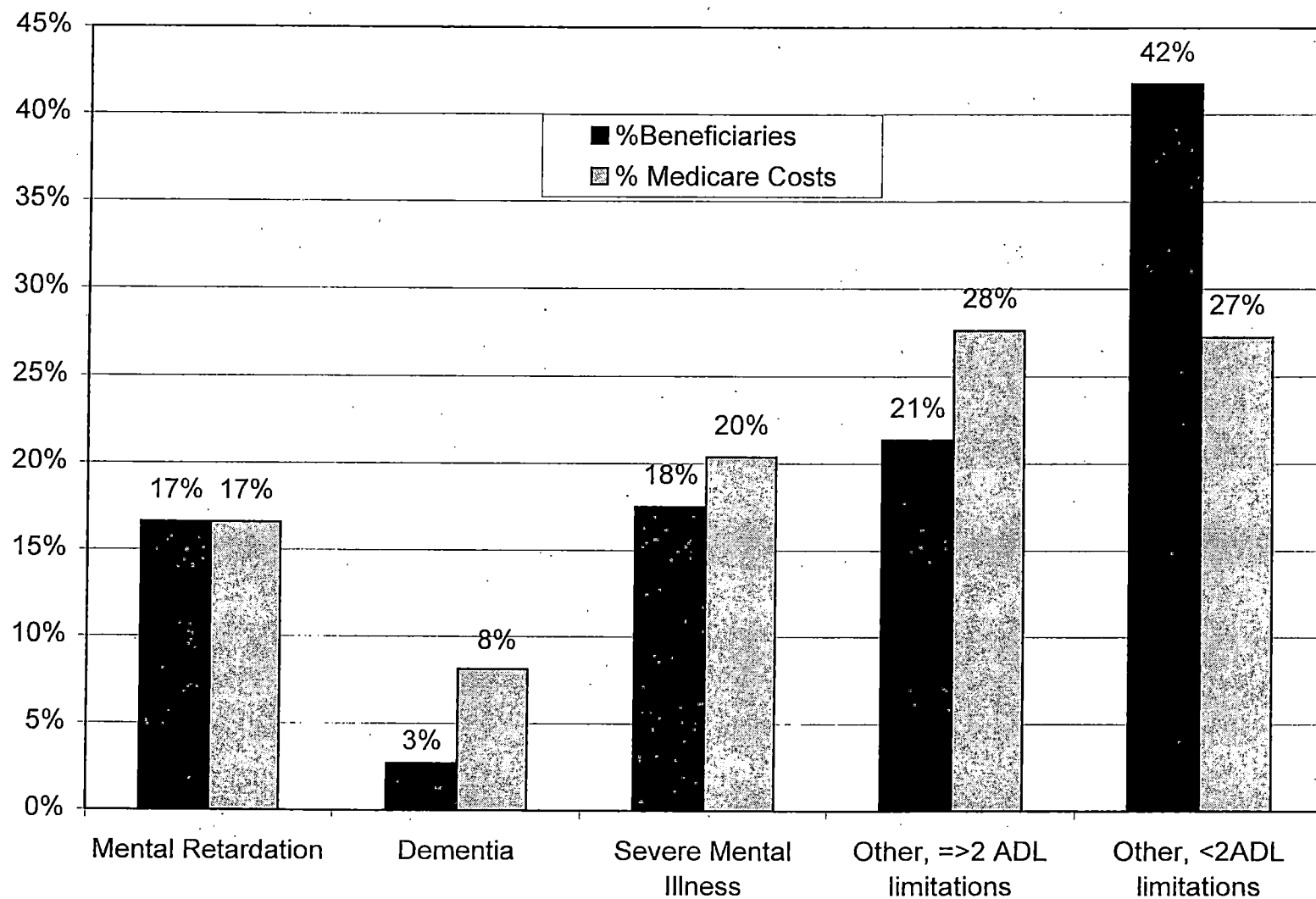
Roxie, The data Lex wanted is in Exhibit 3 of the attached Excel file. He wanted to know about the number and distribution of dual eligible Medicare beneficiaries under age 65. These estimates are based on 1994-96 Medicare Current Beneficiary Survey data. The population is now probably 15-20% bigger than in this analysis.



Exhibits1210.xls

Hope this helps. Sandy

**Exhibit 1: Medicare Beneficiaries < Age 65 and Their Medicare Costs by Disability Category, 1995 est.**



**Exhibit 2: Medicare Beneficiaries < Age 65 and Healthcare Costs by Disability Type, 1995 est.**

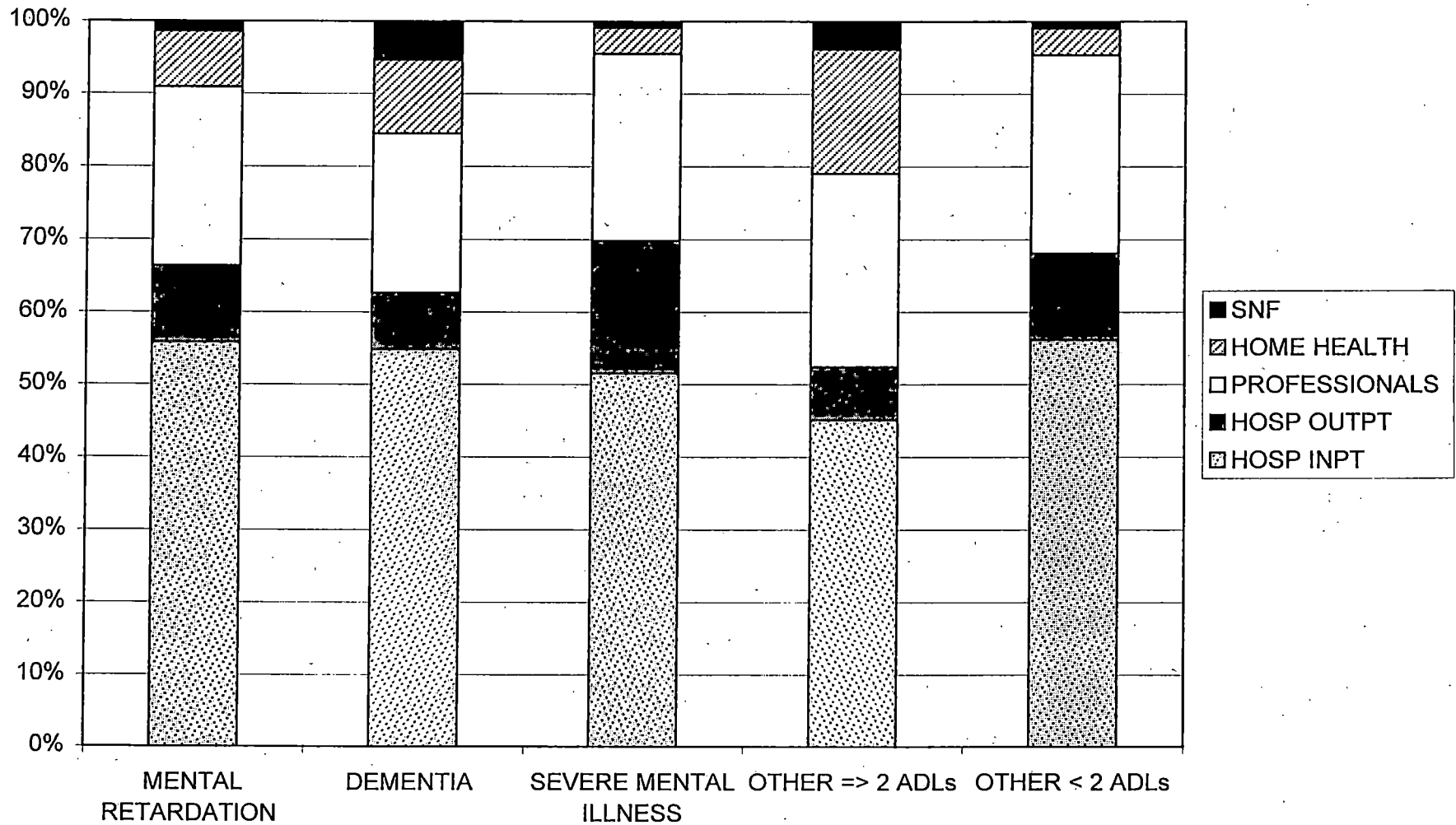
| DISABILITY CATEGORY                        | BENEFICIARIES | MEDICARE<br>COSTS/YEAR<br>\$ (BILLIONS) | MEDICARE<br>COSTS<br>\$/PERSON/YR | ALL PAYERS<br>\$/PERSON/YR | MEDICAID<br>ELIGIBLE<br>% PERSONS | FACILITY RESIDENT<br>FULL OR PART YR<br>% PERSONS |
|--------------------------------------------|---------------|-----------------------------------------|-----------------------------------|----------------------------|-----------------------------------|---------------------------------------------------|
| Beneficiaries with:                        |               |                                         |                                   |                            |                                   |                                                   |
| Mental Retardation (MR)                    | 687027        | 2.63                                    | 3,827                             | 19,990                     | 73%                               | 31%                                               |
| Dementia                                   | 112258        | 1.29                                    | 11,488                            | 24,947                     | 59%                               | 29%                                               |
| Severe Mental Illness<br>no MR or dementia | 724975        | 3.23                                    | 4,454                             | 10,755                     | 53%                               | 8%                                                |
| Subtotal                                   | 1524260       | 7.15                                    | 4,689                             | 15,963                     | 62%                               | 20%                                               |
| Other Beneficiaries with:                  |               |                                         |                                   |                            |                                   |                                                   |
| 2+ ADL limitations                         | 883940        | 4.38                                    | 4,957                             | 11,733                     | 31%                               | 5%                                                |
| < 2 ADL limitations                        | 1728540       | 4.32                                    | 2,500                             | 5,144                      | 32%                               | 0%                                                |
| Subtotal, Other                            | 2612480       | 8.7                                     | 3,331                             | 7,373                      | 32%                               | 2%                                                |
| All Beneficiaries                          | 4136740       | 15.85                                   | 3,832                             | 10,538                     | 43%                               | 8%                                                |
| Disability Combinations:                   |               |                                         |                                   |                            |                                   |                                                   |
| 2+ ADLs & Severe Mental Illness            | 182929        | 1.63                                    | 8,888                             | 22,894                     | 50%                               | 21%                                               |
| 2+ ADLs & Mental Retardation               | 196148        | 1.32                                    | 6,726                             | 40,602                     | 81%                               | 52%                                               |
| MR & Severe Mental Illness                 | 190674        | 1.43                                    | 7,505                             | 22,196                     | 66%                               | 31%                                               |

**EXHIBIT 3: MEDICARE BENEFICIARIES < AGE 65 BY MEDICAID ELIGIBILITY, 1995 est.**

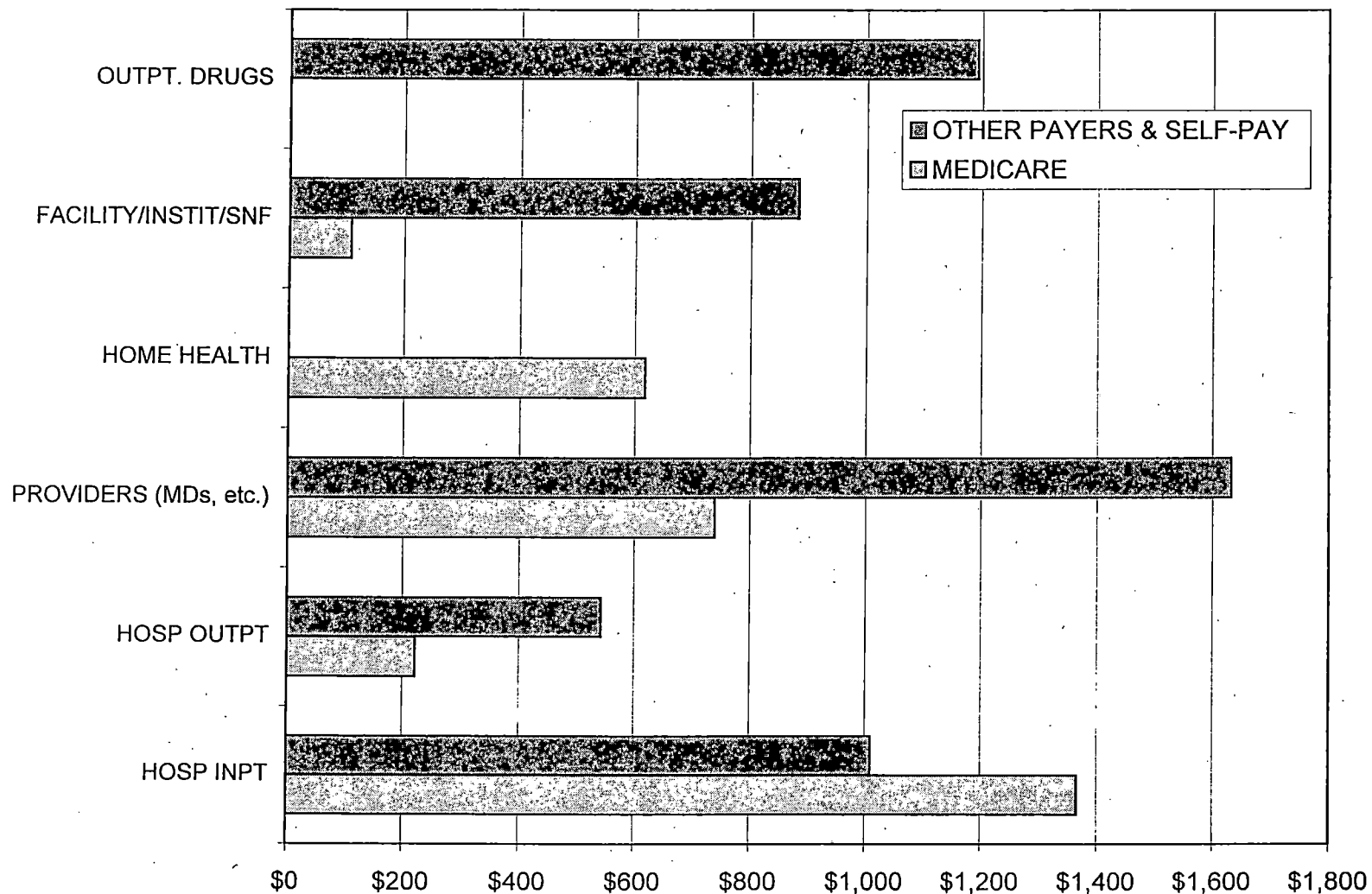
| DISABILITY CATEGORY                               | PERSONS<br># | MEDICARE<br>\$/PERSON/YR | MEDICAID<br>\$/PERSON/YR | OUT-OF-POCKET<br>\$/PERSON/YR | OTHER PAYERS<br>\$/PERSON/YR | TOTAL<br>\$/PERSON/YR |
|---------------------------------------------------|--------------|--------------------------|--------------------------|-------------------------------|------------------------------|-----------------------|
| <b><u>Non-Medicaid Eligible Beneficiaries</u></b> |              |                          |                          |                               |                              |                       |
| All                                               | 2,353,648    | 2,879                    | 0                        | 1,532                         | 2,907                        | 7,318                 |
| Beneficiaries with:                               |              |                          |                          |                               |                              |                       |
| Mental Retardation                                | 188,440      | 4,571                    | 0                        | 1,503                         | 5,501                        | 11,575                |
| Severe Mental Illness*                            | 339,258      | 3,175                    | 0                        | 1,914                         | 3,861                        | 8,950                 |
| Other Beneficiaries:                              |              |                          |                          |                               |                              |                       |
| 2+ ADL limitations                                | 613,048      | 3,082                    | 0                        | 2,175                         | 3,398                        | 8,655                 |
| < 2 ADL limitations                               | 1,166,908    | 2,146                    | 0                        | 982                           | 1,734                        | 4,862                 |
| <b><u>Dual- Eligible Beneficiaries</u></b>        |              |                          |                          |                               |                              |                       |
| All                                               | 1,783,092    | 5,090                    | 6,316                    | 1,251                         | 2,132                        | 14,789                |
| Beneficiaries with:                               |              |                          |                          |                               |                              |                       |
| Mental Retardation                                | 498,587      | 3,546                    | 12,906                   | 1,833                         | 4,886                        | 23,171                |
| Severe Mental Illness*                            | 385,716      | 5,579                    | 3,292                    | 1,190                         | 2,282                        | 12,342                |
| Other Beneficiaries:                              |              |                          |                          |                               |                              |                       |
| 2+ ADL limitations                                | 270,892      | 9,198                    | 7,089                    | 1,607                         | 804                          | 18,699                |
| < 2 ADL limitations                               | 561,632      | 3,238                    | 1,790                    | 385                           | 318                          | 5,730                 |

\*Excludes those with mental retardation or dementia

**Exhibit 4: Percent Distribution of Medicare Expenditures by Service Type for Beneficiaries < Age 65, 1995 est.**



**Exhibit 5: Per Capita Health Care Costs of Medicare Beneficiaries < Age 65 not eligible for Medicaid with 2+ ADLs, 1995 est.**



**Exhibit 2: Medicare Fee For Service Beneficiaries < Age 65 and Costs by Disability Type, 1995 est.**

| DISABILITY CATEGORY                         | BENEFICIARIES    |             | MEDICARE<br>COST/YEAR |             | AVERAGE<br>MEDICARE | AVERAGE                    | MEDICAID              |
|---------------------------------------------|------------------|-------------|-----------------------|-------------|---------------------|----------------------------|-----------------------|
|                                             | #                | %           | \$ BILLIONS           | %           | \$/PERSON/YR        | ALL PAYERS<br>\$/PERSON/YR | ELIGIBLE<br>% PERSONS |
| <b>Beneficiaries with:</b>                  |                  |             |                       |             |                     |                            |                       |
| Mental Retardation (MR)                     | 687,027          | 17%         | 2.63                  | 17%         | 3,827               | 19,990                     | 73%                   |
| Dementia, no MR                             | 112,258          | 3%          | 1.29                  | 8%          | 11,488              | 24,947                     | 59%                   |
| Severe Mental Illness,<br>no MR or dementia | 724,974          | 18%         | 3.23                  | 20%         | 4,454               | 10,755                     | 53%                   |
| Subtotal                                    | 1,524,260        | 37%         | 7.15                  | 45%         | 4,689               | 15,963                     | 62%                   |
| <b>Other Beneficiaries:</b>                 |                  |             |                       |             |                     |                            |                       |
| 2+ ADL limitations                          | 883,940          | 21%         | 4.38                  | 28%         | 4,957               | 11,733                     | 31%                   |
| < 2 ADL limitations                         | 1,728,540        | 42%         | 4.32                  | 27%         | 2,500               | 5,144                      | 32%                   |
| Subtotal, Other                             | 2,612,480        | 63%         | 8.70                  | 55%         | 3,331               | 7,373                      | 32%                   |
| <b>All Beneficiaries</b>                    | <b>4,136,740</b> | <b>100%</b> | <b>15.85</b>          | <b>100%</b> | <b>3,832</b>        | <b>10,538</b>              | <b>43%</b>            |
| <b>Combinations:</b>                        |                  |             |                       |             |                     |                            |                       |
| 2+ADLs & Severe Mental Illness              | 182,929          | 4%          | 1.63                  | 10%         | 8,888               | 22,894                     | 50%                   |
| 2+ ADLs & MR                                | 196,148          | 8%          | 1.32                  | 8%          | 6,726               | 40,602                     | 81%                   |
| MR & Severe Mental Illness                  | 190,674          | 9%          | 1.43                  | 9%          | 7,505               | 22,196                     | 66%                   |



|                |                   |                |                  |          |          |          |
|----------------|-------------------|----------------|------------------|----------|----------|----------|
| MC \$/Yr       |                   | POP            |                  | AA_CARE  | AA_TOT   |          |
| 2,629,360,772  |                   |                |                  | 3831.807 | 10538.35 | 0.431038 |
| 1,289,644,089  | All               | 4136740.07     |                  |          |          |          |
| 3,228,766,215  | Disability Catego | %Beneficiaries | % Medicare Costs |          |          |          |
| -              | Mental Retardati  | 17%            | 17%              | 3827.157 | 19990.44 | 0.725717 |
| 7,147,770,954  | Dementia          | 3%             | 8%               | 11488.18 | 24946.97 | 0.590279 |
| -              | Severe Mental II  | 18%            | 20%              | 4453.63  | 10754.8  | 0.532041 |
| 4,381,314,329  | Other, =>2 ADL    | 21%            | 28%              | 4956.574 | 11733.09 | 0.30646  |
| 4,322,103,381  | Other, <2ADL lim  | 42%            | 27%              | 2500.436 | 5144.003 | 0.324917 |
| 8,703,417,994  | >=2ADL+DD         | 196147.58      |                  | 6726.27  | 40601.98 | 0.814104 |
| 15,851,189,379 | >=2ADL+MI         | 182928.62      |                  | 8888.491 | 22893.5  | 0.50139  |
| -              | DD+MI             | 190674.1067    |                  | 7504.58  | 22196.19 | 0.66406  |
| -              | Subtotal, all Men | 1524260.047    |                  | 4689.34  | 15962.78 | 0.623626 |
| 1,625,959,359  | Subtotal, No Men  | 2612480.023    |                  | 3331.477 | 7373.439 | 0.318672 |
| 1,319,341,594  |                   |                |                  |          |          |          |
| 1,430,929,057  |                   |                |                  |          |          |          |