

Updated Estimates of Site Neutrality and Evaluation of Cassidy-Hassan Framework

SUPPLEMENTAL EXHIBIT: State Impacts of Site Neutrality (2025-2034; Corresponding to Tables 1-3)

May 19, 2025

ACTUARIAL
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Section 1: Impact of Comprehensive Site Neutrality

	Medicare Savings	Medicaid Duals Savings	ACA Marketplace Savings	Total Federal Savings	Beneficiary Savings - Part B Premiums	Beneficiary Savings - Cost Sharing	Total Beneficiary Savings	Beneficiary Savings - Part B Premiums	Beneficiary Savings - Cost Sharing	Total Beneficiary Savings
State	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ per bene-year	\$ per bene-year	\$ per bene-year
National	\$126,122	\$4,387	\$17,044	\$147,553	\$43,192	\$36,714	\$79,906	\$62	\$53	\$114
Alabama	\$2,247	\$47	\$389	\$2,683	\$730	\$646	\$1,376	\$62	\$55	\$117
Alaska	\$110	\$9	\$13	\$133	\$73	\$39	\$112	\$62	\$34	\$96
Arizona	\$813	\$91	\$186	\$1,090	\$966	\$385	\$1,351	\$62	\$25	\$87
Arkansas	\$1,524	\$33	\$162	\$1,719	\$444	\$427	\$871	\$62	\$60	\$122
California	\$7,981	\$839	\$1,109	\$9,930	\$4,491	\$2,701	\$7,192	\$62	\$38	\$99
Colorado	\$1,568	\$45	\$174	\$1,787	\$669	\$485	\$1,154	\$62	\$45	\$107
Connecticut	\$1,827	\$34	\$116	\$1,977	\$487	\$502	\$989	\$62	\$64	\$126
Delaware	\$413	\$9	\$36	\$458	\$157	\$124	\$280	\$62	\$49	\$111
District of Columbia	\$94	\$11	\$9	\$114	\$64	\$34	\$98	\$62	\$33	\$95
Florida	\$5,627	\$247	\$3,144	\$9,018	\$3,331	\$1,940	\$5,271	\$62	\$36	\$98
Georgia	\$2,709	\$75	\$955	\$3,739	\$1,257	\$859	\$2,117	\$62	\$43	\$105
Hawaii	\$335	\$23	\$16	\$374	\$199	\$116	\$315	\$62	\$36	\$98
Idaho	\$1,050	\$14	\$87	\$1,151	\$253	\$283	\$536	\$62	\$70	\$132
Illinois	\$5,949	\$180	\$366	\$6,495	\$1,568	\$1,631	\$3,199	\$62	\$65	\$127
Indiana	\$3,358	\$83	\$255	\$3,696	\$893	\$922	\$1,815	\$62	\$65	\$126
Iowa	\$1,636	\$31	\$80	\$1,748	\$445	\$452	\$897	\$62	\$63	\$125
Kansas	\$1,119	\$22	\$115	\$1,256	\$383	\$326	\$708	\$62	\$53	\$115
Kentucky	\$2,633	\$47	\$71	\$2,751	\$646	\$712	\$1,358	\$62	\$69	\$131
Louisiana	\$2,086	\$62	\$176	\$2,324	\$616	\$586	\$1,202	\$62	\$59	\$121
Maine	\$1,144	\$27	\$58	\$1,229	\$246	\$302	\$547	\$62	\$77	\$139
Massachusetts	\$5,645	\$145	\$403	\$6,194	\$947	\$1,431	\$2,378	\$62	\$95	\$156
Michigan	\$5,989	\$146	\$435	\$6,571	\$1,464	\$1,617	\$3,082	\$62	\$69	\$131
Minnesota	\$3,446	\$65	\$110	\$3,621	\$743	\$909	\$1,652	\$62	\$77	\$138
Mississippi	\$1,200	\$40	\$225	\$1,465	\$421	\$351	\$772	\$62	\$52	\$114
Missouri	\$3,733	\$93	\$340	\$4,166	\$866	\$998	\$1,864	\$62	\$72	\$134
Montana	\$770	\$9	\$56	\$834	\$170	\$204	\$374	\$62	\$75	\$137
Nebraska	\$651	\$19	\$67	\$737	\$249	\$195	\$444	\$62	\$49	\$111
Nevada	\$189	\$20	\$50	\$259	\$389	\$125	\$513	\$62	\$20	\$82
New Hampshire	\$973	\$10	\$61	\$1,044	\$222	\$259	\$481	\$62	\$73	\$135
New Jersey	\$2,766	\$106	\$329	\$3,201	\$1,144	\$848	\$1,992	\$62	\$46	\$108
New Mexico	\$910	\$28	\$53	\$991	\$302	\$263	\$565	\$62	\$54	\$116
New York	\$7,534	\$494	\$250	\$8,279	\$2,547	\$2,186	\$4,733	\$62	\$54	\$115
North Carolina	\$3,870	\$133	\$801	\$4,804	\$1,439	\$1,151	\$2,590	\$62	\$50	\$112
North Dakota	\$843	\$6	\$44	\$892	\$96	\$204	\$300	\$62	\$133	\$195
Ohio	\$7,758	\$139	\$557	\$8,454	\$1,649	\$2,042	\$3,690	\$62	\$77	\$139
Oklahoma	\$2,134	\$49	\$269	\$2,452	\$523	\$577	\$1,100	\$62	\$69	\$131
Oregon	\$1,266	\$60	\$90	\$1,416	\$617	\$408	\$1,025	\$62	\$41	\$103
Pennsylvania	\$7,229	\$198	\$437	\$7,863	\$1,922	\$1,985	\$3,907	\$62	\$65	\$126
Rhode Island	\$483	\$20	\$33	\$536	\$158	\$139	\$297	\$62	\$55	\$117
South Carolina	\$2,109	\$75	\$475	\$2,658	\$791	\$629	\$1,419	\$62	\$50	\$112
South Dakota	\$1,195	\$5	\$58	\$1,259	\$128	\$287	\$415	\$62	\$141	\$202
Tennessee	\$2,221	\$81	\$492	\$2,794	\$963	\$690	\$1,653	\$62	\$45	\$107
Texas	\$6,358	\$179	\$2,633	\$9,170	\$3,068	\$2,042	\$5,111	\$62	\$42	\$103
Utah	\$816	\$21	\$301	\$1,138	\$299	\$242	\$540	\$62	\$51	\$112
Vermont	\$294	\$10	\$22	\$326	\$107	\$87	\$194	\$62	\$51	\$112
Virginia	\$2,829	\$79	\$380	\$3,289	\$1,090	\$850	\$1,940	\$62	\$49	\$111
Washington	\$2,996	\$72	\$220	\$3,287	\$988	\$864	\$1,852	\$62	\$55	\$116
West Virginia	\$1,506	\$23	\$55	\$1,584	\$298	\$392	\$689	\$62	\$82	\$144
Wisconsin	\$4,473	\$82	\$239	\$4,794	\$851	\$1,156	\$2,007	\$62	\$85	\$147
Wyoming	\$158	\$4	\$22	\$184	\$82	\$52	\$134	\$62	\$40	\$101

Notes: Results are from ARC's site neutrality simulation model, calibrated to the 2023 Medicare 5% sample Limited Data Set (LDS). Projections are calibrated to the 2024 Medicare Trustees Report. Federal savings reflect reductions in spending and do not account for potential increases in tax revenues resulting from lower employer-sponsored insurance costs (see discussion on page 3 of the main text). Part B premium savings amounts correspond to beneficiaries who pay the standard monthly Part B premium. Comprehensive site neutrality is defined as site-neutral payments for all services at off-campus HOPDs and select services at on-campus HOPDs (see discussion on page 2 of the main text). Maryland is excluded from the table due to its Medicare waiver exemption from the OPSS.

Updated Estimates of Site Neutrality and Evaluation of Cassidy-Hassan Framework

SUPPLEMENTAL EXHIBIT: State Impacts of Site Neutrality (2025-2034; Corresponding to Tables 1-3)

May 19, 2025

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Section 2: Impact of Off-Campus HOPD Site Neutrality

	Medicare Savings	Medicaid Duals Savings	ACA Marketplace Savings	Total Federal Savings	Beneficiary Savings - Part B Premiums	Beneficiary Savings - Cost Sharing	Total Beneficiary Savings	Beneficiary Savings - Part B Premiums	Beneficiary Savings - Cost Sharing	Total Beneficiary Savings
State	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ millions	\$ per bene-year	\$ per bene-year	\$ per bene-year
National	\$24,149	\$840	\$3,263	\$28,253	\$8,270	\$7,030	\$15,300	\$12	\$10	\$22
Alabama	\$264	\$9	\$53	\$326	\$140	\$87	\$227	\$12	\$7	\$19
Alaska*	(\$6)	\$2	\$1	(\$4)	\$14	\$2	\$15	\$12	\$1	\$13
Arizona*	(\$58)	\$17	\$13	(\$27)	\$185	\$27	\$212	\$12	\$2	\$14
Arkansas	\$139	\$6	\$18	\$163	\$85	\$48	\$133	\$12	\$7	\$19
California	\$1,249	\$161	\$188	\$1,598	\$860	\$455	\$1,315	\$12	\$6	\$18
Colorado	\$125	\$9	\$20	\$154	\$128	\$55	\$183	\$12	\$5	\$17
Connecticut	\$704	\$6	\$40	\$750	\$93	\$173	\$267	\$12	\$22	\$34
Delaware	\$132	\$2	\$10	\$144	\$30	\$35	\$65	\$12	\$14	\$26
District of Columbia	\$2	\$2	\$1	\$5	\$12	\$3	\$15	\$12	\$3	\$15
Florida	\$1,401	\$47	\$720	\$2,168	\$638	\$441	\$1,079	\$12	\$8	\$20
Georgia	\$583	\$14	\$199	\$797	\$241	\$178	\$419	\$12	\$9	\$21
Hawaii	\$19	\$4	\$2	\$26	\$38	\$12	\$51	\$12	\$4	\$16
Idaho	\$195	\$3	\$16	\$214	\$48	\$53	\$101	\$12	\$13	\$25
Illinois	\$790	\$34	\$53	\$878	\$300	\$236	\$536	\$12	\$9	\$21
Indiana	\$585	\$16	\$46	\$646	\$171	\$164	\$335	\$12	\$11	\$23
Iowa	\$186	\$6	\$10	\$203	\$85	\$59	\$144	\$12	\$8	\$20
Kansas	\$128	\$4	\$16	\$148	\$73	\$44	\$117	\$12	\$7	\$19
Kentucky	\$465	\$9	\$13	\$487	\$124	\$128	\$252	\$12	\$12	\$24
Louisiana	\$115	\$12	\$15	\$142	\$118	\$50	\$168	\$12	\$5	\$17
Maine	\$257	\$5	\$13	\$275	\$47	\$66	\$113	\$12	\$17	\$29
Massachusetts	\$1,207	\$28	\$86	\$1,321	\$181	\$302	\$483	\$12	\$20	\$32
Michigan	\$1,687	\$28	\$116	\$1,831	\$280	\$428	\$708	\$12	\$18	\$30
Minnesota	\$234	\$13	\$10	\$256	\$142	\$81	\$224	\$12	\$7	\$19
Mississippi	\$149	\$8	\$32	\$188	\$81	\$50	\$130	\$12	\$7	\$19
Missouri	\$728	\$18	\$67	\$812	\$166	\$194	\$360	\$12	\$14	\$26
Montana	\$15	\$2	\$3	\$20	\$33	\$10	\$43	\$12	\$4	\$16
Nebraska	\$58	\$4	\$8	\$70	\$48	\$23	\$70	\$12	\$6	\$18
Nevada	\$9	\$4	\$7	\$20	\$74	\$18	\$92	\$12	\$3	\$15
New Hampshire	\$134	\$2	\$9	\$145	\$42	\$38	\$81	\$12	\$11	\$23
New Jersey	\$1,007	\$20	\$104	\$1,132	\$219	\$266	\$486	\$12	\$15	\$26
New Mexico	\$137	\$5	\$9	\$151	\$58	\$42	\$100	\$12	\$9	\$21
New York	\$2,597	\$95	\$77	\$2,769	\$488	\$671	\$1,158	\$12	\$16	\$28
North Carolina	\$954	\$25	\$187	\$1,166	\$276	\$267	\$542	\$12	\$12	\$23
North Dakota	\$178	\$1	\$9	\$189	\$18	\$43	\$61	\$12	\$28	\$40
Ohio	\$2,051	\$27	\$141	\$2,219	\$316	\$515	\$831	\$12	\$20	\$31
Oklahoma	\$310	\$9	\$42	\$361	\$100	\$89	\$189	\$12	\$11	\$22
Oregon	\$45	\$11	\$8	\$64	\$118	\$35	\$153	\$12	\$4	\$15
Pennsylvania	\$1,872	\$38	\$108	\$2,017	\$368	\$487	\$855	\$12	\$16	\$28
Rhode Island	\$89	\$4	\$6	\$99	\$30	\$26	\$56	\$12	\$10	\$22
South Carolina	\$224	\$14	\$62	\$300	\$151	\$81	\$232	\$12	\$6	\$18
South Dakota	\$55	\$1	\$3	\$60	\$25	\$17	\$42	\$12	\$8	\$20
Tennessee	\$268	\$15	\$70	\$353	\$184	\$98	\$282	\$12	\$6	\$18
Texas	\$1,000	\$34	\$445	\$1,479	\$588	\$343	\$931	\$12	\$7	\$19
Utah	\$123	\$4	\$49	\$176	\$57	\$39	\$96	\$12	\$8	\$20
Vermont	\$18	\$2	\$2	\$22	\$21	\$8	\$29	\$12	\$5	\$17
Virginia	\$470	\$15	\$66	\$551	\$209	\$147	\$356	\$12	\$8	\$20
Washington	\$729	\$14	\$51	\$793	\$189	\$199	\$388	\$12	\$13	\$24
West Virginia	\$35	\$4	\$3	\$42	\$57	\$20	\$77	\$12	\$4	\$16
Wisconsin	\$603	\$16	\$35	\$653	\$163	\$166	\$329	\$12	\$12	\$24
Wyoming*	(\$7)	\$1	\$1	(\$5)	\$16	\$2	\$18	\$12	\$1	\$13

Notes: Results are from ARC's site neutrality simulation model, calibrated to the 2023 Medicare 5% sample Limited Data Set (LDS). Projections are calibrated to the 2024 Medicare Trustees Report. Federal savings reflect reductions in spending and do not account for potential increases in tax revenues resulting from lower employer-sponsored insurance costs (see discussion on page 3 of the main text). Part B premium savings amounts correspond to beneficiaries who pay the standard monthly Part B premium. Comprehensive site neutrality is defined as site-neutral payments for all services at off-campus HOPDs and select services at on-campus HOPDs (see discussion on page 2 of the main text). Maryland is excluded from the table due to its Medicare waiver exemption from the OPSS.

* In states where only a small share of HOPD services occur off-campus, the in-state Medicare savings from site neutrality may not be enough to offset the reduction in the nationally determined Part B premium, resulting in a net negative federal impact for those states.