Trella Health

2026

Post-Acute Market Intelligence Report: 2026 Edition

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About Our Data Sources

As an Innovator in the Centers for Medicare & Medicaid Services' Virtual Research Data Center Program, Trella Health has access to 100% of Medicare Part A and Part B claims, as well as Medicare Advantage data. Findings in this report were derived from Medicare fee-for-service claims through Q4 2025, Medicare Advantage claims through Q4 2023, CMS Medicare Advantage Enrollment by Contract and State data, CMS Monthly Enrollment data through January 2026, and supplemental claims data.

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Scott Tapp

Chief Executive Officer, Trella Health

Trella Health



"At Trella Health, we believe better healthcare starts with informed decisions. That requires more than data alone. It requires actionable intelligence, connected workflows, and the ability to turn insight into impact.

This year's report captures a market at an inflection point. Medicare Advantage growth went flat for the first time in a decade. FFS home health and skilled nursing volumes are showing the first signs of a new baseline. Hospice continues to grow, and the report quantifies why earlier adoption matters for patients and for total cost of care. And the patients moving through post-acute care are growing more clinically complex.

These shifts are exactly why we built this report and why we keep innovating in our solutions. As Trella Health expands our AI-enabled intelligence and workflow platform, our focus remains clear: helping healthcare organizations strengthen clinical and business operations, drive high-quality care, and deliver healthier outcomes.

We hope this report serves as a valuable resource for your planning and decision-making, and for the first time, one you can explore interactively, down to the markets you serve.

Thank you for trusting Trella Health as a partner in navigating what's next.



— Scott Tapp, CEO

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Key trends shaping post-acute growth and performance

Medicare Advantage growth went flat for the first time in a decade	National Medicare Advantage penetration held at 55.4% through January 2026 after increasing by an average of 2.1 percentage points annually since 2017. Thirty states now have Medicare Advantage penetration above 50%, including 14 states above 60%.
Home health start-of-care performance differs widely across states	The average time from inpatient discharge to the start of home health care increased nationally to 3.3 days in 2025. Start times slowed in 39 states, with state averages ranging from 2.3 days to 6.5 days.
Earlier hospice adoption is associated with lower end-of-life Medicare spending	Patients with 121 or more days on hospice averaged a $29K lower total cost of care over their final six months than patients who never enrolled, $68K versus $97K.
Hospice admissions continue to accelerate	Fee-for-service hospice admissions increased 4.1% in 2025, rising from approximately 1.61M to 1.68M. Hospice admissions have now increased 18.5% nationally since 2019, although admissions growth varies considerably by state.
Skilled nursing admissions returned to growth	Fee-for-service skilled nursing admissions increased 1.7% to approximately 1.58M in 2025, marking its first annual increase since 2022. However, the recovery remains uneven, with admissions increasing in 27 states and declining in 24.
TEAM raises the stakes for post-acute referral relationships	Across the five TEAM surgical episodes, discharge patterns vary widely and average costs range from roughly $30K for joint replacement to $51.3K for coronary artery bypass graft procedures — underscoring the need for post-acute providers to demonstrate their value to hospital referral partners and support stronger care transitions.
Earlier hospice adoption is associated with lower end-of-life Medicare spending	Patients with 121 or more days on hospice averaged a $29K lower total cost of care over their final six months than patients who never enrolled — $68K versus $97K.

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Medicare Advantage

National Medicare Advantage Penetration

For nearly a decade, Medicare Advantage moved one way: up and to the right. That paused this year. Through January 2026, national MA penetration held at 55.4%, flat after gaining 18.7 points since 2017. January is only the first read on the year, not the full picture, but the shift is real and worth watching. For the first time in years, Fee-for-Service grew nearly as fast as MA (+348K vs. +361K). Underneath the flat line, penetration fell in 22 states, largely where carriers exited. Vermont is the sharpest — major plans didn't renew, and penetration collapsed from 33.5% to 13.7% in a year, sending 30,000+ beneficiaries back to Fee-for-Service.

MA penetration held at 55.4%, its first flat year in a decade

After averaging +2.1 points a year since 2017, national Medicare Advantage (MA) penetration didn't move from 2025 to January 2026.

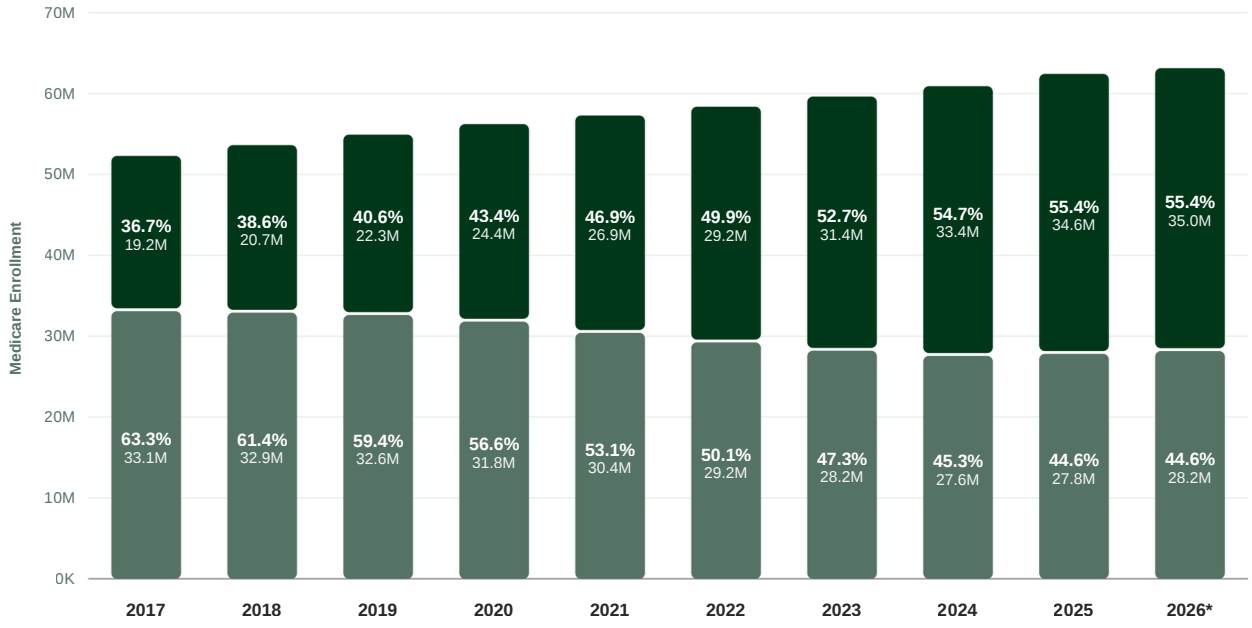
Total Medicare eligibility grew +710K, but split evenly

The Medicare-eligible population added about 710K beneficiaries from 2025 to Jan 2026, but for the first time in years the gain divided almost evenly: MA +361K, FFS +348K.

14 states now top 60% MA penetration

MA exceeds 50% in 30 states and 60% in 14, including Michigan, Alabama, Ohio, Florida, and North Carolina.

National Medicare-Eligible Enrollment by Medicare Type



ENROLLMENT TYPE

- Medicare Advantage (Parts A and B)
- Traditional Medicare (Parts A and B)

*2026 reflects the January 2026 enrollment snapshot; prior years are annual figures.

Source: CMS Medicare enrollment data · Data Timeframe: 2017 - January 2026

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Medicare Advantage Penetration by State

Medicare Advantage penetration is higher than in 2017 across 49 states, but the map is anything but uniform. Penetration spans a 64-point gap, from Michigan's 67.4% to Alaska's 3.1%, shaped by decades of plan availability, regional preference, and network economics. Thirty states now sit above 50% and 14 above 60%, while a handful of rural, low-density markets remain firmly Fee-for-Service.

30 states surpassed 50% MA penetration — 14 now top 60%

Thirty states exceed 50% MA penetration and 14 exceed 60%, led by Michigan (67.4%), Rhode Island (66.3%), and Alabama (66.2%), reflecting widespread saturation across diverse regions.

5 states have gained 28+ percentage points since 2017

Maine (+32.3), Connecticut (+30.5), Mississippi (+30.0), West Virginia (+29.6), and Kentucky (+28.7) led the nation, several moving from FFS-dominant to MA-majority in under a decade.

MA penetration ranges 64 points across states

From Michigan's 67.4% to Alaska's 3.1%, state-level penetration spans more than 64 percentage points. A handful of very-low states (AK, VT, WY) drag the national average down, but in most markets MA is the clear majority.

Medicare Advantage Penetration by State

National Takeaways

- The national average for MA Penetration stands at 55.4% — unchanged from the prior year
- Michigan leads all states at 67.4% — the highest in the nation
- Alaska ranks last at 3.1% — 52.3 percentage points below the national average
- State variation spans 64.3 percentage points — from 3.1% (Alaska) to 67.4% (Michigan)

MA PENETRATION

All 50 States + DC

55.4%

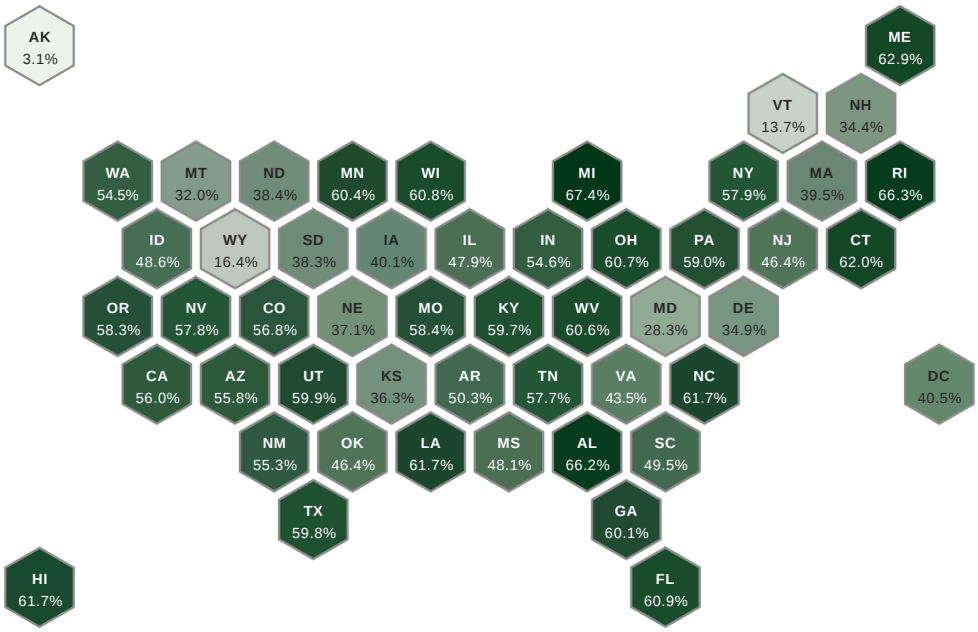
National Average

2023 | 52.7%

2024 | 54.7%

2025 | 55.4%

Jan 2026 | 55.4%



Source: CMS Medicare enrollment data · Data Timeframe: January 2026

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Medicare Advantage Post-Acute Care Reach by Payer

The ten largest Medicare Advantage payers control 81% of national MA enrollment, and with it, an outsized share of post-acute referrals. This view compares each payer's share of home health and SNF patients against its share of MA enrollment, exposing where a plan's post-acute footprint runs ahead of or behind its size. Figures reflect 2023, the latest year with payer-level utilization data.

The two largest payers control 45% of MA enrollment

UnitedHealth (25.3%) and Humana (19.7%) together held 45% of national MA enrollment in 2023, illustrating how significant these payers are in the national market and why it's essential for PAC agencies to work closely with them.

UnitedHealth and Humana use home health and SNF services more than their enrollment alone suggests

UnitedHealth and Humana combined amounted to 45% of enrollment but accounted for a higher proportion of home health patients (47.4%) and SNF patients (49.9%). This indicates these payers may have plan models that utilize home health and SNF services more than others — a key variable in building strong relationships with PAC partners.

Kaiser's SNF share sits below its enrollment share (−2.8 pp) — a care model difference, not a scale one

Kaiser accounted for 6.6% of MA enrollment but 3.8% of skilled nursing patients, the largest negative difference among the ten largest payers.

How Each MA Payer's Home Health and SNF Share Compares to Its Enrollment Share

Each payer's share of national home health and skilled nursing patients vs. its share of MA enrollment. The difference shows where a payer's post-acute mix sits relative to its size. Filter by plan type to compare HMO and PPO books. Ten largest payers, 2023.



How to read: A setting dot to the **right** of the enrollment dot means the payer serves a larger share of that setting's patients than its size alone would suggest. **UnitedHealth**'s share is above its enrollment share in both settings (+1.5 pp HH, +3.6 pp SNF). **Kaiser** — 100% HMO — is proportional on home health but lower in skilled nursing (−2.8 pp).

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MEDICARE ADVANTAGE ENROLLMENT (PARTS A & B) BY STATE AND YEAR

State	2023	2024	2025	Jan 2026
National	**31,436.9K**	**33,355.4K**	**34,626.8K**	**34,988.2K**
AK	2.9K	3.1K	3.6K	3.4K
AL	629.9K	664.2K	685.1K	696.1K
AR	287.4K	305.7K	318.2K	323.7K
AZ	717.9K	754.3K	783.0K	794.9K
CA	3,365.4K	3,508.5K	3,635.4K	3,677.1K
CO	508.3K	536.8K	558.2K	559.9K
CT	393.0K	417.6K	438.8K	439.0K
DC	29.7K	31.7K	33.3K	33.1K
DE	70.9K	78.2K	82.7K	82.3K
FL	2,748.0K	2,881.0K	2,968.6K	3,014.5K
GA	1,004.5K	1,065.9K	1,103.3K	1,120.0K
HI	158.8K	163.8K	166.9K	168.4K
IA	235.2K	254.6K	266.7K	264.6K
ID	177.8K	191.7K	203.3K	186.9K
IL	958.5K	1,029.5K	1,065.6K	1,078.3K
IN	634.7K	678.3K	706.9K	720.2K
KS	181.6K	195.9K	198.4K	203.1K
KY	499.9K	527.1K	543.0K	554.3K
LA	494.9K	523.7K	540.9K	551.7K
MA	480.9K	516.1K	535.2K	536.7K
MD	245.3K	275.3K	297.6K	289.3K
ME	203.8K	216.5K	225.6K	226.8K
MI	1,297.2K	1,385.0K	1,439.9K	1,462.7K
MN	646.2K	683.4K	710.9K	673.1K
MO	665.8K	705.8K	728.7K	741.4K
MS	249.1K	274.4K	287.4K	294.3K
MT	70.6K	77.2K	80.2K	80.3K
NC	1,142.8K	1,232.9K	1,298.5K	1,332.2K
ND	44.8K	50.6K	53.8K	54.1K
NE	120.0K	129.4K	133.4K	135.5K
NH	109.9K	119.4K	125.7K	110.8K
NJ	669.9K	711.7K	739.2K	754.4K
NM	219.9K	229.9K	233.8K	239.7K
NV	287.9K	305.8K	318.1K	324.8K
NY	1,923.0K	2,040.1K	2,114.2K	2,136.2K
OH	1,334.5K	1,403.2K	1,454.3K	1,463.8K
OK	301.1K	325.2K	339.8K	349.8K
OR	495.3K	516.5K	522.0K	522.4K
PA	1,480.5K	1,560.5K	1,625.1K	1,645.3K
RI	136.1K	143.7K	148.2K	150.1K
SC	517.8K	558.0K	582.7K	590.0K
SD	64.8K	71.3K	75.8K	72.2K
TN	738.4K	776.5K	800.2K	812.9K
TX	2,402.1K	2,541.5K	2,648.3K	2,708.2K
UT	223.3K	241.1K	257.1K	264.8K
VA	593.6K	643.1K	674.4K	683.0K
VT	49.6K	53.6K	51.7K	21.4K
WA	675.4K	741.2K	766.9K	780.8K
WI	703.7K	748.8K	778.2K	781.3K
WV	228.0K	243.1K	252.2K	258.7K
WY	16.7K	22.9K	25.7K	20.0K

FEE-FOR-SERVICE ENROLLMENT (PARTS A & B) BY STATE AND YEAR

State	2023	2024	2025	Jan 2026
National	**28,209.2K**	**27,567.9K**	**27,821.0K**	**28,169.3K**
AK	98.0K	100.6K	103.0K	104.6K
AL	388.7K	368.1K	360.4K	354.9K
AR	335.0K	325.2K	320.9K	319.3K
AZ	625.8K	620.9K	625.9K	630.0K
CA	2,690.7K	2,690.8K	2,837.7K	2,886.0K
CO	408.7K	404.7K	412.5K	425.5K
CT	262.7K	255.0K	257.2K	269.2K
DC	49.5K	48.3K	48.0K	48.7K
DE	148.4K	147.6K	150.2K	153.7K
FL	1,957.5K	1,915.6K	1,923.7K	1,934.7K
GA	734.7K	714.7K	738.5K	744.4K
HI	102.4K	101.6K	103.4K	104.4K
IA	392.4K	385.7K	386.5K	395.3K
ID	178.5K	175.5K	176.0K	197.3K
IL	1,182.9K	1,150.8K	1,159.1K	1,171.4K
IN	620.5K	602.3K	600.1K	599.2K
KS	350.0K	346.3K	354.8K	356.1K
KY	398.5K	384.1K	380.4K	374.5K
LA	363.0K	347.6K	344.9K	341.9K
MA	802.1K	790.5K	802.3K	820.4K
MD	722.3K	711.5K	711.1K	731.6K
ME	138.9K	133.3K	131.5K	133.8K
MI	770.9K	724.8K	711.4K	708.2K
MN	392.1K	383.4K	387.9K	441.2K
MO	544.7K	527.9K	528.3K	527.5K
MS	342.1K	325.4K	320.4K	317.4K
MT	165.8K	164.6K	167.7K	170.2K
NC	891.7K	850.1K	838.1K	828.4K
ND	87.4K	84.8K	85.3K	86.9K
NE	225.2K	222.9K	227.3K	229.6K
NH	189.8K	188.9K	191.5K	210.8K
NJ	858.9K	852.6K	863.9K	869.8K
NM	194.1K	191.5K	195.4K	193.5K
NV	240.7K	236.1K	237.1K	237.0K
NY	1561.7K	1523.8K	1532.2K	1552.1K
OH	966.6K	939.7K	933.2K	946.0K
OK	420.4K	409.0K	407.3K	403.3K
OR	363.8K	356.9K	367.4K	374.1K
PA	1,174.7K	1,143.4K	1,135.1K	1,141.9K
RI	77.3K	74.6K	75.4K	76.2K
SC	600.8K	590.8K	596.3K	601.9K
SD	113.6K	110.9K	110.7K	116.5K
TN	609.9K	596.1K	598.6K	596.9K
TX	1,822.7K	1,794.5K	1,815.9K	1,818.4K
UT	185.9K	180.5K	178.2K	177.3K
VA	887.0K	871.8K	877.0K	886.6K
VT	99.3K	98.1K	102.8K	134.7K
WA	681.6K	643.2K	650.0K	652.5K
WI	500.9K	486.4K	489.8K	503.1K
WV	190.6K	179.6K	173.7K	168.5K
WY	97.8K	94.8K	94.9K	102.0K

MEDICARE ADVANTAGE PENETRATION RATE BY STATE AND YEAR

State	2023	2024	2025	Jan 2026
National	**52.7%**	**54.7%**	**55.4%**	**55.4%**
AK	2.9%	3.0%	3.4%	3.1%
AL	61.8%	64.3%	65.5%	66.2%
AR	46.2%	48.5%	49.8%	50.3%
AZ	53.4%	54.8%	55.6%	55.8%
CA	55.6%	56.6%	56.2%	56.0%
CO	55.4%	57.0%	57.5%	56.8%
CT	59.9%	62.1%	63.0%	62.0%
DC	37.5%	39.6%	41.0%	40.5%
DE	32.3%	34.6%	35.5%	34.9%
FL	58.4%	60.1%	60.7%	60.9%
GA	57.8%	59.9%	59.9%	60.1%
HI	60.8%	61.7%	61.7%	61.7%
IA	37.5%	39.8%	40.8%	40.1%
ID	49.9%	52.2%	53.6%	48.6%
IL	44.8%	47.2%	47.9%	47.9%
IN	50.6%	53.0%	54.1%	54.6%
KS	34.2%	36.1%	35.9%	36.3%
KY	55.6%	57.8%	58.8%	59.7%
LA	57.7%	60.1%	61.1%	61.7%
MA	37.5%	39.5%	40.0%	39.5%
MD	25.4%	27.9%	29.5%	28.3%
ME	59.5%	61.9%	63.2%	62.9%
MI	62.7%	65.6%	66.9%	67.4%
MN	62.2%	64.1%	64.7%	60.4%
MO	55.0%	57.2%	58.0%	58.4%
MS	42.1%	45.8%	47.3%	48.1%
MT	29.9%	31.9%	32.4%	32.0%
NC	56.2%	59.2%	60.8%	61.7%
ND	33.9%	37.4%	38.7%	38.4%
NE	34.8%	36.7%	37.0%	37.1%
NH	36.7%	38.7%	39.6%	34.4%
NJ	43.8%	45.5%	46.1%	46.4%
NM	53.1%	54.6%	54.5%	55.3%
NV	54.5%	56.4%	57.3%	57.8%
NY	55.2%	57.2%	58.0%	57.9%
OH	58.0%	59.9%	60.9%	60.7%
OK	41.7%	44.3%	45.5%	46.4%
OR	57.6%	59.1%	58.7%	58.3%
PA	55.8%	57.7%	58.9%	59.0%
RI	63.8%	65.8%	66.3%	66.3%
SC	46.3%	48.6%	49.4%	49.5%
SD	36.3%	39.1%	40.6%	38.3%
TN	54.8%	56.6%	57.2%	57.7%
TX	56.9%	58.6%	59.3%	59.8%
UT	54.6%	57.2%	59.1%	59.9%
VA	40.1%	42.5%	43.5%	43.5%
VT	33.3%	35.3%	33.5%	13.7%
WA	49.8%	53.5%	54.1%	54.5%
WI	58.4%	60.6%	61.4%	60.8%
WV	54.5%	57.5%	59.2%	60.6%
WY	14.6%	19.4%	21.3%	16.4%

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Inpatient Discharges by Post-Acute Care Instruction

How inpatient discharge instructions split across care settings shapes the entire downstream post-acute market. That split has been quietly reweighting: home health rose to 22.6% of FFS inpatient discharge instructions in 2025 while skilled nursing slipped to 20.0%, reversing their 2019 order and making home health the leading directed post-acute destination. This chart breaks annual discharge instructions into all six destinations, nationally and for every state, from 2019 through 2025.

Home health gained share in inpatient discharge instructions, while SNF has slipped

Home health rose from 20.7% of inpatient discharge instructions in 2019 to 22.6% in 2025, overtaking skilled nursing instructions (21.3% → 20.0%). The reversal landed in 2020, as COVID-19 pushed patients away from SNF settings and toward care at home.

State discharge patterns range 4-to-1 on home health

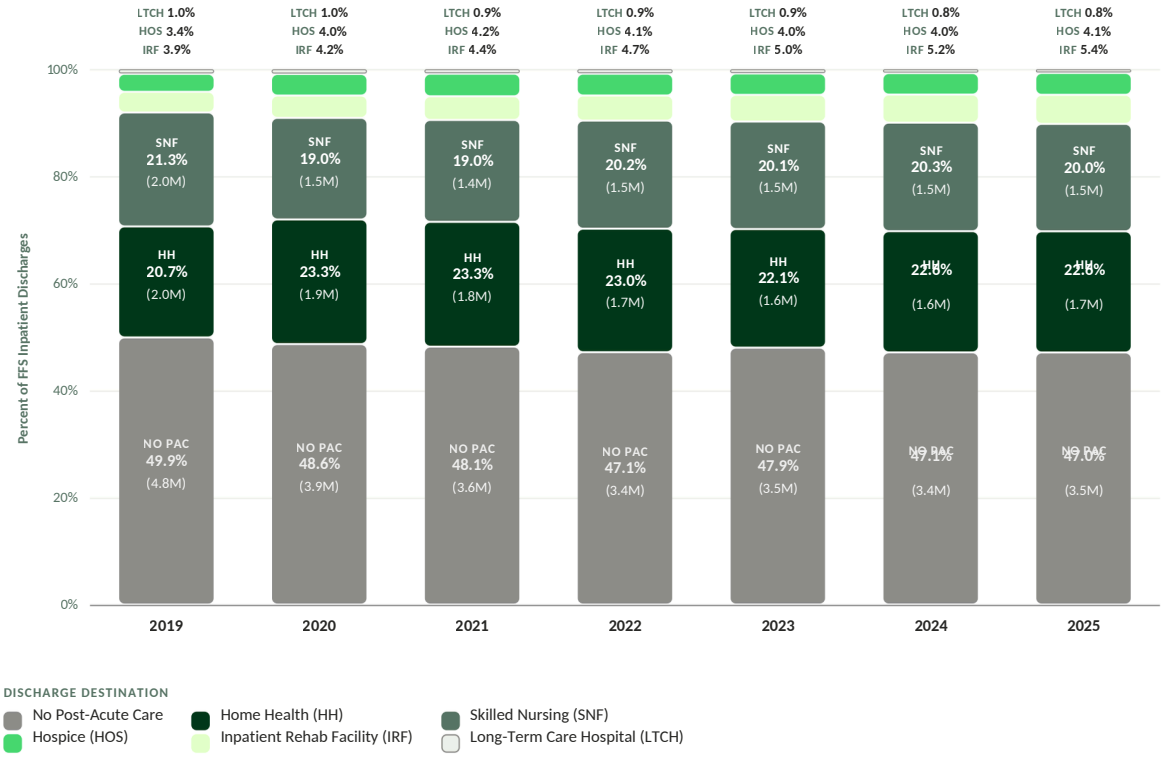
Home health's share of instructions runs from 32.0% in Massachusetts down to 8.6% in Montana — nearly a fourfold gap. New England (MA, RI, CT) leans heaviest on home health; the Mountain West and Plains (MT, WY, SD) least.

Where you live shapes what happens after the hospital

Only 36% of patients in Connecticut are discharged with no post-acute instruction, compared to 73% in Alaska. Provider access and local practice patterns drive a gap that may have little to do with patients' actual needs.

Annual FFS Inpatient Discharge Instructions by Post-Acute Care Destination

National share of fee-for-service inpatient discharges instructed to enter each post-acute setting, 2019 – 2025.



How to read: each bar splits that year's FFS inpatient discharges by the post-acute setting patients were instructed to at discharge. **No Post-Acute Care** means the discharge carried no PAC instruction.

Source: CMS Medicare FFS claims data · Data Timeframe: 2019 - 2025

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PAC Adherence and Instructional Variation by State

Two metrics have a strong influence on whether a hospital discharge becomes a post-acute admission: how often patients are instructed to PAC, 53.0% of FFS discharges in 2025, and how often they follow that instruction. Adherence to inpatient discharge instructions ranges from 90.5% for hospice down to 70.7% for home health. The state maps sharpen the picture: instruction rates span 27.5% to 64.4%, and even hospice adherence — the most reliable in the country — falls to 78.6% in New York.

53.0% of discharges carry a PAC instruction, leveling after consistent increases

Up just 0.1 points in 2025 after +0.8 the year before. Nearly half of FFS inpatient discharges still leave the hospital with no post-acute plan at all.

SNF adherence has fallen two straight reporting periods (85.6% → 83.7%)

Paired with SNF's shrinking share of discharge instructions, the skilled nursing funnel is narrowing at both stages.

Hospice adherence remains above 90% nationally, with significant state variation

New York ranks last among the 50 states and D.C., at 78.6%, 11.9 percentage points below the national average, while more than 45 state-level markets exceed 85%.

PAC Instruction Rate by State

National Takeaways

- The national average for PAC Instruction Rate stands at 53.0% — up 0.1 percentage points from the prior year
- Connecticut leads all states at 64.4% — the highest in the nation
- Alaska ranks last at 27.5% — 25.5 percentage points below the national average
- State variation spans 36.9 percentage points — from 27.5% (Alaska) to 64.4% (Connecticut)

PAC INSTRUCTION RATE

All 50 States + DC

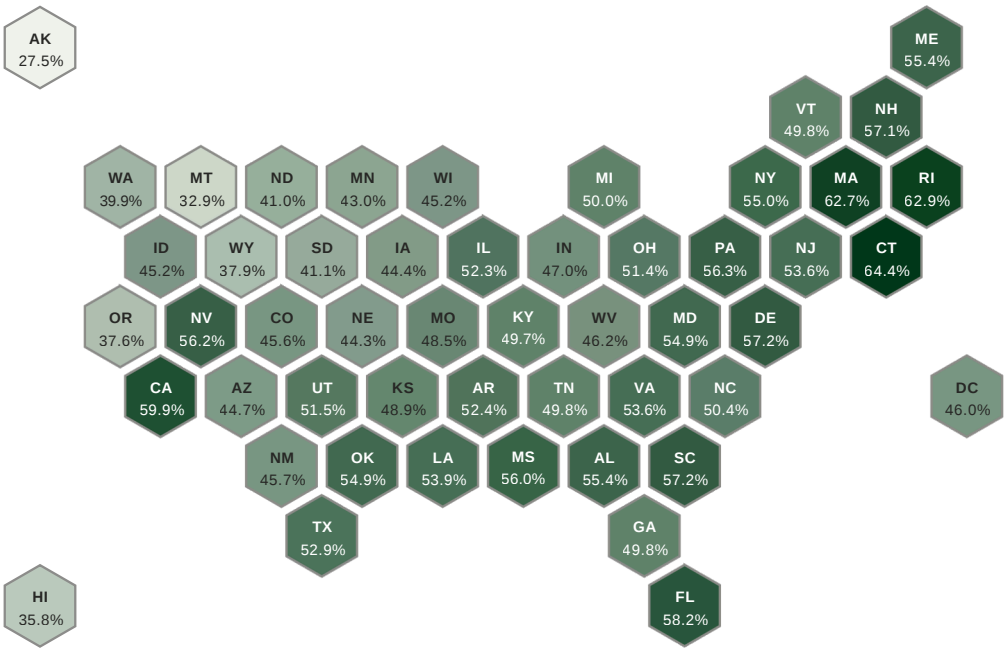
53.0%

National Average

2023 | 52.1%

2024 | 52.9%

2025 | 53.0%



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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Adherence to Post-Acute Discharge Instructions by State

National Takeaways

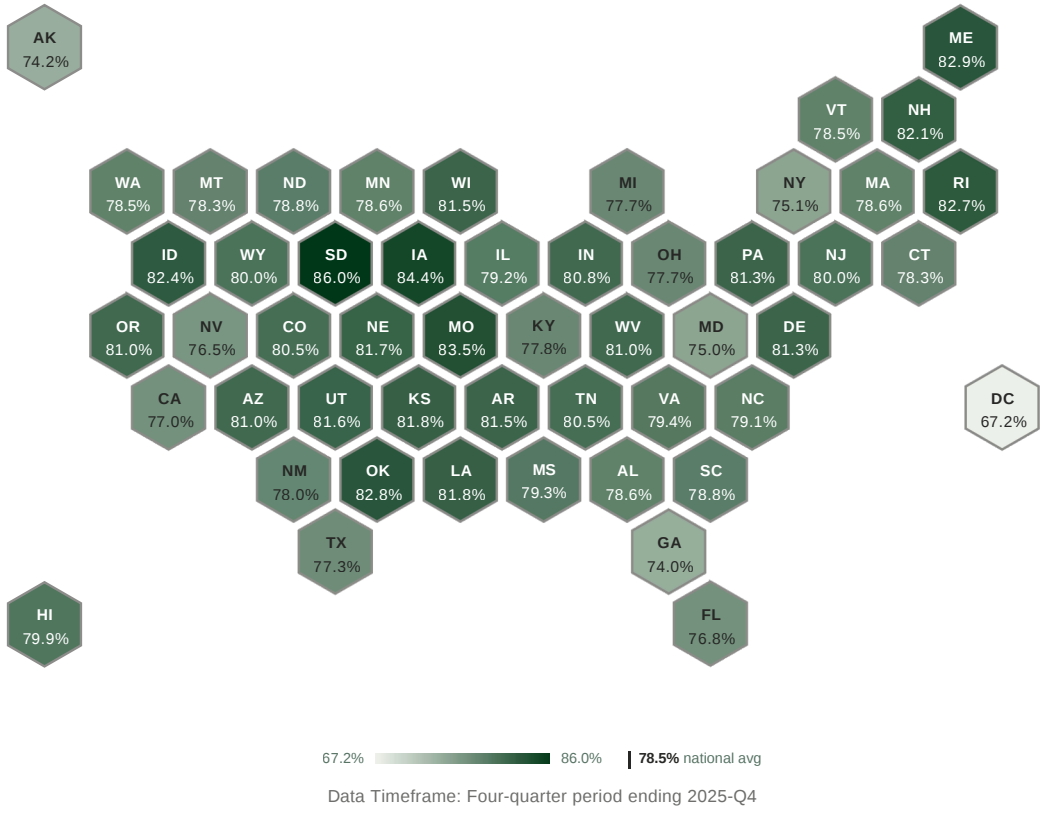
- Nationally, 78.5% of patients instructed to post-acute care at discharge followed that instruction — down 0.2 percentage points versus the prior four-quarter period
- South Dakota has the highest adherence at 86.0% — best in the nation
- Washington DC has the lowest at 67.2% — 11.3 percentage points below the national average
- State variation spans 18.8 percentage points — from 67.2% (Washington DC) to 86.0% (South Dakota)

PAC ADHERENCE

All 50 States + DC
(rolling 4-qtr periods)

78.5%

National Average
2023-Q4 | 77.9%
2024-Q4 | 78.7%
2025-Q4 | 78.5%



Data Timeframe: Four-quarter period ending 2025-Q4

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Average Time to Start of Home Health Care after Inpatient Discharge by State

Time to start care is the metric referral sources actually feel. In 2025, the national average rose to 3.3 days, with start times worsening in 39 states. The spread is nearly threefold: Louisiana starts care in 2.3 days, Hawaii in 6.5 days.

National average time to start of care increased by 0.2 days to 3.3 in 2025

The 0.2-day increase in 2025 snapped a two-year run of flat national performance, and it wasn't driven by outliers. From the Gulf South to the Pacific Northwest, most states gave back ground.

In 39 states, home health starts slowed in 2025

When three-quarters of the country moves in the same direction in the same year, the cause isn't local. Louisiana, with the nation's shortest time to start of care, and Alaska, among the longest, both added time in 2025.

In just 14 states, the average home health start comes within 3 days

Louisiana (2.3 days) and Utah (2.4) set the pace among the 14 states starting care inside 3 days. In the other 37, the first visit stretches past three days — and in the slowest six days.

Average Time to Start of Home Health Care After Inpatient Discharge by State

National Takeaways

- The national Average Time to Start of Care is 3.3 days — up 0.2 days from the prior year
- Louisiana has the fastest access at 2.3 days — quickest start of care in the nation
- Hawaii is slowest at 6.5 days — 3.2 days above the national average, a possible capacity signal
- State variation spans 4.2 days — from 2.3 days (Louisiana) to 6.5 days (Hawaii)

AVERAGE TIME TO START CARE

All 50 States + DC

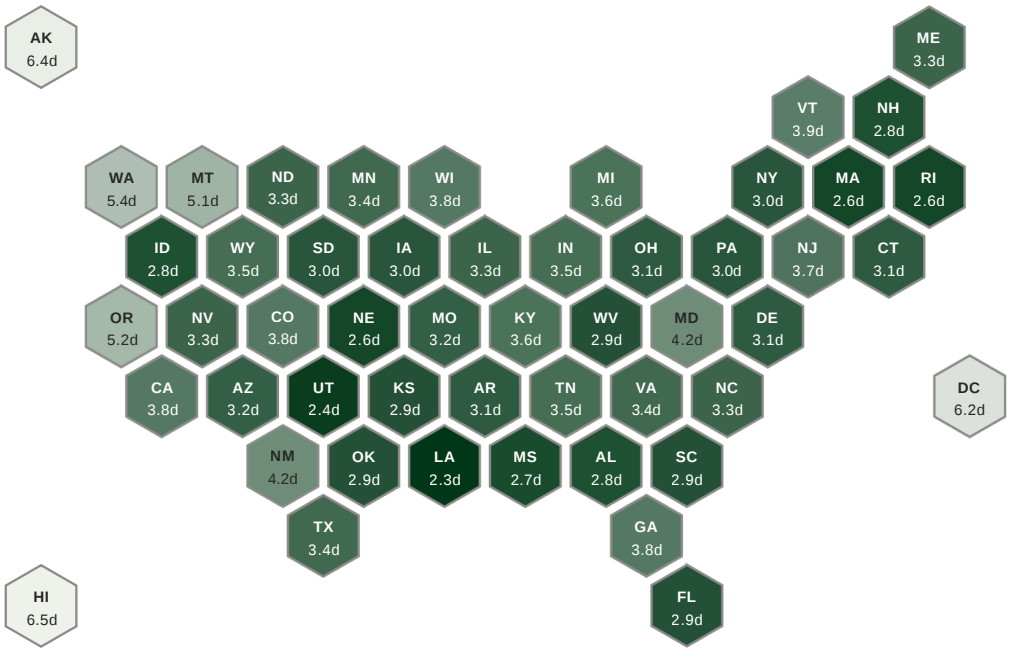
3.3 Days

National Average

2023 | 3.1 Days

2024 | 3.1 Days

2025 | 3.3 Days



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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PAC INSTRUCTIONS			
State	2023	2024	2025
National	**3,799.1K**	**3,801.9K**	**3,900.0K**
AK	3.9K	4.1K	4.5K
AL	61.9K	58.4K	57.9K
AR	47.2K	46.4K	45.2K
AZ	61.8K	64.6K	68.1K
CA	364.9K	387.2K	427.6K
CO	38.3K	37.7K	39.4K
CT	48.9K	48.2K	46.9K
DC	10.0K	10.2K	10.7K
DE	21.4K	20.9K	21.6K
FL	347.6K	357.7K	367.9K
GA	91.7K	93.0K	101.3K
HI	6.2K	6.3K	6.4K
IA	33.3K	32.6K	32.2K
ID	13.7K	13.9K	14.5K
IL	164.2K	159.5K	163.7K
IN	81.8K	78.7K	77.6K
KS	41.0K	40.8K	43.2K
KY	52.5K	53.0K	53.3K
LA	59.0K	57.2K	56.0K
MA	146.9K	145.9K	150.3K
MD	86.0K	86.6K	86.5K
ME	13.3K	13.8K	14.0K
MI	101.3K	96.8K	94.1K
MN	44.5K	45.5K	48.3K
MO	75.0K	73.4K	73.6K
MS	47.6K	47.3K	44.5K
MT	8.8K	8.9K	9.4K
NC	105.0K	102.6K	101.1K
ND	11.4K	11.1K	11.2K
NE	23.7K	23.3K	23.7K
NH	23.1K	23.3K	23.8K
NJ	125.6K	125.8K	127.8K
NM	15.1K	15.7K	15.9K
NV	37.8K	38.2K	40.1K
NY	229.4K	228.7K	236.2K
OH	139.1K	136.5K	136.5K
OK	58.4K	55.6K	57.3K
OR	21.8K	22.6K	23.8K
PA	186.2K	186.9K	187.0K
RI	12.8K	12.6K	12.8K
SC	78.2K	78.3K	80.3K
SD	12.8K	12.4K	12.7K
TN	85.0K	82.0K	84.9K
TX	288.3K	285.3K	291.4K
UT	20.9K	20.8K	21.4K
VA	112.6K	114.1K	114.3K
VT	7.6K	7.0K	7.4K
WA	48.6K	48.9K	49.4K
WI	49.7K	49.4K	50.9K
WV	28.7K	27.4K	26.5K
WY	4.4K	4.6K	4.7K

NO-PAC INSTRUCTIONS			
State	2023	2024	2025
National	**3,497.9K**	**3,378.7K**	**3,463.9K**
AK	12.0K	12.0K	12.0K
AL	50.2K	46.7K	46.6K
AR	43.4K	41.7K	41.1K
AZ	82.1K	81.6K	84.4K
CA	275.9K	266.2K	286.1K
CO	47.2K	45.1K	47.1K
CT	27.6K	25.1K	26.0K
DC	13.0K	12.4K	12.5K
DE	14.4K	15.3K	16.2K
FL	268.3K	257.7K	264.1K
GA	99.9K	95.7K	102.0K
HI	11.4K	11.3K	11.5K
IA	42.2K	40.6K	40.4K
ID	16.6K	17.0K	17.6K
IL	157.2K	148.5K	149.6K
IN	90.1K	86.6K	87.4K
KS	44.2K	43.0K	45.2K
KY	56.1K	54.0K	54.1K
LA	49.3K	47.3K	48.0K
MA	87.9K	86.1K	89.5K
MD	72.6K	70.9K	71.0K
ME	11.4K	11.2K	11.3K
MI	104.4K	96.4K	93.9K
MN	62.8K	61.6K	63.9K
MO	80.7K	79.2K	78.3K
MS	35.3K	33.5K	34.9K
MT	18.9K	18.9K	19.1K
NC	103.6K	99.0K	99.3K
ND	16.5K	15.7K	16.1K
NE	30.2K	29.4K	29.8K
NH	17.1K	17.3K	17.9K
NJ	105.8K	105.5K	110.5K
NM	18.2K	17.5K	18.9K
NV	33.1K	31.1K	31.2K
NY	196.0K	189.2K	193.3K
OH	131.8K	128.7K	129.2K
OK	47.8K	45.9K	47.0K
OR	39.9K	38.0K	39.4K
PA	149.7K	142.6K	144.9K
RI	8.0K	7.6K	7.6K
SC	60.5K	58.6K	60.2K
SD	19.3K	18.8K	18.1K
TN	86.7K	83.2K	85.6K
TX	258.5K	251.7K	259.8K
UT	20.6K	19.8K	20.1K
VA	95.0K	93.9K	99.0K
VT	7.4K	7.3K	7.5K
WA	74.2K	72.0K	74.3K
WI	63.8K	61.7K	61.7K
WV	31.0K	30.5K	30.9K
WY	8.5K	8.1K	7.7K

% OF DISCHARGES WITH PAC INSTRUCTIONS			
State	2023	2024	2025
National	**52.1%**	**52.9%**	**53.0%**
AK	24.6%	25.4%	27.5%
AL	55.2%	55.6%	55.4%
AR	52.1%	52.7%	52.4%
AZ	42.9%	44.2%	44.7%
CA	56.9%	59.3%	59.9%
CO	44.8%	45.5%	45.6%
CT	64.0%	65.7%	64.4%
DC	43.6%	45.1%	46.0%
DE	59.8%	57.6%	57.2%
FL	56.4%	58.1%	58.2%
GA	47.9%	49.3%	49.8%
HI	35.4%	35.8%	35.8%
IA	44.1%	44.5%	44.4%
ID	45.3%	45.0%	45.2%
IL	51.1%	51.8%	52.3%
IN	47.6%	47.6%	47.0%
KS	48.1%	48.7%	48.9%
KY	48.3%	49.5%	49.7%
LA	54.5%	54.7%	53.9%
MA	62.6%	62.9%	62.7%
MD	54.2%	55.0%	54.9%
ME	53.9%	55.4%	55.4%
MI	49.2%	50.1%	50.0%
MN	41.5%	42.5%	43.0%
MO	48.2%	48.1%	48.5%
MS	57.5%	58.5%	56.0%
MT	31.7%	32.0%	32.9%
NC	50.4%	50.9%	50.4%
ND	40.8%	41.6%	41.0%
NE	44.0%	44.3%	44.3%
NH	57.5%	57.4%	57.1%
NJ	54.3%	54.4%	53.6%
NM	45.4%	47.3%	45.7%
NV	53.3%	55.1%	56.2%
NY	53.9%	54.7%	55.0%
OH	51.3%	51.5%	51.4%
OK	55.0%	54.8%	54.9%
OR	35.4%	37.3%	37.6%
PA	55.4%	56.7%	56.3%
RI	61.7%	62.3%	62.9%
SC	56.4%	57.2%	57.2%
SD	39.9%	39.8%	41.1%
TN	49.5%	49.6%	49.8%
TX	52.7%	53.1%	52.9%
UT	50.3%	51.3%	51.5%
VA	54.2%	54.8%	53.6%
VT	50.5%	48.9%	49.8%
WA	39.5%	40.4%	39.9%
WI	43.8%	44.5%	45.2%
WV	48.1%	47.3%	46.2%
WY	34.3%	36.1%	37.9%

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Post-Acute Trends - Adherence to Inpatient Discharge Instructions by Year and State (New for 2026)

ADHERENCE — ALL PAC SETTINGS			
State	2023	2024	2025
National	**77.9%**	**78.7%**	**78.5%**
AK	72.0%	72.0%	74.2%
AL	77.4%	79.4%	78.6%
AR	78.0%	80.9%	81.5%
AZ	81.8%	81.0%	81.0%
CA	76.8%	77.4%	77.0%
CO	81.1%	80.7%	80.5%
CT	77.2%	78.8%	78.3%
DC	68.0%	68.2%	67.2%
DE	79.3%	82.3%	81.3%
FL	78.9%	78.1%	76.8%
GA	74.7%	74.9%	74.0%
HI	77.1%	77.1%	79.9%
IA	84.7%	84.7%	84.4%
ID	80.8%	80.8%	82.4%
IL	77.9%	78.7%	79.2%
IN	79.0%	80.5%	80.8%
KS	82.5%	83.8%	81.8%
KY	76.3%	78.4%	77.8%
LA	78.1%	81.6%	81.8%
MA	75.2%	78.9%	78.6%
MD	74.8%	74.8%	75.0%
ME	79.9%	82.5%	82.9%
MI	77.5%	78.2%	77.7%
MN	77.6%	78.5%	78.6%
MO	82.4%	83.1%	83.5%
MS	75.0%	77.8%	79.3%
MT	77.8%	76.9%	78.3%
NC	78.4%	79.1%	79.1%
ND	80.0%	78.1%	78.8%
NE	80.3%	80.8%	81.7%
NH	78.3%	82.1%	82.1%
NJ	80.2%	80.1%	80.0%
NM	77.8%	77.2%	78.0%
NV	77.6%	77.2%	76.5%
NY	74.8%	74.6%	75.1%
OH	77.8%	78.0%	77.7%
OK	79.6%	82.4%	82.8%
OR	78.0%	78.8%	81.0%
PA	79.8%	81.2%	81.3%
RI	81.0%	83.5%	82.7%
SC	77.4%	78.9%	78.8%
SD	85.2%	85.1%	86.0%
TN	78.8%	80.8%	80.5%
TX	76.8%	77.3%	77.3%
UT	80.4%	81.4%	81.6%
VA	79.3%	79.4%	79.4%
VT	73.3%	78.4%	78.5%
WA	78.3%	78.0%	78.5%
WI	79.5%	81.1%	81.5%
WV	76.7%	78.6%	81.0%
WY	80.0%	78.0%	80.0%

2025 ADHERENCE BY SETTING			
State	Home Health	Hospice	SNF
National	**70.7%**	**90.5%**	**83.7%**
AK	63.2%	80.6%	81.9%
AL	75.6%	91.9%	78.8%
AR	76.3%	87.6%	81.7%
AZ	72.0%	90.5%	86.9%
CA	68.6%	91.6%	82.6%
CO	68.7%	91.9%	88.3%
CT	71.6%	90.8%	85.2%
DC	56.1%	85.6%	79.8%
DE	78.3%	92.0%	82.6%
FL	67.7%	86.1%	83.1%
GA	69.0%	92.1%	75.5%
HI	61.5%	92.2%	86.6%
IA	73.0%	94.6%	90.3%
ID	75.4%	92.0%	89.9%
IL	71.6%	94.4%	82.4%
IN	71.0%	94.8%	83.0%
KS	71.4%	92.3%	88.0%
KY	72.2%	92.1%	80.6%
LA	76.1%	91.0%	82.0%
MA	77.1%	92.1%	85.3%
MD	66.8%	91.0%	84.4%
ME	76.1%	91.5%	88.8%
MI	69.2%	91.6%	83.8%
MN	70.6%	94.0%	83.0%
MO	75.7%	92.5%	85.2%
MS	76.9%	86.0%	80.2%
MT	64.4%	91.7%	83.9%
NC	71.8%	90.9%	82.6%
ND	66.1%	94.4%	80.1%
NE	76.3%	94.0%	88.7%
NH	79.6%	92.4%	83.9%
NJ	70.2%	93.8%	87.0%
NM	63.9%	91.6%	86.0%
NV	64.4%	91.2%	83.3%
NY	68.6%	78.6%	83.9%
OH	69.1%	90.9%	81.7%
OK	73.4%	91.9%	89.0%
OR	70.1%	93.5%	87.9%
PA	76.6%	91.1%	84.5%
RI	76.5%	94.1%	87.0%
SC	76.0%	92.1%	75.2%
SD	77.1%	94.5%	87.8%
TN	72.3%	90.5%	84.9%
TX	65.1%	90.1%	82.7%
UT	73.2%	92.0%	89.5%
VA	70.5%	91.7%	87.4%
VT	76.4%	89.2%	80.7%
WA	63.3%	92.6%	88.1%
WI	73.5%	94.4%	83.6%
WV	80.0%	80.9%	79.3%
WY	66.5%	87.5%	86.7%

2025 INSTRUCTION RATE BY SETTING			
State	Home Health	Hospice	SNF
National	**22.6%**	**4.1%**	**20.0%**
AK	12.6%	2.9%	7.6%
AL	25.0%	5.1%	16.9%
AR	21.1%	4.5%	14.9%
AZ	19.4%	4.2%	13.9%
CA	27.1%	3.5%	25.6%
CO	18.5%	3.9%	15.2%
CT	29.7%	3.8%	28.8%
DC	19.6%	3.0%	17.8%
DE	27.2%	4.9%	16.7%
FL	27.3%	5.7%	17.8%
GA	22.0%	5.1%	15.6%
HI	9.2%	4.1%	20.3%
IA	12.9%	3.6%	22.2%
ID	17.2%	3.8%	18.8%
IL	21.4%	3.9%	22.5%
IN	14.5%	3.7%	22.1%
KS	16.8%	3.9%	21.4%
KY	18.2%	4.1%	19.3%
LA	22.6%	4.9%	16.1%
MA	32.0%	2.9%	21.1%
MD	23.2%	4.6%	22.6%
ME	25.8%	4.2%	20.2%
MI	21.1%	4.0%	20.0%
MN	15.5%	3.1%	22.4%
MO	17.5%	4.4%	18.4%
MS	22.7%	5.3%	22.0%
MT	8.6%	2.7%	18.1%
NC	21.4%	4.5%	20.2%
ND	10.8%	2.3%	21.6%
NE	12.6%	3.1%	22.8%
NH	28.1%	3.2%	19.9%
NJ	19.5%	3.7%	24.9%
NM	17.7%	4.2%	17.0%
NV	26.9%	4.1%	14.0%
NY	24.6%	2.3%	24.8%
OH	20.6%	3.9%	21.0%
OK	23.1%	4.6%	17.7%
OR	15.5%	4.0%	16.7%
PA	25.2%	3.3%	20.9%
RI	30.4%	4.7%	23.9%
SC	27.5%	5.0%	15.1%
SD	10.5%	2.6%	23.5%
TN	19.1%	4.2%	18.6%
TX	23.0%	4.8%	14.7%
UT	23.2%	4.6%	19.5%
VA	25.1%	4.4%	18.1%
VT	22.6%	3.0%	22.4%
WA	13.8%	3.6%	20.1%
WI	16.9%	4.5%	19.2%
WV	19.2%	3.6%	16.2%
WY	10.1%	3.5%	19.4%

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Home Health Admissions

FFS home health admissions continued to decline amid the ongoing shift toward MA, illustrated by the annual FFS and MA totals beneath the chart. Plateauing MA enrollment could foreshadow a new benchmark for expected FFS home health admissions in the near future.

Home health demand is growing, just not in FFS

Combined FFS and MA admissions rose from 6.65M to 7.09M between 2019 and 2023, growth of 6.5% while FFS shrank 19%. The volume didn't disappear. It moved to Medicare Advantage.

The lowest quarter in the series isn't the pandemic. It's Q4 2024

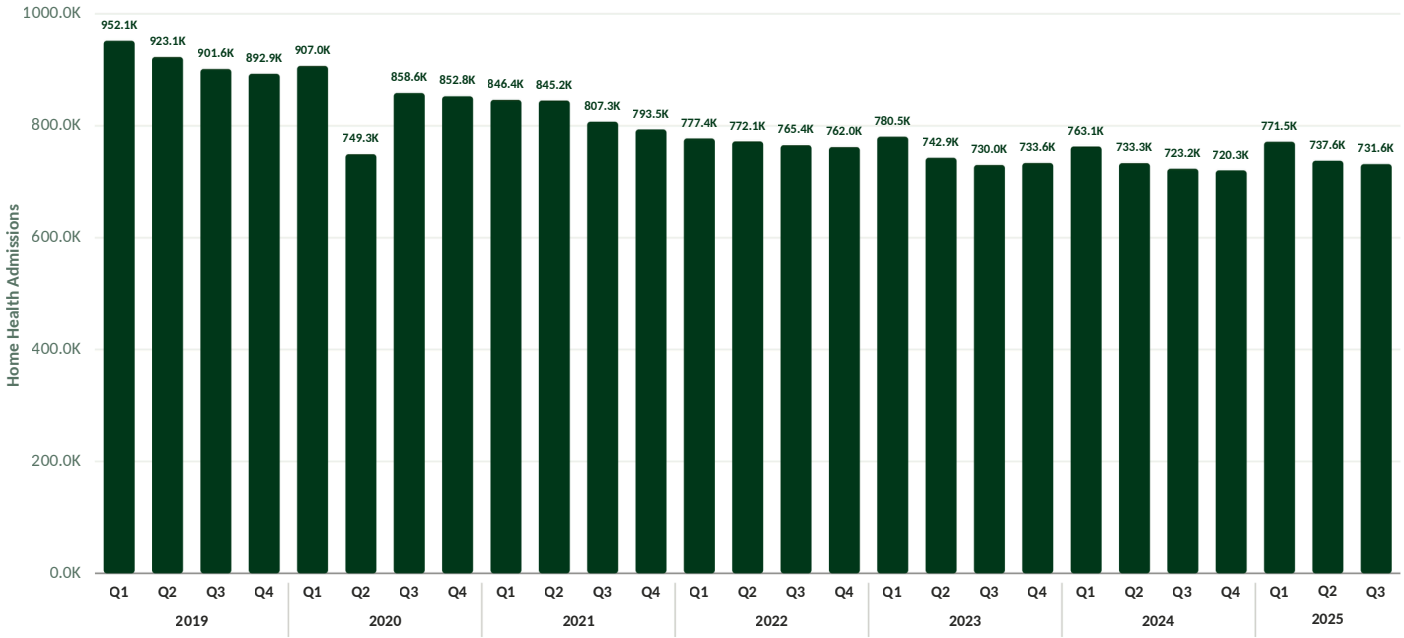
At 720.3K, late 2024 dipped below even the Q2 2020 COVID trough of 749.3K. The pandemic was a shock the series absorbed; the payer shift is a slide it hasn't.

For the first time in the series, every 2025 quarter is up year-over-year

Quarterly volumes kept easing lower for two more years — until 2025, when all three reported quarters came in above the prior year for the first time in the series.

National Home Health Admissions by Quarter

Fee-for-service home health admissions per quarter, Q1 2019–Q3 2025. Choose a state to see its market.



	2019	2020	2021	2022	2023
FFS Total	3.67M	3.37M	3.29M	3.08M	2.99M
MA	2.98M	2.95M	3.45M	3.77M	4.10M
Total					

How to read: each bar in the quarterly chart is one quarter of fee-for-service home health admissions. The most recent quarter (2025-Q4) is excluded because its claims have not fully run out. Because Medicare Advantage data is only available annually and through 2023, annual FFS and MA totals are shown beneath the year labels rather than as quarterly bars.

Source: CMS Medicare FFS and Medicare Advantage claims data · Data Timeframe: Quarterly (FFS): Q1 2019 - Q3 2025 · Annual (FFS & MA): 2019 - 2023

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Home Health Utilization, Hospitalization, and Readmissions

The average risk score of FFS home health patients has risen every year since 2020 — from 2.31 to 2.56, and up 7.2% since 2019. Over the same stretch, home health has been the leading post-acute destination, with 22.6% of FFS discharge instructions in 2025. Hospitalization rose for a third straight year (24.2%) and readmissions ticked up to 12.0% — but read those rates against the acuity climb. More complex patients are arriving in higher volume.

Home health FFS utilization is steady at 24.5% nationally — but ranges from 11.9% to 35.4% by state

Massachusetts leads the nation at 35.4%, with Rhode Island and New Hampshire close behind, while the northern Plains (Montana 11.9%, North Dakota 12.6%) sit at a third of those rates.

49 states saw FFS hospitalization rise over two years, reaching 24.2% nationally

A move that broad isn't 49 states underperforming at once. It's the national acuity climb showing up everywhere, as agencies take on patients who once went to facility care.

FFS readmissions ticked up to 12.0%, with the increase spread across 36 states

The climb from 11.8% moved through 36 states — modest, broad, and consistent with a caseload at its highest average risk score in the data.

Home Health Utilization by State

National Takeaways

- The national average for Home Health Utilization stands at 24.5% — down 0.2 percentage points from the prior year
- Massachusetts leads all states at 35.4% — the highest in the nation#1
- Montana ranks last at 11.9% — 12.6 percentage points below the national averageLast
- State variation spans 23.5 percentage points — from 11.9% (Montana) to 35.4% (Massachusetts)

HOME HEALTH UTILIZATION

All 50 States + DC

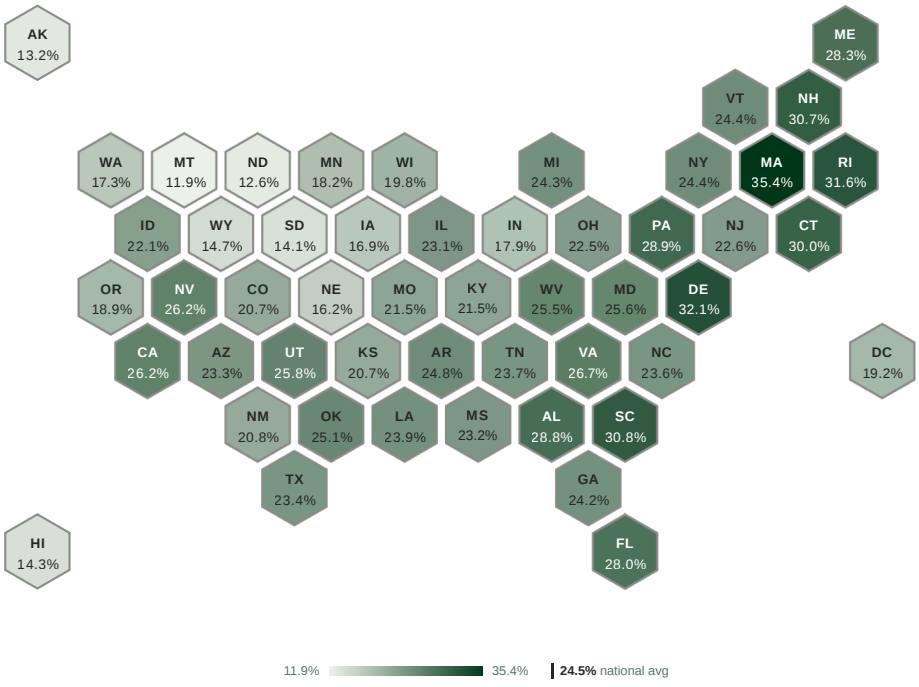
24.5%

National Average

2023 | 24.8%

2024 | 24.7%

2025 | 24.5%



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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Home Health Hospitalization Rate by State

National Takeaways

- The national Hospitalization Rate for FFS home health is 24.2% — up 0.5 percentage points from the prior year
- Utah has the lowest rate at 17.3% — best in the nation
- West Virginia has the highest rate at 29.0% — 4.8 percentage points above the national average
- State variation spans 11.7 percentage points — from 17.3% (Utah) to 29.0% (West Virginia)

HOSPITALIZATION RATE

All 50 States + DC

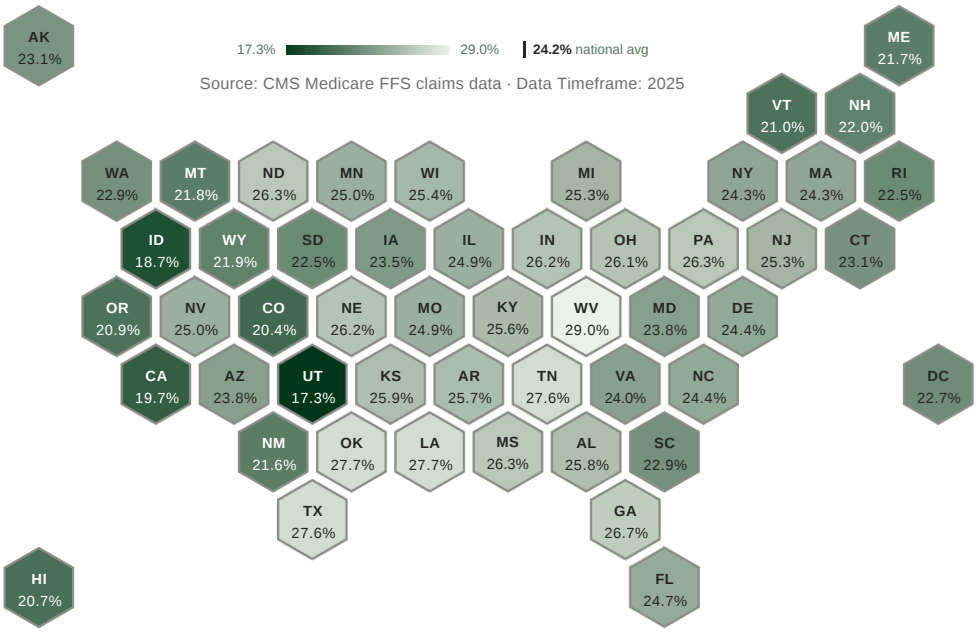
24.2%

National Average

2023 | 23.4%

2024 | 23.7%

2025 | 24.2%



Home Health Readmission Rate by State

National Takeaways

- The national Readmission Rate for FFS home health is 12.0% — up 0.2 percentage points from the prior year
- Utah has the lowest rate at 8.2% — best in the nation
- West Virginia has the highest rate at 14.2% — 2.2 percentage points above the national average
- State variation spans 6.0 percentage points — from 8.2% (Utah) to 14.2% (West Virginia)

READMISSION RATE

All 50 States + DC

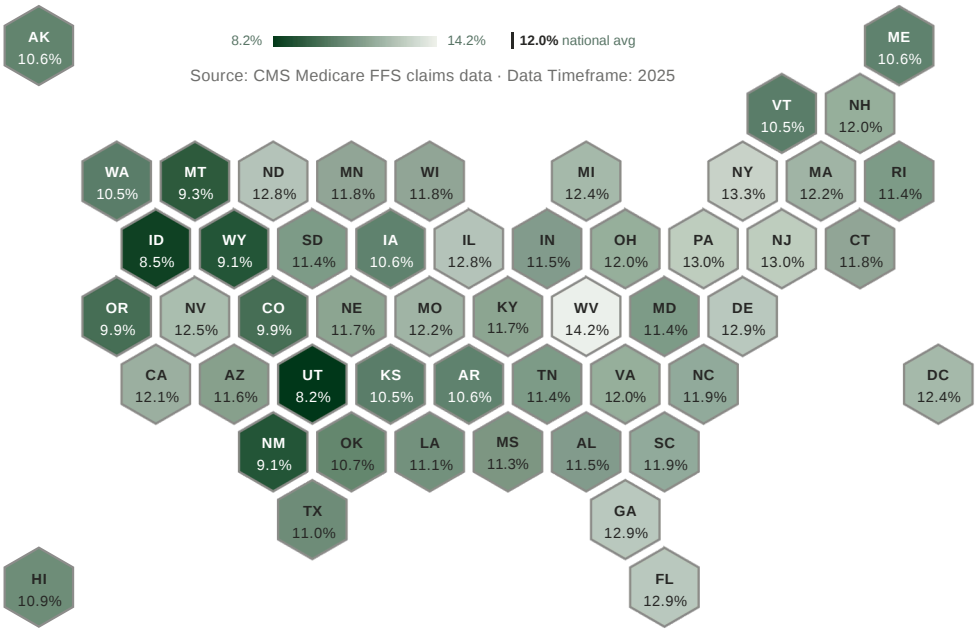
12.0%

National Average

2023 | 11.8%

2024 | 11.8%

2025 | 12.0%



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HOME HEALTH ADMISSIONS			
State	2023 Q3	2024 Q3	2025 Q3
National	**731.4K**	**724.5K**	**732.9K**
AK	0.9K	1.0K	1.0K
AL	12.4K	11.7K	11.7K
AR	7.6K	7.5K	7.3K
AZ	11.6K	11.6K	11.8K
CA	103.2K	110.9K	120.4K
CO	7.3K	6.8K	6.8K
CT	9.8K	9.4K	9.4K
DC	1.0K	1.0K	1.1K
DE	3.8K	3.4K	3.5K
FL	73.8K	71.7K	73.2K
GA	17.5K	17.1K	16.8K
HI	1.2K	1.3K	1.4K
IA	4.7K	4.5K	4.5K
ID	3.4K	3.3K	3.4K
IL	32.0K	31.6K	31.1K
IN	11.3K	10.6K	10.3K
KS	6.6K	6.4K	6.2K
KY	9.7K	8.9K	8.6K
LA	10.3K	9.6K	9.6K
MA	28.0K	27.6K	28.2K
MD	16.8K	16.8K	16.7K
ME	2.9K	2.9K	2.9K
MI	20.7K	18.8K	17.9K
MN	7.6K	7.8K	7.9K
MO	11.3K	10.8K	10.4K
MS	10.6K	10.0K	9.9K
MT	1.2K	1.4K	1.5K
NC	20.2K	18.9K	18.2K
ND	1.0K	0.8K	0.8K
NE	3.3K	3.3K	3.2K
NH	4.7K	4.7K	4.7K
NJ	19.8K	19.3K	19.3K
NM	3.3K	3.4K	3.4K
NV	7.7K	7.4K	7.7K
NY	38.0K	38.7K	40.7K
OH	21.5K	21.2K	20.7K
OK	12.0K	11.5K	11.1K
OR	5.5K	5.6K	5.9K
PA	30.2K	30.2K	29.6K
RI	2.6K	2.5K	2.5K
SC	16.0K	15.7K	16.2K
SD	1.4K	1.3K	1.4K
TN	14.9K	14.9K	14.6K
TX	47.1K	46.5K	45.7K
UT	5.6K	5.4K	5.3K
VA	21.2K	21.5K	21.2K
VT	2.2K	2.2K	2.4K
WA	10.6K	10.2K	10.4K
WI	8.1K	8.1K	7.9K
WV	4.8K	4.6K	4.3K
WY	1.0K	1.0K	1.1K

YOY% CHANGE IN ADMISSIONS			
State	2023 Q3	2024 Q3	2025 Q3
National	**-4.6%**	**-1.0%**	**+1.2%**
AK	+11.2%	+3.0%	+2.6%
AL	-8.5%	-5.6%	+0.2%
AR	-11.2%	-0.1%	-3.3%
AZ	-2.6%	+0.2%	+1.5%
CA	+3.1%	+7.4%	+8.6%
CO	-4.4%	-6.6%	-0.1%
CT	-2.9%	-4.2%	-0.4%
DC	+17.2%	-0.7%	+1.4%
DE	+1.1%	-8.9%	+2.8%
FL	+0.5%	-2.8%	+2.1%
GA	-6.8%	-2.0%	-2.0%
HI	-3.5%	+7.3%	+9.2%
IA	-9.8%	-4.6%	+0.5%
ID	-8.3%	-2.2%	+2.9%
IL	-7.2%	-1.0%	-1.5%
IN	-9.9%	-5.8%	-2.9%
KS	-10.2%	-2.7%	-4.2%
KY	-11.8%	-8.2%	-3.4%
LA	-8.3%	-7.1%	-0.3%
MA	-0.8%	-1.6%	+2.3%
MD	-4.5%	-0.1%	-0.9%
ME	-13.0%	+3.0%	-2.7%
MI	-9.9%	-8.9%	-4.8%
MN	-3.3%	+1.5%	+2.3%
MO	-9.9%	-3.8%	-4.0%
MS	-13.2%	-5.5%	-0.4%
MT	-11.8%	+14.7%	+7.1%
NC	-5.5%	-6.5%	-3.7%
ND	-5.7%	-12.9%	-4.1%
NE	-11.4%	-2.1%	-3.6%
NH	-8.5%	-0.8%	-0.3%
NJ	-5.6%	-2.8%	+0.1%
NM	-9.4%	+2.7%	-0.1%
NV	-0.2%	-3.8%	+3.1%
NY	-3.2%	+1.7%	+5.2%
OH	-3.9%	-1.6%	-2.3%
OK	-10.2%	-3.9%	-3.3%
OR	-9.1%	+1.7%	+4.7%
PA	-6.5%	-0.1%	-2.0%
RI	-9.1%	-6.9%	+0.6%
SC	-3.4%	-2.2%	+3.0%
SD	-10.4%	-7.7%	+3.7%
TN	-7.8%	-0.0%	-2.1%
TX	-7.2%	-1.4%	-1.6%
UT	-6.2%	-3.5%	-1.1%
VA	-6.7%	+1.1%	-1.2%
VT	-5.0%	+0.1%	+6.4%
WA	-6.8%	-3.9%	+2.8%
WI	-10.1%	-0.6%	-1.4%
WV	-13.5%	-3.6%	-5.4%
WY	-14.2%	-2.4%	+10.4%

HOME HEALTH UTILIZATION			
State	2023	2024	2025
National	**24.8%**	**24.7%**	**24.5%**
AK	13.1%	13.3%	13.2%
AL	29.2%	29.0%	28.8%
AR	24.5%	24.6%	24.8%
AZ	22.7%	23.3%	23.3%
CA	26.4%	26.5%	26.2%
CO	20.9%	20.3%	20.7%
CT	30.2%	30.2%	30.0%
DC	18.8%	19.9%	19.2%
DE	32.6%	33.6%	32.1%
FL	28.3%	28.6%	28.0%
GA	24.5%	24.8%	24.2%
HI	12.4%	13.3%	14.3%
IA	17.4%	16.9%	16.9%
ID	23.1%	21.7%	22.1%
IL	23.5%	23.3%	23.1%
IN	18.5%	18.1%	17.9%
KS	21.3%	21.8%	20.7%
KY	22.5%	22.3%	21.5%
LA	24.0%	23.9%	23.9%
MA	35.6%	35.9%	35.4%
MD	25.6%	25.5%	25.6%
ME	27.3%	28.2%	28.3%
MI	25.3%	24.6%	24.3%
MN	17.8%	18.1%	18.2%
MO	22.7%	22.1%	21.5%
MS	24.4%	23.6%	23.2%
MT	10.6%	10.8%	11.9%
NC	24.9%	24.2%	23.6%
ND	14.0%	13.0%	12.6%
NE	17.4%	16.5%	16.2%
NH	31.7%	31.9%	30.7%
NJ	24.3%	23.6%	22.6%
NM	20.2%	21.0%	20.8%
NV	26.3%	26.0%	26.2%
NY	24.2%	24.1%	24.4%
OH	22.5%	22.5%	22.5%
OK	25.5%	24.7%	25.1%
OR	18.6%	18.5%	18.9%
PA	30.2%	29.6%	28.9%
RI	30.8%	31.4%	31.6%
SC	30.9%	30.5%	30.8%
SD	13.7%	13.1%	14.1%
TN	23.8%	23.9%	23.7%
TX	23.7%	23.6%	23.4%
UT	25.8%	25.8%	25.8%
VA	27.1%	26.8%	26.7%
VT	25.7%	26.0%	24.4%
WA	17.6%	17.2%	17.3%
WI	19.3%	19.3%	19.8%
WV	25.4%	24.6%	25.5%
WY	14.4%	14.5%	14.7%

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HOSPITALIZATION RATE			
State	2023	2024	2025
National	**23.4%**	**23.7%**	**24.2%**
AK	22.0%	22.5%	23.1%
AL	25.2%	25.3%	25.8%
AR	24.8%	25.4%	25.7%
AZ	22.1%	22.9%	23.8%
CA	19.0%	18.9%	19.7%
CO	19.8%	19.9%	20.4%
CT	22.8%	22.8%	23.1%
DC	22.2%	21.2%	22.7%
DE	22.8%	23.5%	24.4%
FL	23.5%	24.1%	24.7%
GA	25.6%	25.9%	26.7%
HI	20.5%	19.9%	20.7%
IA	22.6%	23.4%	23.5%
ID	17.2%	17.8%	18.7%
IL	24.0%	24.5%	24.9%
IN	25.6%	25.8%	26.2%
KS	24.7%	25.1%	25.9%
KY	24.5%	24.9%	25.6%
LA	27.0%	27.3%	27.7%
MA	23.9%	24.0%	24.3%
MD	22.5%	23.2%	23.8%
ME	19.7%	20.7%	21.7%
MI	23.9%	24.6%	25.3%
MN	23.2%	24.1%	25.0%
MO	23.5%	24.2%	24.9%
MS	26.2%	26.3%	26.3%
MT	21.1%	21.3%	21.8%
NC	23.2%	23.9%	24.4%
ND	24.8%	24.8%	26.3%
NE	23.7%	25.6%	26.2%
NH	21.4%	21.7%	22.0%
NJ	24.7%	25.1%	25.3%
NM	21.4%	21.4%	21.6%
NV	24.5%	24.4%	25.0%
NY	23.8%	23.7%	24.3%
OH	25.0%	25.6%	26.1%
OK	27.2%	27.5%	27.7%
OR	20.2%	20.4%	20.9%
PA	25.1%	25.6%	26.3%
RI	21.5%	21.7%	22.5%
SC	22.8%	23.0%	22.9%
SD	21.8%	22.0%	22.5%
TN	27.6%	27.7%	27.6%
TX	26.7%	27.2%	27.6%
UT	16.6%	16.8%	17.3%
VA	23.2%	23.5%	24.0%
VT	21.7%	21.6%	21.0%
WA	21.9%	22.5%	22.9%
WI	24.0%	24.7%	25.4%
WV	27.8%	28.3%	29.0%
WY	21.7%	21.3%	21.9%

READMISSION RATE			
State	2023	2024	2025
National	**11.8%**	**11.8%**	**12.0%**
AK	11.3%	10.8%	10.6%
AL	11.4%	11.3%	11.5%
AR	10.7%	10.5%	10.6%
AZ	11.2%	11.4%	11.6%
CA	12.0%	11.9%	12.1%
CO	10.2%	9.9%	9.9%
CT	11.8%	11.7%	11.8%
DC	10.9%	10.8%	12.4%
DE	12.7%	12.8%	12.9%
FL	12.5%	12.7%	12.9%
GA	12.7%	12.8%	12.9%
HI	11.0%	10.3%	10.9%
IA	9.9%	10.3%	10.6%
ID	8.0%	8.0%	8.5%
IL	12.4%	12.5%	12.8%
IN	11.7%	11.5%	11.5%
KS	10.0%	10.3%	10.5%
KY	11.4%	11.6%	11.7%
LA	11.1%	11.2%	11.1%
MA	12.1%	12.0%	12.2%
MD	11.2%	11.3%	11.4%
ME	10.3%	10.6%	10.6%
MI	12.7%	12.3%	12.4%
MN	11.3%	11.4%	11.8%
MO	12.0%	12.1%	12.2%
MS	11.4%	11.2%	11.3%
MT	8.8%	8.8%	9.3%
NC	11.6%	11.7%	11.9%
ND	11.6%	11.9%	12.8%
NE	10.5%	11.4%	11.7%
NH	12.0%	12.2%	12.0%
NJ	12.6%	12.9%	13.0%
NM	9.0%	8.9%	9.1%
NV	12.4%	12.2%	12.5%
NY	12.9%	12.8%	13.3%
OH	11.9%	11.9%	12.0%
OK	10.0%	10.3%	10.7%
OR	9.6%	9.7%	9.9%
PA	12.7%	12.9%	13.0%
RI	11.2%	10.7%	11.4%
SC	11.4%	11.7%	11.9%
SD	11.0%	10.9%	11.4%
TN	11.6%	11.4%	11.4%
TX	10.5%	10.7%	11.0%
UT	8.5%	8.2%	8.2%
VA	11.8%	11.8%	12.0%
VT	11.2%	10.7%	10.5%
WA	10.0%	10.2%	10.5%
WI	12.0%	11.8%	11.8%
WV	13.2%	13.5%	14.2%
WY	10.5%	9.6%	9.1%

AVG TIME TO START OF CARE (DAYS)			
State	2023	2024	2025
National	**3.1**	**3.1**	**3.3**
AK	4.8	5.3	6.4
AL	2.6	2.7	2.8
AR	2.9	3.0	3.1
AZ	3.2	3.2	3.2
CA	3.5	3.4	3.8
CO	3.3	3.4	3.8
CT	3.0	2.9	3.1
DC	5.3	5.8	6.2
DE	2.8	2.8	3.1
FL	2.7	2.6	2.9
GA	3.6	3.7	3.8
HI	7.1	7.6	6.5
IA	2.9	3.0	3.0
ID	2.8	2.7	2.8
IL	3.1	3.1	3.3
IN	3.3	3.4	3.5
KS	2.9	2.8	2.9
KY	3.1	3.3	3.6
LA	2.2	2.2	2.3
MA	2.5	2.5	2.6
MD	3.8	4.0	4.2
ME	3.2	3.0	3.3
MI	3.4	3.4	3.6
MN	3.4	3.4	3.4
MO	2.9	3.0	3.2
MS	2.7	2.7	2.7
MT	5.8	5.8	5.1
NC	3.1	3.2	3.3
ND	3.3	3.0	3.3
NE	2.5	2.5	2.6
NH	2.6	2.6	2.8
NJ	3.7	3.7	3.7
NM	3.8	4.0	4.2
NV	3.0	3.0	3.3
NY	3.0	2.9	3.0
OH	3.3	3.1	3.1
OK	2.8	2.8	2.9
OR	5.1	5.3	5.2
PA	2.8	2.8	3.0
RI	2.6	2.5	2.6
SC	2.8	2.8	2.9
SD	2.8	2.8	3.0
TN	3.5	3.4	3.5
TX	3.2	3.2	3.4
UT	2.4	2.2	2.4
VA	3.2	3.3	3.4
VT	3.8	3.9	3.9
WA	5.0	5.2	5.4
WI	3.6	3.8	3.8
WV	3.0	2.9	2.9
WY	3.0	3.1	3.5

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Hospice Admissions by Quarter

FFS hospice admissions reached 1.68M in 2025, up 4.1%, the fastest annual growth in five years, and the fourth consecutive year the growth rate has accelerated. Unlike home health and skilled nursing, where FFS volume has compressed as enrollment shifts to Medicare Advantage, hospice remains a fee-for-service benefit for nearly all Medicare patients.

FFS hospice admissions grew 4.1% in 2025, the fastest rate in five years

1.61M to 1.68M, and the fourth straight year the growth rate has increased: +1.1% in 2022, +2.2% in 2023, +3.7% in 2024, +4.1% in 2025.

The national +18.5% growth since 2019 masks wide state variation

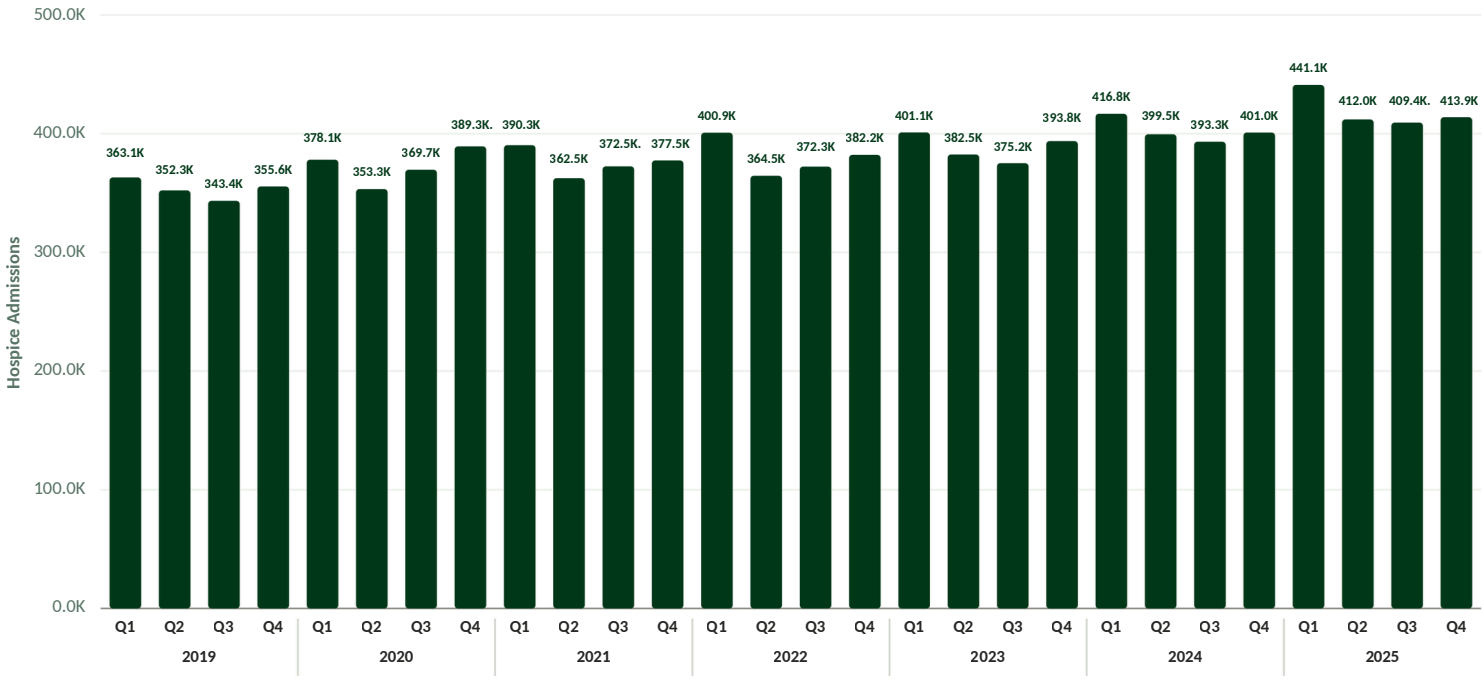
Admissions range from +47% in Alaska to −4% in New York, the only state below its 2019 level. Use the market selector below to view growth in the markets you serve.

Q1 2025 set a new high: 441.1K admissions in a single quarter

Q1 is reliably hospice's strongest quarter, and each year's Q1 has topped the last since 2023, useful for quarter-over-quarter benchmarking.

National Hospice Admissions by Quarter

Fee-for-service hospice admissions per quarter, Q1 2019–Q4 2025. Choose a state to see its market.



How to read: each bar is one quarter of fee-for-service hospice admissions.

Source: CMS Medicare FFS claims data · Data Timeframe: Q1 2019 - Q4 2025

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Hospice Utilization and Average Length of Stay by State

Hospice utilization is rising at roughly a point a year — 51.9% of FFS decedents in 2025, with gains in 50 states over two years. Average length of stay is also increasing, up two days since 2023 to 66.5 days. Longer stays often reflect earlier hospice identification and are associated with lower total cost of care, as quantified in the next section.

Hospice deaths rose 4.1% vs. a 1.8% rise in total Medicare mortalities

The gap between the two growth rates is what drives utilization upward — hospice deaths grew from 1.26M to 1.31M between 2024 and 2025, growing at more than twice the rate of overall Medicare mortalities.

The highest- and lowest-utilization states diverge on length of stay

Utah leads the nation at 67.6% utilization with 76.2-day average stays; New York sits last at 27.5%, among the shortest stays — adoption and early identification moving together.

ALOS has climbed YoY: 64.5 days in 2023, 65.7 in 2024, 66.5 in 2025

A two-day increase over two consecutive years suggests that earlier hospice identification is rising alongside utilization. When admissions and length of stay increase together, it may indicate that more patients are reaching hospice and receiving care earlier in their end-of-life journey.

Hospice Utilization by State

National Takeaways

- The national average for Hospice Utilization stands at 51.9% — up 1.1 percentage points from the prior year
- Utah leads all states at 67.6% — the highest in the nation
- New York ranks last at 27.5% — 24.4 percentage points below the national average
- State variation spans 40.1 percentage points — from 27.5% (New York) to 67.6% (Utah)

HOSPICE UTILIZATION

All 50 States + DC

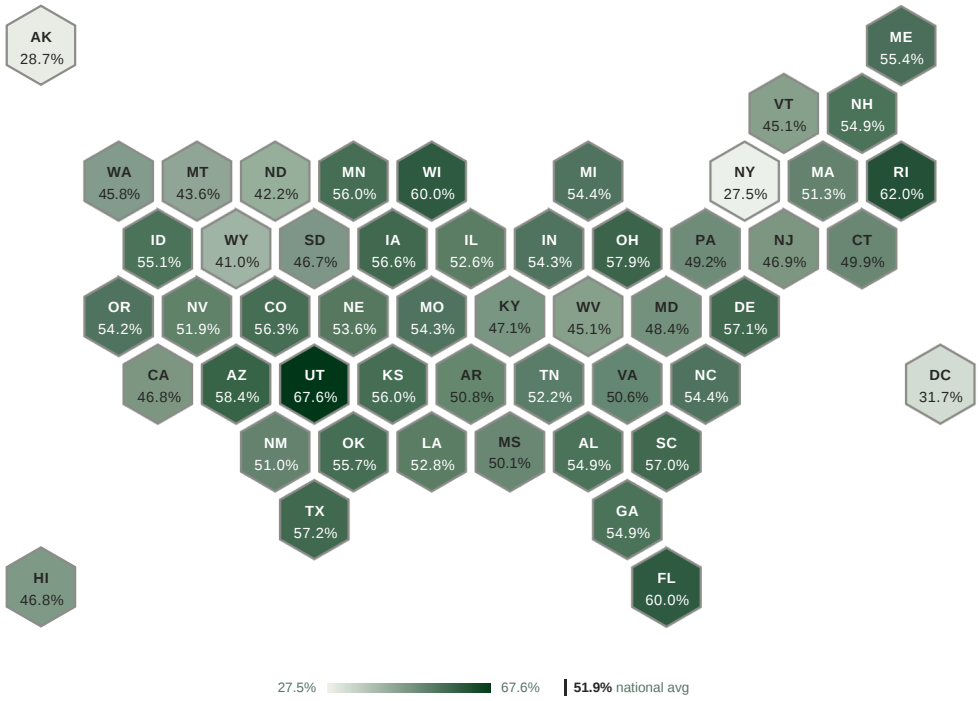
51.9%

National Average

2023 | 49.8%

2024 | 50.8%

2025 | 51.9%



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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Hospice Average Length of Stay by State

National Takeaways

- The national hospice Average Length of Stay is 66.5 days — up 0.8 days from the prior year
- California has the longest average stay at 85.3 days — often a marker of earlier hospice identification
- Kentucky has the shortest at 43.5 days — 23.0 days below the national average
- State variation spans 41.8 days — from 43.5 days (Kentucky) to 85.3 days (California)

AVERAGE LENGTH OF STAY

All 50 States + DC

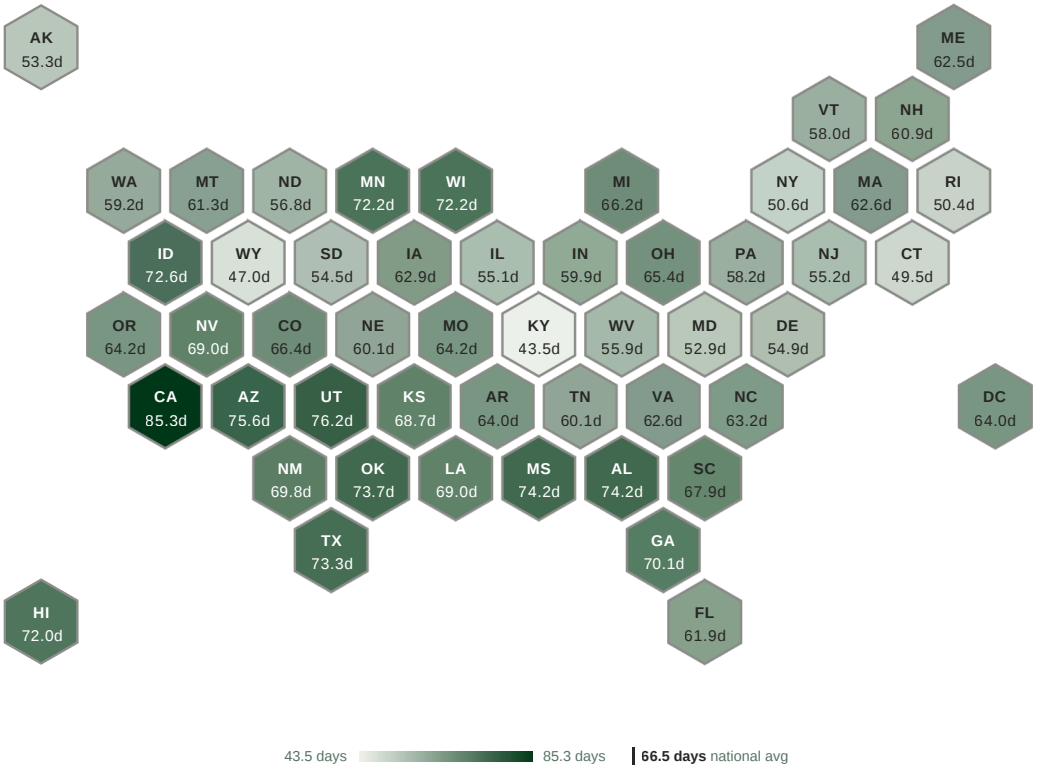
66.5 Days

National Average

2023 | 64.5 Days

2024 | 65.7 Days

2025 | 66.5 Days



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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Cost of Care by Hospice Adoption Timeframe

Patients who enter hospice earlier accrue markedly lower total end-of-life Medicare costs: $68K over the final six months for 2025 decedents with 121+ days on hospice, versus $97K for those who never enrolled. As hospice tenure grows, hospice spending rises — but inpatient spending falls much faster, so the total drops sharply. This is an association, not a controlled effect — earlier-hospice patients differ clinically from those who never enroll — but the pattern underscores the value of early identification for hospices competing in value-based care networks.

Patients with 121+ days on hospice averaged a $29K lower cost of care

$68K versus $97K for those who never enrolled, all 2025 decedents, a 30% difference in total Medicare spend over the final six months of life.

Even two weeks or less on hospice is associated with $7K lower spend

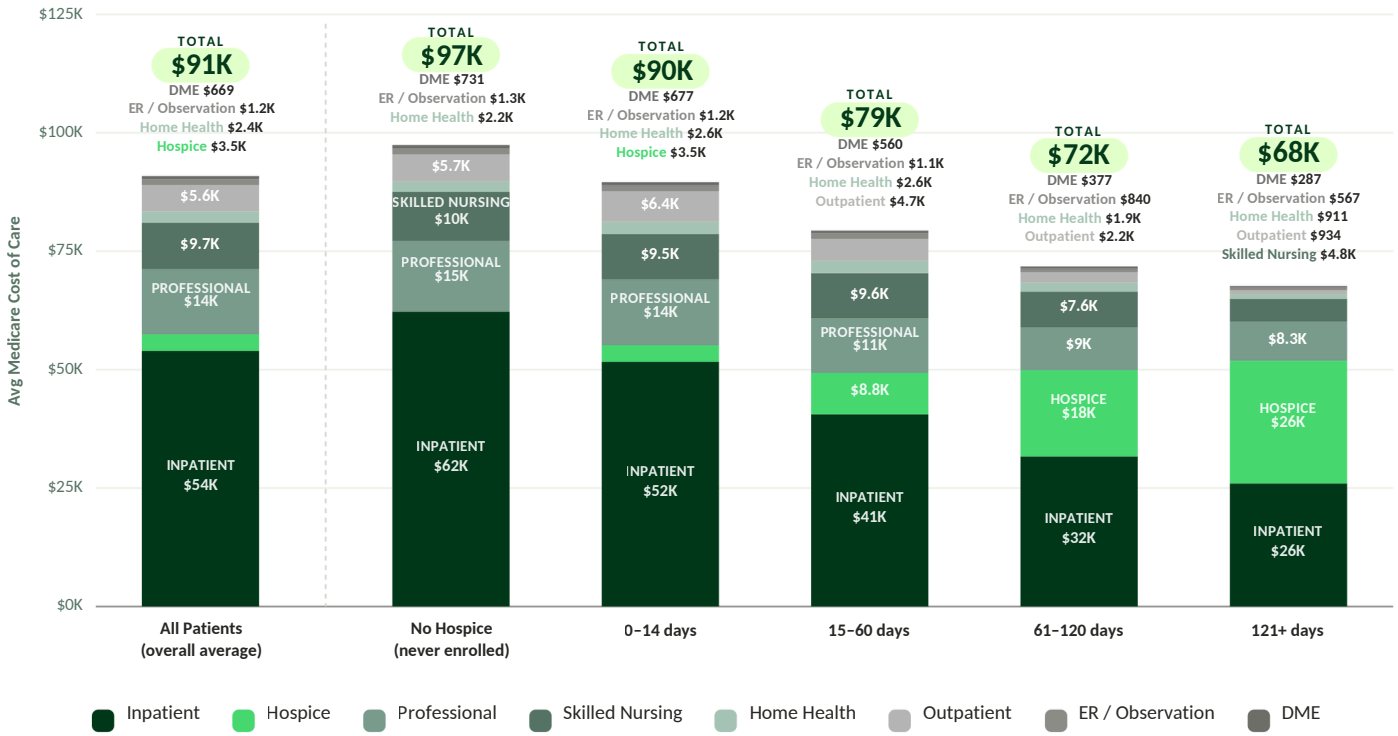
Patients with 0–14 days of hospice averaged $90K in Medicare spending, compared with $97K for those with no hospice. The difference appears even at the earliest adoption window, not only among patients with longer stays.

The cost difference holds across all 50 states and D.C., with no exceptions

The gap between never-enrolled and 121+ day patients ranges from $1.7K in Nevada to $43.5K in Maryland, but every state runs the same direction.

National Cost of Care by Hospice Adoption Timing

Average Medicare cost of care over the patient's final 6 months of life, for patients who died in 2025, grouped by how long they were on hospice beforehand.



Cost is average Medicare spend over the patient's final 6 months of life, for patients who died in 2025, grouped by time on hospice. State values with too few patients are omitted.

Source: CMS Medicare FFS claims data · Data Timeframe: 2025 (final 6 months of life for 2025 decedents)

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HOSPICE ADMISSIONS (ANNUAL)			
State	2023	2024	2025
National	1562.6K	1620.3K	1687.1K
AK	1.2K	1.3K	1.4K
AL	32.3K	33.8K	36.0K
AR	17.2K	18.2K	18.8K
AZ	41.4K	43.0K	44.6K
CA	166.5K	173.3K	175.6K
CO	22.6K	23.6K	24.4K
CT	14.7K	15.4K	15.9K
DC	1.4K	1.4K	1.6K
DE	5.8K	5.8K	6.0K
FL	137.1K	141.2K	147.3K
GA	50.0K	52.9K	57.1K
HI	5.5K	5.8K	6.1K
IA	18.0K	18.5K	18.7K
ID	8.9K	9.2K	9.5K
IL	52.7K	53.7K	56.4K
IN	35.8K	35.3K	37.2K
KS	15.8K	16.3K	16.4K
KY	21.0K	21.8K	22.8K
LA	24.7K	25.5K	25.4K
MA	29.3K	30.2K	31.0K
MD	22.8K	23.6K	24.4K
ME	8.6K	8.6K	9.1K
MI	54.1K	55.7K	58.1K
MN	26.1K	27.2K	28.5K
MO	33.6K	35.5K	37.4K
MS	17.2K	18.1K	19.2K
MT	4.0K	4.6K	4.9K
NC	52.3K	54.7K	57.2K
ND	2.5K	2.6K	2.7K
NE	8.9K	8.9K	9.4K
NH	7.1K	7.4K	7.8K
NJ	33.4K	34.5K	35.2K
NM	10.0K	10.5K	11.4K
NV	15.4K	16.7K	16.9K
NY	41.6K	41.8K	43.1K
OH	68.8K	72.9K	74.8K
OK	24.1K	26.0K	27.2K
OR	20.6K	20.6K	22.8K
PA	64.1K	66.0K	68.2K
RI	6.0K	6.2K	6.2K
SC	31.8K	33.2K	35.0K
SD	3.6K	3.7K	3.8K
TN	36.4K	38.9K	40.4K
TX	132.6K	138.3K	144.7K
UT	13.2K	14.0K	15.2K
VA	36.8K	37.5K	39.7K
VT	3.1K	2.9K	3.1K
WA	27.0K	27.4K	29.4K
WI	32.6K	33.3K	35.5K
WV	10.4K	10.7K	10.8K
WY	2.1K	2.1K	2.3K

FFS MORTALITIES			
State	2023	2024	2025
National	2513.6K	2529.9K	2577.1K
AK	3.8K	3.9K	3.9K
AL	46.8K	47.1K	48.5K
AR	28.7K	29.2K	29.6K
AZ	54.1K	55.6K	55.8K
CA	234.2K	231.6K	232.6K
CO	34.8K	34.6K	35.5K
CT	26.8K	27.1K	27.4K
DC	3.6K	3.5K	3.7K
DE	8.5K	8.7K	9.1K
FL	185.5K	187.5K	188.6K
GA	73.9K	75.2K	77.0K
HI	10.5K	10.8K	10.6K
IA	27.3K	27.7K	28.0K
ID	13.4K	13.8K	13.8K
IL	90.5K	90.3K	92.5K
IN	55.6K	55.7K	57.3K
KS	23.4K	23.5K	23.7K
KY	41.9K	42.2K	43.1K
LA	37.5K	38.4K	38.1K
MA	50.9K	50.7K	51.3K
MD	41.5K	42.5K	43.5K
ME	14.1K	13.9K	14.3K
MI	84.9K	85.7K	88.8K
MN	40.6K	41.6K	42.2K
MO	53.3K	54.3K	55.5K
MS	27.3K	27.5K	28.3K
MT	9.2K	9.5K	9.3K
NC	85.3K	85.4K	88.0K
ND	5.5K	5.7K	5.7K
NE	15.1K	15.1K	14.9K
NH	12.0K	12.0K	12.2K
NJ	61.6K	62.1K	63.0K
NM	16.8K	16.8K	17.2K
NV	22.1K	22.4K	22.5K
NY	133.3K	132.5K	135.3K
OH	101.6K	102.6K	105.5K
OK	34.4K	35.5K	36.4K
OR	34.5K	34.4K	34.9K
PA	114.7K	114.3K	116.7K
RI	8.7K	8.8K	8.7K
SC	45.9K	46.8K	48.0K
SD	7.0K	7.2K	7.2K
TN	62.1K	63.1K	64.9K
TX	175.4K	178.1K	181.8K
UT	16.4K	16.6K	17.1K
VA	62.9K	62.9K	64.7K
VT	5.7K	5.7K	5.8K
WA	52.5K	52.9K	53.5K
WI	47.7K	47.8K	49.6K
WV	19.8K	20.0K	20.6K
WY	4.5K	4.7K	4.7K

HOSPICE MORTALITIES			
State	2023	2024	2025
National	1236.6K	1268.9K	1320.6K
AK	1.0K	1.1K	1.1K
AL	23.9K	25.2K	26.6K
AR	13.9K	14.5K	15.0K
AZ	30.3K	31.4K	32.6K
CA	107.2K	106.7K	108.9K
CO	18.4K	19.1K	20.0K
CT	13.0K	13.5K	13.7K
DC	1.1K	1.0K	1.2K
DE	4.8K	5.0K	5.2K
FL	109.2K	109.9K	113.2K
GA	38.1K	39.8K	42.3K
HI	4.6K	4.8K	5.0K
IA	15.2K	15.8K	15.9K
ID	7.0K	7.6K	7.6K
IL	45.3K	45.9K	48.6K
IN	29.6K	29.9K	31.2K
KS	12.8K	13.2K	13.3K
KY	18.7K	19.6K	20.3K
LA	19.2K	20.1K	20.1K
MA	24.9K	25.4K	26.3K
MD	19.4K	20.2K	21.1K
ME	7.4K	7.5K	7.9K
MI	45.0K	46.3K	48.3K
MN	22.3K	23.1K	23.6K
MO	27.0K	28.9K	30.1K
MS	12.8K	13.2K	14.2K
MT	3.2K	3.7K	4.1K
NC	44.4K	45.3K	47.9K
ND	2.2K	2.3K	2.4K
NE	7.7K	7.8K	8.0K
NH	6.1K	6.3K	6.7K
NJ	28.5K	29.2K	29.6K
NM	7.9K	8.2K	8.8K
NV	11.1K	11.5K	11.7K
NY	36.0K	36.1K	37.3K
OH	56.5K	58.3K	61.1K
OK	17.7K	19.2K	20.2K
OR	17.4K	17.5K	18.9K
PA	55.0K	55.6K	57.4K
RI	5.3K	5.4K	5.4K
SC	25.1K	26.1K	27.4K
SD	3.1K	3.2K	3.3K
TN	30.6K	32.4K	33.9K
TX	95.9K	99.2K	103.9K
UT	10.4K	10.9K	11.5K
VA	30.8K	30.8K	32.7K
VT	2.5K	2.5K	2.6K
WA	23.0K	23.3K	24.5K
WI	26.9K	27.9K	29.8K
WV	9.0K	9.2K	9.3K
WY	1.7K	1.8K	1.9K

HOSPICE UTILIZATION			
State	2023	2024	2025
National	49.8%	50.8%	51.9%
AK	25.8%	27.8%	28.7%
AL	51.0%	53.5%	54.9%
AR	48.5%	49.5%	50.8%
AZ	56.0%	56.4%	58.4%
CA	45.8%	46.1%	46.8%
CO	52.8%	55.1%	56.3%
CT	48.4%	49.8%	49.9%
DC	29.4%	29.5%	31.7%
DE	56.3%	57.7%	57.1%
FL	58.8%	58.6%	60.0%
GA	51.5%	52.9%	54.9%
HI	43.6%	44.3%	46.8%
IA	55.9%	57.1%	56.6%
ID	52.0%	55.3%	55.1%
IL	50.0%	50.8%	52.6%
IN	53.3%	53.6%	54.3%
KS	54.6%	56.3%	56.0%
KY	44.7%	46.3%	47.1%
LA	51.2%	52.4%	52.8%
MA	48.8%	50.2%	51.3%
MD	46.8%	47.6%	48.4%
ME	52.3%	53.8%	55.4%
MI	52.9%	54.0%	54.4%
MN	54.8%	55.5%	56.0%
MO	50.7%	53.3%	54.3%
MS	46.9%	48.1%	50.1%
MT	35.4%	39.6%	43.6%
NC	52.1%	53.0%	54.4%
ND	40.1%	39.7%	42.2%
NE	50.6%	51.7%	53.6%
NH	51.0%	53.0%	54.9%
NJ	46.2%	47.0%	46.9%
NM	47.1%	48.6%	51.0%
NV	50.4%	51.3%	51.9%
NY	27.0%	27.2%	27.5%
OH	55.6%	56.9%	57.9%
OK	51.5%	54.0%	55.7%
OR	50.4%	50.7%	54.2%
PA	47.9%	48.6%	49.2%
RI	60.3%	61.2%	62.0%
SC	54.7%	55.8%	57.0%
SD	43.8%	44.4%	46.7%
TN	49.4%	51.3%	52.2%
TX	54.7%	55.7%	57.2%
UT	63.5%	65.5%	67.6%
VA	48.9%	49.0%	50.6%
VT	44.8%	43.0%	45.1%
WA	43.7%	44.1%	45.8%
WI	56.5%	58.4%	60.0%
WV	45.2%	46.0%	45.1%
WY	38.3%	38.2%	41.0%

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AVERAGE LENGTH OF STAY (DAYS)			
State	2023	2024	2025
National	**64.5**	**65.7**	**66.5**
AK	53.7	56.1	53.3
AL	75.8	75.4	74.2
AR	60.0	62.8	64.0
AZ	76.4	75.9	75.6
CA	79.1	85.7	85.3
CO	66.8	69.1	66.4
CT	49.5	47.3	49.5
DC	65.0	64.4	64.0
DE	59.1	60.5	54.9
FL	58.9	59.2	61.9
GA	69.1	70.0	70.1
HI	67.8	69.6	72.0
IA	60.5	61.1	62.9
ID	70.0	69.4	72.6
IL	54.3	53.6	55.1
IN	58.1	60.8	59.9
KS	68.5	68.3	68.7
KY	45.4	44.2	43.5
LA	66.7	66.9	69.0
MA	61.6	61.7	62.6
MD	50.8	50.1	52.9
ME	57.2	65.0	62.5
MI	64.9	65.1	66.2
MN	72.8	73.0	72.2
MO	63.4	63.7	64.2
MS	69.7	72.6	74.2
MT	61.9	58.9	61.3
NC	61.3	61.4	63.2
ND	53.9	55.3	56.8
NE	57.6	59.9	60.1
NH	61.9	62.1	60.9
NJ	53.3	53.7	55.2
NM	66.3	65.5	69.8
NV	67.5	68.5	69.0
NY	51.5	50.4	50.6
OH	62.5	61.3	65.4
OK	73.8	72.7	73.7
OR	61.6	63.3	64.2
PA	57.7	57.8	58.2
RI	54.1	50.7	50.4
SC	64.2	66.8	67.9
SD	52.6	54.8	54.5
TN	59.7	59.2	60.1
TX	71.3	73.5	73.3
UT	77.1	75.9	76.2
VA	62.5	63.4	62.6
VT	59.6	65.3	58.0
WA	58.4	60.2	59.2
WI	67.4	68.3	72.2
WV	53.8	55.2	55.9
WY	47.6	49.1	47.0

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AVERAGE TOTAL COST OF CARE — FINAL 6 MONTHS OF LIFE, 2025 DECEDENTS					
State	No Hospice	0–14 days	15–60 days	61–120 days	121+ days
National	**$97.4K**	**$89.6K**	**$79.3K**	**$71.8K**	**$67.7K**
AK	$91.6K	$78.1K	$69.7K	$55.4K	$54.7K
AL	$75.7K	$69.7K	$63.5K	$56.4K	$53.3K
AR	$80.9K	$78.9K	$75.3K	$66.1K	$69.9K
AZ	$94.4K	$91.0K	$80.5K	$74.0K	$81.4K
CA	$134.3K	$115.5K	$103.3K	$101.4K	$105.4K
CO	$81.1K	$89.0K	$75.6K	$61.5K	$53.6K
CT	$97.1K	$93.3K	$80.5K	$76.6K	$58.2K
DC	$125.1K	$117.2K	$103.6K	$76.7K	$81.5K
DE	$91.3K	$89.3K	$77.2K	$69.2K	$63.3K
FL	$99.9K	$94.5K	$83.1K	$77.9K	$72.8K
GA	$89.4K	$84.8K	$73.6K	$69.3K	$63.1K
HI	$86.8K	$84.6K	$72.5K	$70.8K	$72.0K
IA	$66.6K	$68.0K	$60.9K	$51.7K	$47.5K
ID	$67.7K	$69.5K	$63.1K	$59.8K	$59.1K
IL	$98.5K	$88.5K	$80.7K	$68.6K	$60.1K
IN	$87.9K	$80.6K	$73.2K	$67.1K	$59.3K
KS	$76.6K	$80.1K	$70.3K	$63.3K	$53.6K
KY	$76.4K	$77.9K	$68.3K	$61.6K	$56.6K
LA	$83.5K	$83.0K	$72.9K	$63.0K	$63.5K
MA	$98.8K	$98.2K	$85.9K	$75.1K	$62.8K
MD	$117.4K	$116.8K	$97.7K	$77.0K	$73.9K
ME	$66.8K	$66.2K	$61.1K	$59.3K	$52.7K
MI	$88.8K	$80.4K	$68.7K	$63.5K	$55.3K
MN	$73.8K	$77.6K	$70.0K	$62.0K	$53.1K
MO	$83.6K	$79.1K	$70.6K	$64.6K	$55.8K
MS	$84.1K	$74.8K	$66.9K	$66.3K	$56.8K
MT	$70.8K	$68.3K	$60.1K	$59.5K	$50.3K
NC	$76.9K	$73.3K	$68.5K	$59.8K	$56.6K
ND	$65.4K	$76.9K	$63.5K	$55.3K	$45.6K
NE	$82.9K	$80.4K	$73.9K	$60.2K	$50.8K
NH	$75.3K	$74.3K	$71.9K	$62.4K	$55.3K
NJ	$113.0K	$99.9K	$89.5K	$76.0K	$82.6K
NM	$76.6K	$75.0K	$71.4K	$61.3K	$53.0K
NV	$125.6K	$114.6K	$113.3K	$89.5K	$123.9K
NY	$116.8K	$105.3K	$93.3K	$83.0K	$76.0K
OH	$93.0K	$85.3K	$75.6K	$67.3K	$54.8K
OK	$98.5K	$89.3K	$87.1K	$75.1K	$61.9K
OR	$83.2K	$74.9K	$68.3K	$65.3K	$57.2K
PA	$86.7K	$85.5K	$73.2K	$64.6K	$52.8K
RI	$74.9K	$82.1K	$78.5K	$65.6K	$56.6K
SC	$76.8K	$77.8K	$70.4K	$65.2K	$53.1K
SD	$68.1K	$77.7K	$67.5K	$55.3K	$46.0K
TN	$76.8K	$72.7K	$69.0K	$61.3K	$49.4K
TX	$103.5K	$100.5K	$86.8K	$76.7K	$67.2K
UT	$80.7K	$78.8K	$65.7K	$60.3K	$61.6K
VA	$80.0K	$75.3K	$67.5K	$65.1K	$54.2K
VT	$54.2K	$49.3K	$50.3K	$43.3K	$39.2K
WA	$77.9K	$75.9K	$69.8K	$64.3K	$54.3K
WI	$73.4K	$75.1K	$67.7K	$61.7K	$56.5K
WV	$69.5K	$80.4K	$73.0K	$66.3K	$58.2K
WY	$78.5K	$80.0K	$68.8K	$60.3K	$50.7K

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Skilled Nursing Admissions by Quarter

FFS skilled nursing admissions have stabilized after a hard two years: a 13.7% drop in 2023, another 5.2% in 2024, then a 1.7% recovery to 1.58M in 2025, with every quarter running above its prior-year mark. MA supplies the backdrop: its SNF admissions reached 1.48M by 2023, narrowing FFS's lead to 158K. With MA enrollment growth now flat, 2025's level may be the shape of the new baseline.

2025 was the first growth year since 2022: admissions rose 1.7% to 1.58M

All four quarters ran above their 2024 counterparts — strongest in Q1 (+4.1%) and holding positive through Q4.

10.1% MA SNF admission growth surpassed MA enrollment rise

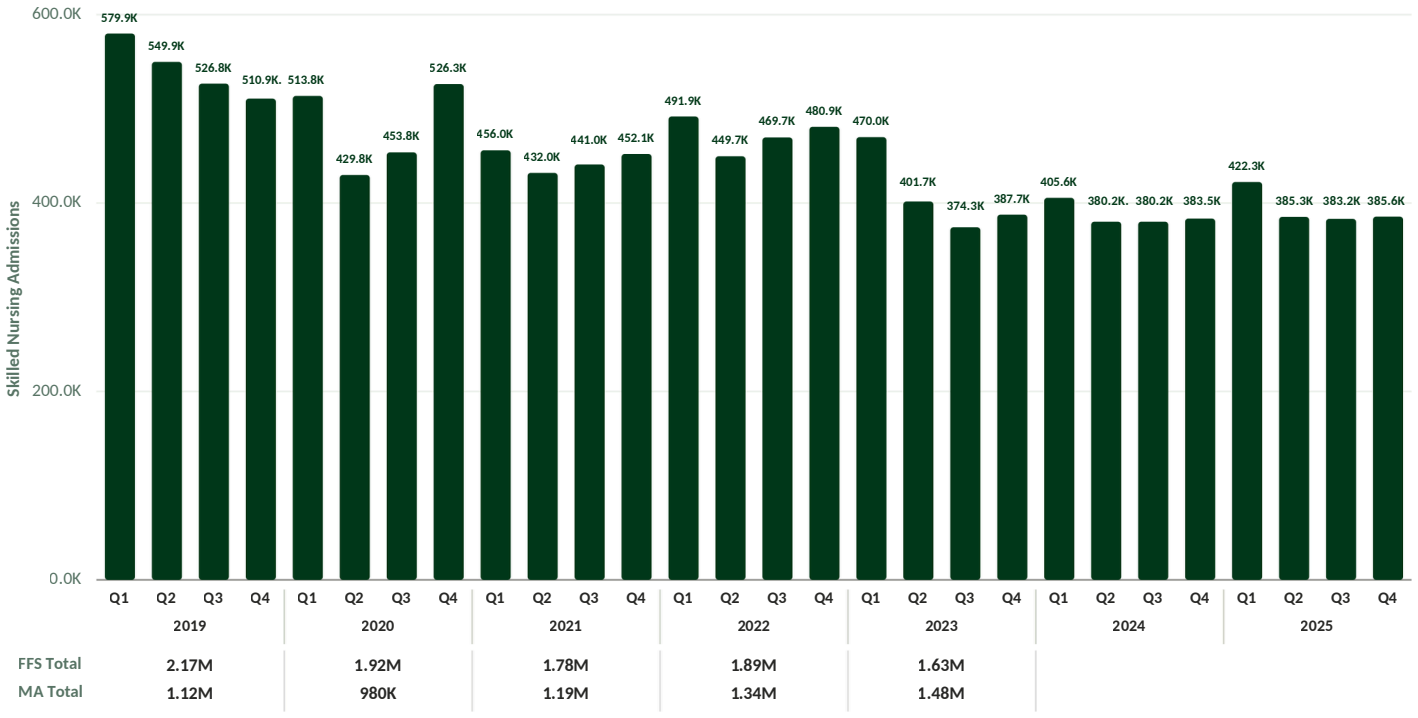
Between 2022 and 2023, MA skilled nursing admissions rose 10.1%, exceeding the 7.9% growth in MA enrollment — members are using SNF at a rising rate, not just growing in number.

The 2025 turn split the country: 27 states grew, 24 kept declining

California's +10.1% and other large-state gains carried the national +1.7% — use the market selector below to see which side of the line your markets landed on.

National Skilled Nursing Admissions by Quarter

Fee-for-service skilled nursing admissions per quarter, Q1 2019–Q4 2025. Choose a state to see its market.



How to read: each bar in the quarterly chart is one quarter of fee-for-service skilled nursing admissions. Because Medicare Advantage data is only available annually and through 2023, annual FFS and MA totals are shown beneath the year labels rather than as quarterly bars.

Source: CMS Medicare FFS and Medicare Advantage claims data · Data Timeframe: Quarterly (FFS): Q1 2019 - Q4 2025 · Annual (FFS & MA): 2019 - 2023

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Skilled Nursing Utilization by State

The average risk score of FFS skilled nursing patients has risen every year since 2020, reaching 2.85 in 2025 — the highest-acuity caseload in post-acute care. Against that backdrop, utilization eased to 22.4% while hospitalization rose to 31.0% and readmissions to 15.6%. The hospitalization increase is the map's most striking pattern, rising across all 50 states and D.C. over two years, a breadth that points to system-wide forces — rising acuity among them — rather than local performance.

FFS SNF utilization is steady at 22.4%, but varies fourfold by state

The Northeast leans on facility care most — Connecticut, New Jersey, and New York all above 26% — while Alaska's 8.0% runs at a third of the national average.

SNF hospitalization reached 31.0% in 2025, up 3.5 points in two years

23 states reported rates of 30% or higher in 2025, up from 4 in 2023. With rates rising in all states and D.C., the pattern points to system-wide drivers — including a caseload whose average risk score has climbed every year since 2020.

SNF readmissions rose modestly to 15.6%, up every year since 2019

Rates increased in 41 states, with the range spanning Alaska's 9.5% to Illinois's 17.4% — a nearly 8-point spread in the metric hospital partners watch most closely.

Skilled Nursing Utilization by State

National Takeaways

- The national average for Skilled Nursing Utilization stands at 22.4% — down 0.3 percentage points from the prior year
- Connecticut leads all states at 29.6% — the highest in the nation
- Alaska ranks last at 8.0% — 14.4 percentage points below the national average
- State variation spans 21.6 percentage points — from 8.0% (Alaska) to 29.6% (Connecticut)

SKILLED NURSING UTILIZATION

All 50 States + DC

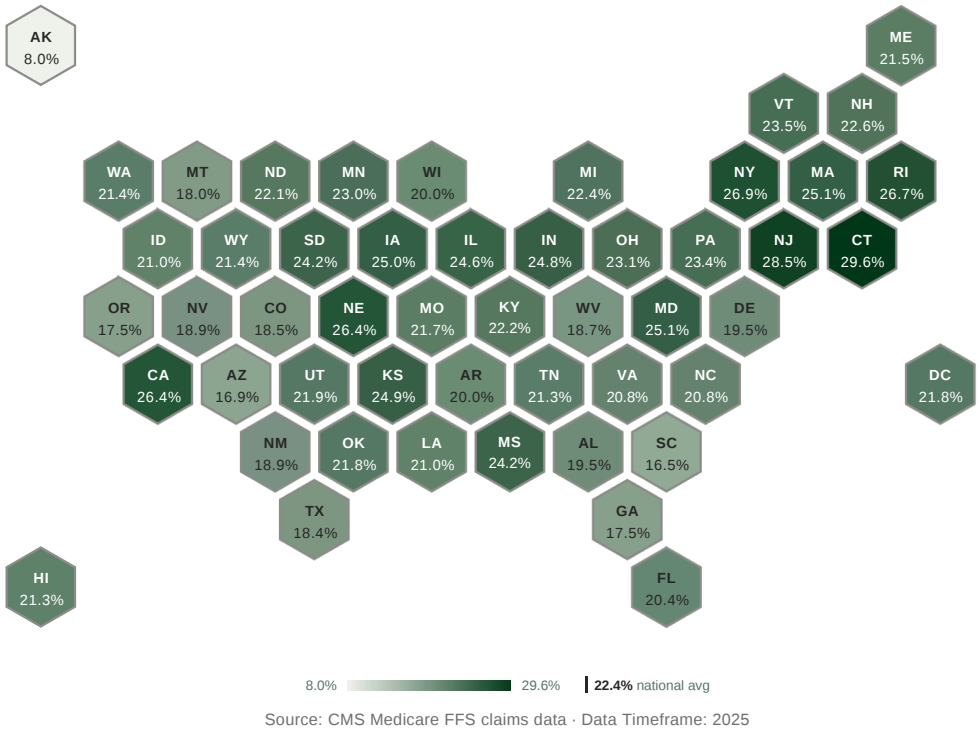
22.4%

National Average

2023 | 22.7%

2024 | 22.7%

2025 | 22.4%



Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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SKILLED NURSING ADMISSIONS			
State	2023	2024	2025
National	**388.0K**	**383.7K**	**385.9K**
AK	0.3K	0.4K	0.4K
AL	4.8K	4.6K	4.7K
AR	3.9K	3.8K	3.7K
AZ	5.7K	5.6K	5.4K
CA	38.9K	41.3K	44.9K
CO	4.0K	3.7K	3.6K
CT	5.3K	5.1K	5.2K
DC	0.8K	0.8K	0.9K
DE	1.5K	1.5K	1.6K
FL	31.7K	33.4K	31.9K
GA	7.9K	8.0K	8.5K
HI	0.9K	0.9K	0.9K
IA	5.1K	5.0K	4.8K
ID	1.6K	1.6K	1.6K
IL	18.5K	17.7K	17.6K
IN	9.1K	8.6K	8.4K
KS	5.3K	5.2K	5.0K
KY	6.0K	5.5K	5.2K
LA	4.9K	4.6K	4.5K
MA	13.6K	13.3K	13.7K
MD	10.4K	9.7K	9.7K
ME	1.5K	1.5K	1.4K
MI	10.5K	9.8K	9.6K
MN	5.7K	6.0K	5.8K
MO	8.1K	7.3K	7.3K
MS	5.2K	4.7K	4.3K
MT	1.2K	1.2K	1.3K
NC	10.2K	10.2K	10.0K
ND	1.2K	1.2K	1.1K
NE	3.5K	3.3K	3.2K
NH	2.1K	2.0K	2.2K
NJ	16.4K	16.6K	17.2K
NM	1.7K	1.7K	1.8K
NV	2.5K	2.5K	2.6K
NY	31.1K	31.2K	32.2K
OH	14.6K	13.8K	13.4K
OK	5.6K	5.5K	5.4K
OR	2.6K	2.7K	2.8K
PA	17.7K	17.9K	17.5K
RI	1.4K	1.2K	1.3K
SC	5.4K	5.3K	5.2K
SD	1.8K	1.7K	1.6K
TN	7.5K	7.5K	7.6K
TX	21.1K	20.2K	20.2K
UT	2.0K	2.0K	2.1K
VA	10.3K	9.8K	9.8K
VT	1.1K	1.0K	1.2K
WA	6.5K	6.4K	6.5K
WI	5.9K	5.5K	5.5K
WV	2.4K	2.3K	2.2K
WY	0.9K	0.9K	0.8K

YOY% CHANGE IN ADMISSIONS			
State	2023	2024	2025
National	**-19.4%**	**-1.1%**	**+0.6%**
AK	-0.6%	+8.4%	+17.9%
AL	-14.8%	-3.5%	+2.0%
AR	-27.6%	-3.5%	-3.5%
AZ	-19.7%	-0.7%	-4.0%
CA	-24.1%	+6.3%	+8.7%
CO	-22.0%	-8.5%	-1.8%
CT	-31.5%	-3.3%	+1.6%
DC	-8.8%	+1.0%	+7.6%
DE	-14.2%	+0.0%	+6.5%
FL	-13.7%	+5.3%	-4.3%
GA	-13.8%	+1.6%	+5.9%
HI	-2.1%	+3.2%	+0.7%
IA	-27.5%	-2.1%	-3.7%
ID	-9.8%	-2.6%	+2.0%
IL	-21.3%	-4.0%	-0.6%
IN	-30.1%	-5.9%	-2.3%
KS	-20.2%	-0.7%	-4.8%
KY	-18.9%	-9.1%	-5.2%
LA	-23.5%	-6.8%	-2.2%
MA	-18.7%	-1.9%	+2.7%
MD	-16.9%	-6.8%	-0.7%
ME	-17.5%	-1.7%	-6.4%
MI	-17.6%	-6.6%	-1.6%
MN	-11.6%	+5.5%	-3.0%
MO	-22.2%	-9.8%	+0.8%
MS	-5.6%	-8.5%	-8.6%
MT	-12.9%	+4.7%	+6.7%
NC	-15.0%	+0.6%	-2.6%
ND	-15.7%	-1.9%	-3.9%
NE	-9.7%	-3.3%	-4.2%
NH	-23.3%	-2.7%	+6.6%
NJ	-18.1%	+1.3%	+3.9%
NM	-20.3%	+2.2%	+1.4%
NV	-13.4%	+2.3%	+4.9%
NY	-16.8%	+0.3%	+3.1%
OH	-24.2%	-5.6%	-2.6%
OK	-19.6%	-2.4%	-2.2%
OR	-4.8%	+2.3%	+6.4%
PA	-13.4%	+1.3%	-2.0%
RI	-22.2%	-14.6%	+9.9%
SC	-19.4%	-1.3%	-0.7%
SD	-9.4%	-5.8%	-9.3%
TN	-17.8%	+0.4%	+0.4%
TX	-29.9%	-4.5%	+0.2%
UT	-20.0%	-1.3%	+6.1%
VA	-15.2%	-5.5%	+0.9%
VT	-21.1%	-2.5%	+12.7%
WA	-4.0%	-0.5%	+0.6%
WI	-19.6%	-6.3%	+0.1%
WV	-22.2%	-3.3%	-4.3%
WY	-14.9%	+4.4%	-10.5%

SNF UTILIZATION			
State	2023	2024	2025
National	**22.7%**	**22.7%**	**22.4%**
AK	7.4%	7.2%	8.0%
AL	19.7%	19.2%	19.5%
AR	20.5%	20.0%	20.0%
AZ	18.1%	17.3%	16.9%
CA	25.1%	26.0%	26.4%
CO	21.0%	19.5%	18.5%
CT	30.1%	29.7%	29.6%
DC	22.4%	22.6%	21.8%
DE	19.7%	19.6%	19.5%
FL	21.8%	21.5%	20.4%
GA	18.1%	17.8%	17.5%
HI	20.1%	21.0%	21.3%
IA	25.4%	25.3%	25.0%
ID	21.4%	20.7%	21.0%
IL	24.7%	24.5%	24.6%
IN	25.3%	25.1%	24.8%
KS	26.2%	25.8%	24.9%
KY	23.4%	23.0%	22.2%
LA	21.6%	21.2%	21.0%
MA	25.2%	25.3%	25.1%
MD	26.5%	26.1%	25.1%
ME	20.8%	21.3%	21.5%
MI	21.6%	22.1%	22.4%
MN	22.4%	22.7%	23.0%
MO	22.8%	21.8%	21.7%
MS	25.3%	25.0%	24.2%
MT	17.5%	18.5%	18.0%
NC	20.9%	21.3%	20.8%
ND	21.8%	22.6%	22.1%
NE	26.2%	26.4%	26.4%
NH	22.1%	22.0%	22.6%
NJ	28.7%	28.8%	28.5%
NM	19.4%	19.3%	18.9%
NV	18.1%	18.4%	18.9%
NY	26.4%	27.0%	26.9%
OH	24.3%	23.7%	23.1%
OK	22.3%	22.3%	21.8%
OR	15.6%	17.3%	17.5%
PA	22.9%	23.4%	23.4%
RI	29.3%	27.8%	26.7%
SC	17.1%	17.0%	16.5%
SD	23.3%	24.0%	24.2%
TN	21.6%	21.5%	21.3%
TX	19.2%	18.6%	18.4%
UT	22.4%	22.1%	21.9%
VA	21.0%	21.4%	20.8%
VT	22.1%	22.6%	23.5%
WA	20.9%	21.5%	21.4%
WI	20.8%	20.6%	20.0%
WV	18.6%	18.5%	18.7%
WY	19.6%	20.8%	21.4%

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HOSPITALIZATION RATE			
State	2023	2024	2025
National	**27.5%**	**29.7%**	**31.0%**
AK	19.2%	20.0%	20.1%
AL	26.9%	28.2%	29.3%
AR	26.8%	28.9%	29.9%
AZ	26.6%	27.8%	28.5%
CA	27.1%	30.9%	33.0%
CO	21.8%	23.7%	24.9%
CT	27.1%	29.7%	30.8%
DC	27.6%	29.7%	29.9%
DE	27.5%	30.2%	32.8%
FL	30.9%	32.6%	33.7%
GA	30.0%	32.1%	33.4%
HI	22.9%	24.5%	25.6%
IA	19.5%	21.4%	23.1%
ID	17.7%	19.7%	21.3%
IL	30.8%	32.8%	34.0%
IN	26.5%	28.4%	29.4%
KS	23.4%	24.5%	26.1%
KY	27.0%	29.4%	30.9%
LA	28.1%	31.4%	34.0%
MA	27.6%	29.6%	31.1%
MD	28.3%	30.1%	31.1%
ME	18.8%	21.8%	23.8%
MI	29.8%	31.3%	32.3%
MN	22.4%	24.4%	25.7%
MO	28.4%	30.6%	31.9%
MS	28.9%	30.6%	32.0%
MT	18.1%	20.1%	21.6%
NC	26.6%	28.5%	29.7%
ND	19.1%	21.5%	22.9%
NE	22.0%	24.4%	25.6%
NH	22.3%	24.5%	25.5%
NJ	30.9%	32.8%	34.1%
NM	24.7%	27.5%	28.0%
NV	29.3%	31.5%	32.6%
NY	28.6%	30.4%	31.4%
OH	28.5%	30.8%	31.9%
OK	28.4%	30.9%	32.2%
OR	22.4%	23.9%	24.0%
PA	27.1%	29.3%	30.5%
RI	24.1%	26.3%	27.8%
SC	28.2%	31.2%	32.9%
SD	19.7%	20.5%	22.0%
TN	27.6%	28.9%	29.3%
TX	28.0%	30.9%	32.9%
UT	19.7%	21.1%	22.3%
VA	27.7%	29.3%	30.1%
VT	19.2%	21.4%	22.9%
WA	22.5%	24.4%	25.6%
WI	23.8%	25.8%	26.7%
WV	27.3%	29.3%	30.1%
WY	19.0%	21.2%	22.9%

READMISSION RATE			
State	2023	2024	2025
National	**15.3%**	**15.4%**	**15.6%**
AK	10.4%	10.9%	9.5%
AL	14.7%	15.2%	15.7%
AR	15.3%	15.4%	15.2%
AZ	14.6%	14.6%	14.5%
CA	15.8%	15.9%	16.0%
CO	12.0%	12.3%	12.8%
CT	15.8%	16.2%	16.0%
DC	15.4%	15.2%	14.9%
DE	15.0%	15.5%	16.6%
FL	17.2%	17.1%	17.3%
GA	16.6%	16.9%	17.2%
HI	12.7%	13.7%	14.7%
IA	10.6%	11.0%	11.7%
ID	9.0%	9.6%	10.4%
IL	17.1%	17.3%	17.4%
IN	14.8%	14.8%	14.9%
KS	11.6%	11.6%	12.1%
KY	15.1%	15.5%	15.7%
LA	15.2%	15.7%	16.4%
MA	15.6%	15.8%	15.9%
MD	15.2%	15.1%	15.0%
ME	10.9%	11.4%	12.2%
MI	16.6%	16.5%	16.6%
MN	12.0%	12.8%	13.4%
MO	15.9%	16.3%	16.5%
MS	14.3%	14.9%	15.4%
MT	9.4%	10.0%	11.1%
NC	14.7%	14.8%	15.2%
ND	10.5%	11.3%	12.1%
NE	11.2%	11.8%	12.1%
NH	11.9%	12.2%	12.6%
NJ	17.3%	17.2%	17.2%
NM	14.5%	15.3%	15.3%
NV	15.4%	15.7%	16.0%
NY	15.9%	15.9%	15.7%
OH	16.0%	16.3%	16.4%
OK	15.1%	15.7%	16.4%
OR	12.3%	12.8%	13.1%
PA	14.9%	15.3%	15.4%
RI	14.4%	15.2%	14.8%
SC	15.8%	16.3%	17.0%
SD	10.4%	10.6%	11.4%
TN	14.5%	14.4%	14.7%
TX	16.1%	16.4%	16.7%
UT	10.4%	10.8%	11.1%
VA	15.2%	14.8%	14.9%
VT	11.5%	11.6%	11.8%
WA	12.2%	12.9%	13.3%
WI	13.3%	13.5%	13.5%
WV	14.8%	15.0%	14.8%
WY	9.6%	10.0%	11.4%

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TEAM Model

Home Health and SNFs' Role in TEAM Model Success and Care Transition Optimization

Under TEAM, the hospital is accountable for spending and outcomes across the full 30-day episode. Five surgical procedures are covered, with total episode costs from about $30K for a joint replacement to over $51K for a bypass. Where patients go after surgery is a choice, and it varies widely — some markets favor home health, others skilled nursing for the same procedure. That choice carries outcome stakes determined by patient needs and strong post-acute partnerships.

Each of the five TEAM procedures has its own discharge pattern

Hip and femur fracture is the only SNF-led episode (42.7%); CABG sends 43.8% of patients to home health; 53.7% of major bowel patients leave with no PAC instruction at all.

Joint replacement is TEAM's volume anchor — and its most balanced episode

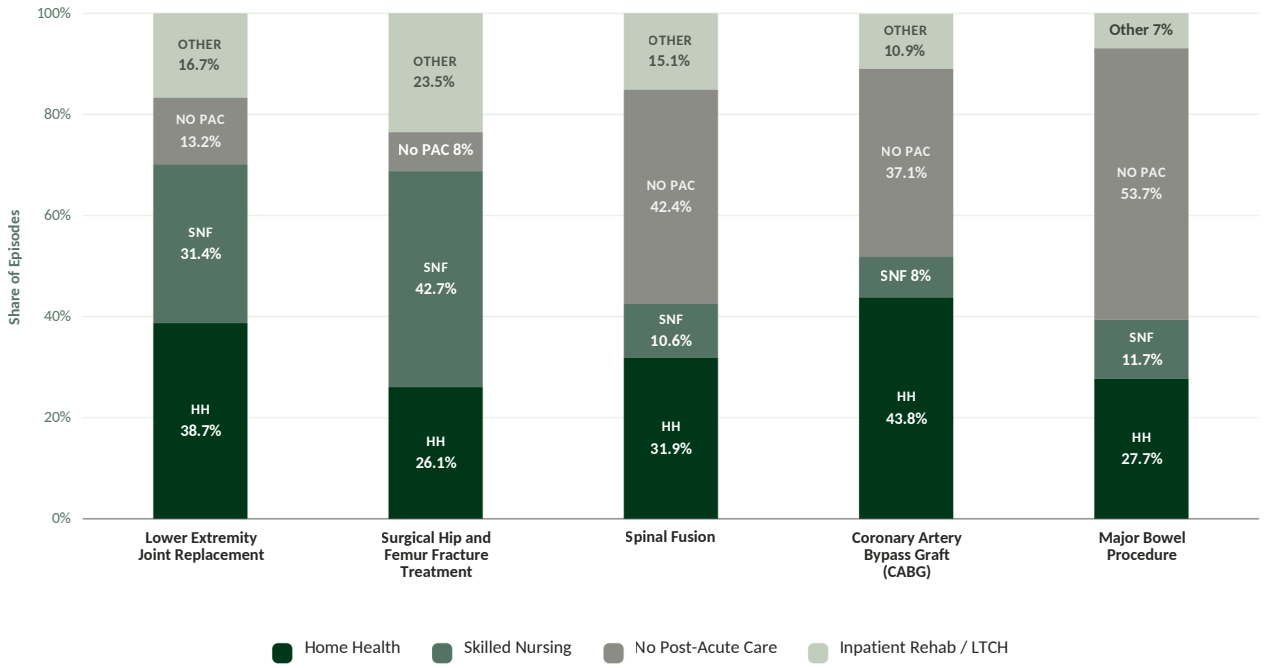
The only procedure where home health (38.7%) and skilled nursing (31.4%) both carry substantial share, making it the episode where discharge patterns have the most room to shift.

CABG carries the most exposure: the costliest episode and the widest readmission gap

At $51.3K per episode and a 10.5-point spread between home health (8.0%) and skilled nursing (18.5%), CABG puts more risk on the discharge decision than any other episode.

National: TEAM Surgical Episode Discharge Instructions by Post-Acute Destination

Where patients were instructed to go at discharge for each TEAM surgical episode — home health, skilled nursing, no post-acute care, or other (inpatient rehab and long-term care hospitals).



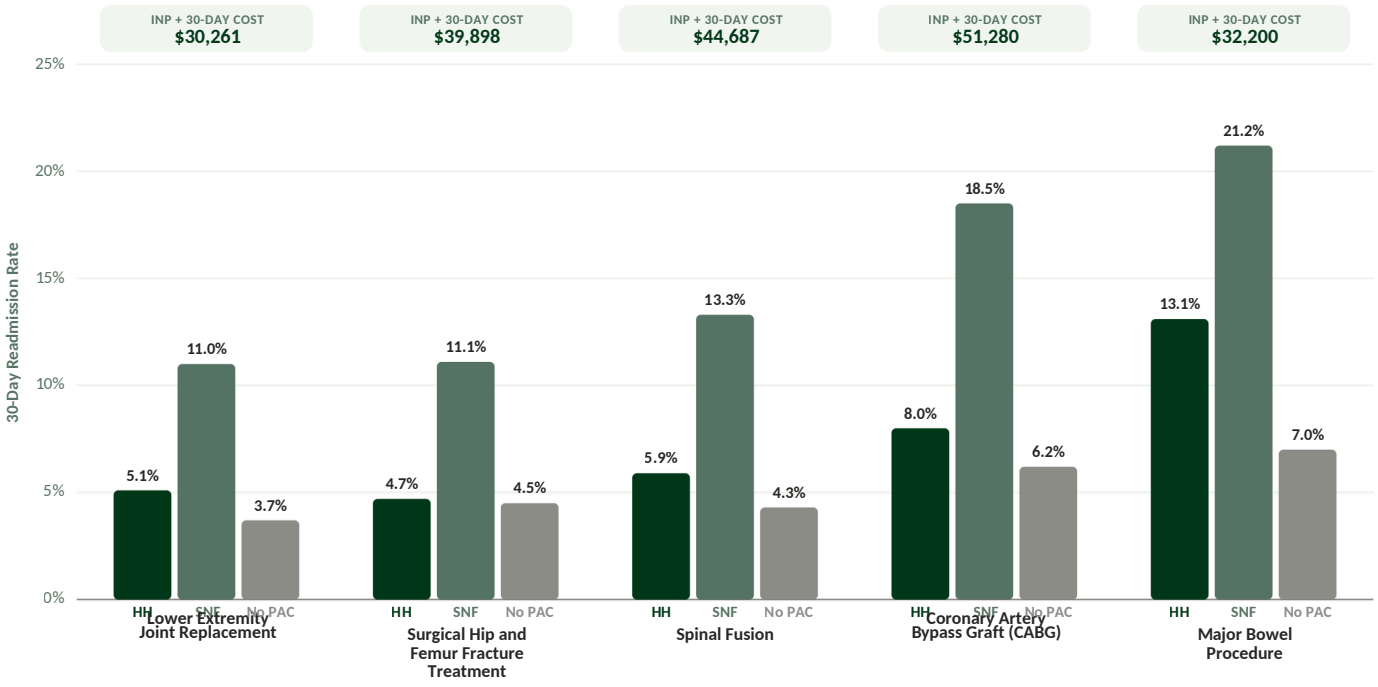
Bars show the full destination mix: home health, skilled nursing, no post-acute care, and **Other** (inpatient rehab and long-term care hospitals). State values with too few episodes are omitted.

Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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National: 30-Day Readmission Rate by Post-Acute Destination - TEAM Surgical Episodes

Across the five surgical episodes in CMS's Transforming Episode Accountability Model (TEAM), home-health episodes show lower 30-day readmission rates than skilled nursing.



Total episode cost is the inpatient stay plus 30 days of post-discharge care. Readmission rates are 30-day all-cause and unadjusted.
State values with too few episodes to report are omitted.

Source: CMS Medicare FFS claims data · Data Timeframe: 2025

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AVG TOTAL EPISODE COST (INPATIENT + 30 DAYS)					
State	Joint Replacement	Hip & Femur Fracture	Spinal Fusion	CABG	Major Bowel
AK	$31.5K	$45.9K	$47.6K	$51.8K	$38.0K
AL	$24.5K	$31.4K	$32.0K	$38.7K	$24.8K
AR	$32.8K	$36.3K	$37.5K	$41.0K	$26.8K
AZ	$31.9K	$39.1K	$43.5K	$51.0K	$30.4K
CA	$35.7K	$49.5K	$62.6K	$72.0K	$43.5K
CO	$32.7K	$39.4K	$49.2K	$50.8K	$31.0K
CT	$33.7K	$42.0K	$52.5K	$59.5K	$35.4K
DC	$33.9K	$45.2K	$52.1K	$62.7K	$36.9K
DE	$40.1K	$43.3K	$41.0K	$54.4K	$29.2K
FL	$29.6K	$37.5K	$40.8K	$48.1K	$30.8K
GA	$33.3K	$37.8K	$40.5K	$47.0K	$29.1K
HI	$36.1K	$45.7K	$46.9K	$56.4K	$37.6K
IA	$26.0K	$35.7K	$38.2K	$46.7K	$26.3K
ID	$30.0K	$36.6K	$43.0K	$51.3K	$28.5K
IL	$29.0K	$37.8K	$45.4K	$51.3K	$31.1K
IN	$29.7K	$37.0K	$42.5K	$47.7K	$29.2K
KS	$23.8K	$40.7K	$40.0K	$47.1K	$27.8K
KY	$31.2K	$35.5K	$43.7K	$41.5K	$27.3K
LA	$33.1K	$36.6K	$34.3K	$45.2K	$27.9K
MA	$29.9K	$44.0K	$51.7K	$66.9K	$35.5K
MD	$44.7K	$52.0K	$67.4K	$75.9K	$44.8K
ME	$34.3K	$36.1K	$39.6K	$45.1K	$30.4K
MI	$26.6K	$33.6K	$40.0K	$50.4K	$29.0K
MN	$25.7K	$36.4K	$41.0K	$51.6K	$32.7K
MO	$30.8K	$37.3K	$41.4K	$45.8K	$29.1K
MS	$32.1K	$35.7K	$31.7K	$41.8K	$26.7K
MT	$30.8K	$40.2K	$37.8K	$47.1K	$27.9K
NC	$25.8K	$33.3K	$39.4K	$43.0K	$27.1K
ND	$34.4K	$40.7K	$40.4K	$43.7K	$30.4K
NE	$31.5K	$40.7K	$38.8K	$50.5K	$29.3K
NH	$33.5K	$42.3K	$39.5K	$51.1K	$34.4K
NJ	$36.3K	$44.6K	$46.3K	$54.0K	$35.1K
NM	$29.6K	$38.7K	$47.9K	$46.6K	$31.8K
NV	$35.8K	$45.3K	$46.2K	$60.5K	$37.0K
NY	$27.3K	$48.4K	$54.8K	$61.8K	$40.4K
OH	$27.3K	$34.8K	$41.1K	$45.7K	$29.6K
OK	$31.7K	$39.8K	$36.5K	$44.4K	$30.4K
OR	$30.7K	$38.1K	$47.8K	$56.0K	$33.1K
PA	$25.6K	$37.5K	$43.6K	$49.7K	$31.5K
RI	$28.9K	$38.4K	$49.0K	$57.1K	$29.6K
SC	$32.3K	$37.2K	$37.2K	$46.1K	$28.9K
SD	$27.8K	$39.5K	$35.0K	$44.3K	$29.7K
TN	$27.4K	$34.0K	$37.8K	$43.0K	$26.3K
TX	$32.4K	$42.4K	$41.8K	$49.4K	$30.6K
UT	$26.3K	$34.7K	$38.3K	$44.0K	$28.0K
VA	$29.4K	$35.1K	$41.4K	$49.6K	$28.1K
VT	$24.3K	$27.6K	$28.0K	$37.6K	$24.8K
WA	$31.3K	$38.2K	$44.9K	$49.8K	$31.0K
WI	$26.6K	$34.9K	$38.6K	$46.4K	$29.1K
WV	$24.0K	$33.6K	$39.7K	$47.4K	$28.7K
WY	$34.2K	$44.6K	$44.5K	$61.4K	$35.0K

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30-DAY READMISSION — JOINT REPLACEMENT			
State	HH	SNF	No PAC
AK	9.0%	6.1%	4.0%
AL	6.0%	13.7%	2.8%
AR	3.6%	13.0%	3.0%
AZ	4.3%	11.2%	3.9%
CA	3.7%	10.2%	3.2%
CO	4.8%	11.6%	3.8%
CT	3.8%	10.0%	4.4%
DC	2.7%	8.7%	7.7%
DE	9.1%	13.6%	0.0%
FL	5.9%	12.6%	4.1%
GA	6.1%	12.6%	4.1%
HI	4.2%	9.0%	2.3%
IA	5.6%	9.3%	2.7%
ID	5.9%	7.7%	1.6%
IL	4.9%	12.5%	5.0%
IN	4.9%	10.6%	2.5%
KS	5.5%	9.0%	3.5%
KY	5.5%	11.8%	6.2%
LA	6.7%	14.0%	3.9%
MA	3.8%	9.8%	3.7%
MD	4.6%	10.4%	4.7%
ME	7.4%	12.1%	3.6%
MI	5.6%	12.2%	4.8%
MN	4.7%	10.8%	2.7%
MO	5.5%	12.8%	4.5%
MS	4.8%	10.6%	6.3%
MT	7.3%	11.9%	5.1%
NC	4.6%	11.3%	3.3%
ND	5.3%	11.0%	4.0%
NE	7.2%	9.7%	4.5%
NH	5.6%	8.9%	2.1%
NJ	4.7%	12.4%	5.1%
NM	5.2%	11.2%	4.7%
NV	6.4%	12.1%	2.8%
NY	3.1%	9.2%	3.3%
OH	5.5%	12.9%	4.3%
OK	5.2%	15.2%	5.0%
OR	3.3%	9.7%	3.3%
PA	5.1%	10.7%	3.9%
RI	3.0%	11.4%	0.0%
SC	4.9%	12.6%	7.1%
SD	5.5%	9.3%	5.4%
TN	5.7%	10.5%	3.8%
TX	4.9%	12.1%	4.5%
UT	3.4%	9.5%	2.6%
VA	5.6%	10.5%	3.4%
VT	7.6%	18.3%	0.0%
WA	3.3%	8.1%	3.0%
WI	5.9%	12.1%	3.9%
WV	4.9%	7.4%	1.9%
WY	0.0%	9.5%	1.3%

30-DAY READMISSION — HIP & FEMUR FRACTURE			
State	HH	SNF	No PAC
AK	3.4%	5.5%	7.9%
AL	6.4%	13.4%	6.3%
AR	5.5%	11.3%	3.1%
AZ	5.3%	9.7%	3.4%
CA	5.4%	11.3%	5.5%
CO	2.2%	8.8%	2.0%
CT	4.2%	12.0%	3.1%
DC	6.3%	9.6%	6.0%
DE	6.1%	12.3%	3.0%
FL	5.5%	13.3%	5.2%
GA	5.5%	11.8%	4.7%
HI	2.9%	8.1%	1.6%
IA	3.6%	10.3%	3.3%
ID	3.7%	6.5%	1.8%
IL	5.1%	13.4%	5.2%
IN	4.5%	10.7%	3.7%
KS	5.0%	11.0%	0.5%
KY	4.4%	11.5%	4.8%
LA	5.1%	13.5%	8.1%
MA	4.7%	12.5%	4.3%
MD	4.8%	11.5%	6.1%
ME	4.9%	10.2%	3.9%
MI	4.5%	11.7%	4.5%
MN	5.7%	12.7%	4.8%
MO	4.6%	12.5%	5.2%
MS	4.0%	11.1%	8.7%
MT	0.9%	7.8%	3.0%
NC	4.3%	11.6%	3.2%
ND	7.8%	8.8%	3.8%
NE	3.4%	10.0%	6.4%
NH	4.6%	9.7%	5.2%
NJ	5.3%	13.5%	7.2%
NM	4.0%	13.1%	0.0%
NV	4.6%	12.2%	5.7%
NY	5.0%	10.4%	7.0%
OH	5.7%	13.0%	4.3%
OK	5.2%	11.1%	5.6%
OR	5.6%	10.8%	5.0%
PA	5.3%	12.6%	5.6%
RI	3.4%	13.0%	2.6%
SC	5.2%	13.3%	3.1%
SD	4.1%	10.4%	4.9%
TN	6.4%	10.9%	4.8%
TX	5.1%	11.5%	5.7%
UT	4.7%	8.6%	3.9%
VA	5.8%	11.5%	5.3%
VT	6.0%	10.9%	4.8%
WA	4.3%	9.4%	5.7%
WI	4.3%	12.9%	2.7%
WV	6.2%	13.1%	4.3%
WY	1.6%	9.3%	2.4%

30-DAY READMISSION — SPINAL FUSION			
State	HH	SNF	No PAC
AK	7.8%	16.0%	3.3%
AL	8.5%	15.0%	4.1%
AR	7.3%	16.3%	3.5%
AZ	5.3%	10.5%	4.6%
CA	5.5%	14.0%	3.5%
CO	5.6%	12.1%	5.0%
CT	6.0%	10.2%	4.0%
DC	6.3%	15.4%	3.2%
DE	6.7%	10.3%	3.8%
FL	6.9%	14.2%	4.2%
GA	7.2%	15.6%	4.8%
HI	3.1%	12.5%	2.9%
IA	3.3%	12.0%	4.0%
ID	5.1%	11.2%	2.6%
IL	7.3%	14.5%	4.4%
IN	3.6%	9.7%	4.5%
KS	6.2%	14.2%	4.8%
KY	4.4%	15.3%	4.8%
LA	6.1%	11.3%	3.3%
MA	5.3%	14.3%	4.1%
MD	5.9%	12.8%	4.5%
ME	1.2%	16.1%	6.0%
MI	7.2%	18.4%	4.7%
MN	7.6%	13.1%	4.9%
MO	7.5%	12.7%	4.6%
MS	1.7%	11.7%	2.0%
MT	5.2%	10.6%	4.7%
NC	7.1%	11.8%	4.0%
ND	7.0%	11.5%	5.4%
NE	8.0%	12.4%	5.1%
NH	6.6%	10.6%	3.1%
NJ	5.9%	16.1%	4.5%
NM	6.2%	14.6%	4.4%
NV	7.5%	13.0%	4.7%
NY	6.3%	13.1%	3.6%
OH	7.3%	15.5%	4.2%
OK	7.1%	12.8%	3.5%
OR	5.1%	16.0%	2.8%
PA	6.4%	13.0%	4.4%
RI	3.7%	17.7%	4.5%
SC	5.4%	16.6%	3.5%
SD	7.7%	14.0%	1.7%
TN	8.6%	13.9%	4.2%
TX	5.3%	13.9%	4.7%
UT	5.2%	13.5%	2.1%
VA	5.1%	13.3%	4.1%
VT	6.8%	9.5%	7.5%
WA	5.6%	11.3%	4.2%
WI	4.3%	14.2%	3.3%
WV	7.4%	18.4%	7.0%
WY	0.0%	0.0%	11.6%

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30-DAY READMISSION — CABG			
State	HH	SNF	No PAC
AK	10.0%	40.0%	7.1%
AL	10.1%	24.4%	5.1%
AR	10.1%	19.4%	5.5%
AZ	8.4%	12.3%	7.0%
CA	8.8%	20.3%	8.0%
CO	7.3%	20.5%	6.5%
CT	8.2%	30.3%	5.8%
DC	9.2%	18.2%	6.1%
DE	5.1%	16.7%	4.9%
FL	8.5%	19.6%	8.0%
GA	12.7%	17.8%	6.0%
HI	10.7%	20.0%	8.6%
IA	9.6%	19.4%	5.4%
ID	5.2%	12.7%	5.3%
IL	8.8%	21.3%	8.1%
IN	7.7%	17.5%	4.8%
KS	8.3%	17.2%	6.4%
KY	7.0%	15.1%	7.1%
LA	8.6%	22.0%	5.9%
MA	8.4%	17.2%	5.6%
MD	6.5%	19.5%	5.1%
ME	6.1%	25.0%	5.9%
MI	8.6%	13.1%	4.1%
MN	11.0%	18.6%	7.6%
MO	8.9%	19.6%	7.9%
MS	7.4%	14.1%	5.2%
MT	5.7%	16.1%	5.4%
NC	7.6%	15.5%	6.2%
ND	10.8%	18.8%	6.8%
NE	8.3%	11.3%	5.1%
NH	8.4%	10.5%	5.3%
NJ	7.4%	17.2%	8.8%
NM	2.9%	16.1%	6.1%
NV	11.2%	16.7%	5.0%
NY	7.8%	17.2%	6.2%
OH	7.8%	19.0%	7.6%
OK	8.6%	20.8%	7.1%
OR	6.4%	15.8%	6.0%
PA	8.8%	19.3%	6.6%
RI	1.3%	13.8%	0.0%
SC	8.5%	19.6%	7.2%
SD	3.3%	9.1%	4.5%
TN	9.3%	19.4%	7.0%
TX	9.1%	19.9%	8.0%
UT	7.2%	17.0%	4.7%
VA	7.8%	12.7%	4.9%
VT	12.0%	21.1%	5.1%
WA	7.9%	20.4%	6.0%
WI	9.2%	16.7%	6.4%
WV	12.0%	30.2%	6.4%
WY	0.0%	—	12.3%

30-DAY READMISSION — MAJOR BOWEL			
State	HH	SNF	No PAC
AK	7.4%	8.3%	10.1%
AL	12.3%	18.1%	6.1%
AR	12.9%	19.9%	7.2%
AZ	13.2%	21.3%	6.3%
CA	14.0%	21.5%	6.6%
CO	14.6%	22.3%	7.3%
CT	9.9%	22.8%	5.8%
DC	15.4%	26.8%	5.9%
DE	12.6%	27.2%	6.5%
FL	14.1%	22.2%	7.4%
GA	13.7%	21.7%	7.3%
HI	15.6%	21.2%	7.9%
IA	12.2%	17.2%	5.5%
ID	10.9%	11.2%	6.2%
IL	13.5%	25.5%	7.0%
IN	13.2%	22.2%	7.7%
KS	13.2%	18.2%	7.4%
KY	13.8%	22.0%	9.2%
LA	11.0%	20.9%	6.5%
MA	15.1%	22.6%	5.7%
MD	12.5%	23.1%	6.5%
ME	17.1%	18.2%	5.7%
MI	14.3%	24.8%	6.9%
MN	11.7%	21.4%	9.7%
MO	12.8%	20.2%	8.8%
MS	12.7%	25.5%	7.3%
MT	13.5%	14.6%	8.2%
NC	14.6%	21.3%	6.9%
ND	13.1%	32.9%	8.9%
NE	16.0%	22.5%	4.9%
NH	13.2%	20.0%	6.6%
NJ	12.5%	21.4%	6.3%
NM	7.0%	14.8%	4.8%
NV	17.0%	21.4%	8.5%
NY	14.5%	21.4%	7.0%
OH	14.4%	23.0%	7.6%
OK	15.5%	23.8%	6.6%
OR	13.0%	17.9%	7.1%
PA	14.4%	23.3%	6.9%
RI	12.0%	18.3%	6.7%
SC	12.0%	20.2%	6.5%
SD	10.9%	25.0%	7.1%
TN	12.7%	23.2%	6.9%
TX	13.6%	20.6%	7.2%
UT	9.4%	18.9%	6.9%
VA	13.7%	23.0%	5.8%
VT	16.4%	23.4%	8.5%
WA	10.9%	15.2%	6.7%
WI	15.0%	20.1%	7.0%
WV	17.9%	31.0%	7.7%
WY	6.1%	16.7%	3.6%

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Top Home Medical Equipment & Infusion Codes by Claim Volume

The ten largest HME codes and the ten largest infusion codes tell two very different stories. In HME, respiratory rules: nine of the top ten codes are oxygen or PAP equipment and supplies, led by oxygen concentrators (E1390) at 21.7M claims. In infusion, the top ten are essentially fluids and antibiotics — four IV-fluid codes and four IV-antibiotic codes, plus two catheter supplies — led by normal saline (J7030) at 13.4M. Both are Medicare-anchored, but HME's leaders skew toward Medicare Advantage while infusion's pull in more commercial and Medicaid volume.

The top HME codes are a respiratory story

Nine of the ten highest-volume HME codes are oxygen or PAP (CPAP/BiPAP) equipment and supplies. Oxygen concentrators, CPAP devices, and PAP filters lead the group, and continuous glucose monitoring is the only non-respiratory code to crack the list.

Infusion claim leaders are fluids and antibiotics

Eight of the ten largest infusion codes by claim volume are IV fluids or IV antibiotics. The remaining two are catheter-flush supplies — heparin flush and sterile water/saline.

Both are Medicare-anchored, but the payer mix diverges

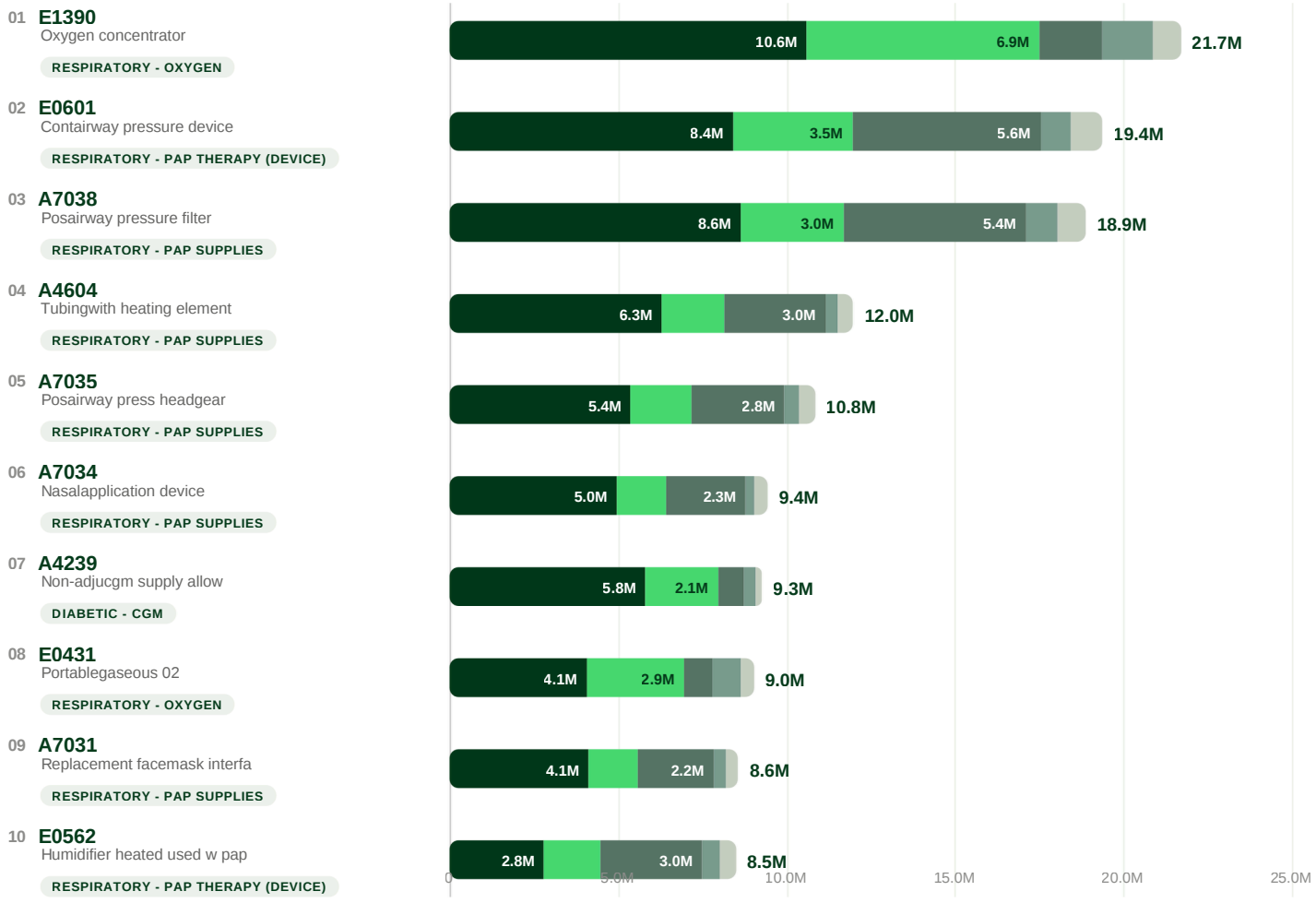
Among the top ten HME codes, Medicare and Medicare Advantage together make up roughly 69% of claims. The top ten infusion codes lean less on Medicare and more on commercial and Medicaid — consistent with a younger, working-age infusion population.

Continue to next page for Top 10 HME Procedure Codes by Claim Volume

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Top 10 HME Procedure Codes by Claim Volume

Top HME codes ranked by claim volume for the selected market, each bar split by payer type.



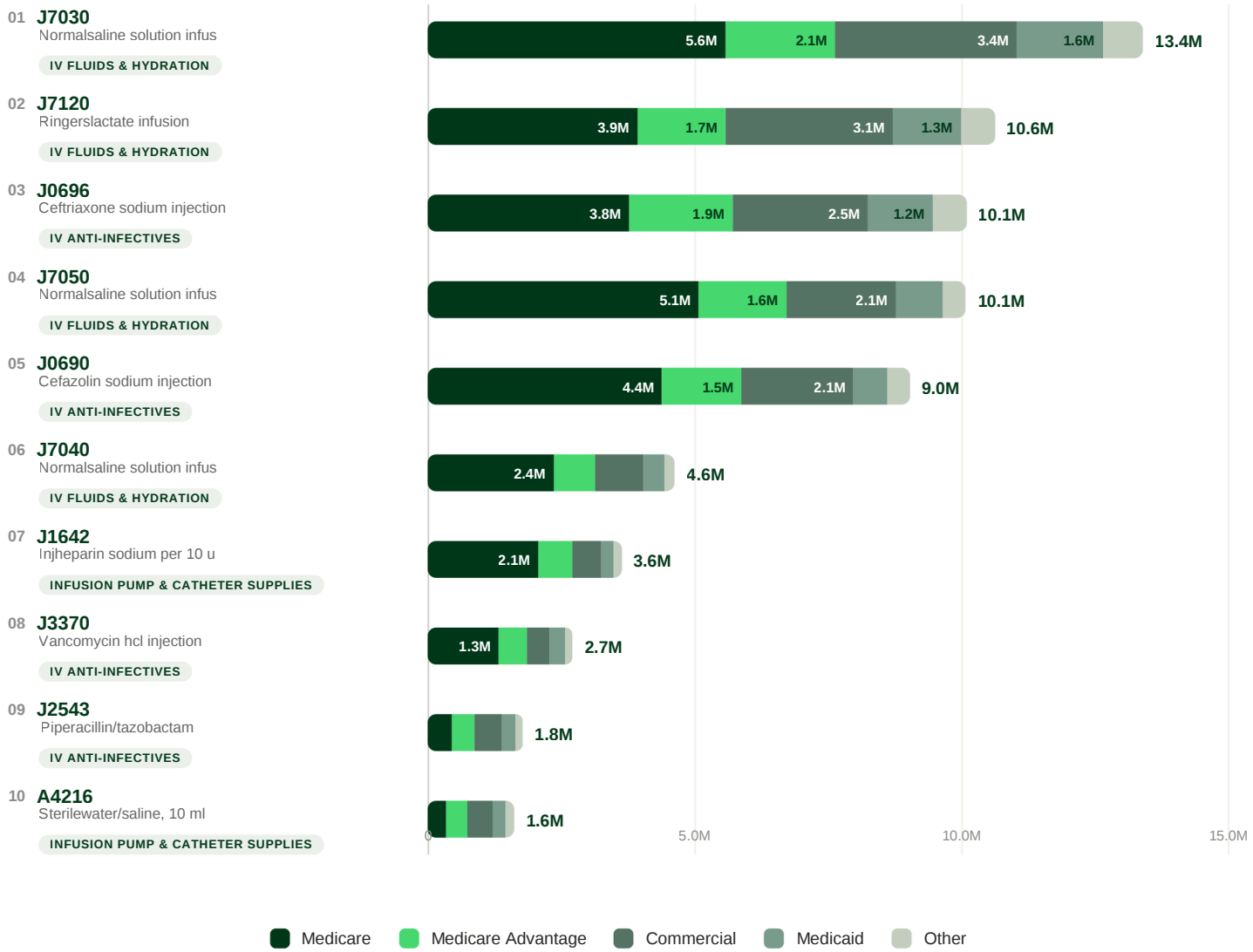
How to read: bar length is the code's total claim volume for this chart's selected market (sum of the five payer types; **PLAN_TYPE = Total** rollup rows and the **National** state-total rows are excluded to avoid double-counting). Each segment is a payer type's share of that code; codes are ranked by volume within their **HME** classification, and the pill shows the clinical sub-category.

Source: CMS Medicare and supplemental claims data · Data Timeframe: 2025

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Top 10 Infusion Procedure Codes by Claim Volume

Top infusion codes ranked by claim volume for the selected market, each bar split by payer type.



How to read: bar length is the code's total claim volume for this chart's selected market (sum of the five payer types; **PLAN_TYPE = Total** rollup rows and the **National** state-total rows are excluded to avoid double-counting). Each segment is a payer type's share of that code; codes are ranked by volume within their **Infusion** classification, and the pill shows the clinical sub-category.

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TOP 10 HME CODES BY CLAIM VOLUME							
Code	Category	Medicare	MA	Commercial	Medicaid	Other	Total
E1390 — Oxygen concentrator	Respiratory - Oxygen	10.6M	6.9M	1.9M	1.5M	857K	21.7M
E0601 — Cont airway pressure device	Respiratory - PAP therapy (device)	8.4M	3.5M	5.6M	889K	960K	19.4M
A7038 — Pos airway pressure filter	Respiratory - PAP supplies	8.6M	3.0M	5.4M	929K	849K	18.9M
A4604 — Tubing with heating element	Respiratory - PAP supplies	6.3M	1.9M	3.0M	360K	470K	12.0M
A7035 — Pos airway press headgear	Respiratory - PAP supplies	5.4M	1.8M	2.8M	421K	473K	10.8M
A7034 — Nasal application device	Respiratory - PAP supplies	5.0M	1.5M	2.3M	266K	376K	9.4M
A4239 — Non-adju cgm supply allow	Diabetic - CGM	5.8M	2.1M	751K	367K	202K	9.3M
E0431 — Portable gaseous 02	Respiratory - Oxygen	4.1M	2.9M	850K	812K	397K	9.0M
A7031 — Replacement facemask interfa	Respiratory - PAP supplies	4.1M	1.5M	2.2M	370K	365K	8.6M
E0562 — Humidifier heated used w pap	Respiratory - PAP therapy (device)	2.8M	1.7M	3.0M	512K	481K	8.5M

TOP 10 INFUSION CODES BY CLAIM VOLUME							
Code	Category	Medicare	MA	Commercial	Medicaid	Other	Total
J7030 — Normal saline solution infus	IV fluids & hydration	5.6M	2.1M	3.4M	1.6M	765K	13.4M
J7120 — Ringers lactate infusion	IV fluids & hydration	3.9M	1.7M	3.1M	1.3M	645K	10.6M
J0696 — Ceftriaxone sodium injection	IV anti-infectives	3.8M	1.9M	2.5M	1.2M	635K	10.1M
J7050 — Normal saline solution infus	IV fluids & hydration	5.1M	1.6M	2.1M	875K	436K	10.1M
J0690 — Cefazolin sodium injection	IV anti-infectives	4.4M	1.5M	2.1M	638K	410K	9.0M
J7040 — Normal saline solution infus	IV fluids & hydration	2.4M	780K	893K	403K	204K	4.6M
J1642 — Inj heparin sodium per 10 u	Infusion pump & catheter supplies	2.1M	628K	537K	254K	141K	3.6M
J3370 — Vancomycin hcl injection	IV anti-infectives	1.3M	514K	446K	290K	134K	2.7M
J2543 — Piperacillin/tazobactam	IV anti-infectives	465K	423K	493K	271K	141K	1.8M
A4216 — Sterile water/saline, 10 ml	Infusion pump & catheter supplies	352K	393K	476K	244K	159K	1.6M

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