Questions

• There will be a question and answer session following the presentations.
• If you are watching via webcast, you may tweet questions using #futureofhh or email futureofhh@ahhqi.org.
Today’s Speaker: Kathleen Gilmartin

Kathleen Gilmartin
President and CEO, Interim HealthCare

Kathleen re-joined Interim HealthCare Inc. as President & CEO in September 2008. Her career with Interim has spanned twenty years in several leadership roles driving franchise sales, operations and clinical practice. Her experience as a registered nurse, healthcare consultant and business executive in the healthcare industry has helped guide Interim’s profitable growth in diversified home care services, hospice and medical staffing. She currently serves on the boards of the Alliance for Home Health Quality and Improvement (AHHQI) and International Franchise Association, and is a member of the IFA Women’s Franchise Committee. Originally from Buffalo, New York, Kathleen earned her bachelor’s degree from D’Youville College and resides in South Florida.
Today’s Speaker: Sally Rodriguez

Sally Rodriguez
Director, Avalere

Sally Rodriguez, Director, provides analytic and strategic support to healthcare provider clients by using data analysis and policy expertise to help them navigate the evolving market and shed light on key issues in acute, post-acute, and long-term care. Sally leads the development of business intelligence platforms that leverage a variety of public and private information to equip healthcare providers with data-driven insights and original analyses to improve performance under Medicare, Medicaid, and commercial payment policies.
Dr. Landers is the President and CEO of the Visiting Nurse Association Health Group, Inc., the nation’s second largest not-for-profit home health care organization. As a certified family doctor and geriatrician, Dr. Landers places a strong emphasis on house calls to the vulnerable elderly and has a specialized interest in geriatric medicine, home health, hospice and palliative care.

Dr. Landers is a graduate of the Case Western Reserve University School of Medicine and the Johns Hopkins University School of Hygiene and Public Health. He currently serves on numerous Boards including the Alliance for Home Health Quality and Innovation, Partnership for Quality Home Health Care, Community Health Accreditation Program (CHAP), and Visiting Nurse Associations of America (VNAA). Dr. Landers has authored several articles on the role of home care in national publications, including the New England Journal of Medicine and the Journal of the American Medicine. Dr. Landers most recently joined the Huffington Post as a regular blogger focusing on health policy, family caregivers, and nurses and finding ways to improve quality and value in American health care.

Before joining VNA Health Group, Dr. Landers served as the Director of the Center for Home Care and Community Rehabilitation and Director of Post-Acute Operations for the world-renowned Cleveland Clinic. In 2014, Dr. Landers received the NJBiz 40 Under 40 Award, a recognition of New Jersey’s most accomplished young businessmen and women.
About the Alliance

• 501(c)(3) non-profit research foundation

• Mission: To support research and education on the value home health care can offer to patients and the U.S. health care system. Working with researchers, key experts and thought leaders, and providers across the spectrum of care, we strive to foster solutions that will improve health care in America.

• www.ahhqi.org
Membership
Future of Home Health Project

• Report is the culmination of a four phase research-based strategic planning project on the future of home health care in America.
• Goal is to improve understanding of how home health care is currently used, and how it will be used in the future for older Americans and Americans with disabilities.
The Future of Home Health Care

Findings and Recommendations

June 2016
Framing the Conversation

The Impetus for This Work

- A recognition of the need to be clear about the role and relevance of home-based care, especially in the context of considerable evolution within the health care system
- The Alliance for Home Health Quality and Innovation partnered with Avalere Health to articulate a vision for the future of home health care via
  - Literature reviews
  - Interviews with policy leaders
  - Interviews and case studies with innovative home health providers
  - Review of the IOM workshop on the future of home health care

Key Considerations and Definitions

- Much of the research for this paper focused on the Medicare home health benefit, but we acknowledge a broad range and opportunity for home-based care
- We typically refer to Medicare-covered services as home healthcare, and the broader spectrum as home-based care
The Movement Towards Home-Based Care

SEVERAL FACTORS CREATE AN IMPERATIVE FOR HOME-BASED CARE

- Demographic shifts
- Patient preference
- Alignment with HHS’ Triple Aim goals

Population Health
Home health providers can serve homebound patients and many others; those facing an acute exacerbation, with chronic conditions, or that need care coordination services

Patient Experience
Medicare beneficiaries want to stay home as long as possible, regardless of their homebound status; home health providers can increasingly facilitate this goal

Lower Cost of Care
Home health services can substitute for higher-cost institutional providers as well as provide the continuing care that prevents hospital and other high-cost utilization
Drivers Emphasizing Home-Based Care

POLICY AND CONSUMER PREFERENCE INFLUENCE THE SHIFT

- Consumer preference for home-based care is consistently shown
- CMS/CMMI initiatives incentivize the use of home healthcare in Medicare
  - Emphasis on value creates incentives to utilize less costly home healthcare services where appropriate

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Source: Avalere Health, 2016

Payers and providers engaged in alternative payment models are developing a strategic emphasis on shifting the site of care towards the home.
Evolving Role of Medicare Home Health

Now

Post-Acute Care
Current benefit, enhanced opportunity to provide value in APMs

Near Future

Care Management
Increased reimbursement opportunities in APMs, MA

Expansion of Services in the Home
New APMs or models like Hosp. at Home could expand role of HH

Longer-Term

Source: Avalere Health, 2016
The Spectrum of Home-Based Care

A WIDE RANGE OF SERVICES CAN BE PROVIDED AT HOME

Care coordination and management performed by home healthcare professionals is an evolving area of service.
Shifting to a Community and Home-Based Model

KEY STRATEGY FOR HEALTH CARE INNOVATION

# Key Takeaways from Policy and Thought Leader Interviews

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<th>Payment and Delivery Reform</th>
<th>Future of Home Health</th>
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<td>1. Payment and delivery reform is here to stay</td>
<td>1. Home health as the “big winner” in payment and delivery reforms</td>
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<td>2. No dominant model is emerging- continued heterogeneity across markets expected</td>
<td>2. Varying perspectives around how to modify the HH benefit</td>
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<td>3. Greater momentum around bundling and Medicare Advantage than ACOs</td>
<td>3. No single model identified for managing patients</td>
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<td>4. Locus of control physician versus hospital unclear</td>
<td>4. Opportunity for innovation in benefits for community-referred beneficiaries</td>
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<td>5. Payment and delivery will continue to rely on FFS systems with retrospective reconciliation</td>
<td>5. Home health agencies must adapt to the changes to Medicare payment and delivery</td>
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<td>6. Flexibility is greater when shared risk but limitations on innovation within existing FFS structure</td>
<td>6. Caregiver burden is a crisis necessitating a long-term care solution</td>
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Examples of Innovation

- **Mid-Atlantic Health System**
  Innovation: Physician Visits At Home

- **Visiting Nurse Association Health Systems**
  Patient experience, lower cost

- **Southeastern Home Health Provider**
  Patient experience, population health

- **Sutter Health**
  Integrated Care

- **Private Duty Home Care Provider**
  High Quality Home Care enabled by technology
Four Key Characteristics of the HHA of the Future

- Patient and Person-Centered
- Seamlessly Connected and Coordinated
- High Quality
- Technology-Enabled
The Three Critical Roles of the Home Health Agency of the Future

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<th>Post-Acute Care and Acute Care Partners</th>
<th>Primary Care Partners</th>
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| • Form partnerships with hospitals and their staffs, community physicians, and caregivers  
  • Provide services (e.g. skilled clinical care, care coordination, health education) to support the patient's safe care transition to the home and community | • Develop close partnerships with primary care medical homes and home-based primary care programs during time-limited episodes where care recipients need an escalation in home-based care |

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<th>Home-Based Long-Term Care Partners</th>
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<td>• Form partnerships with home-based long term care and social support models (e.g. formal and informal personal care providers) with responsive skilled nursing, therapy, and related services during episodes where care recipients need a brief escalation of home-based care</td>
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Capabilities Needed to Fulfill these Key Roles

- Home-based medical care
- HIT
- Primary to acute hospital level care
- Remote monitoring & Telehealth
- Palliative care
- Care transitions support

Source: Avalere Health, 2016
Challenges to Address in the Current Environment

- Financing Mechanisms
- Regulatory Constraints
- Addressing Program Integrity and Fraud and Abuse
- Measuring Performance: Quality and Patient Experience
- Workforce Limitations
- Clinical Capabilities Related to Diseases Focused on by APMs
- Operational Capabilities
- Long-Term Care
Conclusions and Recommendations

- Home health care should be empowered as a full partner that both shares in risk and has freedom to deploy the best care to patients
- CMS should address financing and regulatory elements of new and alternative payment models to enable the appropriate use of Medicare home health care
- Program integrity and fraud should be addressed in a targeted fashion, directed towards fraud “hot spot” areas

Targeted changes to Medicare policies in conjunction with core capabilities driven by the home health care industry combine to deliver high-quality, efficient care to consumers who increasingly desire to age in place.
Framework for the Future of Home Health Care
Discussion & Questions

Tweet questions to #FutureofHH or email futureofhh@ahhqi.org
Thank You!