

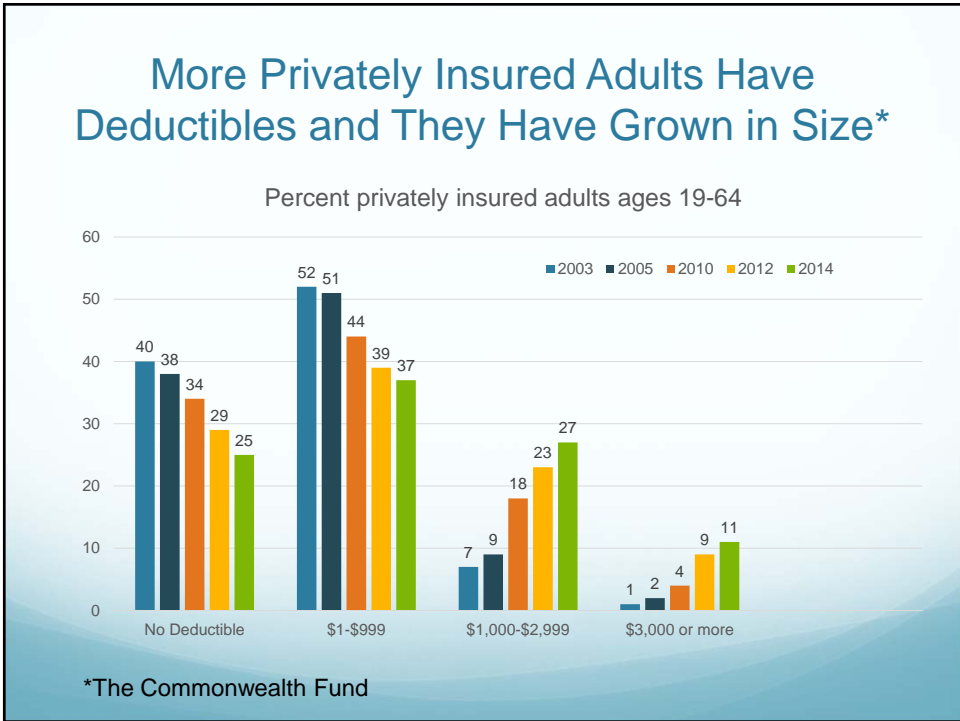
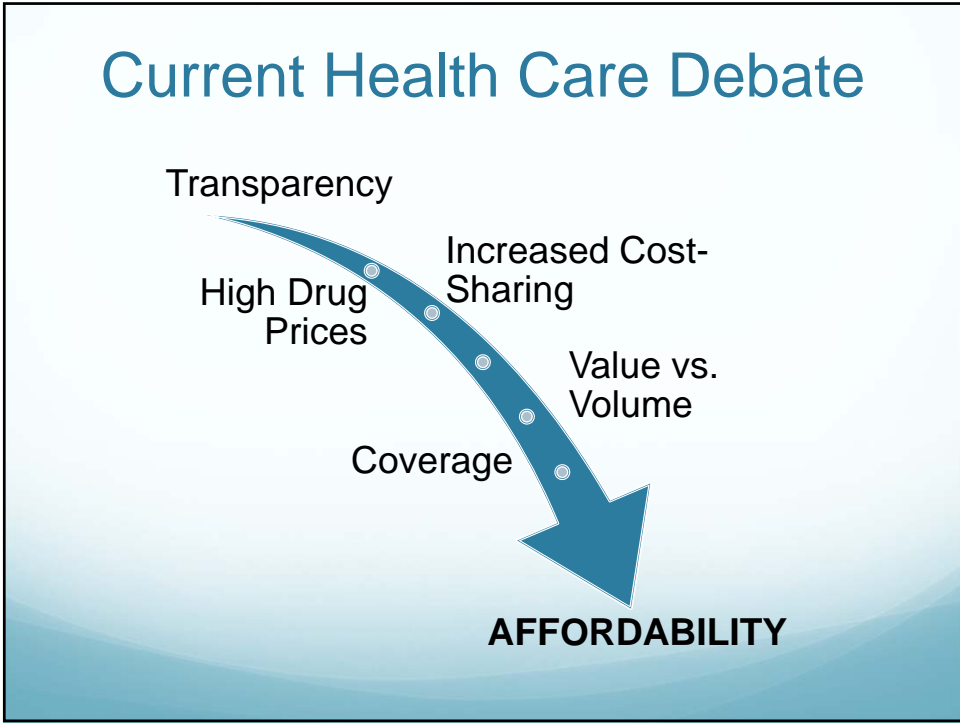
Health Care Trends: Post-ACA

Council of State Home Care Associations

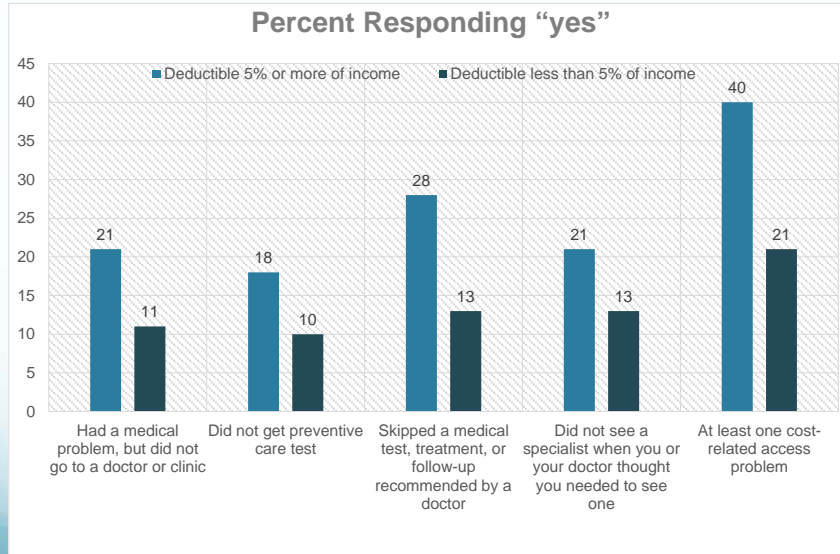
Yvette Fontenot, MPP
Partner
Avenue Solutions

Agenda

- Current Health Care Debate
- Impact of Election
- Business Opportunities



Two of Five Adults with High Deductibles Relative to Their Income Delayed or Avoided Needed Care Because of Their Deductible*



*The Commonwealth Fund

Democratic Focus: Improving Affordability

Information

- Transparency
- Calculators
- Consumer Choice Tools (Standard Benefit Designs)

Coverage

- Premiums
- Deductibles and Out-of-Pocket Costs
- Networks
- Drug Pricing

Democratic Focus: Improving Affordability

Delivery

- Accountable Care Organizations
- Bundles
- Readmissions and Hospital Acquired Conditions

System

- Medicaid Expansion
- Increasing Enrollment

Provider Impact

- ACA laid the groundwork on delivery system reform
 - Movement from volume to value
 - Increased provider risk with quality backstop
 - ACOs, medical homes, etc
- Bipartisan agreement led to MACRA
 - Providers are either in MIPS or ACPMs
 - Level of risk required under ACPMs is large
 - Plans will have providers in both models for years
- Bipartisan support continues but lack of Congressional action empowers the Administration

The Election: Where are We Headed?

- Exchange Concept is Engrained but Vision Varies
 - Consumer responsibility continues
 - Viability
 - SBEs
- Growth in Exchanges Depends on:
 - Tax Treatment
 - Response of Stakeholders
- Focus on State Flexibility
 - Medicaid
 - 1332 Waivers
- ACOs vs. Medicare Advantage
- Consolidation