

Home Health & Home Care Trends and Serious Illness

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Portrait of NC Home Health

- In the fall of 2018, the North Carolina Division of Health Service Regulation reported 208 Medicare certified home health agencies in North Carolina (corporate and branch offices).
- Data from the “Home Health Agency 2018 Annual Data Supplements” indicated a total of 227,778 home health patients were served during 2017 (*FY 2016-2017*).

Association for Home & Hospice Care of NC

Lic. #	Name	Facility County	Resident County	< 18	18-64	65-74	75+	Total
HC0422	Rex Home Services	Wake	Wake	4	882	862	1295	3043
HC1293	WakeMed Home Health	Wake	Wake	0	1054	615	986	2655
HC0299	Kindred at Home	Wake	Wake	0	360	541	1503	2404
HC0074	Well Care Home Health, Inc.	Wake	Wake	0	506	545	934	1985
HC3820	BAYADA Home Health Care, Inc.	Wake	Wake	0	114	226	946	1286
HC0360	Duke Home Health	Durham	Wake	6	384	235	349	974
HC2562	Liberty Home Care	Wake	Wake	0	164	252	352	768
HC2112	Medi Home Health Agency	Wake	Wake	0	54	111	366	531
HC0327	Brookdale Home Health Raleigh	Durham	Wake	0	31	77	375	483
HC0339	Intrepid USA Healthcare Services	Wake	Wake	0	69	111	254	434
HC0507	3HC	Johnston	Wake	16	166	87	135	404
HC0031	Transitions LifeCare	Wake	Wake	0	65	76	227	368
HC4538	PruittHealth Home Health-Wake	Wake	Wake	0	26	71	191	288
HC0166	Amedisys Home Health of Chapel Hill	Orange	Wake	0	37	54	158	249
HC1437	North Carolina Home Health	Wake	Wake	1	45	71	104	221
HC0145	Amedisys Home Health	Durham	Wake	0	47	53	107	207
HC0215	Kindred at Home	Franklin	Wake	0	21	32	73	126
HC0078	Amedisys Home Health	Franklin	Wake	0	29	25	68	122
HC0125	Liberty Home Care	Harnett	Wake	0	4	9	10	23
HC0828	Pediatric Services of America, Inc.	Wake	Wake	20	0	0	0	20
HC0249	Advanced Home Care	Alamance	Wake	0	4	2	1	7
HC0500	Franklin County Home Health Agency	Franklin	Wake	0	0	1	3	4
HC0503	Kindred at Home	Harnett	Wake	0	0	0	3	3
HC0528	Liberty Home Care	Chatham	Wake	0	0	1	2	3
HC0255	3HC	Sampson	Wake	0	1	1	0	2
HC0288	Liberty Home Care	Brunswick	Wake	0	0	1	1	2
HC0501	3HC	Vance	Wake	1	0	1	0	2
HC0506	3HC	Jones	Wake	0	1	0	0	1
HC1353	Liberty Home Care	Carteret	Wake	0	0	0	1	1
HC0002	Liberty Home Care	Moore	Wake	0	1	0	0	1
HC1028	Maxim Healthcare Services	Wake	Wake	0	1	0	0	1
HC0168	AssistedCare of the Carolinas	Greene	Wake	0	0	1	0	1
HC1176	Liberty Home Care	Durham	Wake	0	0	1	0	1
HC0508	3HC	Wilson	Wake	0	0	0	1	1
Wake Totals				48	4,066	4,062	8,445	16,621



Home Health Care vs Home Care

	Home Health Care	Home Care
Original Medicare approved	Yes	No
Medicare Advantage approved	Yes, may vary depending on insurer	No
Medicaid approved	Depends on state	Depends on state
Covers long term care	No	Yes, if specified
Skilled nursing	Yes	No
Rehabilitation therapy	Yes	No
Meal preparation	No	Yes
Activities of daily living (bathing, cleaning etc.)	No	Yes
Requirements for enrollment	Yes	No, unless enrolling in Medicaid funded program

of Home Care Agencies in NC

1665 Licensed Home Care Agencies*

- In NC, this includes licensed home care, private duty, companion/sitter, home health, and hospice agencies combined
- If you remove the total number of *home health care and hospice* agencies, there are 1199 licensed *home care* agencies*
- >600 licensed agencies are dormant or inactive (source: DMA/DHSR)



Clinical Profile of Home Health Users

Table 2.1: Top 20 Most Common Diagnosis Related Groups (MS-DRGs) for Beneficiaries Discharged from Hospital to Part A Home Health Episodes, 2017

MS-DRG	Number of Home Health Part A Claims, 2017	Percent of Total Home Health Part A Claims, 2017
Major Joint Replacement or Reattachment of Lower Extremity w/o MCC	159,905	8.55%
Septicemia or Severe Sepsis w/o MV 96+ hours w MCC	86,385	4.62%
Heart Failure & Shock w MCC	47,596	2.55%
Heart Failure & Shock w CC	41,161	2.20%
Hip & Femur Procedures Except Major Joint w CC	35,349	1.89%
Intracranial Hemorrhage or Cerebral Infarction w CC or TPA in 24 hrs	30,463	1.63%
Simple Pneumonia & Pleurisy w MCC	29,793	1.59%
Septicemia or Severe Sepsis w/o MV 96+ hours w/o MCC	27,725	1.48%
Chronic Obstructive Pulmonary Disease w MCC	27,669	1.48%
Kidney & Urinary Tract Infections w/o MCC	27,205	1.45%
Simple Pneumonia & Pleurisy w CC	27,130	1.45%
Renal Failure w CC	26,670	1.43%
Cellulitis w/o MCC	24,912	1.33%
Pulmonary Edema & Respiratory Failure	23,978	1.28%
Spinal Fusion Except Cervical w/o MCC	21,215	1.13%
Renal Failure w MCC	20,498	1.10%
Chronic Obstructive Pulmonary Disease w CC	19,099	1.02%
Esophagitis, Gastroent & Misc Digest Disorders w/o MCC	18,685	1.00%
G.I. Hemorrhage w CC	17,886	0.96%
Infectious & Parasitic Diseases w O.R. Procedure w MCC	17,191	0.92%
Total for Top 20 MS-DRGs	730,515	39.07%

Source: Avalere Health, LLC analysis of Medicare Standard Analytic Files, 2017.

Data for beneficiaries with a Part A home health episode and a prior short-term acute care hospital stay in 2017.

Note: CC is complication or comorbidity. MCC is major complication or comorbidity.

Clinical Profile of Home Health Users

Table 2.3: Percent of Medicare Home Health Users with 3 or More Chronic Conditions Compared to All Medicare Beneficiaries, by State, 2017

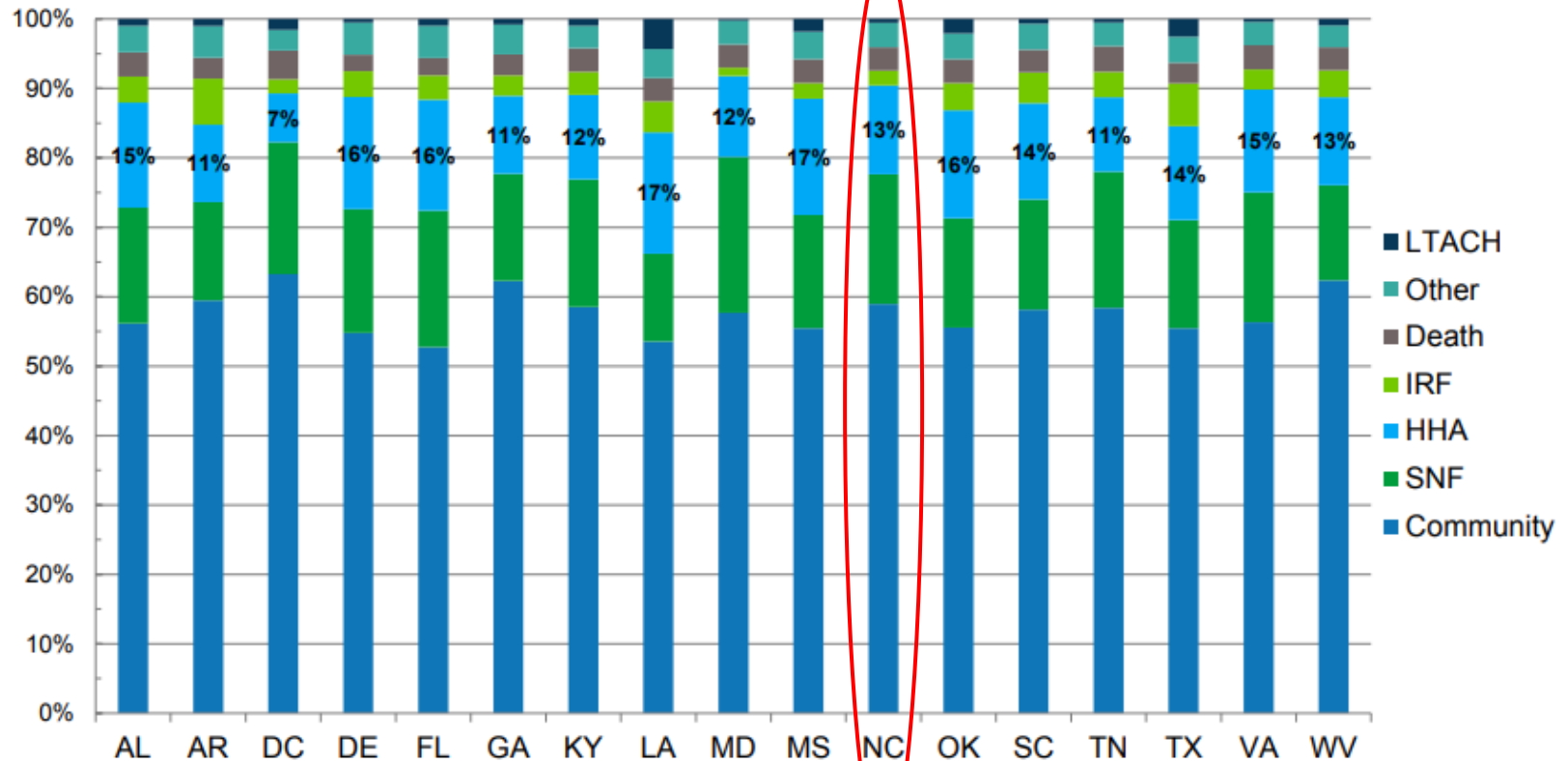
State	Percent of HH Users with 3+ CCs	Percent of Medicare Beneficiaries with 3+ CCs	State	Percent of HH Users with 3+ CCs	Percent of Medicare Beneficiaries with 3+ CCs
Alabama	91.14%	23.10%	Montana	90.25%	29.88%
Alaska	87.41%	25.53%	Nebraska	90.11%	31.09%
Arizona	87.05%	15.48%	Nevada	84.83%	15.34%
Arkansas	90.42%	26.86%	New Hampshire	91.76%	36.03%
California	87.49%	15.76%	New Jersey	89.07%	20.99%
Colorado	85.78%	17.83%	New Mexico	88.12%	22.30%
Connecticut	89.51%	23.91%	New York	89.26%	17.60%
Delaware	90.69%	31.67%	North Carolina	90.72%	24.05%
D.C.	88.24%	23.85%	North Dakota	94.62%	45.29%
Florida	87.00%	17.88%	Ohio	92.65%	24.69%
Georgia	90.12%	20.76%	Oklahoma	91.52%	31.45%
Hawaii	86.54%	11.00%	Oregon	89.01%	17.03%
Idaho	87.79%	24.89%	Pennsylvania	90.28%	21.61%
Illinois	92.56%	29.81%	Rhode Island	89.08%	19.11%
Indiana	92.74%	28.05%	South Carolina	89.42%	24.60%
Iowa	92.15%	33.10%	South Dakota	93.37%	40.91%
Kansas	91.20%	30.69%	Tennessee	90.77%	19.58%
Kentucky	91.19%	28.99%	Texas	90.70%	21.21%
Louisiana	90.78%	26.91%	Utah	82.79%	17.17%
Maine	92.91%	31.93%	Vermont	89.85%	38.45%
Maryland	89.78%	25.32%	Virginia	89.74%	26.51%
Massachusetts	90.15%	27.47%	Washington	88.95%	21.75%
Michigan	92.05%	27.80%	West Virginia	93.62%	34.82%
Minnesota	89.60%	27.13%	Wisconsin	92.43%	23.14%
Mississippi	90.76%	32.39%	Wyoming	86.33%	27.65%
Missouri	91.65%	27.84%			

Source: Avalere Health, LLC analysis of Medicare Standard Analytic Files, 2017.

Note: Having a chronic condition is defined as having a Medicare claim with a chronic condition listed in 2017. Medicare beneficiaries without any claims in 2017 are categorized as having no chronic conditions in 2017. Chronic conditions are defined by the Centers for Medicare and Medicaid Services' Chronic Conditions Data Warehouse.

Post-Acute Care Market Overview

Chart 3.6: Initial Patient Destinations Following an Inpatient Hospital Stay for Medicare Beneficiaries in 2017, for States in Southern Region



Source: Avalere Health, LLC analysis of Medicare Standard Analytic Files, 2017.

Note: U.S. Census Bureau defines which states are in the Southern Region; includes AL, AR, DC, DE, FL, GA, KY, LA, MD, MS, NC, OK, SC, TN, TX, VA, WV.

Hospital: Short-Term Acute Care Hospital (STACH).

Community: Discharges to the community without skilled home health care; includes individuals living at home, assisted living facilities, and retirement communities.

Formal Post-Acute Care Settings: Settings designated as post-acute care by Medicare. Includes skilled nursing facilities (SNF), home health agencies (HHA), inpatient rehabilitation facilities (IRF), and long-term acute care hospitals (LTACH).

Other: Hospice, a different Inpatient Hospital, or other Inpatient Hospitals such as Inpatient Psychiatric Facilities.

Trends to Watch in 2019/2020

- Multiple drivers will prompt home care to become even more clinical and specialized in 2019
- Payers to pay more attention to value of home care
 - Health plans will turn to home care providers for their ability to keep older adults with multiple chronic and complex conditions out of hospital
- Staffing Wars/Workforce Shortages to Get Uglier



Evidence of Trends Underway

- More Partnerships
 - Right at Home and ComforCare announced in 2018 the formation of a preferred partnership agreement with Kindred at Home (owned by Humana, Inc.)
- Medicare Advantage
 - CMS' approval of MA/Home Care Support
- Launching specialized care programs
 - Heart failure, COPD, dementia and other complex conditions



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