

Megatrends in Medicine: Predicting the Next 10 Years of Health Care

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Future Trends of High-Value Care

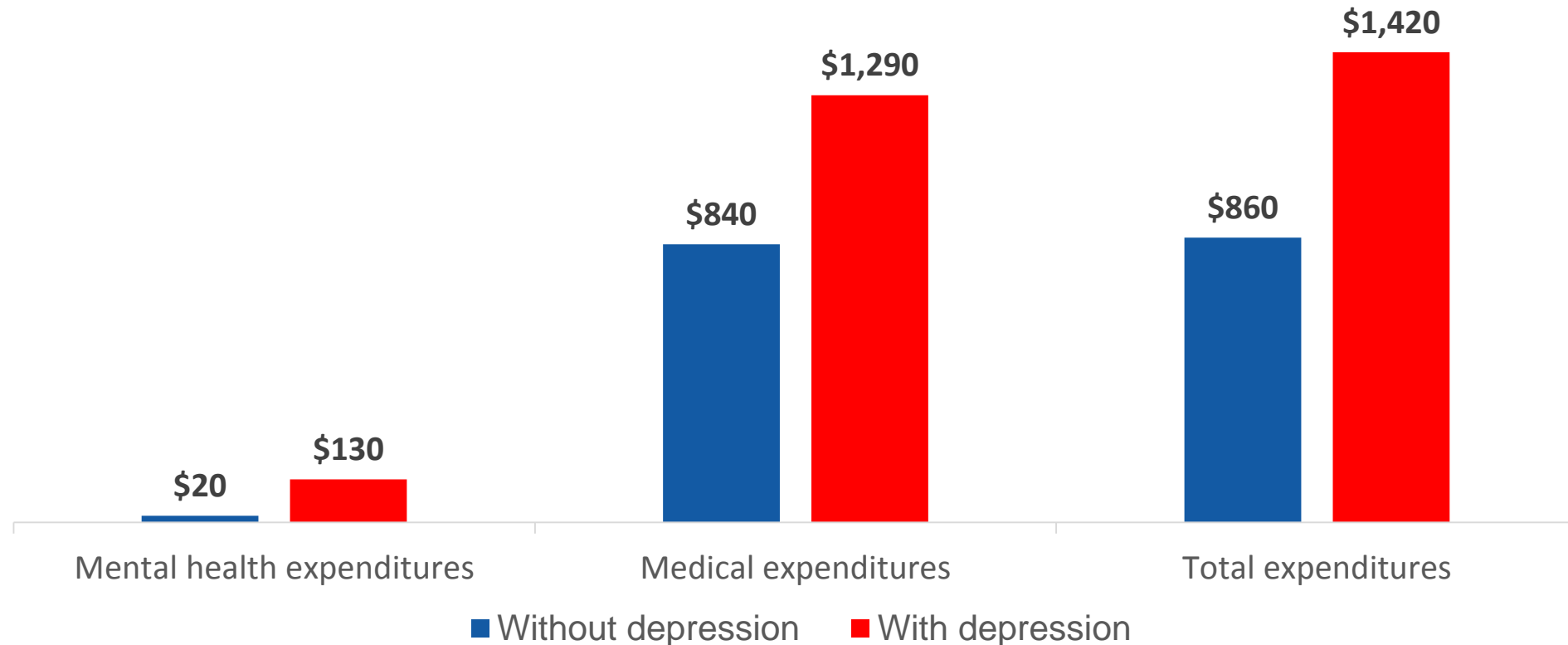
1. VIP care for **chronic conditions**.
2. The **incorporation of behavioral health** in regular care.
3. The **deinstitutionalization** of care.
4. The **performance measurement** of physicians and other providers.
5. Shift towards **value-based payment**.
6. Excessively high **drug prices**.

1. VIP Care for Chronic Conditions



2. Incorporation of Behavioral Health

Monthly Health Care Expenditures for Chronic Conditions,
With and Without Comorbid Depression, 2005

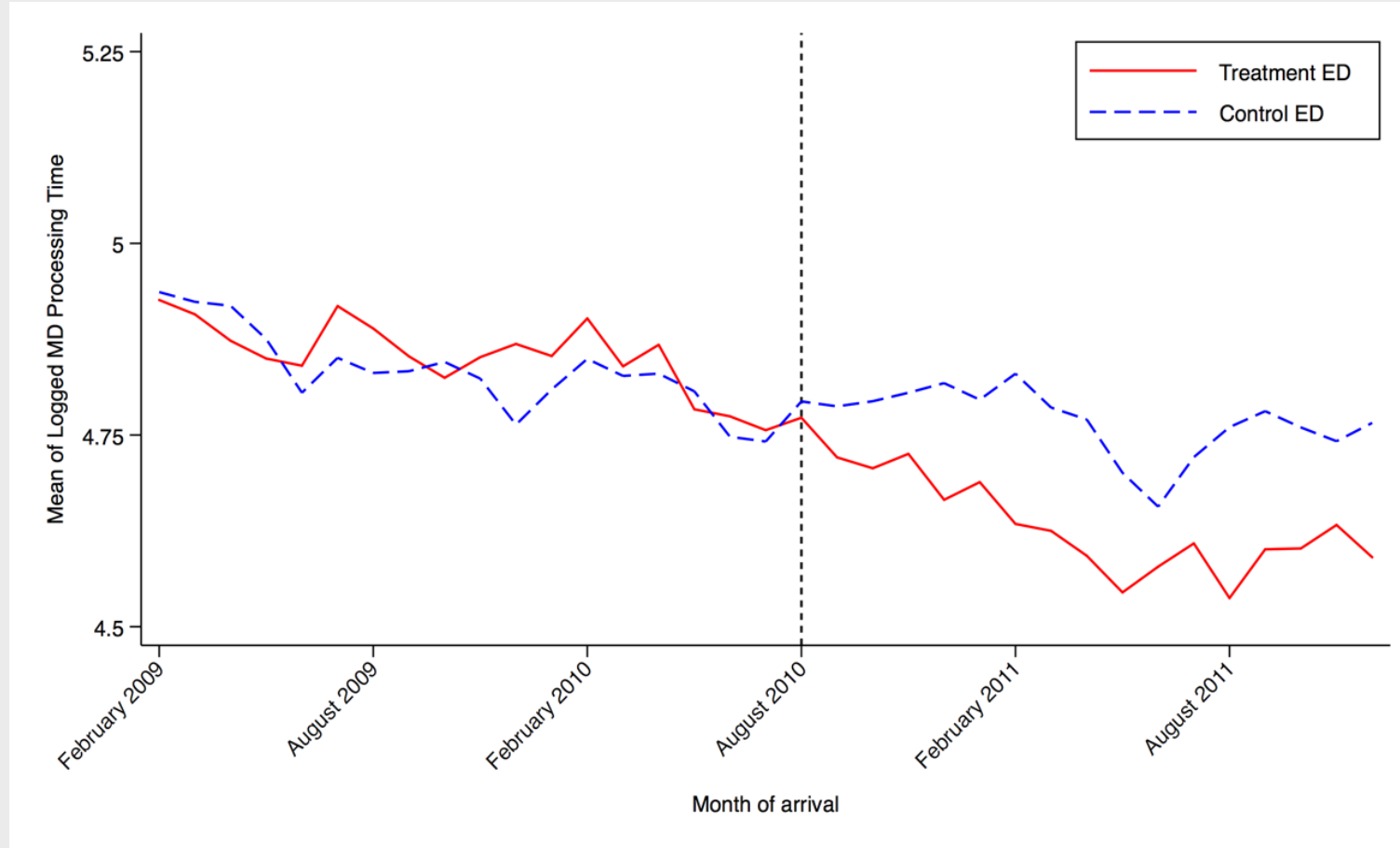


3. The Deinstitutionalization of Care

At Presbyterian Health Services, Albuquerque, NM

	Hospital @ Home	Inpatient
Mean length of stay	3.3 days	4.5 days
Quality metric compliance	100%	91-97%
Rates of falls	0%	0.8%
Rate of readmission with 30 days	10.8%	10.5%
Mortality	0.93%	3.4%
Patient satisfaction score	90.7	83.9

4. Performance Measurement



5. Value-Based Payment



Category 1

Fee for Service –
No Link to
Quality and Value



Category 2

Fee for Service –
Link to
Quality and Value



Category 3

APMs Built on
Fee-for-Service
Architecture



Category 4

Population-Based
Payments

A

Foundational Payments for
Infrastructure & Operations

B

Pay for Reporting

C

Rewards for Performance

D

Rewards and Penalties
for Performance

A

APMs with Upside
Gainsharing

B

APMs with Upside
Gainsharing/Downside Risk

A

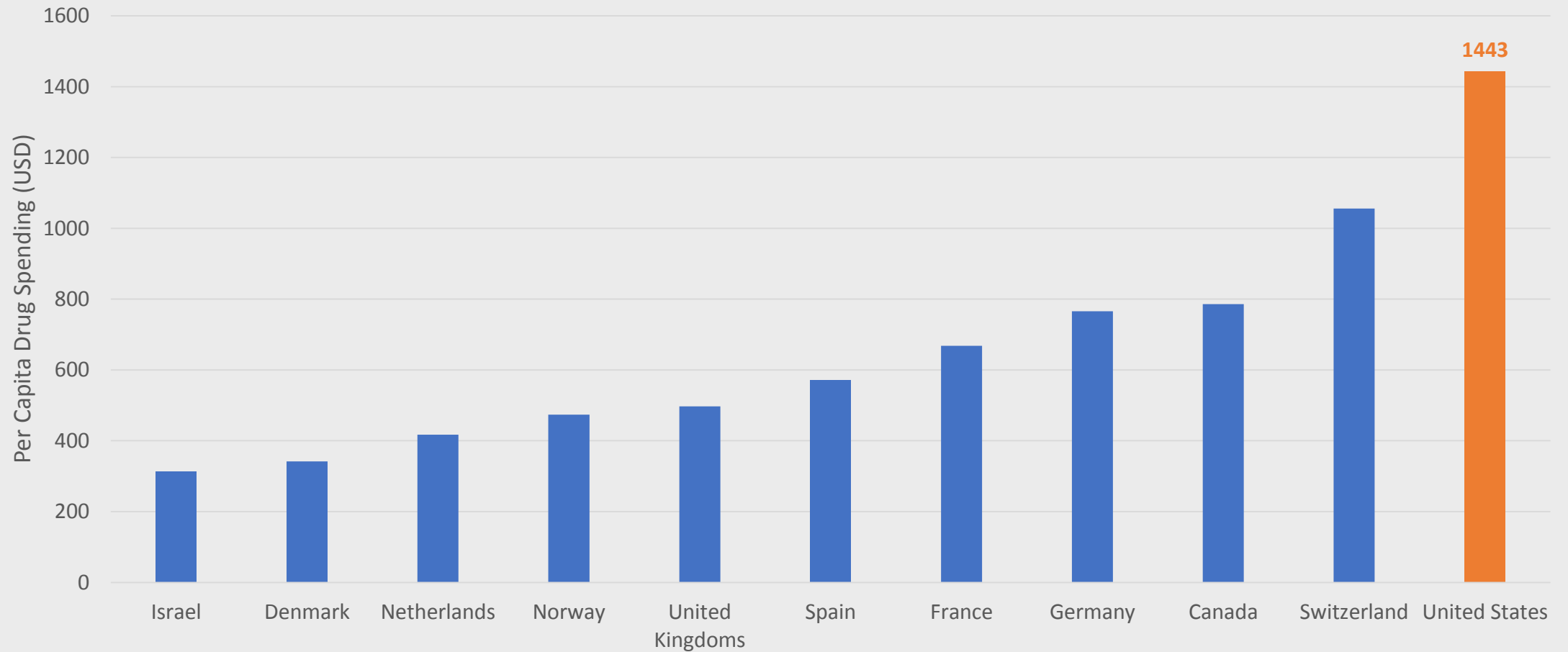
Condition-specific
Population-Based Payment

B

Comprehensive
Population-Based Payment

6. Excessively High Drug Prices

Per Capita Drug Spending (USD) by Country



What can employers do to increase quality and access of care, while decreasing costs?

Employer Recommendations

1. High deductibles are a thing of the past – patients should be steered towards **high-performing narrow networks**.
2. Employers must **rely more on primary care**. They should have all workers see a PCP annually and have them start all care with primary care first.

Employer Recommendations

3. Businesses should require their carriers to have at least 50% of their payments in **alternative payment models** by 2020.
4. Employers should **promote competition in the healthcare marketplaces**. They need to discourage consolidation, having hospitals gobble up other hospitals and physician practices.