Private Payer Trends in The Accountable Care Movement

NAACOS Fall Conference September 17, 2013



What is Accountable Care?

Outcomes

- Improve the individual experience of care
- Improve population health
- Reduce the cost of health care for populations

Processes

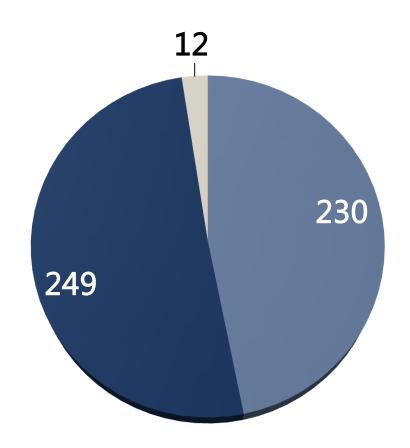
- Oversee the provision of clinical care
- Coordinate the provision of care across the continuum of health services
- Invest in and learn to use appropriate IT to manage population health

tructure

- Bear financial risk for the measured health of a population
- Align incentives to encourage the production of high quality health outcomes

Private Contracts

- No Private Contract
- Have Private Contract
- Contract in Progress



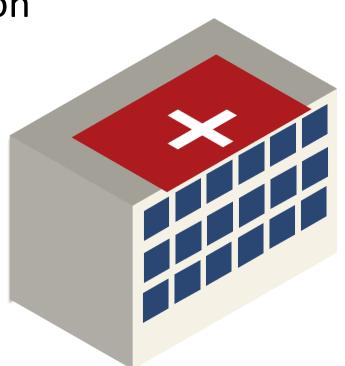
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Overall Trajectory

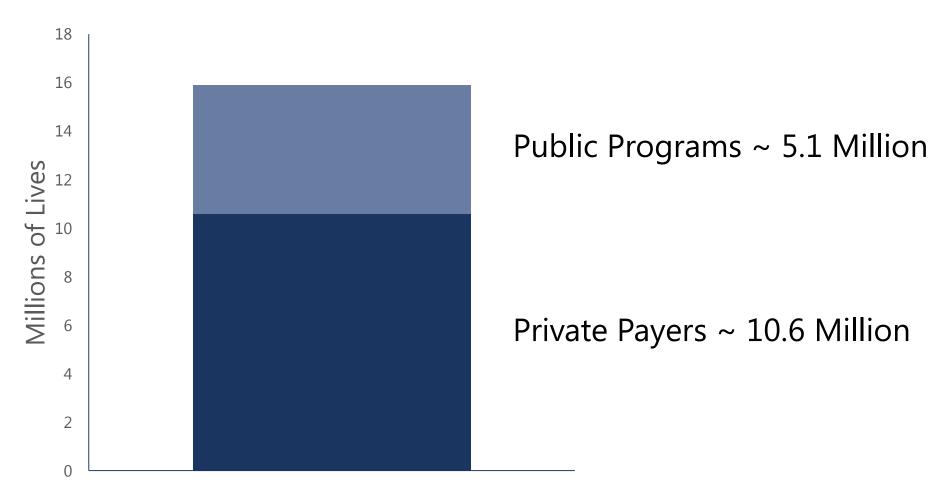


ACOs with Private Contracts

- More Lives & More Physicians
- Hospital Sponsored
- Single Provider Organization
- 33% Multiple Contracts
- 20% CMS Program



Covered Lives



Covered Lives

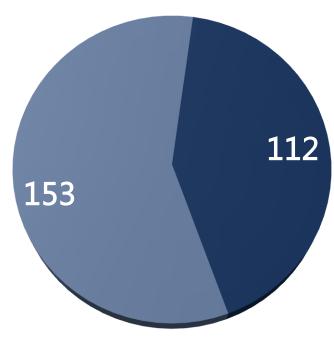


Private Payers

- 265 Payment Arrangements
- 67 Unique Payers
- 39 Payers With Only 1 Arrangement

Top 7 Payers

- Cigna
- Aetna
- UnitedHealthcare
- BCBS of Massachusetts
- Anthem
- Blue Shield of California
- Blue Cross Blue Shield of Michigan



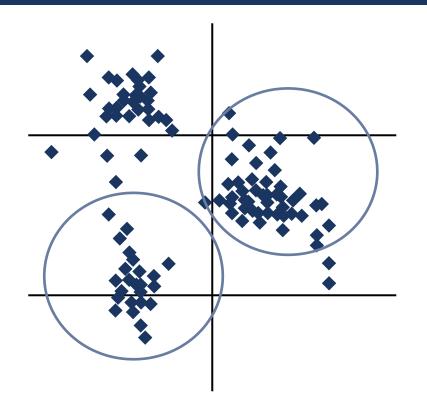
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Private Payer Contracts

- Can Be Shared Savings
- Potentially More Savings
- Bonuses
- Flexibility for Controlling Patients
- Payer Involvement
 - Care coordinators, data analytics & other technologies
 - Ease of data sharing

ACO Taxonomy



Survey: Determine common provider configurations

Interview: Topics relevant to transition to ACO model

- Benchmarking Reports
- ACO Categories
- Collaboration Opportunities

Future Outlook





A health care intelligence business

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