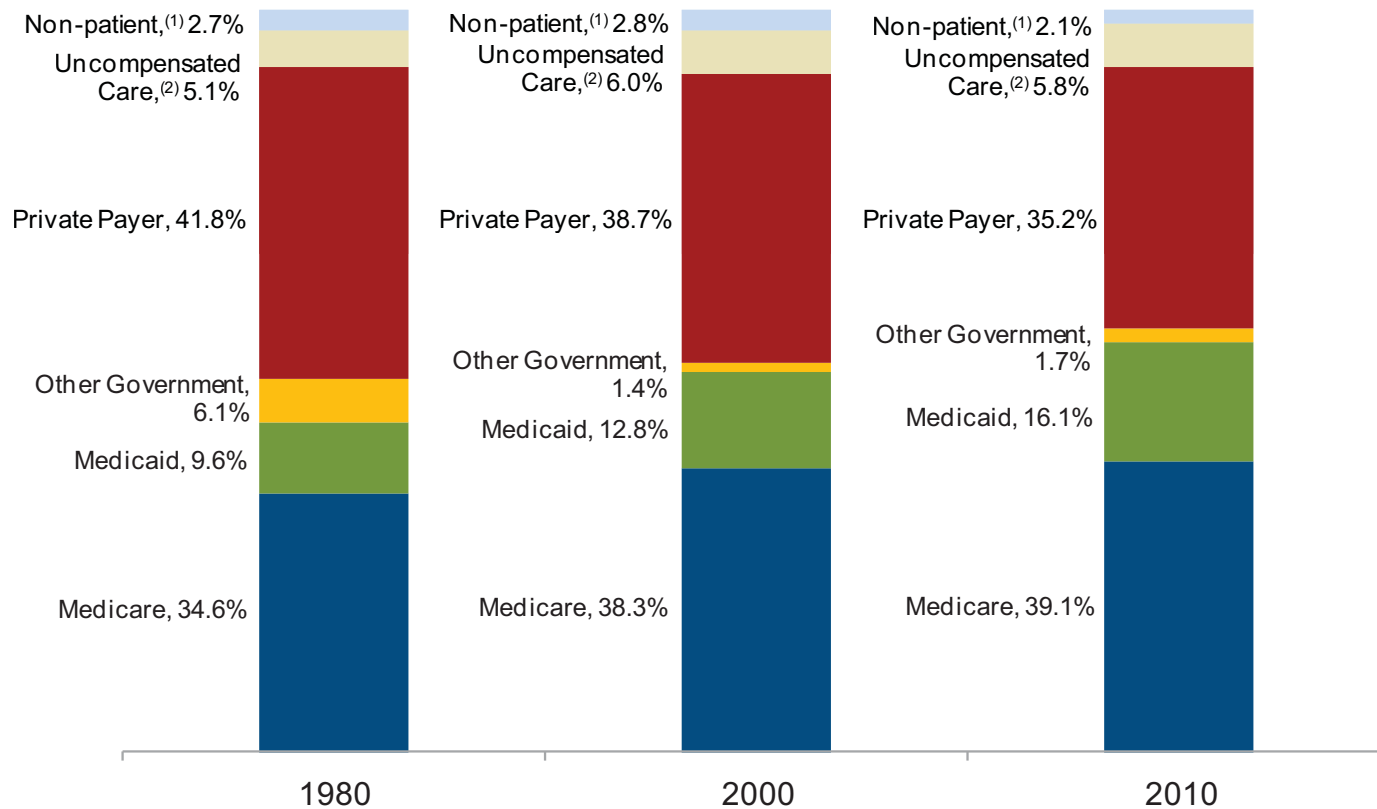


Highlights on Key provisions

▶ 2014

- ❖ Individual Requirement to Have Insurance
- ❖ Expanded Medicaid Coverage
- ❖ Employer Penalty
- ❖ Medicare Payments Reductions for certain hospital–Acquired Infections

Chart 4.5: Distribution of Hospital Cost by Payer Type, 1980, 2000, and 2010



Source: Avalere Health analysis of American Hospital Association Annual Survey data, 2010, for community hospitals.

(1) Non-patient represents costs for cafeterias, parking lots, gift shops and other non-patient care operating services and are not attributed to any one payer.

(2) Uncompensated care represents bad debt expense and charity care, at cost.



Reform Implications for Providers

▶ Sources of Revenue

- Growth coming from public payers
 - Demographics of Medicare
 - Medicaid patients via Reform
 - Commercial Market in transition

▶ Strategies

- Case managers targeting Emergency Room frequent visitors
- Higher margin surgical back filling



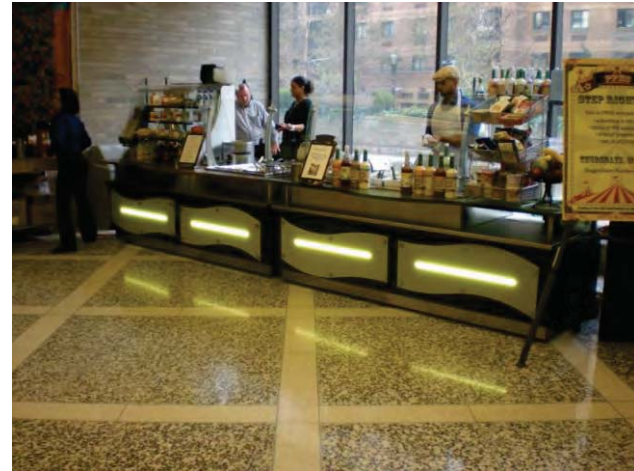
Reform Implications for Providers

- ▶ Operations Reform
 - Not just cost cutting, expense management
 - Low cost setting treatment
- ▶ ACOs
 - Integrated System Collaboration
 - Significant Investments
 - IT
 - Risk/Capital
 - Administrative



Reform Implications for Providers

- ▶ Revenue Generation focus
- ▶ Consolidation
- ▶ HR Implications
- ▶ Operations Reform
- ▶ Capital Expenditures
- ▶ Department Implications within Facilities



Reform Implications post Election

▶ Obama Win

- Fully implement ACA, all 50 states
- More time for regulation development
- Emphasis on maintain current Medicare
- Cut provider payments
- Expand Medicaid to cover the uninsured
- Exchange acceleration



Post Election

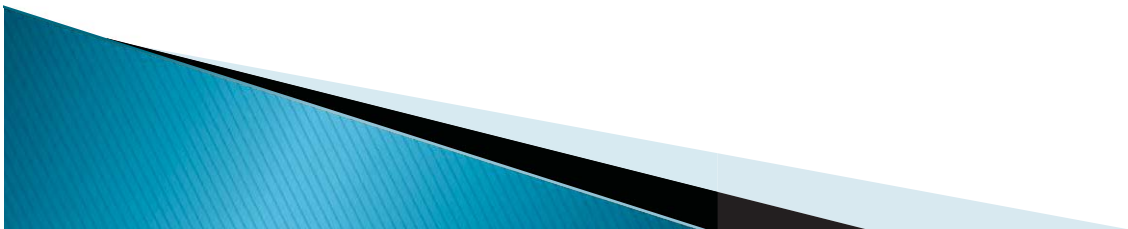
- ▶ Fiscal Cliff/Sequestration –
 - 2% reduction in Medicare
- ▶ Other Financial Issues Remain
 - Disproportionate–share hospital payment cuts expected
 - Medicare Physician payment formula, “Doc Fix” needs to be addressed (27%)
 - Medicare
 - Medicaid



Questions?

- ▶ Contact information

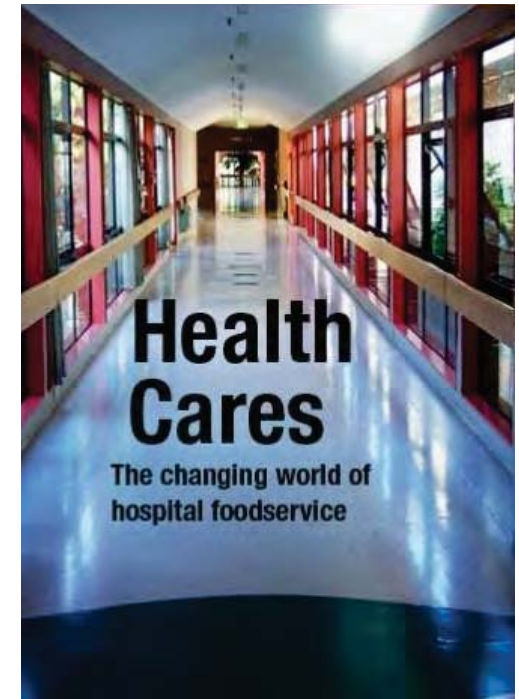
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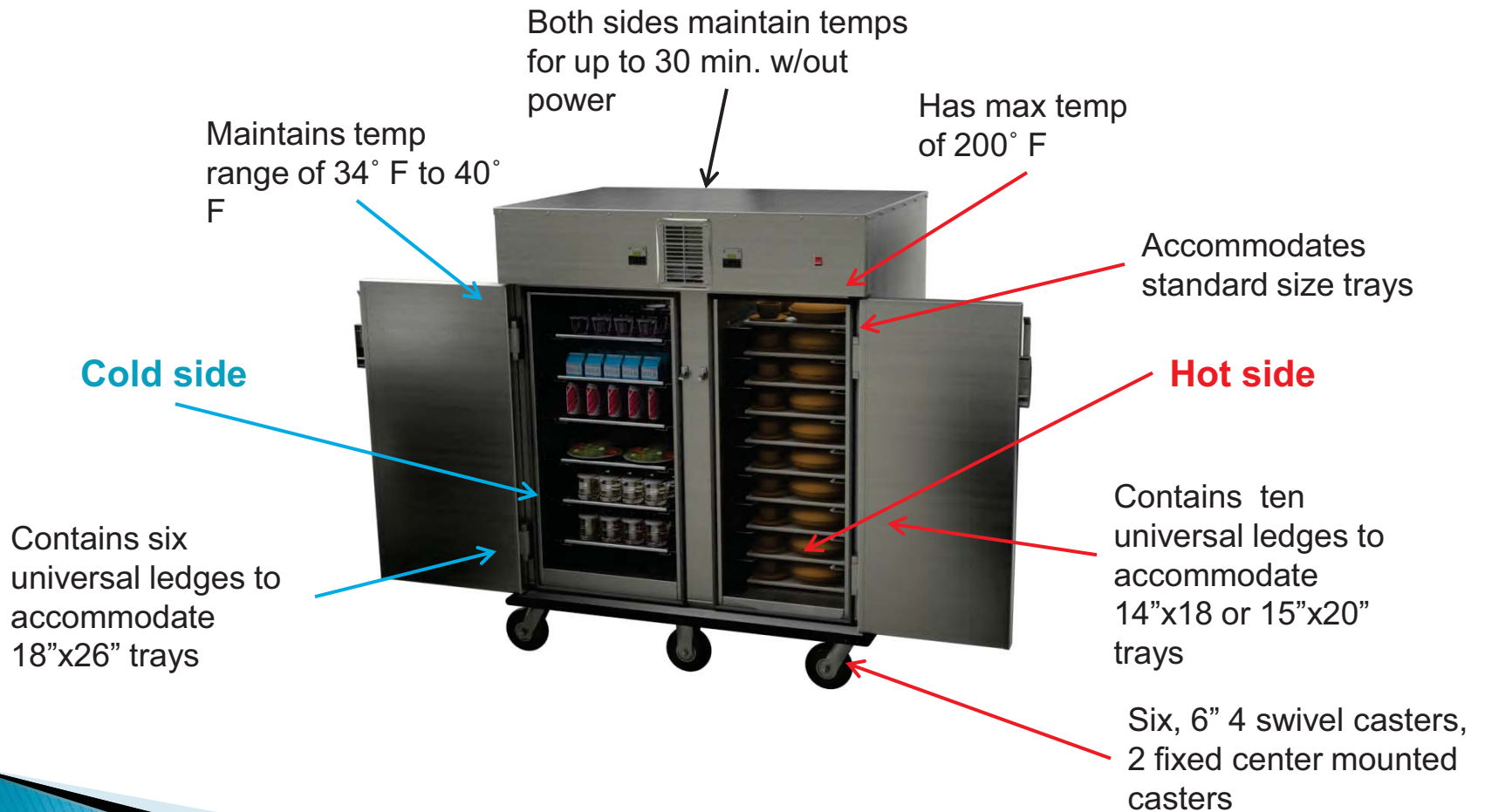
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dispenser

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or Rack Dispenser
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silverware dispenser