

Health Care Update: An Industry In Transition

Patient Centered Care Through the Eyes of Providers, Plans and Suppliers

SPEAKER INTRODUCTIONS

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FORCES OF CHANGE?

Devices, technology and delivery systems

- Innovation
- Data
- The Internet

Regulation

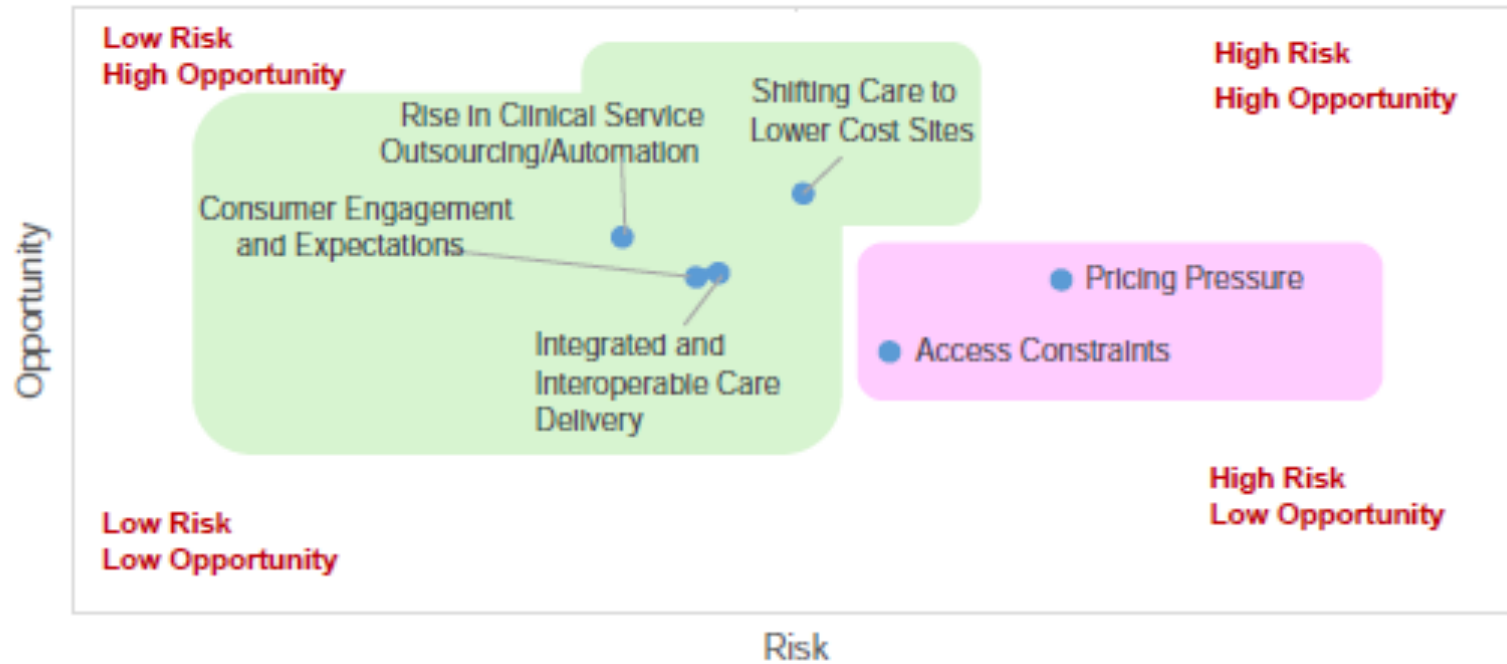
- Insurance
- Device regulation

Who exercise control?

- Patients
- Health plans (private and public)
- Employers

DISRUPTION

Health Care & Life Sciences disruptors (Chart 3)



KPMG 2018 Health Care & Life Sciences Investment Outlook

DISRUPTION = OPPORTUNITY

(for somebody)

AREAS OF FOCUS IN THE INDUSTRY

- Wellness and prevention
- What health insurance covers
- The opioid crisis
- Physician practices and practice management
- Behavioral health
- Employer's focus on costs
- Providers paid performance based compensation
- Direct to consumer services and products

AREAS OF FOCUS IN THE INDUSTRY

- Genetic medicine
- Integrated managed care
- Disease states
- Social determinants of health
- Big data and data protection
- Research and innovation

HYPOTHETICAL ONE

Mary is a 56 yr. old woman with diabetes. She is an office worker and has coverage under her employer sponsored health insurance (albeit with high cost sharing.)

Mary is 40 lbs. overweight, is too busy to exercise and has repeatedly missed appointments with the her new endocrinologist. She claims his office hours are not convenient, his office is too-far away (it takes two buses to travel to and from his office), she can't afford to take time of work to see him, and she feels fine.

Mary's best friend, Esther, is a nurse who works for Mary's long-standing primary care physician. The primary care physician became out-of-network at the beginning of the year, so Mary stopped seeing her.

Mary and Esther attend the same church and Esther usually gives Mary a ride to services. They also talk to each other using the new Echo Show. Mary confided in Esther that she often does not bother to monitor her glucose levels, and that she lies about this to her endocrinologist. Although she felt guilty sharing this secret, Esther told her employer.

The FDA just issued an letter clearing for commercial distribution a new implantable glucose monitor which can communicate information in real-time over the internet.

HYPOTHETICAL ONE

What can (or should) be done. Assume, you represent:

- Mary's health plan.
- The manufacturer of the new FDA approved device.
- The manufacturer of more conventional glucose monitoring products.
- Mary's endocrinologist.
- Mary's former primary care physician.
- Mary's employer.

DISCUSSION OF HYPOTHETICAL ONE

HYPOTHETICAL TWO

Its EIGHT years later

Mary is no longer in a high-deductible plan; she is in a Medicare Advantage Plan, and her diabetes is out of control.

Discussion: *What now?*

