How have state hospice organizations changed?
Hospice Utilization

- Is a measure of ACCESS…
- Is a measure of QUALITY…
Hospice Utilization

• Is complicated...


2005-2019 State Hospice Utilization
17-Year Trends

Note: Hospice Utilization = Medicare Hospice Deaths / Total Medicare Deaths.

www.HospiceAnalytics.com
Hospice Utilization – Thoughts on 2020 & 2021...

- 2020 Hospice Utilization decreased nationally for the first time ever.
- 2021 Hospice Utilization decreased nationally again – although less of a decrease.
- The last time Hospice Utilization was ~44.9% was 2012...

WHY?

Hospice Trends:
- 2020 and 2021 hospice admissions and deaths are above 2019.
- Although, 2021 hospice admissions and deaths are slightly lower than 2020. Presumably, this is due to the ongoing impact of COVID and deaths in hospitals and facilities where hospices had limited access during 2021.

Medicare Trends:
- 2020 and 2021 total Medicare deaths are well above 2019 (~+400K).
- On average over the past 10 years, we see an increase of ~40,000 Medicare beneficiary deaths / year.

<table>
<thead>
<tr>
<th>Year</th>
<th>Medicare Deaths</th>
<th>Increase From Previous Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>2,280,118</td>
<td>+34,073</td>
</tr>
<tr>
<td>2019</td>
<td>2,294,493</td>
<td>+14,375</td>
</tr>
<tr>
<td>2020</td>
<td>2,701,983</td>
<td>+407,490</td>
</tr>
<tr>
<td>2021</td>
<td>2,722,978</td>
<td>+20,995</td>
</tr>
</tbody>
</table>
2021 Hospice Utilization
(Medicare Hospice Deaths / Total Medicare Deaths)

2020 Hospice Utilization
(Medicare Hospice Deaths / Total Medicare Deaths)
## 2021 Demographics & Hospice Utilization

<table>
<thead>
<tr>
<th></th>
<th>Connecticut</th>
<th>National</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (2020 Census; 2021 NA)</td>
<td>3,557,006</td>
<td>339,398,247</td>
</tr>
<tr>
<td>Total Deaths (2020 Census; 2021 NA)</td>
<td>37,853</td>
<td>3,465,369</td>
</tr>
<tr>
<td>Medicare Beneficiaries</td>
<td>733,688</td>
<td>66,267,916</td>
</tr>
<tr>
<td>Medicare Beneficiary Deaths</td>
<td>27,595</td>
<td>2,722,978</td>
</tr>
<tr>
<td>Medicare Beneficiaries Admitted to Hospice</td>
<td>15,725</td>
<td>1,692,112</td>
</tr>
<tr>
<td>Medicare Hospice Beneficiary Deaths</td>
<td>12,245</td>
<td>1,223,327</td>
</tr>
<tr>
<td>Medicare Hospice Total Days of Care</td>
<td>924,380 Days</td>
<td>122,454,819 Days</td>
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<tr>
<td>Medicare Hospice Mean Days / Beneficiary</td>
<td>59 Days</td>
<td>68 Days</td>
</tr>
<tr>
<td>Medicare Hospice Mean Days / Beneficiary</td>
<td>16 Days</td>
<td>23 Days</td>
</tr>
<tr>
<td>Medicare Hospice Total Payments</td>
<td>$189,570,937</td>
<td>$22,059,484,635</td>
</tr>
<tr>
<td>Medicare Hospice Mean Payment / Beneficiary</td>
<td>$12,059</td>
<td>$13,117</td>
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</tbody>
</table>

## 2020 Demographics & Hospice Utilization

<table>
<thead>
<tr>
<th></th>
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<th>National</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>3,557,006</td>
<td>339,398,247</td>
</tr>
<tr>
<td>Total Deaths</td>
<td>37,853</td>
<td>3,465,369</td>
</tr>
<tr>
<td>Medicare Beneficiaries</td>
<td>726,333</td>
<td>64,459,982</td>
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<tr>
<td>Medicare Beneficiary Deaths</td>
<td>31,309</td>
<td>2,701,983</td>
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<tr>
<td>Medicare Beneficiaries Admitted to Hospice</td>
<td>17,129</td>
<td>1,703,813</td>
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<tr>
<td>Medicare Hospice Beneficiary Deaths</td>
<td>13,703</td>
<td>1,260,605</td>
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<tr>
<td>Medicare Hospice Total Days of Care</td>
<td>962,157 Days</td>
<td>125,709,522 Days</td>
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<tr>
<td>Medicare Hospice Mean Days / Beneficiary</td>
<td>58 Days</td>
<td>74 Days</td>
</tr>
<tr>
<td>Medicare Hospice Mean Days / Beneficiary</td>
<td>15 Days</td>
<td>24 Days</td>
</tr>
<tr>
<td>Medicare Hospice Total Payments</td>
<td>$196,091,322</td>
<td>$22,060,331,635</td>
</tr>
<tr>
<td>Medicare Hospice Mean Payment / Beneficiary</td>
<td>$11,450</td>
<td>$12,949</td>
</tr>
</tbody>
</table>
2021 Hospice Utilization
(Medicare Hospice Deaths / Total Medicare Deaths)

2020 Hospice Utilization
(Medicare Hospice Deaths / Total Medicare Deaths)
2021 Hospice Utilization x County – Connecticut
(Medicare Hospice Deaths / Total Medicare Deaths)

National: 44.9%
CT #32: 44.4%

2020 Hospice Utilization x County – Connecticut
(Medicare Hospice Deaths / Total Medicare Deaths)

National: 46.7%
CT #39: 43.8%
Change in Hospice Utilization 2019-2021
(Medicare Hospice Deaths / Total Medicare Deaths)


Impact of COVID – WOW!

Change in Hospice Utilization 2000-2021
(Medicare Hospice Deaths / Total Medicare Deaths)

Medicare Advantage & Hospice

Hospice Medicare Advantage

Hospice Medicare Advantage

- On January 18, 2019, CMS announced it will test carving hospice into Medicare Advantage (MA) plans under its Value-Based Insurance Design (VBID).
- This test began 1/1/2021.
- Some initial concerns include:
  - Will hospice reimbursement be reduced by MA plans? Perhaps MA plans will send more beneficiaries to hospice, but pay less for them?
  - Will hospice interdisciplinary services be unbundled? Perhaps MA plans will only pay for more skilled discipline visits?
  - How will CMS measure success? (Only $$?) This is the quality question!

9/29/22: CMS posted the list of plans that will be participating in the MA VBID Hospice Component model for CY 2023. Fifteen plans will be participating, six more than in 2021 and two more than in 2022.

~Theresa Forster, NAHC
2021 Medicare Advantage – All
Percentage of All Beneficiaries

CT #10: 49.3%
National: 44.7%

2021 Medicare Advantage – All – Connecticut
Percentage of All Beneficiaries

CT #10: 49.3%
National: 44.7%
2021 Medicare Advantage – Deaths
Percentage of Beneficiary Deaths

Note: When comparing MA All to MA Deaths, 20% of counties change rank.

2021 Medicare Advantage – Deaths, Connecticut
Percentage of Beneficiary Deaths

Note: When comparing MA All to MA Deaths, 20% of counties change rank.
2021 Medicare Advantage – Deaths
Percentage of All Beneficiaries

National: 43.6%
CT #23: 42.6%

Note: When comparing MA All to MA Deaths, 27% of counties change rank.

www.HospiceAnalytics.com
10/11/22 Notes:
• CMS released the August refresh of Hospice Compare information on 8/31/22. Several changes have been made, including:
  • New Hospice Star Rating information is available.
  • CMS is removing seven individual HIS process measures and the Comprehensive Assessment Measure no earlier than May 2022.
  • CMS adding the Hospice Care Index (HCI), a composite measure of 10 indicators from claims data, expected in the 8/22 refresh.
• Hospice Outcomes & Patient Evaluation (HOPE) tool is in development.

**New Medicare Hospice Star Ratings, 8/31/22**

• Over 6,000 hospices were included in the Aug. 31, 2022 Care Compare for Hospice release (N= 6,041; 27% of hospices nationally in CA).

• Only 1/3 of hospices had reportable Star Ratings (2,026 / 6,041), perhaps because CMS blanks cells with <70 beneficiaries for Star Ratings.

• Of hospices with reportable Star Ratings:
  o 5 Star= 195 (10%) hospices
  o 4 Star= 782 (39%) hospices
  o 3 Star= 737 (36%) hospices
  o 2 Star= 287 (14%) hospices
  o 1 Star= 25 (1%) hospices

• Therefore, about half of hospices had Star Ratings 4+ (49%) and 85% of hospices had 3+ Star Ratings.
**New Medicare Hospice Star Ratings, 8/31/22**

- Some caveats:
  - Hospice Star Ratings are new. We should allow ~2 years for both CMS and Hospices to receive, understand, and work to improve scores before making important decisions based on this information.
  - The percentages of hospices with Star Ratings in each state ranged from 10% (CA) to 96% (KY). Reasons for hospices missing Star Ratings need to be better understood, discussed, and reduced in the future.
  - In Connecticut, 20/27 (74%) of Medicare certified hospices eligible for Star Ratings received Star Ratings.

**Hospice Item Set Notes, 8/31/22**

- Interestingly, Hospice Item Set scores dropped significantly between 2022 Q2 and Q3 – perhaps COVID related (since this is an internal measure)?
- This decreased both HIS mean scores and HIS & CAHPS mean scores.
8/22 Care Compare – Hospice
Mean Hospice Star Scores x State

8/22 Care Compare - Hospice
Hospice HIS & CAHPS – Average Top Box Scores
8/22 Hospice Compare:
Hospice HIS & CAHPS – Average Top Box Scores

Connecticut Top 10:

<table>
<thead>
<tr>
<th>Hospice</th>
<th>Mean HIS &amp;</th>
<th>Star Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRANCISCAN FAMILY CARE CENTER 71530</td>
<td>87.07%</td>
<td>4</td>
</tr>
<tr>
<td>BRISTOL HOSPITAL HOME CARE AGENCY 71517</td>
<td>87.34%</td>
<td>4</td>
</tr>
<tr>
<td>VON HOGAN HOME CARE AND HOSPICE 71524</td>
<td>86.03%</td>
<td>4</td>
</tr>
<tr>
<td>REGIONAL HOSPICE &amp; PALLIATIVE CARE OF WESTERN CT 71519</td>
<td>85.77%</td>
<td>4</td>
</tr>
<tr>
<td>DAY KIMBALL HOMECARE 71504</td>
<td>85.10%</td>
<td>4</td>
</tr>
<tr>
<td>CONNECTICUT HOSPICE INC 71603</td>
<td>84.71%</td>
<td>3</td>
</tr>
<tr>
<td>VISITING NURSE &amp; HEALTH SERVICES OF CONNECTICUT 71502</td>
<td>84.43%</td>
<td>3</td>
</tr>
<tr>
<td>VNA COMMUNITY HEALTHCARE &amp; HOSPICE 71544</td>
<td>82.29%</td>
<td>3</td>
</tr>
<tr>
<td>CONSTELLATION HOSPICE 71524</td>
<td>82.83%</td>
<td>2</td>
</tr>
<tr>
<td>MAISONCARE HOME HEALTH AND HOSPICE INC 71516</td>
<td>81.97%</td>
<td>3</td>
</tr>
</tbody>
</table>

N= 2979 / 6041 (49%) of hospices; Hospice Analytics, 8/31/22.

Additional Medicare Claims Data Points
6/22 Medicare Hospice
Percentage of Hospices x Corporate Ownership

Connecticut

- Independent, 41%
- Potential Chain, 44%
- Private Equity, 7%
- Publicly Traded, 7%

National

- Independent, 55%
- Potential Chain, 24%
- Private Equity, 13%
- Publicly Traded, 8%

Mean Star Ratings

Connecticut

- Independent: 3.7
- Potential Chain: 3.3
- Publicly Traded: 3.2
- Private Equity: 3.1

National

- Independent, 55%
- Potential Chain, 24%
- Private Equity, 13%
- Publicly Traded, 8%

*6/22 Hospice Analytics update; based on JAMA, Stevenson; Aldridge, 2021.*
### 2021 Medicare Hospice
Percentage of Hospices x Type Control

#### Connecticut
- For profit: 33%
- Non-profit / Other: 67%

#### National
- For profit: 69%
- Non-profit / Other: 31%

---

### Mean Star Ratings

#### Connecticut
- Non-profit / Other: 3.6
- For profit: 3.2

#### National
- For profit: 69%
- Non-profit / Other: 31%
2021 Medicare Hospice Percentage of Hospices x Accreditation Organization

Connecticut
- Not accredited, 75%
- CHAP, 25%
- ACHC, 0%
- Joint Commission, 0%

National
- Not accredited, 47%
- CHAP, 20%
- ACHC, 14%
- Joint Commission, 20%

Mean Star Ratings

Not accredited

ACHC

CHAP

Joint Commission

3.6

3.3

3.2

3.2

0.0

1.0

2.0

3.0

4.0

5.0
2021 Medicare Beneficiaries Admitted to Hospice
National= 1,692,112

CT #33: 15,725

Note: 2021 Medicare Hospice Admissions= 1,806,306.

2020 Medicare Beneficiaries Admitted to Hospice
National= 1,703,652

CT #33: 17,126

Note: 2020 Medicare Hospice Admissions= 1,820,889.
2005-2021 Hospice Mean Days of Care
17-Year Trends

2021 Medicare Hospice
Median Days of Care / Beneficiary
2020 Medicare Hospice
Median Days of Care / Beneficiary

National: 24
CT #49: 15

2005-2021 Hospice Median Days of Care
17-Year Trends
### 2021 Medicare Hospice Total Medicare Reimbursement

National: $22,059,484,635

<table>
<thead>
<tr>
<th>State</th>
<th>Reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$2,897,170,737</td>
</tr>
<tr>
<td>Florida</td>
<td>$2,024,763,608</td>
</tr>
<tr>
<td>Texas</td>
<td>$2,019,439,751</td>
</tr>
<tr>
<td>Ohio</td>
<td>$973,739,614</td>
</tr>
<tr>
<td>Pennsylvania</td>
<td>$812,658,565</td>
</tr>
</tbody>
</table>

### 2020 Medicare Hospice Total Medicare Reimbursement

National: $22,060,231,454

<table>
<thead>
<tr>
<th>State</th>
<th>Reimbursement</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$2,897,170,737</td>
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<td>Pennsylvania</td>
<td>$812,658,565</td>
</tr>
</tbody>
</table>

www.HospiceAnalytics.com  61
2021 Medicare Hospice Percentage of Days x LOS / Beneficiary

Connecticut

- 180+ days, 10%
- 90-179 days, 10%
- 30-89 days, 19%
- 8-29 days, 24%

National

- 180+ days, 13%
- < 7 days, 37%
- 90-179 days, 12%
- 30-89 days, 21%
- 8-29 days, 23%

---

2020 Medicare Hospice Percentage of Days x LOS / Beneficiary

Connecticut

- 180+ days, 9%
- 90-179 days, 10%
- 30-89 days, 19%
- 8-29 days, 23%

National

- 180+ days, 13%
- < 7 days, 37%
- 90-179 days, 12%
- 30-89 days, 20%
- 8-29 days, 23%
### 2021 Medicare Hospice
Percentage of Days x LOS / Beneficiary

**Connecticut**
- 0-60 Days: 74%
- 61+ Days: 26%

**National**
- 0-60 Days: 68%
- 61+ Days: 32%

### 2020 Medicare Hospice
Percentage of Days x LOS / Beneficiary

**Connecticut**
- 0-60 Days: 74%
- 61+ Days: 26%

**National**
- 0-60 Days: 68%
- 61+ Days: 32%
2021 Medicare Hospice Beneficiaries
Top Six ICD-10 PRIMARY Diagnoses (out of 19 categories)

2020 Medicare Hospice Beneficiaries
Top Six ICD-10 PRIMARY Diagnoses (out of 19 categories)
2021 Medicare Hospice Beneficiaries
Status at Discharge

- Connecticut: 89% DC Alive, 11% DC Deceased
- National: 84% DC Alive, 16% DC Deceased

Note: Percent DC Deceased = DC Deceased / (DC Deceased + DC Alive) calculated for each admission.

2020 Medicare Hospice Beneficiaries
Status at Discharge

- Connecticut: 90% DC Alive, 10% DC Deceased
- National: 85% DC Alive, 15% DC Deceased

Note: Percent DC Deceased = DC Deceased / (DC Deceased + DC Alive) calculated for each admission.
### 2021 Medicare Hospice Beneficiaries
**Status at Discharge - Detailed**

- **Connecticut**
  - DC Alive - Discharged for Cause (hospice initiated): 66%
  - DC Alive - Moved (hospice initiated): 15%
  - DC Alive - Transfer (patient initiated): 5%
  - DC Alive - No Longer Ill (hospice initiated): 2%
  - DC Alive - Revocation (patient initiated): 1%
  - DC Deceased: 1%
  - Still on Service: 2%

- **National**
  - DC Alive - Discharged for Cause (hospice initiated): 67%
  - DC Alive - Moved (hospice initiated): 20%
  - DC Alive - Transfer (patient initiated): 5%
  - DC Alive - No Longer Ill (hospice initiated): 2%
  - DC Alive - Revocation (patient initiated): 1%
  - DC Deceased: 5%
  - Still on Service: 4%

---

### 2020 Medicare Hospice Beneficiaries
**NEW - Status at Discharge - Detailed**

- **Connecticut**
  - DC Alive - Discharged for Cause (hospice initiated): 90%
  - DC Alive - Moved (hospice initiated): 3%
  - DC Alive - Transfer (patient initiated): 5%
  - DC Alive - No Longer Ill (hospice initiated): 1%
  - DC Alive - Revocation (patient initiated): 2%
  - DC Deceased: 1%
  - Still on Service: 2%

- **National**
  - DC Alive - Discharged for Cause (hospice initiated): 90%
  - DC Alive - Moved (hospice initiated): 5%
  - DC Alive - Transfer (patient initiated): 5%
  - DC Alive - No Longer Ill (hospice initiated): 5%
  - DC Alive - Revocation (patient initiated): 1%
  - DC Deceased: 2%
  - Still on Service: 1%

---

*Note: Percentages calculated for each admission.*

---

*Note: Percent DC Deceased = DC Deceased / (DC Deceased + DC Alive) calculated for each admission.*
2021 Medicare Hospice Beneficiaries
Race: Dying With vs. Without Hospice

Minorities are underserved in hospice.

www.HospiceAnalytics.com
2021 Medicare Hospice Beneficiaries Levels of Care (days)

Connecticut National
Cont. Home Care
Respite Care
General Inpt
Routine Home Care

2020 Medicare Hospice Beneficiaries Levels of Care (days)
Thank you

Please contact Cordt Kassner, PhD, at Hospice Analytics with any questions, comments, feedback, or for additional information:
P: 719-209-1237
E: Info@HospiceAnalytics.com
W: www.HospiceAnalytics.com

* Review the new National Hospice Locator at www.HospiceAnalytics.com — geo-maps and detailed information on every known hospice in the United States!