

PULL OUT AND SAVE

SUPPLEMENT TO

HME News

THE BUSINESS NEWSPAPER FOR HOME MEDICAL EQUIPMENT PROVIDERS

DECEMBER 2012

State of the Industry 2012



The HME Market By The Numbers

Parsing the data

Long live the regionals

It looks like for 2011, compared to 2010, the number of providers that bill Medicare in all categories but one decreased (See page 6).

Last year, when we compared 2009 to 2010, we saw a nice little increase in the number of providers in two categories: \$1 million to \$3 million, and \$3 million to \$10 million.

The number of providers in the \$10 million and up category was the one and only gainer in 2011. What's more: The providers in this category grew from 46 in 2008 to 69 in 2011, a 50% increase.

The fact that the number of providers in this category continues to increase may be the strongest sign yet that regional companies are on the rise.

Shake-up at the top

There has been some interesting movement in the list of top providers this year (See page 10). Lincare remains at the top of the list with about \$772 million in allowed charges, but other than that, no one is really in the same spot as last year.

Apria moved up to No. 2 from No. 3 last year. Accredo moved up to No. 3 from No. 4. Liberty Medical Supply dropped from No. 2 to No. 4. And Lincare Pharmacy and KCI swapped spots from 2010 to 2011 at No. 5 and 6, respectively.

About half of the providers in the top 10 had higher allowed charges in 2011 vs. 2010: Lincare, Apria, Lincare Pharmacy, KCI

and Walgreen.

Still of note: The number of companies in the top 10 that we would consider specialty providers, those whose bread and butter is specialty pharmacy, supplies, wound care or O&P, continue to dominate the list of top providers. Lincare, Apria and Braden Partners are the only more traditional HME providers on the list.

Winners and losers

In respiratory, some of the big winners were: A7032, replacement nasal cushion, which saw about a 30% jump from 2010 to 2011, with \$44.8 million in allowed charges; and A7030, CPAP full face mask, which saw about an 18% jump (See page 8).

What's going on here? Well, there's been a big push in the industry for sleep providers to take advantage of resupply items like these. There are also new policies governing when providers can resupply, so it'll be interesting to see what happens to these numbers in 2012.

In mobility, the codes we watch are K0823, your standard power wheelchair, which was down about 52% from last year; and K0861, your standard complex power wheelchair, which was up about 11% (See page 9).

That jump in K0861 is interesting. When the first-month purchase option for standard power wheelchairs was eliminated Jan. 1, 2011, I wrote a story about how CMS officials were on high alert for providers trying to move more bennies into complex power wheelchairs. The policy doesn't apply to complex power wheelchairs or Group 3 power wheelchairs.

— Elizabeth Beaulieu, Editor, HME News



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Medicare: DME growth by category

A quick snapshot: 2007 - 2011



BETOS	Product	2007	2008	2009	2010	2011
D1A	Med/surg supplies	152M	176M	202M	198M	198M
D1B	Hospital beds	287M	276M	244M	255M	240M
D1C	Oxygen and supplies	2.8B	2.8B	2.0B	2.2B	2.1B
D1D	Wheelchairs	1.3B	1.5B	1.4B	1.4B	1.05B
D1E	Other DME	3.1B	3.3B	3.4B	3.8B	3.6B
D1G	Respiratory meds	900M	657M	588M	629M	637M
	Total	8.5B	8.7B	7.9B	8.5B	7.8B

Allowed Charges

What is a BETOS bucket?

BETOS STANDS FOR BERENSON-EGGERS TYPE OF SERVICE, and it's the name of a coding system developed to analyze the growth in Medicare expenditures. The coding system covers all HCPCS codes; assigns a HCPCS code to only one BETOS bucket; consists of readily understood clinical categories that permit objective assignment; is stable over time; and is relatively immune to minor changes in technology or practice patterns.

SOURCE: CMS



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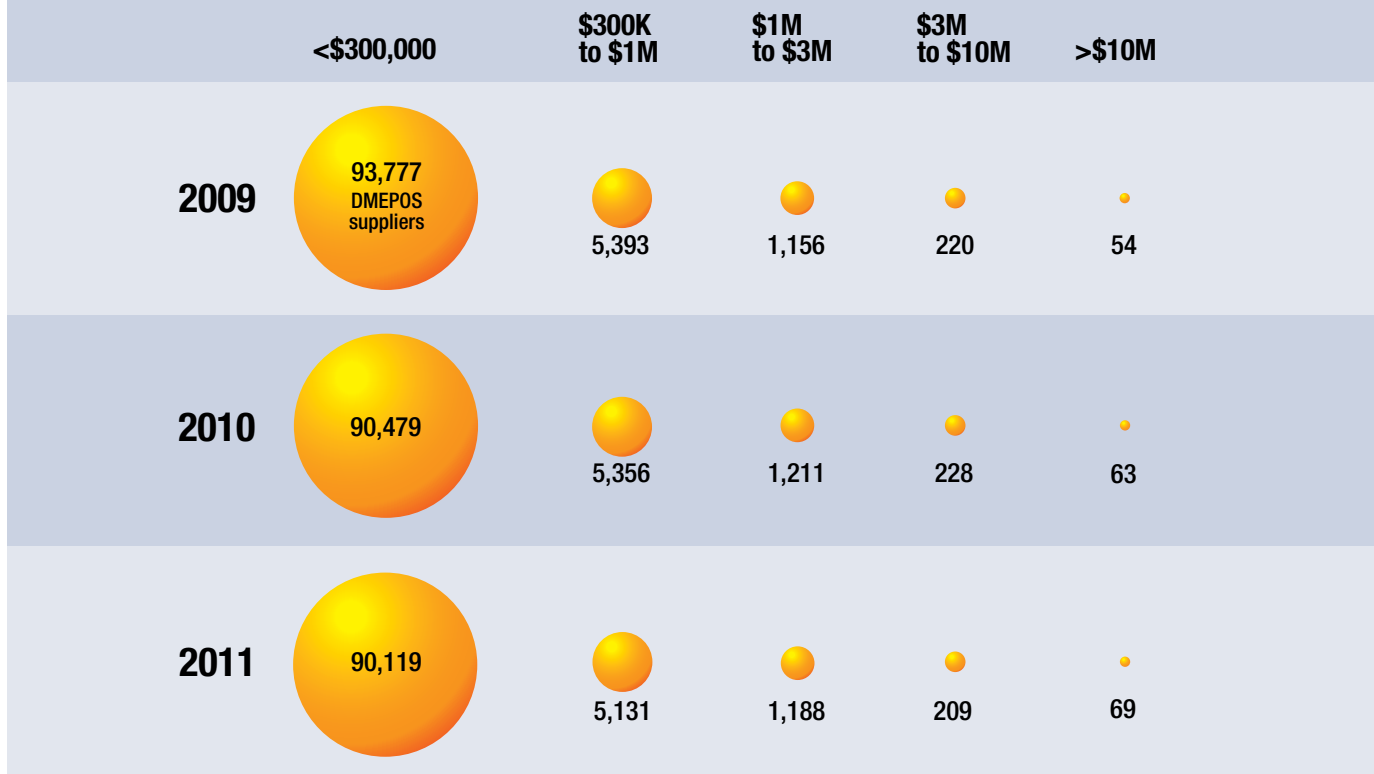
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Most DMEPOS suppliers bill Medicare less than \$300,000 per year



SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

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Medicare: Number of beneficiaries, suppliers, 2011

✓ E1390 O2 Concentrator

Jurisdiction	Beneficiaries	Suppliers
A	211,868	2,099
B	296,087	2,879
C	613,733	5,703
D	343,319	2,923
Nation*		8,404

✓ E0601 CPAP

Jurisdiction	Beneficiaries	Suppliers
A	83,342	1,547
B	120,478	2,325
C	234,635	5,082
D	131,562	2,440
Nation*		8,013

✓ E0260 Hospital Beds

Jurisdiction	Beneficiaries	Suppliers
A	90,525	2,231
B	81,854	2,401
C	188,598	5,703
D	87,010	2,779
Nation*		10,301

✓ A4253 Blood Glucose Strips

Jurisdiction	Beneficiaries	Suppliers
A	785,409	15,397
B	871,920	14,392
C	1,624,082	25,522
D	734,885	14,011
Nation*		51,773

✓ K0823 Power Chair

Jurisdiction	Beneficiaries	Suppliers
A	13,827	415
B	21,789	648
C	55,681	1,875
D	24,391	1,024
Nation*		3,495

✓ K0001 Standard Chair

Jurisdiction	Beneficiaries	Suppliers
A	64,901	2,349
B	64,470	2,592
C	130,387	5,562
D	76,038	2,826
Nation*		10,528

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

***EDITOR'S NOTE:** Why doesn't the number of suppliers from each category equal the total number of suppliers in the nation? Some suppliers work in more than one jurisdiction.

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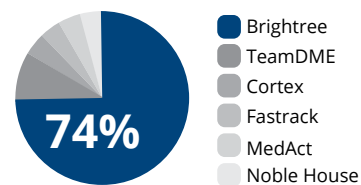
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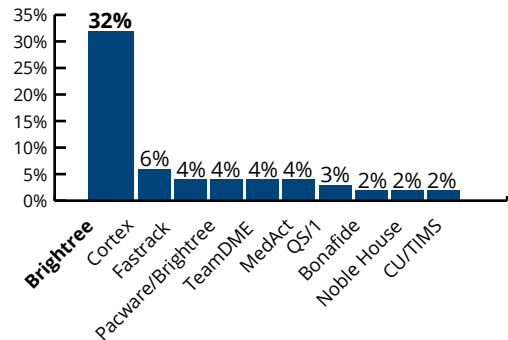
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2012 HME Software Selected by Providers



Percent of decisions to purchase new HME software in 2012 by brand

2012 HME Software Market Share



Top 10 brand % of market share. Note: Pacware was acquired by Brightree in 2011, and is now a Brightree brand

Results are based on an independent survey of a statistically valid sample of providers. The survey is sent to a sample of 1,000 providers who were chosen at random from all HME News magazine subscribers. The results were tabulated and analyzed by Anservitz & Associates.

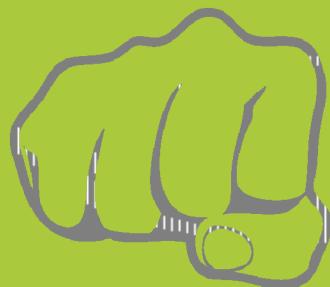
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Medicare: Utilization for 2011, top HCPCS

Respiratory

Rank	HCPCS	Product	Allowed Charges	Allowed Services	2011 Growth
2	E1390	Oxygen concentrator	\$1,755,800,891.53	10,400,341	-4.66%
26	E0601	Cont airway pressure device	\$217,245,543.26	2,753,089	-0.73%
29	J7626	Budesonide non-comp unit	\$197,072,823.44	43,881,509	-20.37%
44	E0431	Portable gaseous O2	\$135,763,224.00	4,798,765	-9.29%
50	Q0513	Disp fee inhal drugs/30 days	\$117,407,745.27	3,558,506	1.71%
51	A7034	Nasal application device	\$115,335,531.10	1,104,411	4.54%
54	A7030	CPAP full face mask	\$110,861,288.90	659,357	18.09%
62	J7605	Arformoterol non-comp unit	\$93,551,175.48	17,448,169	23.53%
65	E0470	RAD w/o backup non-inv intfc	\$92,881,909.20	509,655	-7.45%
80	E0562	Humidifier heated used w PAP	\$78,726,778.26	834,910	-0.14%
103	E0439	Stationary liquid O2	\$58,862,718.60	346,11	-12.61%
109	E0570	Nebulizer with compression	\$54,516,636.03	3,900,788	-3.55%
110	E0443	Portable O2 contents, gas	\$53,548,659.01	701,046	-13.55%
115	A7037	Pos airway pressure tubing	\$52,061,593.48	1,464,490	6.12%
117	E0471	RAD w/backup non inv intrfc	\$50,773,224.37	114,069	5.34%
122	J7606	Formoterol fumarate, inh	\$47,413,319.65	10,030,145	18.33%
126	J7620	Albuterol ipratrop non-comp	\$44,892,807.56	187,730,984	1.10%
128	A7032	Replacement nasal cushion	\$44,793,142.32	1,252,345	29.86%
130	A7035	Pos airway press headgear	\$43,117,183.55	1,285,835	5.71%
132	E0463	Press supp vent invasive int	\$41,496,425.92	28,289	14.74%
160	K0738	Portable gas oxygen system	\$33,330,755.74	654,944	-2.39%
180	J7613	Albuterol non-comp unit	\$28,096,401.70	453,866,833	3.94%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT



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Medicare: Utilization for 2011, top HCPCS

Diabetes, Infusion & Supplies

Rank	HCPCS	Product	Allowed Charges	Allowed Services	2011 Growth
5	A4253	Blood Glucose Strips	\$1,191,672,169.00	34,958,964	-14.55%
35	E2402	Neg Press Wound Therapy Pump	\$158,960,571.83	104,923	1.69%
43	B4035	Enteral Feed Supp Pump	\$139,763,119.68	12,740,929	-14.64%
53	A4259	Lancets Per Box	\$112,180,356.19	10,372,657	-24.12%
56	A5500	Diab Shoe For Density Insert	\$108,101,912.28	1,625,527	-11.01%
67	B4154	Ef Spec Metabolic Noninherit	\$86,878,288.09	77,075,828	-20.87%
69	A4351	Straight Tip Urine Catheter	\$86,208,652.10	48,658,593	21.94%
85	A5512	Multi Den Insert Direct Form	\$73,870,162.26	2,724,420	-9.05%
86	B4197	Parenteral Sol 74-100 Gm Pro	\$73,830,588.58	244,776	0.13%
88	B4150	Ef Complet w/Intact Nutrient	\$73,279,482.68	117,262,147	-17.03%
90	A5513	Multi Den Insert Custom Mold	\$72,083,964.26	1,783,328	-14.43%
105	B4152	Ef Calorie Dense >=1.5Kcal	\$56,364,264.34	109,226,942	-8.65%
111	A4353	Intermittent Urinary Cath	\$53,057,322.29	7,297,286	-1.85%
121	A4352	Coude Tip Urinary Catheter	\$49,102,509.05	7,974,014	33.34%
131	A6021	Collagen Dressing <=16 Sq"	\$41,925,286.53	1,906,688	2.89%
142	A4258	Lancet Device Each	\$38,482,818.07	2,385,289	4.95%
148	E0784	Ext Amb Infusn Pump Insulin	\$36,510,722.36	103,108	-2.01%
151	B4193	Parenteral Sol 52-73 Gm Prot	\$35,251,810.51	141,883	-0.45%
157	B4199	Parenteral Sol >100 Gm Prote	\$33,751,808.79	97,690	10.22%
163	A4221	Maint Drug Infus Cath Per Wk	\$32,171,531.02	1,363,066	-17.99%
167	A4222	Infusion Supplies w/Pump	\$30,507,645.49	643,123	-2.72%
168	A6550	Neg Pres Wound Ther Drsg Set	\$30,392,274.51	1,224,845	0.32%
174	E0607	Blood Glucose Monitor Home	\$29,743,336.20	485,785	10.73%
177	A4407	Ext Wear Ost Skn Barr <=4Sq"	\$28,790,271.63	3,144,532	6.61%
178	B4034	Enter Feed Supkit Syr By Day	\$28,379,097.36	4,992,297	-12.41%
191	A4414	Ost Sknbar w/o Conv<=4 Sq"	\$25,188,936.51	4,882,226	-3.62%
195	E0781	External Ambulatory Infus Pump	\$24,079,755.80	103,037	0.80%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Durable Medical Equipment

Rank	HCPCS	Product	Allowed Charges	Allowed Services	2011 Growth
27	E0260	Hosp bed semi-electr w/ matt	\$211,274,662.87	2,035,180	-6.60%
81	G0283	Elec stim other than wound	\$78,381,557.52	6,634,239	0.57%
82	E0143	Walker folding wheeled w/o s	\$78,223,231.84	782,821	-7.15%
100	E0277	Powered pres-redu air mattrs	\$63,701,599.43	121,898	-20.69%
104	L5673	Socket insert w lock mech	\$56,544,656.12	85,479	-1.76%
119	L7900	Male vacuum erection system	\$50,073,952.20	103,860	6.27%
134	E0163	Commode chair with fixed arm	\$40,465,378.66	367,868	-7.51%
149	L5700	Replace socket below knee	\$35,683,500.93	13,089	0.88%
153	E0730	Tens four lead	\$35,065,069.29	237,695	4.50%
156	L8030	Breast prosthes w/o adhesive	\$34,287,175.60	112,987	-5.11%
188	E0630	Patient lift hydraulic	\$25,801,939.38	302,946	-1.26%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Mobility

Rank	HCPCS	Product	Allowed Charges	Allowed Services	2011 Growth
21	K0823	PWC gp 2 std cap chair	\$243,337,074.57	614,437	-52.31%
93	K0001	Standard wheelchair	\$69,991,911.09	1,564,444	-1.65%
95	K0004	High strength ltwt whlchr	\$68,366,063.73	638,408	-10.40%
96	K0003	Lightweight wheelchair	\$67,567,457.50	922,026	-0.69%
116	E1007	Pwr seat combo w/shear	\$51,407,803.89	6,546	8.84%
145	E2365	U1 sealed leadacid battery	\$37,103,648.38	380,521	-11.59%
158	K0861	PWC gp3 std mult pow opt s/b	\$33,619,876.10	6,723	11.37%
179	K0108	W/c component-accessory NOS	\$28,167,322.11	184,390	9.69%
186	K0825	PWC gp 2 hd cap chair	\$26,192,070.35	59,215	-43.18%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Top providers in 2011

Rank	Company	Allowed Charges	Rank	Company	Allowed Charges	Rank	Company	Allowed Charges
1	Lincare Inc.	\$771,655,432.64	35	Arriva Medical, LLC.	\$34,818,051.22	69	Advanced Respiratory, Inc.	\$16,917,749.51
2	Apria Healthcare Inc.	\$377,713,426.55	36	Optumrx Inc.	\$34,748,087.54	70	Founders Healthcare, LLC	\$16,647,673.49
3	Accredo Health Group Inc.	\$351,721,052.69	37	Amber Enterprises Inc.	\$34,195,846.57	71	Medpoint, LLC	\$16,373,905.05
4	Liberty Medical Supply, Inc.	\$350,296,878.93	38	Djo LLC	\$32,991,621.45	72	Diplomat Pharmacy Inc.	\$16,294,582.88
5	Lincare Pharmacy Serv. Inc.	\$182,258,982.51	39	Pulmo-Dose Inc.	\$32,770,714.93	73	Neighborhood Diabetes	\$16,247,141.73
6	KCI USA, Inc.	\$176,598,517.72	40	American Homepatient, Inc.	\$31,531,072.48	74	Procare Pharmacy Direct, LLC	\$16,020,172.27
7	Walgreen Co.	\$173,287,791.76	41	Empi Inc.	\$31,354,003.66	75	CVS Pharmacy Inc.	\$15,815,888.04
8	Degc Enterprises (U.S.), Inc.	\$138,338,092.18	42	Medical Serv. Of America Inc.	\$29,797,343.86	76	Responsive Home Health Care Inc.	\$15,449,241.03
9	Braden Partners Lp.	\$101,573,657.83	43	Ebi LLC	\$28,973,446.30	77	National Seating & Mobility, Inc.	\$15,343,437.19
10	Hanger Prost. & Ortho. Inc.	\$95,666,103.79	44	Advanced Home Care, Inc.	\$27,752,604.55	78	Roberts Home Medical Inc.	\$15,311,211.48
11	Gordian Medical Inc.	\$78,629,578.97	45	United Seating & Mobility LLC	\$27,705,441.49	79	Centrad Healthcare LLC	\$15,297,564.59
12	Med4home Inc.	\$75,783,773.69	46	Comp. Decubitus Therapy Inc.	\$26,498,780.38	80	MP Totalcare Services, Inc.	\$15,107,840.14
13	Procare Pharmacy, LLC	\$74,735,466.43	47	United States Pharm. Gr. LLC	\$25,782,254.44	81	Sterling Medical Services LLC	\$14,901,729.26
14	American Homepatient, Inc.	\$71,745,207.47	48	Bioscrip Pharmacy, Inc.	\$25,606,712.31	82	Diamedix Healthcare, LLC	\$14,745,368.07
15	Diabetes Care Club	\$71,215,858.52	49	Us Healthcare Supply LLC	\$25,291,477.06	83	Rotech Oxygen & Medical Equip. Inc.	\$14,583,204.84
16	Hanger Prost. & Ortho. East.	\$62,153,399.54	50	Health Care Sol. At Home Inc.	\$23,947,374.77	84	National Rehab Equipment, Inc.	\$14,425,820.59
17	Byram Healthcare Centers Inc.	\$57,201,524.94	51	Dynasplint Systems, Inc.	\$23,786,047.58	85	Walgreens Home Care, Inc.	\$14,351,877.90
18	Option Care Enterprises, Inc.	\$50,940,888.26	52	Norco, Inc.	\$21,154,251.13	86	Home Medical Systems Inc.	\$14,037,024.94
19	Hoveround Corporation	\$48,291,110.94	53	180 Medical Inc.	\$21,046,870.26	87	Dynavox Systems LLC	\$14,011,400.72
20	Hanger Prost. & Ortho. West.	\$47,882,205.91	54	Wal-Mart Stores Inc.	\$20,857,683.84	88	Mp Totalcare Medical, Inc.	\$13,992,396.95
21	Wal-Mart Stores East LP	\$46,874,659.55	55	International Rehab. Sciences	\$20,824,826.57	89	Binson's Hospital Supplies, Inc.	\$13,970,780.30
22	Coram Alternate Site Serv. Inc.	\$45,635,270.87	56	Airway Oxygen Inc.	\$20,430,450.91	90	Barnes Healthcare Of FL LLC	\$13,852,053.98
23	Orthofix Inc.	\$45,373,661.77	57	Lifecare Solutions Inc.	\$20,097,931.77	91	Minimed Distribution Corp.	\$13,566,037.96
24	United States Med. Supp. Inc.	\$44,278,848.48	58	Smith & Nephew, Inc.	\$20,084,383.05	92	Infusystem, Inc.	\$13,227,405.04
25	RGH Enterprises Inc.	\$42,897,240.15	59	Walgreens Mail Service Inc.	\$20,030,083.50	93	Global Medical, Inc.	\$12,643,083.43
26	Caremark, LLC.	\$42,811,118.93	60	Pos-T-Vac Inc.	\$19,746,263.86	94	Thrifty Payless Inc.	\$12,105,868.80
27	Liberator Medical Supply Inc.	\$42,783,394.05	61	Medenvios Healthcare, Inc.	\$19,632,786.98	95	Aps Acquisition, LLC	\$12,094,030.47
28	Zoll Lifecor Corp.	\$42,210,256.05	62	Jl Medical Inc.	\$19,426,087.33	96	The Scooter Store - Orlando, LLC	\$11,656,350.13
29	Doctor Diabetic Supply LLC	\$41,297,363.97	63	Ancillary Mgmt. Solutions	\$18,893,025.53	97	US Med Inc.	\$11,591,076.69
30	Ammed Direct LLC	\$40,463,035.38	64	Med-Care Pharmacy	\$18,742,032.18	98	Advanced Diabetic Solutions LLC	\$11,406,596.51
31	Wright & Filippis, Inc.	\$39,231,459.60	65	Hill-Rom Company Inc.	\$18,648,646.33	99	Shield California Health Care Center	\$11,390,275.84
32	Mckesson Med.-Surg.	\$36,772,523.17	66	Critical Care Systems, Inc.	\$18,367,684.50	100	Home Infusion Solutions, LLC	\$11,377,564.10
33	Med-Care Diab. & Med. Supp.	\$36,718,560.00	67	Landauer Metropolitan Inc.	\$17,864,926.03			
34	Curascript Inc.	\$36,228,052.58	68	Comm.Surg. Sup. Toms River	\$17,336,637.50			

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

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