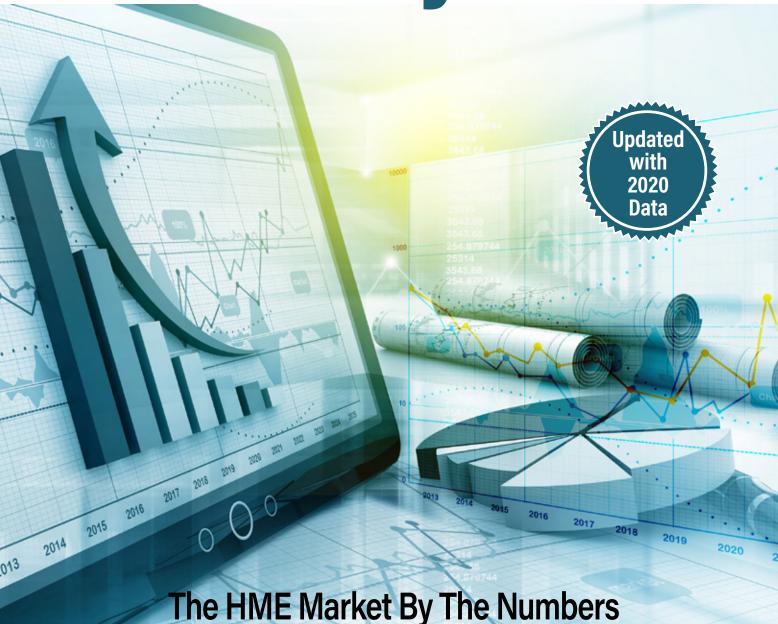
# FILENEWS

BUSINESS NEWS FOR HOME MEDICAL EQUIPMENT PROVIDERS

DECEMBER 2021

# State of the 2021 Industry 2021





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### Enter the pandemic

his State of the Industry report features data from 2020, the year the COVID-19 pandemic turned health care upside down. For our little nook of health care, the pandemic increased demand for product categories like oxygen concentrators – big time.

But to look at the data, not much changed in 2020.



Medicare spent about \$659 million on E1390 in 2020, a 4.31% increase over 2019. I would have been more.

What gives?

It seems the pandemic increased demand for oxygen concentrators, but it also limited new patient setups that weren't related to COVID-19. At least earlier in 2020, visits to doctor's offices and other health care providers were restricted.

What about a product category, like CPAP devices, that didn't likely see increased utilization due to the pandemic but did likely see decreased new patient setups?

Medicare spent about \$194 million on E0601 in 2020, a 4.36% increase over 2019.

So, about the same increase in utilization.

Providers and manufacturers did report they saw an increase

in mask replacements due to the pandemic and the emphasis on improved hygiene, and the data reflects that, with, for example, a 19% increase in Medicare spending on CPAP full face masks.

How did all of this push-and-pull between increased demand and decreased setups impact the top Medicare providers in 2020? Well, it depends.

The top five in 2020 is largely the same as the top five in 2019, with the exception of a bit of musical chairs between Walgreen Co. and Apria. Apria moved up to the No. 4 spot in 2020, while Walgreen Co. slipped into the No. 5 spot.

When you look at allowed charges for 2020 for these top providers, you'll see some double-digit increases, like Apria, which saw about \$251 million in in 2020 vs. \$225 million in 2019, up 11%, but you'll see more holding steady, like Lincare, which saw about \$726 million vs. \$715 million, up 1.5%.

Before I let you have at it, I do want to point to a change in this year's report. Because CMS has restructured the BETOS Classification System, we can no longer compare data from previous years to 2020 on an apples-to-apples basis. Going forward, we will compare the 2020 data in this report to 2021 data and so on.

Speaking of 2021 data, see you right here in a year to take a look at that!

-Elizabeth Beaulieu, editor, HME News

## Bonafide is the best software in the industry, hands down.

I've extensively evaluated the software offered to providers in the DME industry — either through a detailed RFP process or by using the software in business — and there is nothing comparable to the business solutions found in Bonafide.

Candace Snider, Chief Operating Officer, Home Medical Products, Inc.



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### Medicare: DME growth by category

Restructured BETOS Classifications System

BETOS	Allowed Spending (millions)	% Of Allowed Spending	Total Codes	% Of Codes
Drugs administered through DME	\$5,276	0.46%	65	0.48%
Hospital beds	\$484	0.04%	37	0.27%
Medical/surgical supplies	\$2,996	0.26%	332	2.43%
Orthotic devices	\$14,680	1.27%	1023	7.50%
Other DME	\$15,362	1.33%	454	3.33%
Oxygen & supplies	\$4,870	0.42%	20	1.50%
Wheelchairs	\$3,182	0.28%	288	2.11%

### **DME Definitions:**

### **Drugs administered through DME**

- No RBCS Family
- Bronchodilator
- Vasodilator

### **Hospital beds**

No RBCS Family

#### Orthotic devices

- No RBCS Family
- Below Knee Orthotic
- Intermittent Urinary Catheter
- Knee Orthosis
- Lumbar Sacral Orthosis (LSO brace)
- Ostomy

#### Other DME

- No RBCS Family
- Blood Glucose Test/Reagent Strips
- CPAP (Sleep Apnea)
- Home Ventilator

### **Oxygen & Supplies**

· No RBCS Family

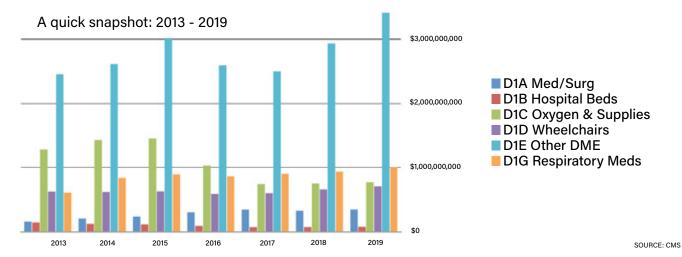
· Oxygen Concentrator

- Wheelchairs
  - No RBCS Family
  - Power Wheelchairs, Accessories

#### Medical/surgical supplies

· No RBCS Family

### Original BETOS System



BETOS	Product	2013	2014	2015	2016	2017	2018	2019
D1A	Med/surg supplies	153M	203M	231M	300M	341M	322M	342M
D1B	Hospital beds	139M	120M	112M	86M	67M	68M	72M
D1C	Oxygen and supplies	1.3B	1.4B	1.5B	1B	740M	750M	770M
D1D	Wheelchairs	622M	615M	625M	588M	596M	657M	703M
D1E	Other DME	2.5B	2.6B	3B	2.6B	2.5B	2.9B	3.4B
D1G	Respiratory meds	605M	836M	890M	863M	900M	935M	1B
	Total	5.3B	5.8B	6.3B	5.5B	5.1B	5.7B	6.3B
							Allowe	d Charnes

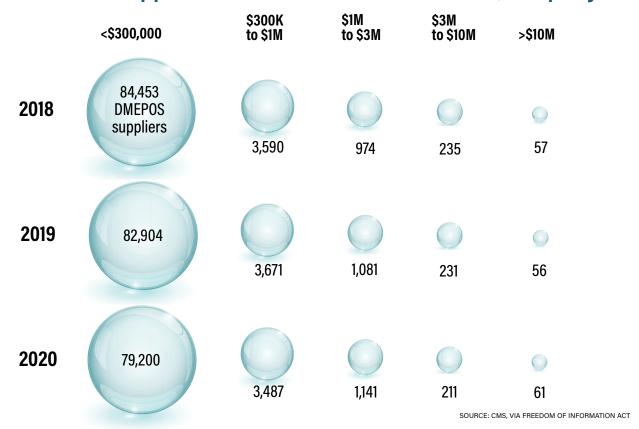
### What is a BETOS bucket?

### 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

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



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— RД	spiratory ———			
110	Spiratory	Allowed	Allowed	2020
Product	Prodecure Code	Charges	Services	Change
E1390	Oxygen concentrator	\$658,773,414.59	6,644,253	4.31%
E0466	Home vent non-invasive inter	\$595,869,612.55	566,755	10.04%
A7030	Cpap full face mask	\$213,902,951.87	1,981,810	19.03%
E0601	Cont airway pressure device	\$194,042,844.22	4,522,894	4.36%
A7031	Replacement facemask interfa	\$187,898,877.45	4,626,624	25.42%
A7034	Nasal application device	\$156,038,822.85	2,362,625	15.88%
A7032	Replacement nasal cushion	\$146,778,068.07	6,521,015	22.69%
A4604	Tubing with heating element	\$106,296,884.81	2,384,219	24.35%
A7033	Replacement nasal pillows	\$83,547,432.94	4,749,714	15.60%
E0470	Rad w/o backup non-inv intfc	\$72,689,602.46	664,875	0.73%
E0562	Humidifier heated used w/pap	\$71,350,747.06	1,344,820	6.55%
E1392	Portable oxygen concentrator	\$60,847,803.70	1,566,020	14.65%
E0465	Home vent invasive interface	\$58,864,448.59	56044	1.52%
A7035	Pos airway press headgear	\$58,205,490.45	2,643,616	12.83%
A7038	Pos airway pressure filter	\$57,766,789.13	22,219,564	19.54%
E0471	Rad w/backup non inv intrfc	\$57,495,407.13	215,722	6.53%
E0431	Portable gaseous 02	\$56,346,029.96	2,824,362	0.78%
A7037	Pos airway pressure tubing	\$31,055,417.13	1,791,033	7.74%
			SOURCE: CMS, VIA F	FREEDOM OF INFORMATION ACT



### Medicare: Utilization for 2020, top HCPCS, continued

Re	espiratory, con't.   ———			
	ophatory, conti	Allowed	Allowed	2020
Product	Prodecure Code	Charges	Services	Change
E0463	Press supp vent invasive int	\$24,676.88	16	23.61%
A7046	Repl water chamber, pap dev	\$23,444,382.57	1,610,644	26.53%
K0738	Portable gas oxygen system	\$21,664,515.44	557,292	8.70%
E0570	Nebulizer with compression	\$15,364,043.63	2,256,353	0.07%
E0443	Portable 02 contents, gas	\$13,541,091.34	253,049	21.33%
A7036	Pos airway press chinstrap	\$2,667,425.54	228,649	7.94%
E0467	Home vent multi-function	\$2,214,208.19	1,756	883.01%
A7003	Nebulizer administration set	\$1,890,459.57	1,000,329	2.99%
E0439	Stationary liquid 02	\$1,657,931.19	17,290	21.09%
E0442	Stationary o2 contents, liquid	\$1,538,095.63	27,491	29.40%
E0444	Portable 02 contents, liquid	\$1,325,961.81	25,487	27.86%
E0434	Portable liquid 02	\$1,046,860.24	26,493	22.29%
A7027	Combination oral/nasal mask	\$533,965.43	3,914	12.10%
A7028	Repl oral cushion combo mask	\$436,619.59	11,581	15.01%
A7029	Repl nasal pillow comb mask	\$243,037.67	14,435	14.02%
A7015	Aerosol mask used w/nebulize	\$202,678.86	139,216	2.36%
A7004	Disposable nebulizer sml vol	\$164,136.74	113,439	14.24%
E0464	Press supp vent noninv int	\$149,604.15	96	72.10%
			SOURCE: CMS, VIA FRE	EDOM OF INFORMATION ACT









**Durable Medical Equipment** 

Product Prodecure Code	Allowed Charges	Allowed Services	2020 Change
E0260Hosp bed semi-electr w/ matt	•	860,952	_
E0143Walker folding wheeled w/o s	\$30,762,632.77	548,796	8.75%
E0630Patient lift hydraulic	\$13,891,948.72	252,058	10.13%
E0163Commode chair with fixed arm	\$11,408,934.78	189,195	0.79%
E0277Powered pres-redu air mattrs	\$8,280,044.31	41,853	24.72%
E0194Air fluidized bed	\$7,779,536.52	2,744	20.92%
E0261Hosp bed semi-electr w/o mat	\$7,736,302.82	131,632	5.71%
E0185Gel pressure mattress pad	\$6,230,148.90	40,643	10.70%
E0303Hosp bed hvy dty xtra wide	\$3,693,526.77	23,954	1.42%
E0250Hosp bed fixed ht w/ mattres	\$3,009,585.10	52,859	18.26%
E1035Patient transfer system <300	\$2,949,802.62	5,977	14.15%
E0156Walker seat attachment	\$2,910,966.06	168,523	17.40%
E0295Hosp bed semi-elect w/o matt	\$2,398,494.54	40,281	54.24%
E0184Dry pressure mattress	\$2,262,136.96	16,682	14.52%
E1038Transport chair pt wt<=300lb	\$1,769,172.00	147,431	5.39%
E2615Pos back post/lat wdth <22in	\$1,521,628.54	3,629	4.19%
E0255Hospital bed var ht w/ mattr	\$1,504,095.09	24,917	15.76%
E0627Seat lift mech, electric any	\$1,349,921.92	4,634	9.20%
E0181Press pad alternating w/ pum	\$1,223,633.75	80,751	7.37%
		SOURCE: CMS, VIA	A FREEDOM OF INFORMATION ACT

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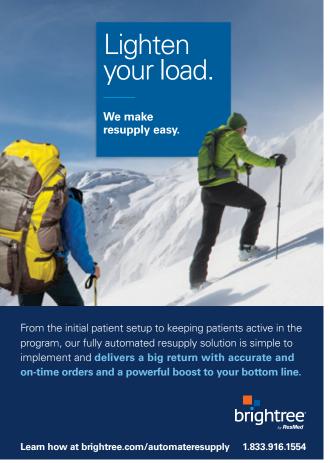


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### Medicare: Utilization for 2020, top HCPCS, continued

Dı	ırable Medical Equipm	nent con't —		
	• •	Allowed	Allowed	2020
Product	Prodecure Code	Charges	Services	Change
E0149	Heavy duty wheeled walker	\$1,197,364.77	106,795	6.91%
E0635	Patient lift electric	\$1,057,008.20	10,643	31.12%
E0373	Nonpowered pressure mattress	\$1,023,444.54	3,624	30.58%
E0135	Walker folding adjust/fixed	\$1,002,439.18	19,857	7.57%
E0165	Commode chair with detacharm	\$938,827.03	86,296	12.07%
E0168	Heavyduty/wide commode chair	\$829,996.93	13,187	0.28%
E0147	Walker variable wheel resist	\$726,072.78	1,834	6.68%
E0371	Nonpower mattress overlay	\$684,976.27	3,296	31.04%
E0912	Hd trapeze bar free standing	\$623,409.89	8,413	3.15%
E0910	Trapeze bar attached to bed	\$605,756.44	56,671	4.06%
E1036	Patient transfer system >300	\$510,186.18	717	42.26%
A4595	Tens suppl 2 lead per month	\$501,859.63	31,650	8.78%
E0304	Hosp bed xtra hvy dty x wide	\$468,442.73	1,071	6.32%
E0705	Transfer device	\$416,279.06	9,097	24.53%
E0940	Trapeze bar free standing	\$317,755.90	16,133	0.53%
	Tens four lead			
E0294	Hosp bed semi-elect w/ mattr	\$272,377.27	4,460	28.52%
E0372	Powered air mattress overlay	\$83,764.10	367	56.25%
E0720	Tens two lead	\$25,749.55	750	30.91%
			SOURCE: CMS, VIA FR	EEDOM OF INFORMATION ACT



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Mobil	ity —	Allowed	Allowed	2020
Product Prode	ecure Code	Charges	Services	Change
	seat combo w/shear	•		
	gp3 std mult pow opt s/b			
	ro connect btw 2 sys			
	dard wheelchair			
	gp 2 std cap chair			
	lightweight wheelchair			
	seat tilt			
E1161Manı	ual adult wc w tiltinspac	\$17,968,927.62	80,421	0.97%
K0003Light	weight wheelchair	\$17,615,328.23	497,146	5.94%
	manual swingaway			
	use back cush wdth <22in			
	gp3 std sing pow opt s/b			
	component-accessory nos			
	n access det adj armrest			
	wc dr wh motor/gear comb			
	gp 2 hd cap chair			
	ndable controller, initl			
· ·	ating whichair leg rests			
	lanar back cush wd <22in			
	elchair anti-tipping devi			
	sealed leadacid battery			
	w/ch acc seat w>=20"<24"			
	w/c cushion wdth < 22 in			
	group 1 std up to 300lbs			
1	y duty wheelchair			
	hemi (low seat) whichr			
	heavy duty wheelchair			
	gp3 hd mult pow opt s/b			
	ealed leadacid battery			
	acc, wheelchair brake			
	strength Itwt whichr			
_	gp2 std sing pow opt s/b			
	gp 2 std port cap chair			
	sealed leadacid battery			
	pro/pos wc cus wd <22in			
	ro connect btw control			
	expandable controller			
	gp 3 std seat/back			
	gp 2 std seat/back			
	ual fully reclining back			
	ery charger, single mode			
	lateral trunk/hip suppor			
	seat combo pwr shear			
	pwr leg elevation			
	gp 1 std cap chair			
	9F : 3tg 6gb 6gr			SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

<ul> <li>Diabetes, Infusion &amp; Supplies</li> </ul>				
	Allowed	Allowed		2020
Product Prodecure Code	Charges	Services		Change
A4253Blood glucose/reagent strips\$136,66	82,029.23	16,296,582		17.97%
E2402Neg press wound therapy pump\$77,7	'95,414.77	93,447		0.30%
E0784Ext amb infusn pump insulin\$56,9	96,057.24	155,215		7.00%
B4035Enteral feed supp pump per d\$47,9	64,290.79	7,628,097		4.74%
B4152Ef calorie dense>/=1.5kcal\$46,7	94,665.72	132,607,432		1.27%
A4222Infusion supplies with pump\$31,9	26,251.54	792,088		12.029%
B4154Ef spec metabolic noninherit\$29,9	07,369.48	40,178,800		5.14%
A6550Neg pres wound ther drsg set\$27,2	287,315.60	1,049,343		5.00%
B4150Ef complet w/intact nutrient\$24,75	53,638.27	58,036,861		5.50%
B4034Enter feed supkit syr by day\$17,8	97,506.46	4,929,866		1.95%
B4153Ef hydrolyzed/amino acids\$17,7	96,279.57	13,264,562		12.32%
A4221Supp non-insulin inf cath/wk\$8,3	318,172.90	381,392		13.34%
B9002Enter nutr inf pump any type\$7,0	68,819.22	98,074		9.97%
E0781External ambulatory infus pu\$5,8	48,326.19	26,650		9.74%
B4036Enteral feed sup kit grav by\$5,70	00,040.98	1,163,467		4.39%
A4259Lancets per box\$5,3	06,789.05	3,672,060		17.62%
B4149Ef blenderized foods\$3,9	14,496.78	3,483,889		28.67%
K0552Sup/ext non-ins inf pump syr\$1,	125,791.55	398,899		15.30%
A4258Lancet device each\$6	93,451.68	312,542		20.11%
			SOURCE: CMS, VIA	A FREEDOM OF INFORMATION ACT

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### Medicare: Number of beneficiaries, suppliers, 2020

### ✓ E1390 O₂ Concentrator

Jurisdiction	Beneficiaries	Suppliers
A	147,102	1,313
В	204,520	1,850
C	418,338	3,344
D	245,512	2,096
Nation*	1.013.025	4.979

<b>✓</b> E0601 CPAP		
Jurisdiction	Beneficiaries	Suppliers
A		1,127
В	147,461	1,714
C	307,945	3,497
D	193,862	2,028
Nation*	774,158	5,096

### ✓ E0260 Hospital Beds

Jurisdiction	Beneficiaries	Suppliers
A	52,209	
B	38,582	1,231
C	81,137	2,591
D	25,695	1,229
Nation*	197,227	4,812

### ✓ A4253 Blood Glucose Strips

Jurisdiction	Beneficiaries	Suppliers
A	483,413	13,736
В	471,768	11,525
C	702,936	21,261
D	491,933	11,962
Nation*	2,147,150	44,921

### ✓ K0823 Power Chair

Jurisdiction	Beneficiaries	Suppliers
A	4,140	197
В	5,315	289
C	15,429	777
D	6,605	403
Nation*	31,428	1,473

\*Note: "nation" numbers of beneficiaries and suppliers are across all dme jurisdictions (beneficiaries and suppliers in multiple jurisdictions are counted only once)

### ✓ K0001 Standard Chair

	Beneficiaries	Suppliers
A	59,350	1,220
	46,810	
C	133,306	2,910
D	53,008	1,663
Nation*	291,586	5,484

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT



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### **Medicare: Top providers in 2020**

Rank Company	Allowed Charges	Rank Company	Allowed Charges
1LINCARE INC		51EDWARDS HEALTH CARE SERVICES, INC	\$20,487,207.89
2ACCREDO HEALTH GROUP INC	\$551,561,120.76	52 .ADVANCED RESPIRATORY, INC	\$19,512,654.75
3LINCARE PHARMACY SERVICES INC	\$340,973,903.70	53 AMERICAN HOMEPATIENT.INC	\$19,150,401.31
4APRIA HEALTHCARE LLC	\$251,357,175.57	54.COMMUNITY SURGICAL SUPPLY OF TOMS RIVER, INC.	\$19,125,232.84
5WALGREEN CO	\$239,936,770.97	55.EBI LLC	\$18,137,333.27
6ZOLL SERVICES LLC	\$187,360,673.45	56.BIOVENTUS LLC	\$17,971,696.88
7BYRAM HEALTHCARE CENTERS, INC	\$133,468,209.08	57AEROCARE HOLDINGS, INC	\$17,958,573.71
8180 MEDICAL INC		58.NUFACTOR INC	
9DEGC ENTERPRISES (U.S.), INC		59.NATIONWIDE MEDICAL, INC	\$17,767,585.60
10CORAM ALTERNATE SITE SERVICES INC	\$115,660,682.63	60.BINSON'S HOSPITAL SUPPLIES, INC.	\$17,754,599.86
11RGH ENTERPRISES INC		61TRICOUNTY MEDICAL EQUIPMENT AND SUPPLY LLC	
12UNITED SEATING AND MOBILITY LLC		62.CRESCENT HEALTHCARE INC	
13GORDIAN MEDICAL INC		63.ROBERTS HOME MEDICAL LLC.	
14KCI USA INC		64.AMERICA'S BEST CARE PLUS INC	
15HANGER PROSTHETICS & ORTHOTICS INC		65.MEDICAL HOTSPOTS, INC	
16OPTION CARE ENTERPRISES INC		66.MINIMED DISTRIBUTION CORP	
17CAREMARK LLC		67REGIONAL HOME CARE INC	
18NATIONAL SEATING & MOBILITY INC		68.BEACON RESPIRATORY SERVICES, INC.	
19LIBERATOR MEDICAL SUPPLY INC		69.ELECTROMED, INC	
20.UNITED STATES MEDICAL SUPPLY, LLC		70HOVEROUND CORPORATION	
21WAL-MART STORES EAST LP		71GOULDS DISCOUNT MEDICAL LLC	
22 .SLEEP MANAGEMENT LLC		72FAMILY MEDICAL SUPPLY LLC	
23.0RTH0FIX US LLC		73LABRIUT DIAGNOSTIC, LLC	
24 .HANGER PROSTHETICS & ORTHOTICS EAST INC		74.BRADEN PARTNERS LP	
25.NORTH COAST MEDICAL SUPPLY LLC		75PALMETTO OXYGEN, LLC	
26.VERUS HEALTHCARE LLC		76OCEANBREEZE INFUSION CARE INC	
27.DJO LLC		77CVS PHARMACY INC	
28 .NORCO, INC		78.MEDICAL SERVICE COMPANIES	
29 .COMFORT MEDICAL, LLC		79ABBVIE ENDOCRINOLOGY INC	
30.DEXCOM INC		80.AMBER ENTERPRISES INC	
31HANGER PROSTHETICS & ORTHOTICS WEST INC.		81DIABETES MANAGEMENT AND SUPPLIES	
32 GABE CARE DIRECT RX INC		82.SOLEO HEALTH INC	
33.NOVOCURE INC.		83 JOHNS HOPKINS PHARMAQUIP INC	
34.SUPER CARE INC	, , , , , , , , , , , , , , , , , , , ,	84.MAYO FOUND. FOR MED. EDUCATION & RESEARCH	
35.WALMART INC		85.REGENTS OF THE UNIVERSITY OF MICHIGAN	
36.ADAPTHEALTH PATIENT CARE SOLUTIONS LLC		86.WILMINGTON MEDICAL SUPPLY, INC	
37SOLARA MEDICAL SUPPLIES, LLC		87PROCARE PHARMACY LLC	
38.BIORX LLC		88.KROGER LIMITED PARTNERSHIP I	
39.RESPIRATORY TECHNOLOGIES, INC.	\$29,331,107,U3	89.ROTECH OXYGEN AND MEDICAL EQUIPMENT INC	
40.PRISM MEDICAL PRODUCTS, L.L.C.		90.PERFORMANCE MODALITIES INC	
the contract of the contract o			
41PROCARE PHARMACY DIRECT LLC42.WOUND CARE CONCEPTS INC		91ABC HOME MEDICAL SUPPLY INC	
		92.CHESAPEAKE REHAB EQUIPMENT INC	
43.1ST AMERICA INFUSION SERVICES LLC		93.TOBII DYNAVOX LLC94.AIRCARE HOME RESPIRATORY LLC	
44.TACTILE SYSTEMS TECHNOLOGY INC			
45.INOGEN INC		95.HEALTHLINE MEDICAL EQUIPMENT LLC	
46.HEALTH CARE SOLUTIONS AT HOME INC		96.PRN MEDICAL SERVICES, LLC	
		97CARELINC MEDICAL EQUIPMENT & SUPPLY CO LLC	
47OCEAN HOME HEALTH SUPPLY, LLC	NO 600 470 00740		
48.MEDSTAR SURGICAL & BREATHING EQUIPMENT, I		98.RESPONSIVE HOME HEALTH CARE INC	
-	\$21,633,306.45	99.PACIFIC MEDICAL INC	\$11,635,994.64





# Medicare data for the HME industry



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