

SUPPLEMENT TO:

HME News

THE BUSINESS NEWSPAPER FOR HOME MEDICAL EQUIPMENT PROVIDERS

DECEMBER 2017

State of the Industry 2017



The HME Market By The Numbers

New data can't come fast enough

This year's State of the Industry Report reflects data from 2016 and, as you know, 2016 was, by all accounts, a tough year for the HME industry, possibly the toughest yet.

The main reason for that: CMS rolled out the competitive bidding program nationwide. The rollout occurred in two waves, the first on Jan. 1 and the second on July 1. (The second wave, as you also know, was retroactively delayed until Jan. 1, 2017, but for the purposes of this report, let's keep the picture as simple as possible.)

This is the likely reason that we see the growth in allowed charges for DME drop to \$5.5 billion in 2016 (see page 7). This is a particularly tough pill to swallow after a series of small rebounds in 2014 (from \$5.3B in 2013 to \$5.8 billion in 2014) and again in 2015 (from \$5.8 billion in 2014 to \$6.3 billion in 2015). Growth in oxygen and supplies took the largest hit in 2016, from roughly \$1.5 billion in 2015 to roughly \$1 billion in 2016.

Not even the nationals were immune from competitive bidding's claws in 2016. While Lincare still took the No. 1 spot on our list of top Medicare providers (see page 15), the amount it was allowed dropped from \$830.9 million in 2015 to \$651.8 million in 2016. Ouch.

Another national that we keep an eye on is Apria Healthcare, which dropped from the No. 3 spot to the No. 4 spot in 2016 with \$224.3 million vs. \$273.5 million. Another national dropped out of, not the top 10, but the top 15 completely: American HomePatient. In 2015, it had \$75.2 million in the No. 13 spot; in 2016, \$57.2 million in the No. 23 spot.

As one would expect, when you cut reimbursement so drastically that it affects access, utilization was down nearly across the board (see pages 12-14).

In the mobility product category, there were a few more positives, like the K0861 power wheelchair with a nearly 17% increase in utilization from 2015 to 2016. There are a number of things working in providers' favor when it comes to mobility, including a carve out from competitive bidding for complex rehab codes, and a prior authorization demonstration process for standard mobility in 19 states through 2018, and a prior authorization process for two complex rehab codes, K0861 and K0856, that started earlier this year.

2016 is done, thankfully. And hopefully 2017 will be another year altogether.

—Elizabeth Beaulieu, editor, *HME News*

An advertisement for dmetrain. The background is a chalkboard with the text "2018 Courses go live next month!" at the top. In the center, a young boy wearing glasses and a bow tie is sitting at a desk with a laptop, looking at the screen. To the left, a blue circle contains the text "Join dmetrain TODAY!". The dmetrain logo is in the top right. At the bottom, a white banner reads "All the classes you need for compliance and accreditation". Below that, an orange banner contains the contact information: "dmetrain | www.dmetrain.com | 877.872.4633 | info@dmetrain.com".

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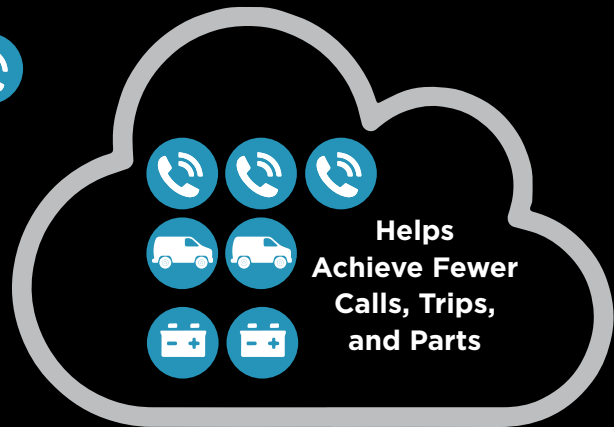
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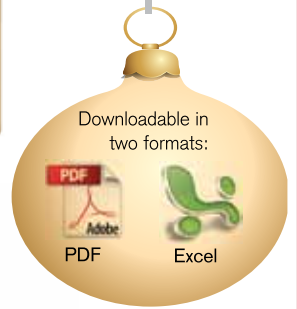
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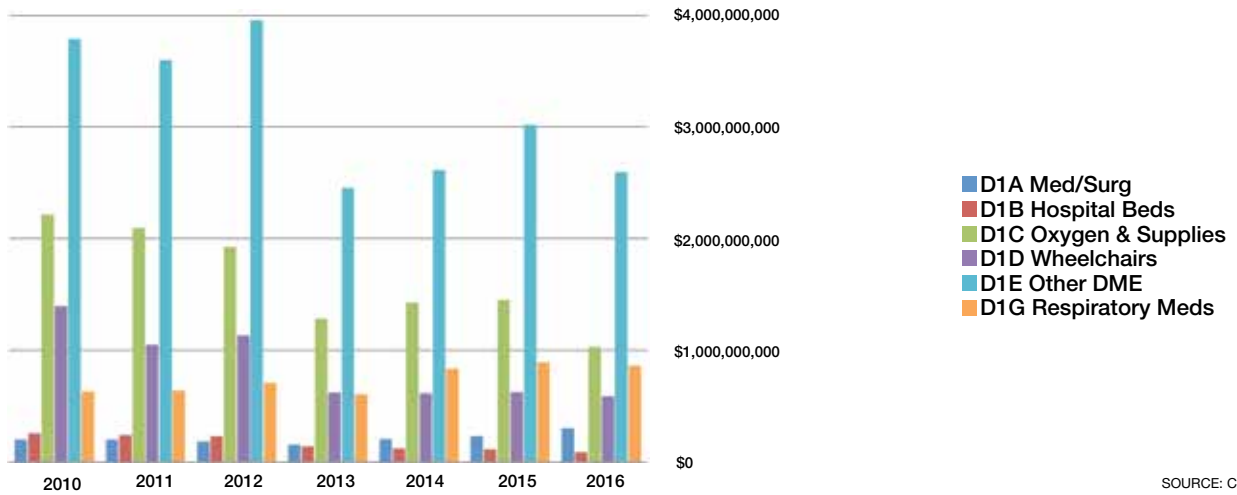


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Medicare: DME growth by category

A quick snapshot: 2010 - 2016



SOURCE: CMS

BETOS Product	2010	2011	2012	2013	2014	2015	2016
D1A.....Med/surg supplies.....	198M.....	198M.....	183M.....	153M.....	203M.....	231M.....	300M
D1B.....Hospital beds.....	255M.....	240M.....	230M.....	139M.....	120M.....	112M.....	86M
D1C.....Oxygen and supplies..	2.2B.....	2.1B.....	1.9B.....	1.3B.....	1.4B.....	1.5B.....	1B
D1D.....Wheelchairs.....	1.4B.....	1.05B.....	1.1B.....	0.622M.....	0.615M.....	0.625M.....	0.588M
D1E.....Other DME.....	3.8B.....	3.6B.....	3.9B.....	2.5B.....	2.6B.....	3B.....	2.6B
D1GRespiratory meds.....	629M.....	637M.....	709M.....	605M.....	836M.....	890M.....	863M
Total	8.5B	7.8B	8.1B	5.3B	5.8B	6.3B	5.5B

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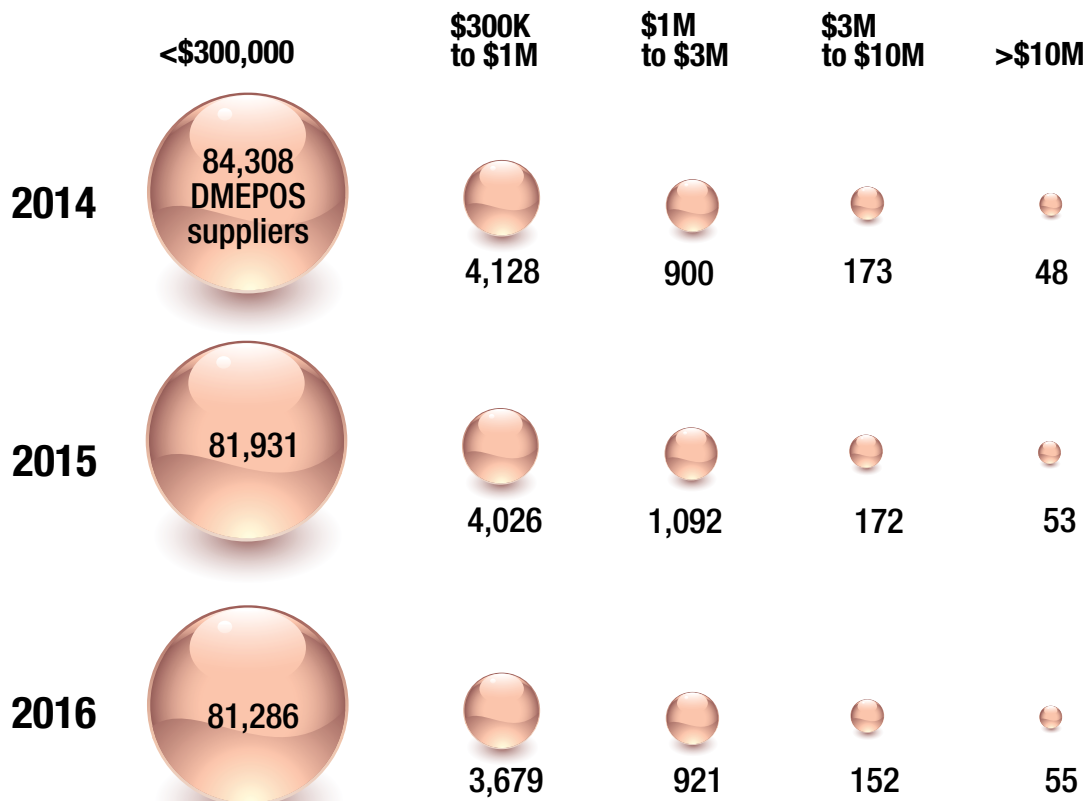
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Most DMEPOS suppliers bill Medicare less than \$300,000 per year



SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

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Medicare: Number of beneficiaries, suppliers, 2016

✓ E1390 O2 Concentrator

Jurisdiction	Beneficiaries	Suppliers
A	176,586	1,371
B	233,570	2,042
C	481,556	3,817
D	265,751	2,215
Nation*	1,154,865	5,886

✓ E0601 CPAP

Jurisdiction	Beneficiaries	Suppliers
A	110,707	1,078
B	130,813	1,771
C	264,339	3,642
D	159,325	1,963
Nation*	663,830	5,708

✓ E0260 Hospital Beds

Jurisdiction	Beneficiaries	Suppliers
A	56,770	912
B	49,790	1,358
C	90,482	3,019
D	22,626	1,385
Nation*	219,306	5,525

✓ A4253 Blood Glucose Strips

Jurisdiction	Beneficiaries	Suppliers
A	684,543	14,721
B	694,861	12,984
C	1,170,601	24,448
D	651,595	13,301
Nation*	3,195,411	48,024

✓ K0823 Power Chair

Jurisdiction	Beneficiaries	Suppliers
A	3,977	167
B	6,290	316
C	20,242	840
D	7,124	388
Nation*	37,560	1,579

✓ K0001 Standard Chair

Jurisdiction	Beneficiaries	Suppliers
A	50,695	1,016
B	50,179	1,601
C	120,402	3,276
D	43,713	1,589
Nation*	264,311	5,859

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

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

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Medicare: Utilization for 2016, top HCPCS

Respiratory

Product	Procedure Code	Allowed Charges	Allowed Services	2016 Growth
E1390.....	Oxygen concentrator	\$838,474,791	8,217,869	-30.03%
E0601.....	Cont airway pressure device	\$159,610,418	3,727,053	-21.00%
A7030	CPAP full face mask.....	\$132,395,314	1,227,190	-11.14%
A7034	Nasal application device	\$109,620,976	1,650,855	-13.23%
A7031	Replacement facemask interfa.....	\$88,935,858	2,182,069	-4.08%
A7032	Replacement nasal cushion	\$76,782,944	3,428,223	-4.84%
E0431.....	Portable gaseous O2.....	\$72,562,161	3,525,578	-18.90%
E0470.....	RAD w/o backup non-inv intfc	\$67,925,241	631,331	-19.05%
E0562.....	Humidifier heated used w/PAP	\$65,465,953	1,429,232	-12.59%
A7033	Replacement nasal pillows.....	\$49,177,413	2,856,360	-0.74%
E0471.....	RAD w/backup non inv intrfc.....	\$44,820,413	167,969	-30.73%
A7035	Pos airway press headgear.....	\$40,624,695	1,879,959	-13.81%
A4604	Tubing with heating element.....	\$39,266,916	888,358	26.45%
K0738	Portable gas oxygen system	\$34,875,211	832,957	-4.92%
A7038	Pos airway pressure filter	\$33,700,698	13,227,967	-10.26%
E1392.....	Portable oxygen concentrator	\$33,494,662	799,860	-1.03%
A7037	Pos airway pressure tubing	\$30,296,622	1,801,118	-32.99%
E0443.....	Portable O2 contents, gas	\$25,802,770	453,637	-26.25%
E0570.....	Nebulizer with compression	\$23,821,744	2,762,067	-43.60%
A7046	Repl water chamber, PAP dev.....	\$11,009,250	774,030	7.79%
E0439.....	Stationary liquid O2	\$7,490,702	71,452	-48.20%
A7005	Nondisposable nebulizer set	\$6,698,765	330,455	-40.83%
E0442.....	Oxygen contents, liquid	\$6,237,792	103,211	-32.09%
A7039	Filter, non disposable w/pap	\$5,649,960	755,638	-21.31%
E0444.....	Portable O2 contents, liquid	\$5,424,037	95,492	-36.84%
E0955.....	Cushioned headrest.....	\$3,397,460	31,015	-12.37%
A7003	Nebulizer administration set	\$2,403,466	1,184,746	-41.23%
E0434.....	Portable liquid O2.....	\$2,022,923	97,813	-38.65%
A7036	Pos airway press chinstrap	\$2,018,537	175,425	-3.41%
A7027	Combination oral/nasal mask.....	\$1,177,553	8,532	-32.58%
E0565.....	Compressor air power source.....	\$982,798	23,571	-26.39%
A7028	Repl oral cushion combo mask.....	\$967,973	24,987	-32.90%
A7029	Repl nasal pillow comb mask.....	\$488,843	29,240	-23.20%
E2208.....	Cylinder tank carrier	\$396,792	8,148	-12.88%
A7004	Disposable nebulizer sml vol	\$390,108	268,046	-43.88%
A7015	Aerosol mask used w nebulize	\$311,188	193,586	-33.41%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Utilization for 2016, top HCPCS

Durable Medical Equipment

Product	Procedure Code	Allowed Charges	Allowed Services	2016 Growth
E0260.....	Hosp bed semi-electr w/matt	\$66,061,086	1,063,132	-24.72%
E0143.....	Walker folding wheeled w/o s	\$36,534,184	631,248	-28.57%
E0163.....	Commode chair with fixed arm	\$16,057,386	217,232	-39.01%
E0630.....	Patient lift hydraulic	\$14,988,253	246,936	-30.11%
E0277.....	Powered pres-redu air mattrs	\$11,969,108	55,119	-32.43%
A4256	Calibrator solution/chips	\$7,583,278	2,025,487	-29.29%
E0185.....	Gel pressure mattress pad	\$7,348,167	39,424	-29.87%
E0261.....	Hosp bed semi-electr w/o mat	\$4,978,465	87,416	-9.18%
E0194.....	Air fluidized bed	\$4,593,554	1,665	38.92%
E0303.....	Hosp bed hvy dty xtra wide	\$4,402,570	28,946	-17.50%
E0156.....	Walker seat attachment	\$3,687,674	224,269	-19.94%
E0250.....	Hosp bed fixed ht w/ mattrs	\$2,868,680	52,540	-9.13%
A4595	TENS suppl 2 lead per month	\$2,847,511	145,213	-70.20%
E0627.....	Seat lift incorp lift-chair	\$2,832,205	9,498	-42.92%
E0730.....	Tens four lead	\$2,724,588	39,023	-67.23%
E1038.....	Transport chair pt wt<=300lb	\$1,881,093	156,551	-7.83%
E0255.....	Hospital bed var ht w/ mattr	\$1,773,687	28,055	-33.55%
E0181.....	Press pad alternating w/ pum	\$1,718,700	102,845	-33.19%
E1035.....	Patient transfer system	\$1,526,597	3,086	-40.14%
E0184.....	Dry pressure mattress	\$1,471,816	13,528	2.43%
E0149.....	Heavy duty wheeled walker	\$1,333,458	23,323	-47.53%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Mobility

Product	Procedure Code	Allowed Charges	Allowed Services	2016 Growth
E1007.....	Pwr seat combo w/shear	\$71,623,696	9,441	12.57%
K0861	PWC gp3 std mult pow opt s/b	\$49,863,497	9,729	16.95%
K0823	PWC gp 2 std cap chair	\$42,629,756	230,764	-24.12%
K0001	Standard wheelchair	\$33,255,850	1,387,482	-24.56%
E2311.....	Electro connect btw 2 sys	\$25,468,552	12,653	15.97%
K0003	Lightweight wheelchair	\$22,520,996	610,071	-25.68%
E1002.....	Pwr seat tilt	\$19,868,949	6,212	7.11%
K0856	PWC gp3 std sing pow opt s/b	\$18,804,813	3,891	6.00%
K0005	Ultralightweight wheelchair	\$14,880,797	8,789	37.77%
E2370.....	Pwr wc motor/gear box combo	\$12,693,846	27,422	-29.07%
E1161.....	Manual adult wc w tiltinspac	\$12,686,360	59,447	22.84%
K0108	W/c component-accessory NOS	\$12,519,580	125,398	-41.81%
E2611.....	Gen use back cush wdth <22in	\$10,405,897	62,535	-2.44%
K0825	PWC gp 2 hd cap chair	\$10,049,904	42,213	-9.04%
E1028.....	W/c manual swingaway	\$9,787,027	72,202	-6.17%
E1008.....	Pwr seat combo pwr shear	\$9,002,480	1,261	42.67%
E2365.....	U1 sealed leadacid battery	\$7,307,046	95,546	-22.09%
K0195	Elevating whlchair leg rests	\$7,176,659	754,625	-11.88%
E0973.....	W/Ch access det adj armrest	\$6,475,995	153,793	-12.53%
E2374.....	Hand/chin ctrl std joystick	\$6,374,444	68,867	12.11%
K0004	High strength ltwt whlchr	\$6,247,551	130,485	-51.67%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Utilization for 2016, top HCPCS

Diabetes, Infusion & Supplies

Product	Procedure Code	Allowed Charges	Allowed Services	2016 Growth
A4253	Blood glucose/reagent strips	\$255,035,012	27,091,639	-17.43%
E2402	Neg press wound therapy pump	\$81,641,245	97,958	-25.02%
B4035	Enteral feed supp pump per d	\$54,849,195	8,668,447	-27.12%
E0784	Ext amb infusn pump insulin	\$52,296,328	151,323	0.92%
A4221	Maint drug infus cath per wk	\$49,805,075	2,416,250	-11.14%
B4152	EF calorie dense>=1.5Kcal	\$42,722,420	122,473,457	-17.48%
B4154	EF spec metabolic noninherit	\$32,736,484	44,284,735	-20.28%
B4150	EF complet w/intact nutrient	\$31,372,439	74,836,407	-21.63%
A4222	Infusion supplies with pump	\$28,686,637	739,959	-22.46%
A6550	Neg pres wound ther drsg set	\$27,394,004	1,100,309	4.92%
E0781	External ambulatory infus pu	\$17,438,386	81,387	-37.34%
B4034	Enter feed supkit syr by day	\$17,035,536	4,851,430	-19.78%
K0552	Supply/ext inf pump syr type	\$15,299,705	5,733,787	-1.90%
B4153	EF hydrolyzed/amino acids	\$13,864,047	10,514,928	-17.73%
A4259	Lancets per box	\$11,324,776	7,327,358	-19.11%
B9002	Enteral infusion pump w/ ala	\$8,238,289	115,734	-23.90%
A7000	Disposable canister for pump	\$6,750,599	830,219	3.35%
B4036	Enteral feed sup kit grav by	\$5,548,588	1,150,161	-17.02%
A4258	Lancet device each	\$2,274,670	967,033	-28.70%
B4149	EF blenderized foods	\$1,140,236	1,051,187	11.31%
B4155	EF incomplete/modular	\$781,471	1,089,075	-19.03%
A7002	Tubing used w suction pump	\$624,238	163,963	-1.47%
A4233	Alkaline batt for glucose mon	\$502,127	910,355	-35.65%
A4235	Lithium batt for glucose mon	\$412,442	397,455	-22.23%
B4087	Gastro/jejuno tube, std	\$288,177	10,271	-22.10%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT



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Medicare: Top providers in 2016

Rank	Company	Allowed Charges	Rank	Company	Allowed Charges
1	LINCARE INC	\$651,783,993.45	51	COMMUNITY SURGICAL SUPPLY OF TOMS RIVER INC	\$20,140,347.85
2	ACCREDO HEALTH GROUP INC	\$482,764,158.21	52	MEDSTAR SURGICAL & BREATHING EQUIPMENT INC	\$19,101,079.29
3	LINCARE PHARMACY SERVICES INC	\$290,162,919.50	53	BINSON'S HOSPITAL SUPPLIES INC	\$18,138,775.75
4	APRIA HEALTHCARE LLC	\$224,300,906.51	54	MINIMED DISTRIBUTION CORP	\$17,861,364.88
5	ZOLL SERVICES LLC	\$204,036,809.08	55	AMERICA'S BEST CARE PLUS INC	\$17,138,252.87
6	WALGREEN CO	\$182,037,356.34	56	US MED LLC	\$16,092,915.86
7	HANGER PROSTHETICS & ORTHOTICS INC	\$106,914,225.89	57	ALL AMERICAN MEDICAL SUPPLIES LLC	\$15,956,847.45
8	CORAM ALTERNATE SITE SERVICES INC	\$94,982,722.65	58	RESPIRATORY TECHNOLOGIES	\$15,866,005.30
9	GORDIAN MEDICAL INC	\$85,269,461.31	59	SYMED INC	\$15,670,123.46
10	KCI USA INC	\$85,114,065.21	60	AEROFLOW INC	\$15,439,893.04
11	OPTION CARE ENTERPRISES INC	\$84,888,652.52	61	WOUND CARE CONCEPTS INC	\$15,313,817.89
12	ARRIVA MEDICAL LLC	\$83,969,331.08	62	TIDEWATER MEDICAL INC	\$15,239,457.53
13	BYRAM HEALTHCARE CENTERS INC	\$79,332,292.47	63	SUPER CARE INC	\$15,119,770.86
14	180 MEDICAL INC	\$78,554,962.96	64	TRICOUNTY MEDICAL EQUIPMENT AND SUPPLY LLC	\$15,105,862.91
15	DEGC ENTERPRISES (U.S.) INC	\$75,624,711.88	65	MEDITECH	\$14,190,896.32
16	UNITED SEATING AND MOBILITY LLC	\$73,189,757.22	66	MEDICAL SERVICES OF AMERICA INC	\$14,156,663.53
17	MED4HOME INC	\$67,330,761.52	67	ABBVIE ENDOCRINOLOGY INC	\$14,094,496.80
18	RGH ENTERPRISES INC	\$63,569,639.67	68	BARNES HEALTHCARE OF FL LLC	\$13,812,266.66
19	LIBERATOR MEDICAL SUPPLY INC	\$63,435,547.92	69	SUNMED MEDICAL SYSTEMS	\$13,776,346.70
20	HANGER PROSTHETICS & ORTHOTICS EAST INC	\$60,606,409.13	70	CENTRAD HEALTHCARE LLC	\$13,397,081.56
21	ORTHOFIX INC	\$60,056,168.19	71	REGENTS OF THE UNIVERSITY OF MICHIGAN	\$12,875,725.57
22	CAREMARK LLC	\$58,311,066.37	72	ADVANCED RESPIRATORY INC	\$12,771,132.69
23	AMERICAN HOMEPATIENT INC	\$57,234,247.12	73	AIRWAY OXYGEN INC	\$12,590,359.05
24	DJO LLC	\$45,433,712.46	74	MCKESSON MEDICAL-SURGICAL MEDIMART INC	\$12,564,120.45
25	VERUS HEALTHCARE LLC	\$41,794,402.69	75	HOME INFUSION SOLUTIONS LLC	\$12,527,808.45
26	WAL-MART STORES EAST LP	\$40,413,150.22	76	CVS PHARMACY INC	\$12,505,337.55
27	HANGER PROSTHETICS & ORTHOTICS WEST INC	\$40,405,286.40	77	PARAGON INFUSION CARE INC	\$12,504,716.37
28	AMERICAN HOMEPATIENT INC	\$36,196,169.93	78	CRESCENT HEALTHCARE INC	\$12,473,847.39
29	MCKESSON PATIENT CARE SOLUTIONS INC	\$34,044,094.77	79	TOBII DYNAVIX LLC	\$12,377,820.19
30	NATIONAL SEATING & MOBILITY INC	\$33,753,190.75	80	NATIONWIDE MEDICAL INC	\$12,268,649.03
31	COMFORT MEDICAL, LLC	\$32,417,781.66	81	AEROCARE HOLDINGS INC	\$12,253,170.35
32	PROCARE PHARMACY LLC	\$29,949,433.80	82	MBS LTD	\$12,094,041.95
33	UNITED STATES MEDICAL SUPPLY LLC	\$29,394,775.18	83	WILMINGTON MEDICAL SUPPLY INC	\$11,905,133.26
34	NORCO INC	\$28,856,072.86	84	IV & HOME HEALTH SERVICES OF TEXAS	\$11,665,402.01
35	HOVEROUND CORPORATION	\$28,425,443.52	85	INFUSION PARTNERS LLC	\$11,659,131.83
36	ADVANCED HOME CARE INC	\$27,022,224.91	86	CUMBERLAND MEDICAL EQUIPMENT INC	\$11,597,311.73
37	ADVANCED TISSUE LLC	\$26,291,640.97	87	ALLCARE MED EQUIP INC	\$11,565,752.06
38	BRADEN PARTNERS LP	\$25,920,564.00	88	YNC ENTERPRISE INC	\$11,543,311.50
39	PRISM MEDICAL PRODUCTS LLC	\$25,547,248.43	89	BIOSCRIP INFUSION SERVICES LLC	\$11,531,039.40
40	PROCARE PHARMACY DIRECT LLC	\$25,451,933.44	90	PRN MEDICAL SERVICES LLC	\$11,420,974.57
41	HEALTH CARE SOLUTIONS AT HOME INC	\$25,360,873.15	91	SOLEO HEALTH INC	\$11,384,661.66
42	BIORX LLC	\$25,178,122.23	92	AMERITA INC	\$11,380,725.61
43	LIBERTY MEDICAL LLC	\$24,750,425.17	93	LIFECARE SOLUTIONS INC	\$11,145,579.68
44	BIOVENTUS LLC	\$23,890,495.65	94	DIPLOMAT PHARMACY INC	\$10,995,468.60
45	INOGEN INC	\$22,431,538.01	95	CORAM HEALTHCARE CORP. OF GREATER NY	\$10,894,114.03
46	OCEAN HOME HEALTH SUPPLY LLC	\$21,499,793.46	96	JOHNS HOPKINS PHARMAQUIP INC	\$10,207,451.39
47	EBI LLC	\$21,441,933.17	97	BIOFUSION LLC	\$10,188,301.57
48	SLEEP MANAGEMENT LLC	\$21,272,991.83	98	TACTILE SYSTEMS TECHNOLOGY INC	\$10,183,979.61
49	AMBER ENTERPRISES INC	\$21,082,958.56	99	SARACARE LLC	\$10,103,090.56
50	WAL-MART STORES INC	\$20,258,272.10	100	HOMECHOICE PARTNERS INC	\$9,988,113.17

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT