

HME News

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DECEMBER 2019

State of the Industry

2019

Updated
with
2018
Data

The HME Market By The Numbers

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I'll take this

For last year's State of the Industry Report, we decided to change the last column header for our utilization data from growth to change, the thinking being that the allowed charges for the majority of products have been going down in the past few years, not up.

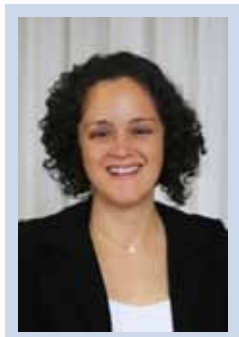
But there's a big difference in this 2018 data.

For example, where utilization for CPAP devices decreased by almost 15% from 2016 to 2017, it increased about 22% from 2017 to 2018. Where oxygen concentrators decreased almost 31% from 2016 to 2017, it increased about 5% from 2017 to 2018.

In general, across product categories, the majority of products we track increased in allowed charges from 2017 to 2018.

And that's not the only positive development in this year's report.

In fact, looking at the BETOS buckets, all categories, with the exception of medical/surgical supplies, saw an increase in allowed charges from Medicare in 2018, with total allowed



charges of \$5.7 billion vs. \$5.1 billion in 2017. Of particular note was the wheelchairs category, which saw a 10% increase in 2018 vs. 2017. Actually, when you compare 2018 data to the previous five-plus years, one might even call it a small rebound, though still far below 2012 levels (\$8.1 billion), the year before competitive bidding expanded significantly in 2013.

There's also the number of providers in the \$3 million to \$10 million range, and the number of providers in the \$10 million and up range—they increased 16% and 6%, respectively, in 2018 vs. 2017. I recently talked to Bernie Lambrese, who is rebuilding his consulting business, and he said what the providers left in the market need to do is get bigger. Simple as that.

Then there's the list of top 100 providers of DMEPOS and their allowed charges from Medicare in 2018. While there wasn't much jockeying in this year's list compared to last year's—the top four companies remained the same: Lincare, Accredo, Lincare Rx and Walgreen—there was an increase in their allowed charges in 2018. Lincare saw a 19.6% increase; Accredo, 6%; and Walgreen 7.4%. Of the top four, only Lincare Rx saw a decline, 7.4%. Beyond the top four, Apria Healthcare, in the No. 5 spot, saw a nice 6.5% increase.

It will be interesting to see the impact of the new pricing that's scheduled to go into effect Jan. 1, 2021, as part of Round 2021 of competitive bidding, but for now, I'll take this.

—Elizabeth Beaulieu, editor, HME News

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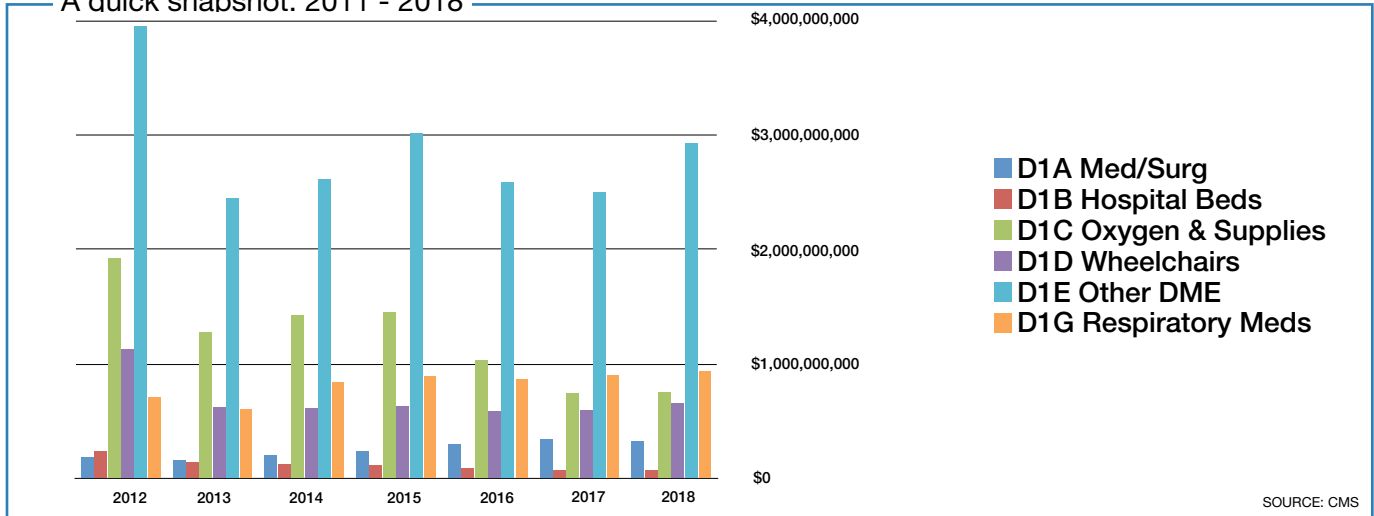
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Medicare: DME growth by category

A quick snapshot: 2011 - 2018



SOURCE: CMS

BETOS Product	2012	2013	2014	2015	2016	2017	2018
D1A.....Med/surg supplies.....	183M.....	153M.....	203M.....	231M.....	300M.....	341M.....	322M.....
D1B.....Hospital beds.....	230M.....	139M.....	120M.....	112M.....	86M.....	67M.....	68M.....
D1C.....Oxygen and supplies..	1.9B.....	1.3B.....	1.4B.....	1.5B.....	1B.....	740M.....	750M.....
D1D.....Wheelchairs.....	1.1B.....	622M.....	615M.....	625M.....	588M.....	596M.....	657M.....
D1E.....Other DME.....	3.9B.....	2.5B.....	2.6B.....	3B.....	2.6B.....	2.5B.....	2.9B.....
D1G.....Respiratory meds.....	709M.....	605M.....	836M.....	890M.....	863M.....	900M.....	935M.....
Total	8.1B	5.3B	5.8B	6.3B	5.5B	5.1B	5.7B

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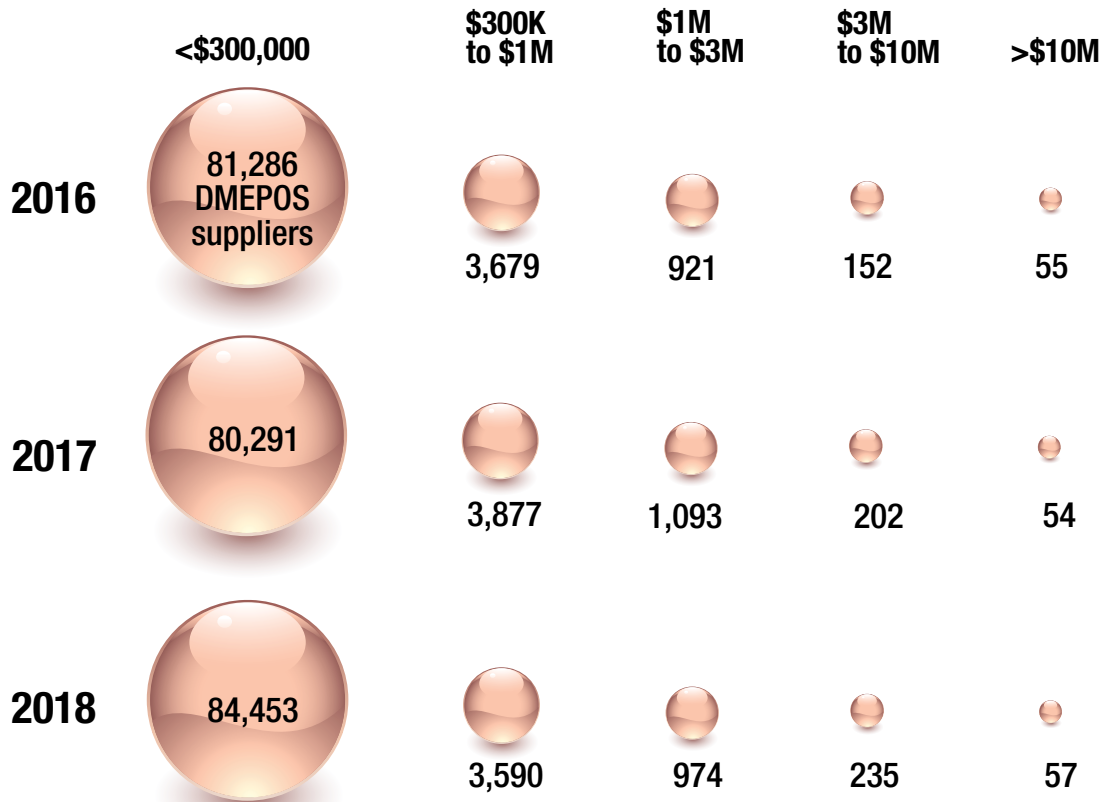
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Most DMEPOS suppliers bill Medicare less than \$300,000 per year



SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT



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Medicare: Utilization for 2018, top HCPCS

Respiratory

Product	Prodecure Code	Allowed Charges	Allowed Services	2018 Change
E1390.....	Oxygen concentrator	\$609,668,597	7,394,769	5.29%
E0601.....	Cont airway pressure device	\$165,487,869	4,487,077	21.32%
A7030	CPAP full face mask.....	\$156,350,653	1,641,127	23.39%
A7031	Replacement facemask interfa.....	\$123,434,753	3,424,706	37.13%
A7034	Nasal application device	\$122,531,962	2,082,639	17.55%
A7032	Replacement nasal cushion	\$100,911,679	5,045,877	27.69%
E0562.....	Humidifier heated used w pap	\$70,096,018	1,522,482	15.19%
A4604	Tubing with heating element.....	\$66,699,448	1,624,960	35.56%
E0470.....	Rad w/o backup non-inv intfc	\$64,948,670	676,582	13.37%
A7033	Replacement nasal pillows.....	\$64,161,174	4,003,301	23.71%
E0431.....	Portable gaseous O2.....	\$63,177,880	3,326,383	3.18%
E0471.....	Rad w/backup non inv intrfc	\$46,109,547	196,358	16.60%
A7035	Pos airway press headgear	\$45,743,386	2,341,146	18.09%
E1392.....	Portable oxygen concentrator	\$44,769,156	1,140,095	26.89%
A7038	Pos airway pressure filter	\$41,583,370	18,473,879	26.18%
K0738	Portable gas oxygen system	\$28,840,422	734,533	-6.65%
A7037	Pos airway pressure tubing.....	\$27,011,829	1,964,561	19.29%
E0443.....	Portable O2 contents, gas.....	\$20,338,193	392,214	-3.75%
A7046	Repl water chamber, pap dev	\$15,805,529	1,161,322	23.79%
E0570.....	Nebulizer with compression	\$13,771,262	2,465,634	15.68%
A7039	Filter, non disposable w pap.....	\$5,848,719	889,110	16.59%
E0955.....	Cushioned headrest.....	\$4,935,525	109,776	25.66%
A7005	Nondisposable nebulizer set	\$3,599,554	268,542	7.29%
E0442.....	Stationary o2 contents, liq	\$3,255,174	58,163	-23.32%
E0439.....	Stationary liquid O2	\$2,904,189	36,045	-22.44%
E0444.....	Portable O2 contents, liquid	\$2,734,731	53,688	-21.98%
A7036	Pos airway press chinstrap	\$2,347,057	216,555	15.20%
A7003	Nebulizer administration set	\$1,933,553	1,158,812	13.38%
E0434.....	Portable liquid O2.....	\$1,082,167	56,012	-17.64%
E0565.....	Compressor air power source.....	\$722,068	20,149	6.71%
A7027	Combination oral/nasal mask.....	\$706,021	5,696	-11.66%
A7028	Repl oral cushion combo mask.....	\$657,049	19,027	-6.06%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Utilization for 2018, top HCPCS

Durable Medical Equipment

Product	Procedure Code	Allowed Charges	Allowed Services	2018 Change
E0260.....	Hosp bed semi-electr w/ matt.....	\$48,275,783	886,245	1.70%
E0143.....	Walker folding wheeled w/o s.....	\$30,067,752	616,487	8.72%
E0630.....	Patient lift hydraulic.....	\$12,019,493	240,225	6.37%
E0163.....	Commode chair with fixed arm.....	\$10,667,377	201,924	8.10%
E0277.....	Powered pres-redu air mattrs.....	\$10,337,961	59,933	24.87%
E0261.....	Hosp bed semi-electr w/o mat.....	\$7,071,555	135,938	23.02%
E0194.....	Air fluidized bed.....	\$6,844,520	2,479	25.98%
E0185.....	Gel pressure mattress pad.....	\$5,299,118	38,719	7.71%
E0303.....	Hosp bed hvy dty xtra wide.....	\$3,678,702	26,393	4.29%
E0250.....	Hosp bed fixed ht w/ mattrs.....	\$3,403,746	64,074	20.69%
E0156.....	Walker seat attachment.....	\$3,322,552	217,021	5.15%
E0255.....	Hospital bed var ht w/ mattr.....	\$2,050,730	37,137	19.51%
E1035.....	Patient transfer system <300.....	\$2,014,739	4,218	50.88%
E0184.....	Dry pressure mattress.....	\$2,008,548	15,614	-5.41%
E1038.....	Transport chair pt wt<=300lb.....	\$1,741,396	151,813	2.89%
E2615.....	Pos back post/lat width <22in.....	\$1,619,176	4,296	26.52%
E0373.....	Nonpowered pressure mattress.....	\$1,527,852	5,902	-5.78%
E0627.....	Seat lift mech, electric any.....	\$1,377,217	5,120	-8.75%
E0295.....	Hosp bed semi-elect w/o matt.....	\$1,313,539	23,934	9.34%
E0149.....	Heavy duty wheeled walker.....	\$1,202,138	119,210	27.89%
E0776.....	Iv pole.....	\$1,141,545	161,473	19.15%
E0181.....	Press pad alternating w/ pum.....	\$1,089,537	79,913	1.09%
E0135.....	Walker folding adjust/fixed.....	\$1,010,898	22,218	1.39%
E0168.....	Heavyduty/wide commode chair.....	\$782,849	12,504	-0.84%
E0165.....	Commode chair with detacharm.....	\$777,887	77,050	9.38%
E0635.....	Patient lift electric.....	\$716,636	7,502	22.83%
E0147.....	Walker variable wheel resist.....	\$696,461	1,922	13.38%
A4595....	Tens suppl 2 lead per month.....	\$637,232	53,158	-8.41%
E0912.....	HD trapeze bar free standing.....	\$609,236	8,832	-1.43%
E0910.....	Trapeze bar attached to bed.....	\$604,410	62,804	-0.08%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Utilization for 2018, top HCPCS

Mobility

Product	Prodecure Code	Allowed Charges	Allowed Services	2018 Change
E1007.....	Pwr seat combo w/shear	\$109,282,919	13,658	26.63%
K0861	Pwc gp3 std mult pow opt s/b.....	\$69,334,658	13,085	22.34%
E2311.....	Electro connect btw 2 sys.....	\$38,272,193	17,772	26.41%
K0823	Pwc gp 2 std cap chair	\$34,116,264	198,545	9.64%
K0001	Standard wheelchair	\$30,637,552	1,481,522	16.50%
K0005	Ultralightweight wheelchair.....	\$24,685,286	13,145	33.38%
E1002.....	Pwr seat tilt.....	\$23,739,126	7,016	13.73%
K0856	Pwc gp3 std sing pow opt s/b.....	\$20,471,653	3,962	6.66%
E1161.....	Manual adult wc w tiltinspac	\$17,002,763	77,830	20.23%
K0003	Lightweight wheelchair.....	\$16,079,012	526,538	-2.54%
E1028.....	W/c manual swingaway	\$15,778,721	251,366	29.97%
E1008.....	Pwr seat combo pwr shear	\$14,165,707	1,760	40.82%
E2611.....	Gen use back cush wth <22in	\$13,839,009	95,166	22.20%
K0108	W/c component-accessory nos	\$12,064,029	119,439	5.26%
E2370.....	Pwr wc dr wh motor/gear comb	\$10,540,180	25,438	4.82%
K0825	Pwc gp 2 hd cap chair.....	\$9,302,465	40,530	8.04%
E0973.....	W/ch access det adj armrest	\$7,836,924	190,437	22.55%
E2377.....	Expandable controller, initl.....	\$7,186,604	16,901	26.31%
K0195	Elevating whlchair leg rests	\$7,156,996	822,986	11.08%
E2620.....	Wc planar back cush wd <22in.....	\$7,016,537	14,768	26.08%
E2361.....	22nf sealed leadacid battery	\$6,768,687	55,823	11.87%
E0971.....	Wheelchair anti-tipping devi	\$5,834,180	306,834	24.90%
E2365.....	U1 sealed leadacid battery.....	\$5,773,986	77,676	-2.24%
K0800	Pov group 1 std up to 300lbs	\$5,412,603	11,465	25.63%
E2601.....	Gen w/c cushion wth < 22 in	\$5,297,076	149,543	16.32%
E2201.....	Man w/ch acc seat w>=20"<24"	\$4,887,127	43,770	25.79%
K0006	Heavy duty wheelchair	\$4,776,419	86,655	12.31%
K0862	Pwc gp3 hd mult pow opt s/b	\$4,688,166	755	22.37%
K0007	Extra heavy duty wheelchair.....	\$4,608,183	57,890	12.53%
E2375.....	Non-expandable controller.....	\$4,470,187	8,399	12.85%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Number of beneficiaries, suppliers, 2018

✓ E1390 O2 Concentrator

Jurisdiction	Beneficiaries	Suppliers
A	168,147	1,405
B	235,058	2,078
C	473,632	3,811
D	263,244	2,196
Nation*	1,136,894	5,737

✓ E0601 CPAP

Jurisdiction	Beneficiaries	Suppliers
A	132,112	1,091
B	151,243	1,787
C	322,925	3,587
D	194,656	2,027
Nation*	799,110	5,461

✓ E0260 Hospital Beds

Jurisdiction	Beneficiaries	Suppliers
A	51,349	807
B	40,314	1,265
C	83,990	2,624
D	20,966	1,164
Nation*	196,171	4,793

✓ A4253 Blood Glucose Strips

Jurisdiction	Beneficiaries	Suppliers
A	648,507	15,679
B	652,896	12,816
C	1,060,745	24,908
D	639,296	13,227
Nation*	2,994,399	49,050

✓ K0823 Power Chair

Jurisdiction	Beneficiaries	Suppliers
A	3,250	168
B	6,592	344
C	19,299	913
D	6,589	409
Nation	35,664	1,672

✓ K0001 Standard Chair

Jurisdiction	Beneficiaries	Suppliers
A	58,720	987
B	53,240	1,511
C	139,709	2,964
D	47,905	1,526
Nation*	298,572	5,287

*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 2018, top HCPCS

Diabetes, Infusion & Supplies

Product	Procedure Code	Allowed Charges	Allowed Services	2018 Change
A4253	Blood glucose/reagent strips	\$198,338,746	23,815,611	4.02%
E2402	Neg press wound therapy pump	\$80,181,632	113,943	21.05%
B4035	Enteral feed supp pump per d	\$50,101,216	8,974,522	11.05%
E0784	Ext amb infusn pump insulin	\$44,625,404	128,851	-5.41%
B4152	Ef calorie dense>=1.5kcal	\$43,303,184	134,880,644	10.27%
A6550	Neg pres wound ther drsg set	\$31,972,682	1,277,172	11.24%
B4154	Ef spec metabolic noninherit	\$31,526,752	46,459,197	9.41%
A4222	Infusion supplies with pump	\$27,751,072	779,412	11.87%
B4150	Ef complet w/intact nutrient	\$27,572,026	71,145,353	3.41%
B4034	Enter feed supkit syr by day	\$16,671,096	5,142,062	8.73%
B4153	Ef hydrolyzed/amino acids	\$14,383,993	11,720,834	12.74%
A7000	Disposable canister for pump	\$8,021,651	974,886	11.04%
B9002	Enter nutr inf pump any type	\$7,799,776	118,113	6.63%
A4259	Lancets per box	\$7,748,845	5,431,318	5.83%
E0781	External ambulatory infus pu	\$7,188,540	35,168	0.02%
A4221	Supp non-insulin inf cath/wk	\$7,103,181	361,172	10.57%
B4036	Enteral feed sup kit grav by	\$5,295,789	1,197,372	6.31%
B4149	Ef blenderized foods	\$2,142,953	2,088,876	52.06%
A4258	Lancet device each	\$1,115,573	522,697	2.72%
K0552	Sup/ext non-ins inf pump syr	\$965,694	366,227	1.81%
B4155	Ef incomplete/modular	\$877,207	1,271,346	24.58%
A7002	Tubing used w suction pump	\$715,994	182,848	10.05%
B4087	Gastro/jejuno tube, std	\$298,740	10,707	14.29%

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT

Medicare: Top providers in 2018

Rank	Company	Allowed Charges	Rank	Company	Allowed Charges
1.	LINCARE INC.....	\$645,054,739	51.	PROCARE PHARMACY LLC.....	\$18,749,295
2.	ACCREDITO HEALTH GROUP INC.....	\$505,525,152	52.	WOUND CARE CONCEPTS INC.....	\$18,596,161
3.	LINCARE PHARMACY SERVICES INC.....	\$267,994,469	53.	WILMINGTON MEDICAL SUPPLY, INC.....	\$18,219,882
4.	WALGREEN CO.....	\$231,869,364	54.	AMBER ENTERPRISES INC.....	\$17,846,819
5.	APRIA HEALTHCARE LLC.....	\$213,344,359	55.	AMERICAN HOMEPATIENT, INC.....	\$17,837,046
6.	ZOLL SERVICES LLC.....	\$208,294,043	56.	ABBVIE ENDOCRINOLOGY INC.....	\$17,360,215
7.	GORDIAN MEDICAL INC.....	\$121,989,031	57.	AEROFLOW INC.....	\$17,299,917
8.	HANGER PROSTHETICS & ORTHOTICS INC.....	\$111,947,362	58.	UNIVERSAL MEDICAL SOLUTIONS LLC.....	\$17,187,029
9.	180 MEDICAL INC.....	\$101,070,055	59.	INOGEN INC.....	\$17,170,892
10.	BYRAM HEALTHCARE CENTERS, INC.....	\$96,935,541	60.	COMMUNITY SURGICAL SUPPLY OF TOMS RIVER, INC.....	\$17,164,046
11.	CORAM ALTERNATE SITE SERVICES INC.....	\$87,239,889	61.	EMBRACE MEDICAL, CO.....	\$16,700,468
12.	UNITED SEATING AND MOBILITY LLC.....	\$84,648,765	62.	ADVANCED TISSUE, LLC.....	\$16,652,999
13.	RGH ENTERPRISES INC.....	\$83,373,187	63.	REGO MEDICAL SUPPLY INC.....	\$16,244,622
14.	LIBERATOR MEDICAL SUPPLY INC.....	\$75,504,146	64.	CVS PHARMACY INC.....	\$15,896,064
15.	DEGC ENTERPRISES (U.S.), INC.....	\$74,572,360	65.	HOVEROUND CORPORATION.....	\$15,882,307
16.	ORTHOPIX INC.....	\$70,807,352	66.	AEROCARE HOLDINGS, INC.....	\$15,664,194
17.	NATIONAL SEATING & MOBILITY INC.....	\$67,993,580	67.	ARBOR MEDICAL EQUIPMENT, INC.....	\$15,637,681
18.	HANGER PROSTHETICS & ORTHOTICS EAST INC.....	\$61,993,446	68.	IN-HOME SENIOR CARE.....	\$15,427,481
19.	WAL-MART STORES EAST LP.....	\$60,022,224	69.	CRESCENT HEALTHCARE, INC.....	\$14,528,609
20.	OPTION CARE ENTERPRISES INC.....	\$59,493,206	70.	TRICOUNTY MEDICAL EQUIPMENT AND SUPPLY LLC.....	\$14,453,016
21.	DEXCOM INC.....	\$57,798,441	71.	RELIABLE ORTHOTICS LLC.....	\$14,203,613
22.	CAREMARK LLC.....	\$57,322,260	72.	TRIANA ENTERPRISES LLC.....	\$14,067,696
23.	KCI USA, INC.....	\$55,556,601	73.	PRN MEDICAL SERVICES, LLC.....	\$13,905,592
24.	VERUS HEALTHCARE LLC.....	\$51,818,512	74.	BRADEN PARTNERS LP.....	\$13,868,828
25.	MED4HOME INC.....	\$49,341,366	75.	AMERICA'S BEST CARE PLUS INC.....	\$13,595,649
26.	DJO LLC.....	\$47,114,596	76.	RECOVERY DME INC.....	\$13,534,457
27.	SLEEP MANAGEMENT LLC.....	\$41,793,776	77.	SD ORTHOTICS.....	\$13,530,395
28.	HANGER PROSTHETICS & ORTHOTICS WEST INC.....	\$41,178,174	78.	ELITE MEDICAL SUPPLY, INC.....	\$13,342,184
29.	COMFORT MEDICAL, LLC.....	\$40,035,481	79.	MINIMED DISTRIBUTION CORP.....	\$13,326,974
30.	SUNMED MEDICAL SYSTEMS LLC.....	\$38,465,716	80.	NATIONWIDE MEDICAL, INC.....	\$13,069,041
31.	PRISM MEDICAL PRODUCTS, L.L.C.....	\$36,448,339	81.	REHAB MEDICAL INC.....	\$13,020,352
32.	UNITED STATES MEDICAL SUPPLY, LLC.....	\$33,966,267	82.	ADVANCED RESPIRATORY, INC.....	\$12,967,234
33.	AMERICAN HOMEPATIENT, INC.....	\$33,778,200	83.	ORTHOTIC & PROSTHETIC CENTERS, INC.....	\$12,760,220
34.	EZ LIFE MEDICAL SUPPLY INC.....	\$31,475,904	84.	KROGER LIMITED PARTNERSHIP I.....	\$12,674,007
35.	MCKESSON PATIENT CARE SOLUTIONS INC.....	\$31,340,021	85.	AIRCARE HOME RESPIRATORY LLC.....	\$12,602,403
36.	WALMART INC.....	\$30,861,647	86.	UNIVERSAL HEALTHCARE GROUP DME, INC.....	\$12,582,210
37.	NORCO, INC.....	\$30,789,484	87.	JOHNS HOPKINS PHARMAQUIP INC.....	\$11,847,688
38.	RESPIRATORY TECHNOLOGIES, INC.....	\$28,634,793	88.	ELECTROMED, INC.....	\$11,795,607
39.	AVONDALE HME, INC.....	\$28,127,615	89.	TACTILE SYSTEMS TECHNOLOGY INC.....	\$11,770,507
40.	SUPER CARE INC.....	\$26,911,424	90.	HEART HOMECARE, LLC.....	\$11,744,920
41.	BIOVENTUS LLC.....	\$26,421,167	91.	BEACON RESPIRATORY SERVICES, INC.....	\$11,718,310
42.	ADVANCED HOME CARE INC.....	\$25,743,443	92.	CARELINC MEDICAL EQUIPMENT & SUPPLY CO LLC.....	\$11,671,977
43.	PROCARE PHARMACY DIRECT, LLC.....	\$25,252,098	93.	DUSARA CORPORATION.....	\$11,657,880
44.	OCEAN HOME HEALTH SUPPLY, LLC.....	\$24,679,041	94.	PACIFIC MEDICAL INC.....	\$11,556,885
45.	HEALTH CARE SOLUTIONS AT HOME INC.....	\$22,532,963	95.	FIRST CHOICE MEDICAL SUPPLY INC.....	\$11,509,103
46.	BINSON'S HOSPITAL SUPPLIES INC.....	\$20,729,810	96.	MYRTLE MEDICAL EQUIPMENT INC.....	\$11,473,712
47.	BIORX LLC.....	\$20,634,640	97.	US MED, LLC.....	\$11,374,523
48.	MEDSTAR SURGICAL & BREATHING EQUIP., INC.....	\$20,498,503	98.	TOBII DYNAVOK LLC.....	\$11,271,371
49.	EBI LLC.....	\$20,103,010	99.	REGIONAL HOME CARE INC.....	\$11,151,480
50.	COMFORT MEDICAL SUPPLY LLC.....	\$19,096,529	100.	MATAWAN HME INC.....	\$11,040,361

SOURCE: CMS, VIA FREEDOM OF INFORMATION ACT



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