

The background features a stethoscope on the left, a network diagram of white lines connecting various medical icons (heart, plus sign, syringe) in the center and right, and a blue diamond-shaped graphic in the top right corner containing the text 'HOT ISSUES IN HEALTH 2017'.

**HOT  
ISSUES  
IN HEALTH  
2017**

# Doctors and Disruptors

How Policymakers Can Respond to Health Market Developments

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**DECEMBER 7, 2017**

# Key Takeaways

1. Consumer demands are changing the health care market.
2. Emerging models of care can have major impacts on care costs, quality and access.
3. There are tradeoffs between innovation and regulation.



**Consumer Demands are  
Changing the Health Care Market.**

# Drug Price Negotiators and Health Insurers: New Frenemies?

The Amazon logo, featuring the word "amazon" in a bold, black, lowercase sans-serif font. Below the text is a curved orange arrow that starts under the letter 'a' and points to the right, ending under the letter 'n'.The logos for CVS Caremark and Aetna. On the left, the word "CVS" is in a large, bold, red sans-serif font, with "CAREMARK" in a smaller, red, serif font below it. A vertical red line separates this from the "aetna" logo on the right, which is in a bold, black, lowercase sans-serif font with a small "SM" trademark symbol to its upper right.

# Non-Traditional Care Delivery Models in Our Backyard



**National**

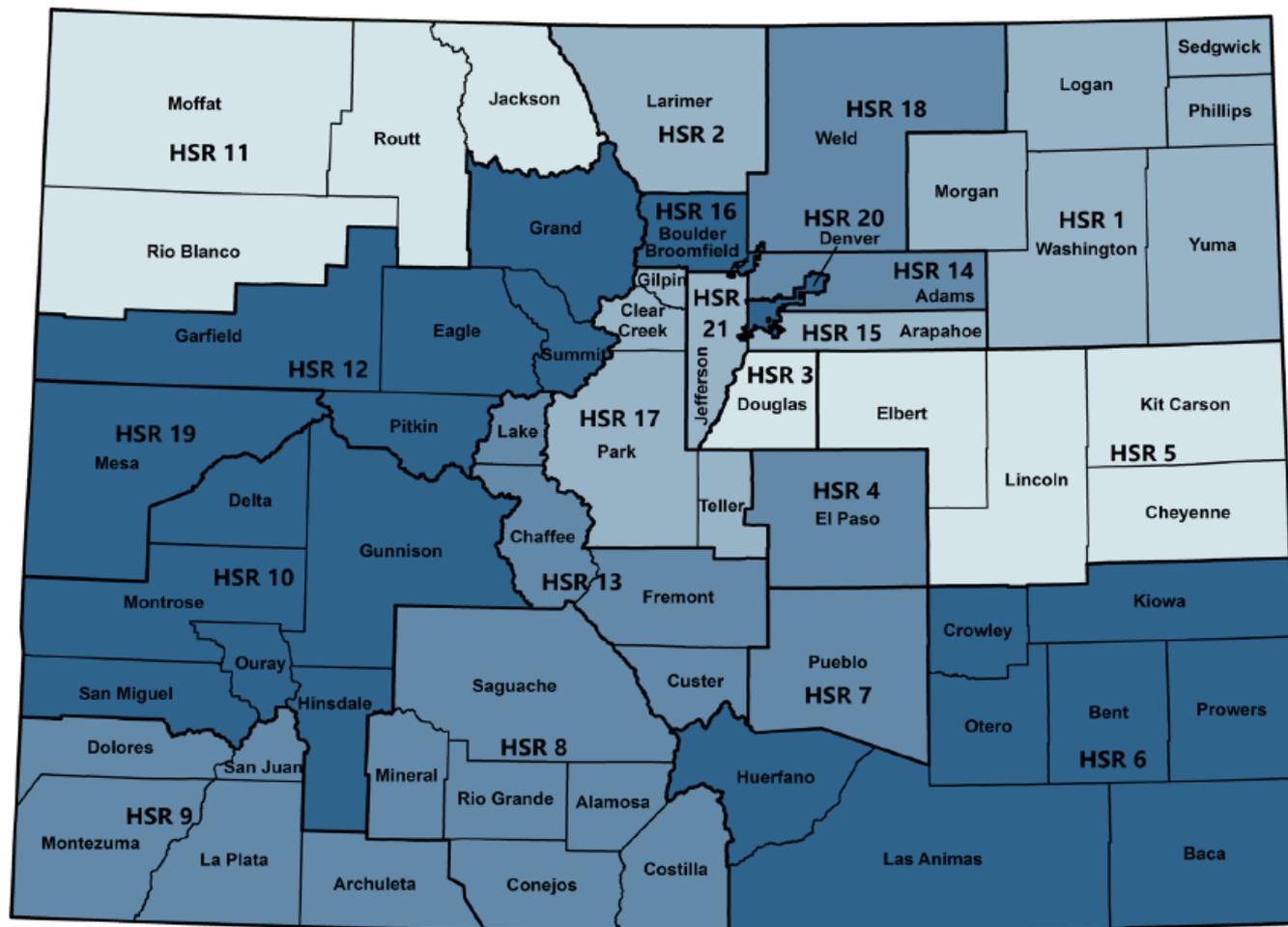


**Regional**



**Local**

# Coloradans Skip Care Because It Costs Too Much



State Average  
**19.3%**

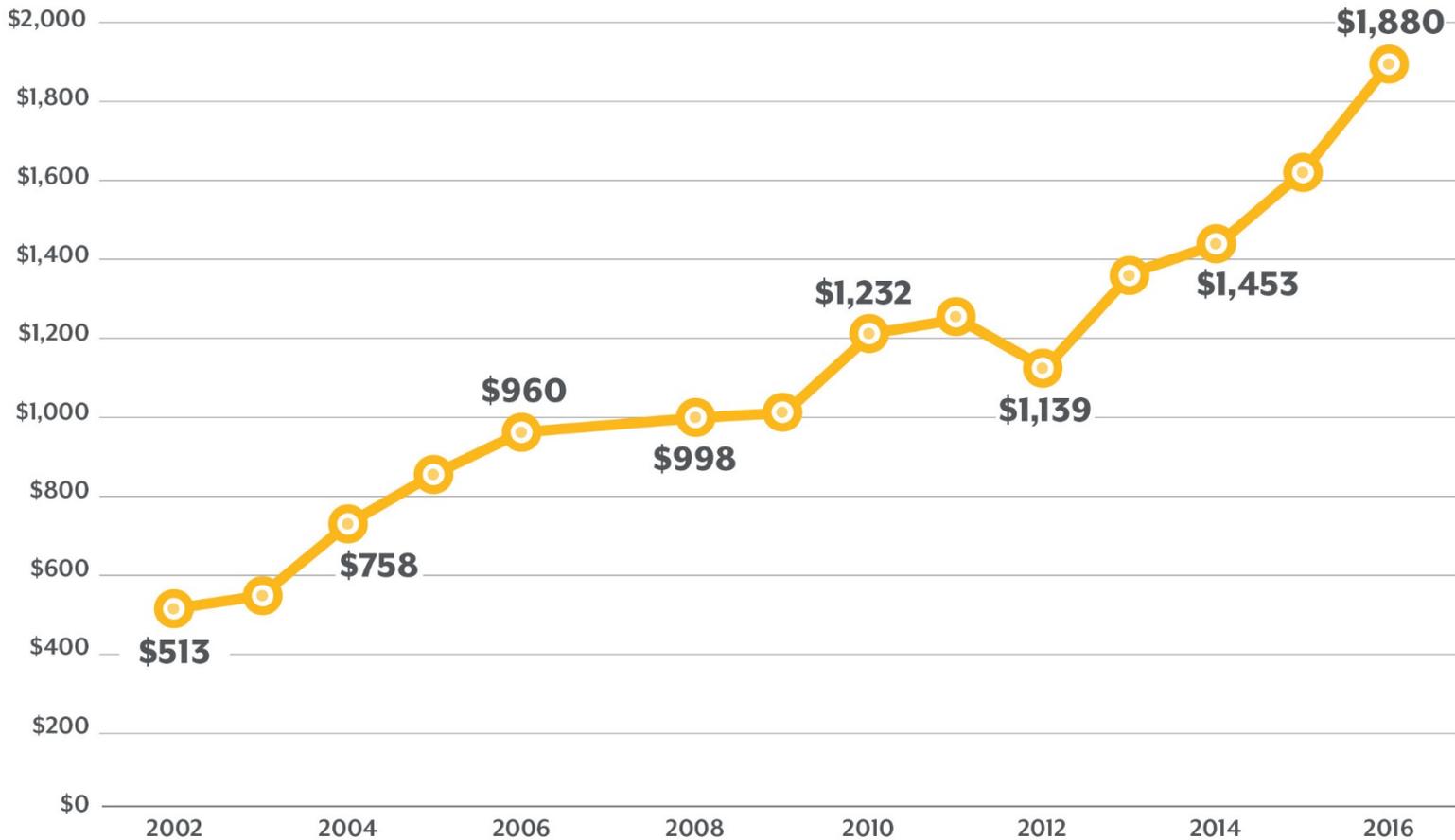


Source: Colorado Health Access Survey, 2017



# Consumers Face Higher Spending

## Average Individual Insurance Deductible



Source: Medical Expenditure Panel Survey



# Physician Burnout is Changing Health Care

## Leadership Survey: Why Physician Burnout Is Epidemic and How

## Health Care Over Half of Pediatricians Report Burnout in 5-Year Study

Insights Report · December

News > Conference News

Rabiya S. Tuma, PhD  
May 15, 2017

Research Article

## The inevitability of physician burnout: Implications for interventions

Anthony Montgomery  

 [Show more](#)

<https://doi.org/10.1016/j.burn.2014.04.002>

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News

## One in Four Physicians Rethinking Clinical Practice

Diana Phillips  
November 02, 2017

 28 Comments



 Added to Email Alerts



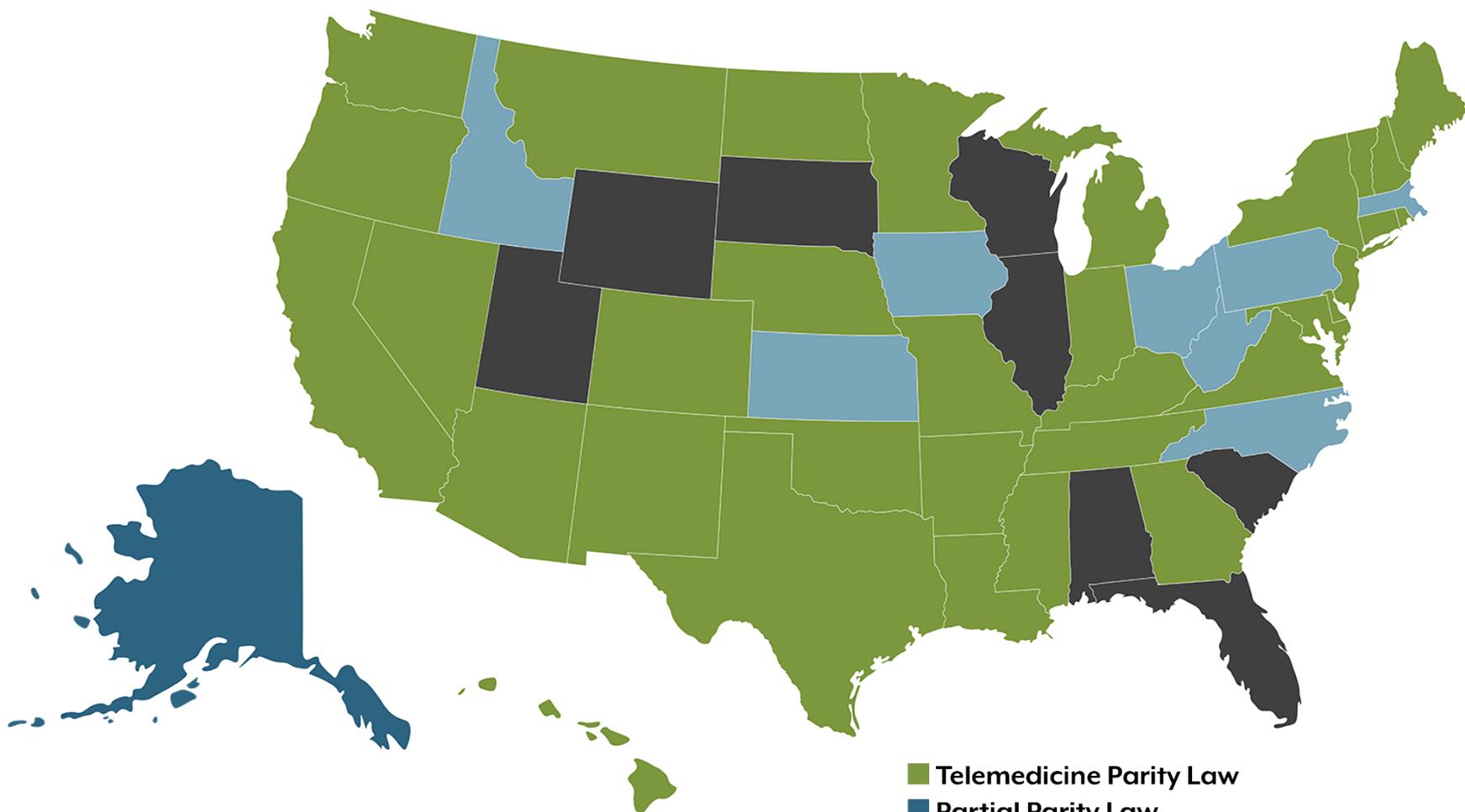


# Emerging Models and Policy Implications

# Example 1: Telehealth and Technology



# Colorado Among Nation's Telehealth Leaders



- Telemedicine Parity Law
- Partial Parity Law
- Proposed Parity Bill
- No Legislative Activity

\*Ohio: Coverage applies to certain health services

SOURCE: American Telemedicine Association, 2017



## QUESTION FOR OUR POLICY COMMUNITY

Telehealth has potential to increase access to care.

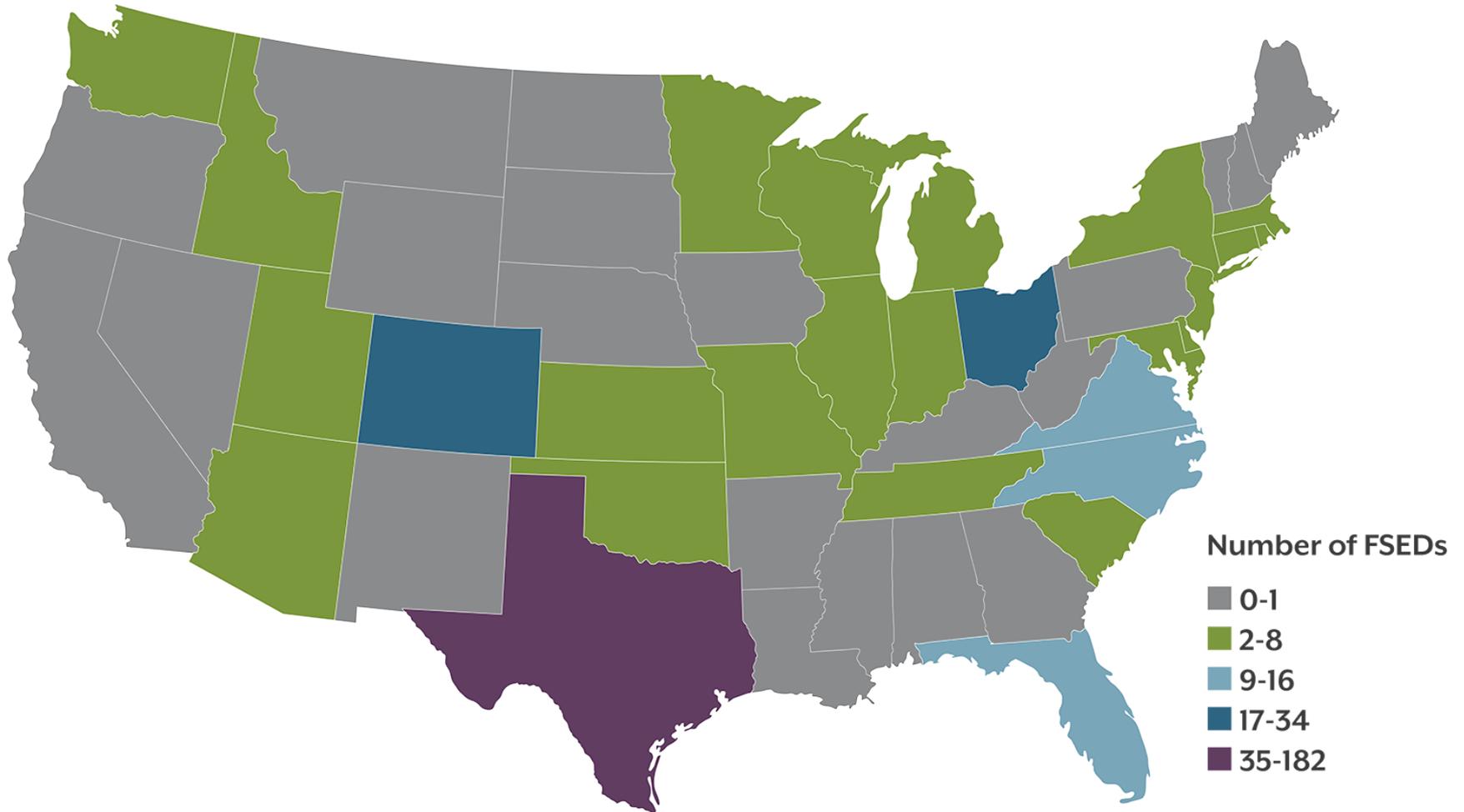


**How can policy reduce operational barriers to telehealth adoption?**

# Example 2: Freestanding Emergency Departments



# Colorado Among Nation's Leaders



Source: Schuur et al. "Where Do Freestanding Emergency Departments Choose to Locate?"  
Annals of Emergency Medicine, 2016

## QUESTION FOR OUR POLICY COMMUNITY

Freestanding EDs  
increase convenience  
of care but at a cost.



How can policy ensure  
price transparency and  
patient safety?

# Example 3: Retail Clinics



# A Health Care Menu?

## Lab test & immunization pricing

### Point of care lab tests

On-demand test performed & results delivered during office visit.

Bladder infection test (UTI)	\$8
Blood sugar test	\$4
Cholesterol test	\$20
A1C test (HbA1c)	\$15
Flu test (influenza A & B)	\$40
H. Pylori test	\$15
Mono test	\$10
Pregnancy test	\$10
Rapid Strep Test	\$20
Urine protein test	\$15
BV test	\$15
Trichomonas test	\$15
TB skin test	\$15

### External lab tests

Lab tests requiring offsite analysis by a separate lab.

PSA (prostate-specific antigen) test	\$15
Blood count (CBC) test	\$8
HIV test	\$95
Pap smear	\$50
STD (Chlamydia/ Gonorrhea) test	\$35
Sugar, electrolytes, & kidney test	\$8
Thyroid test	\$10
Uric acid test	\$8
Vitamin B12 levels test	\$15
Vitamin D levels test	\$35

### Immunization pricing

Immunizations are administered by a NP or other licensed professional.

Quadrivalent flu	\$39.84
HD flu	\$69.84
Hepatitis A	\$67.46
Hepatitis A - child	\$69.88
Hepatitis B	\$68.17
Hepatitis B - child	\$45.32
HPV	\$223.88
Measles	\$88.46
Meningitis	\$129.78
Pneumonia-Pneumovax	\$89.78
Chicken pox	\$144.78
Shingles	\$230
Tetanus (Td)	\$52.46
Tetanus (Tdap)	\$60.54



Some age restrictions apply.



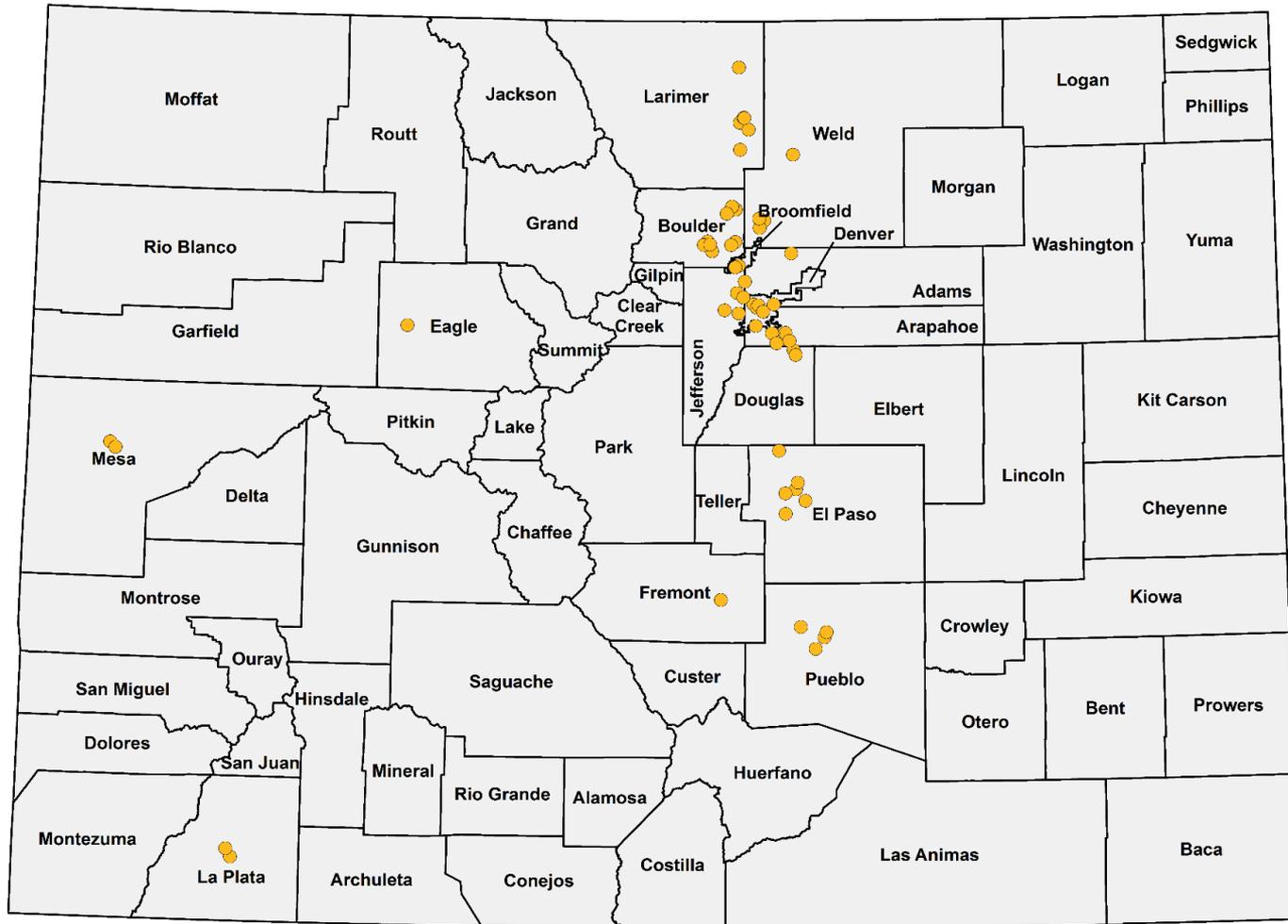
## QUESTION FOR OUR POLICY COMMUNITY

Retail clinics increase access to care and price transparency.



**How can policy ensure quality and continuity of care?**

# Example 4: Direct Primary Care



● Direct Primary Care Locations

Source: CHI's analysis of direct primary care locations, 2017



## QUESTION FOR OUR POLICY COMMUNITY

Direct Primary Care (DPC) is growing but doesn't fit the mold.



**How can policy help extend DPC benefits while considering tradeoffs?**



**There are Tradeoffs Between  
Innovation and Regulation.**

# Managing Market Disruptions: Drivers to Consider



Access to Care



Cost of Health Care



Innovation and Consumer Choice



Workforce Implications



Politics

# Hearing from You

- What other disruptions are likely on the horizon?
- How do we deal with these disruptions?
- What's the role of government in preserving a system that serves the publicly insured versus allowing innovation?

# Key Takeaways

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3. There are tradeoffs between innovation and regulation.



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