Home Care Horizon Report

Description: The number of patients receiving healthcare at home continues to increase, driven not only by preference and cost savings but also by population growth in the 65+ age bracket. This report details the following home care market segments:

- **Home Nursing Care:** Organizations, primarily home health agencies (HHAs), provide nursing care in the home. Many have expanded their basic menu of services to include rehabilitation and infusion therapy, in addition to medication management and general nursing care. Some agencies also offer non-healthcare services such as assistance with housekeeping.

- **Home Hospice:** Over the past decade, families and payers have embraced end-of-life care provided in-home. Almost two-thirds who receive hospice care do so at home, whether that is a family home, nursing home, or independent or assisted living facility. Medicare and other insurers require two physicians to certify a hospice patient has six months or less to live, although services can be renewed and covered for additional periods after that.

- **Infusion Therapy:** Those unable to receive medication or nutrition by mouth may be given intravenous drug delivery, commonly referred to as infusion therapy. Advances in clinical administration have allowed movement from inpatient settings to home and alternate sites to provide these services. This provides cost savings as well as convenience.

- **Home Medical Equipment (HME):** Also commonly referred to as durable medical equipment (DME), HME refers to medical equipment for home use, such as wheelchairs, walkers, hospital beds, and bathing aids. HME dealers often have retail storefronts, but others market their products online only.

- **Home Remote Monitoring:** Technological innovations allow earlier intervention for patients with chronic conditions and provide cost savings by reducing inpatient visits. New monitoring and care management technologies are being developed to provide closer connections between home caregivers, recipients, and clinical providers.

- **Unpaid Care giving:** 16.6% of the U.S. population provided unpaid care for an adult in the past year. In the future, there will be fewer potential caregivers under the age of 65 who can provide unpaid care to seniors and others.

- **Home-Based Primary Care:** A pilot program of the Centers for Medicare and Medicaid Services (CMS) has already yielded cost savings by delivering home-based primary care (nurse, physician, other clinicians) to chronically ill patients.

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