

Home Health Agency Fact Sheet

CON Modernization Task Force

March 23, 2018

Agencies, Quality, Innovation

- 55 licensed home health agencies (HHAs) – most are authorized to serve multiple jurisdictions – some do not serve all authorized jurisdictions
- In 2014, HHAs reported 111,378 clients (unduplicated count) and 1,813,878 home visits - overall average of 16.3 visits per client
- Payor Mix: Medicare (72%); Private insurance (22%), Medicaid (5%).
- CMS Home Health Compare dataset (January 2018): Quality of Patient Care Star Rating (Maryland average = 4.0 Stars; National average = 3.5 Stars); HHCAHPS Survey Summary Star Rating (Maryland average = 3.0 Stars; National average = 4.0 Stars).
- Recent Innovations: CMS imposed Value-Based Purchasing and joint ventures with hospital systems.

Regulatory Scope and CON Activities

- HHAs are the only type of home care provider required to obtain a CON to be established or to expand into new jurisdictions – Only HHAs serve Medicare patients
- Residential Service Agencies (1,187 licensed) are unregulated and provide services for private payment and some limited Medicaid reimbursement
- 21 HHAs entered Maryland through acquisition of an existing HHA.
- Current HHA State Health Plan was adopted in April 2016 – Established new CON review process: (1) determining jurisdictional need; (2) qualifying an applicant; and (3) determining preference in a comparative review.
- SHP does not project need for HHA or HHA capacity – jurisdictions are opened for new HHAs to enter the market based on insufficient consumer choice of HHAs; a highly concentrated HHA service market; or an insufficient choice of high performing HHAs.
- Quality measures and performance thresholds are approved by the Commission for use in opening up jurisdictions and qualifying applicants.
- SHP allows for use of multi-jurisdictional regions in CON review.
- In 2017, 15 jurisdictions were opened up and configured into 4 regions.

Supply in 2014

- Maryland – 0.9 HHAs per 100,000 population
- USA – 3.9 HHAs per 100,000 population