

Cancer and Employers: Trends Update

September 9, 2020

F. Randy Vogenberg, PhD

Principal, Board Chair

The logo for the Institute for Integrated Healthcare (IHI) features three vertical blue bars of varying heights to the left of the word "Healthcare" in a bold, blue, sans-serif font.

IHI Healthcare

Institute for Integrated Healthcare

The logo for the Employer-Provider Interface Council (EPIC) features the letters "E", "P", and "I" in a blue square, followed by the letters "C" in a teal color.

EPIC

Employer-Provider Interface Council

Furloughs, Layoffs, and Member Concerns Impacting 2020 Employee Care Utilization *Not a Change in Benefit Design*

49.4%	ME
47.7%	OR
46.5%	NM
46.0%	WA
45.7%	VA
44.6%	AL
44.5%	AK
42.9%	MI
42.8%	IL
42.6%	NV
42.2%	VT
41.6%	MO
41.6%	OK
41.6%	SC
41.6%	WY
41.4%	OH
41.3%	MD
41.2%	CA
41.1%	CO
41.0%	MA
41.0%	TX
40.9%	MN
40.9%	TN
40.1%	GA
40.0%	MS

- 40% of Americans avoided care through July, now recovering
 - Mississippi in middle of pack with 40% concerned about seeking care
- Underspending 2020 health benefits budget
 - Requires thinking through benefit options for 2021
- Existing employer concern about long term implications, and remaining problematic legal legacies
 - Telehealth, Sequestration, PPE & Drug shortages, etc.

Punch List of Issues on Cancer Care

TODAY

- Manage "Care" and Costs
- Payers are not Negotiators
 - PBM – gross-to-net bubble
- Biosimilars
- Stop Loss use
- Case type point solutions
- "PA" and "white bagging"
- Determining what works
- Alternative Risk contracting

NEAR FUTURE

- Balanced, holistic management
- Employers need to be engaged
 - Only winner is the PBM
- Window closing on savings
- Limited solution, more costly
- Complete strategy needed
- Trusted partner wanted
- Meaningful measures, "value"
- Simplify, direct contracting

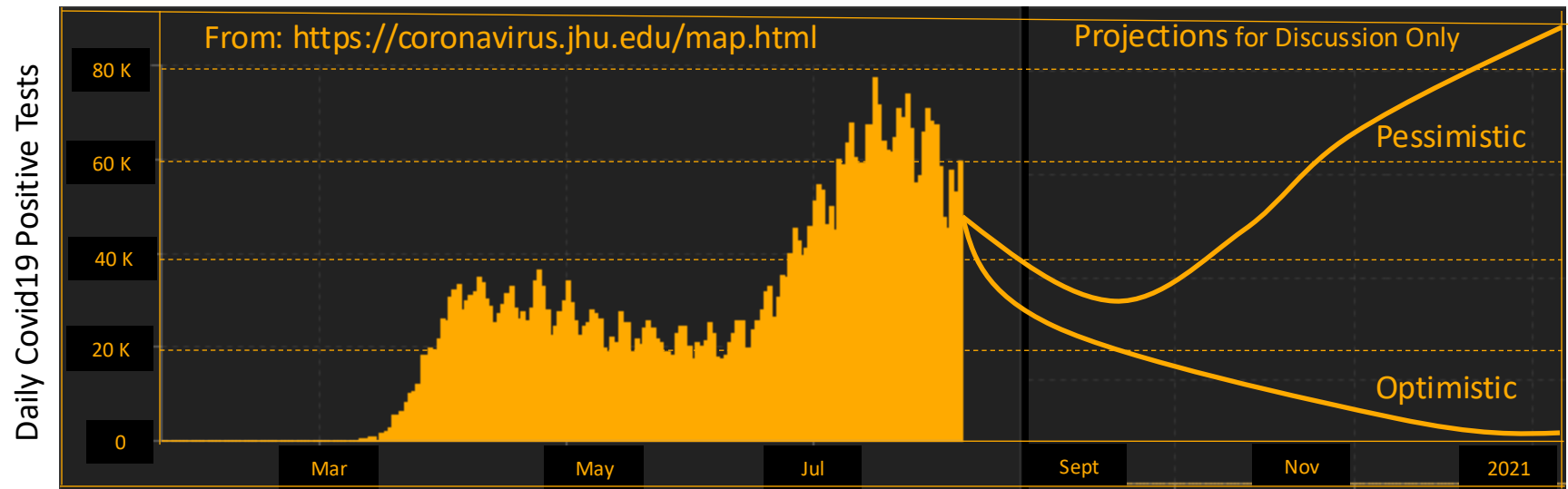
Employers are Expecting Structural Changes

- One significant care delivery shift is Telemedicine^{1,2}
 - Reimbursement rates currently at parity but Application and Standards need to be clarified for permanency
- Other care benefit topics are increasingly relevant
 - Cancer screening; cancer practice business stresses & recovery
 - Covid-19 and vaccinations in general for 2020/2021
 - Looming shortage – plasma fractions for primary or secondary immune deficiencies (B-cell); Covid-19; Multi-symptom Inflamm Cond-children
- Opportunity for provider leadership on returning to get care by addressing both safety & economic effectiveness

1. <https://www.cnbc.com/2020/04/03/telehealth-visits-could-top-1-billion-in-2020-amid-the-coronavirus-crisis.html>

2. <https://www.cdc.gov/nchs/fastats/physician-visits.htm>

Future Based on the “Crystal Ball” is Cloudy



Positive Covid19 Tests in the US by Month and Day

- Primary HR Benefit focus is “Back-to-Work” plan and implementation
- 2021 Benefit Designs are now being finalized, if not already
- Its up to employer plan sponsors to drive market change

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