



Medicare Beneficiary and Workforce Analysis: *Home Health Sector*

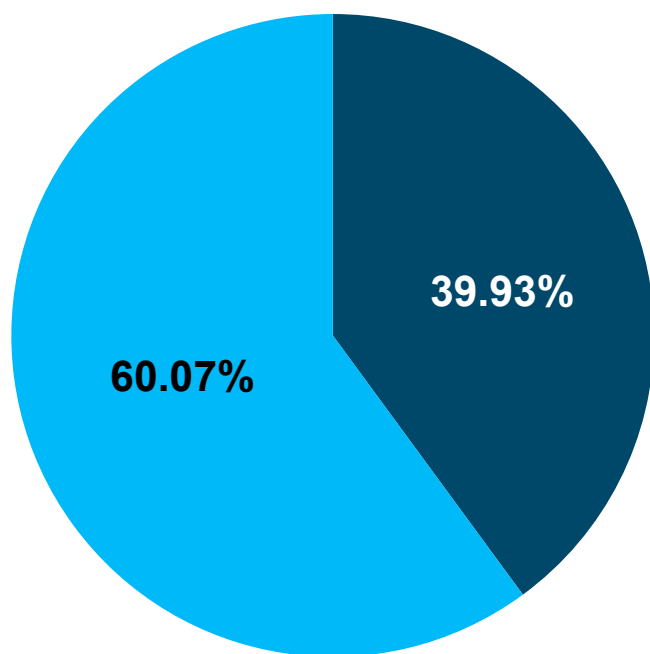
March 2014
avalerehealth.net



Key Findings: Home Health Beneficiaries

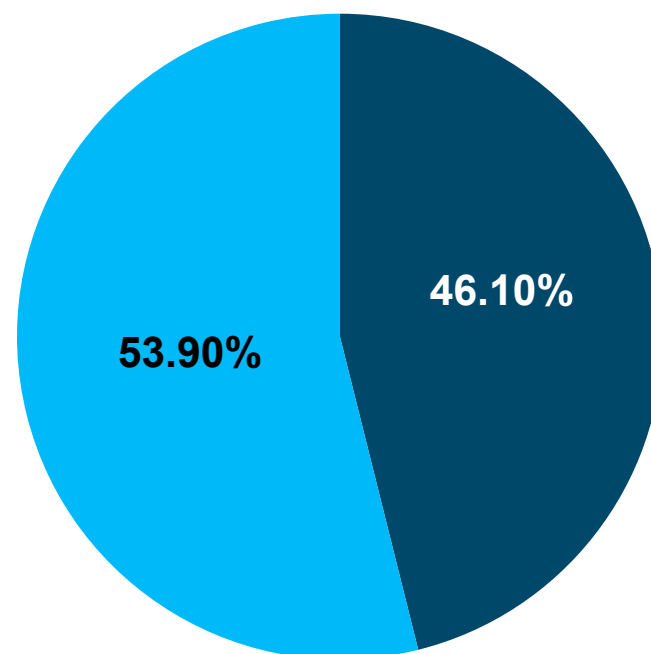
Medicare Home Health Patients are More Likely to be Female

MEDICARE HOME HEALTH PATIENTS



■ Male ■ Female

ALL MEDICARE BENEFICIARIES EXCLUDING HOME HEALTH PATIENTS



■ Male ■ Female

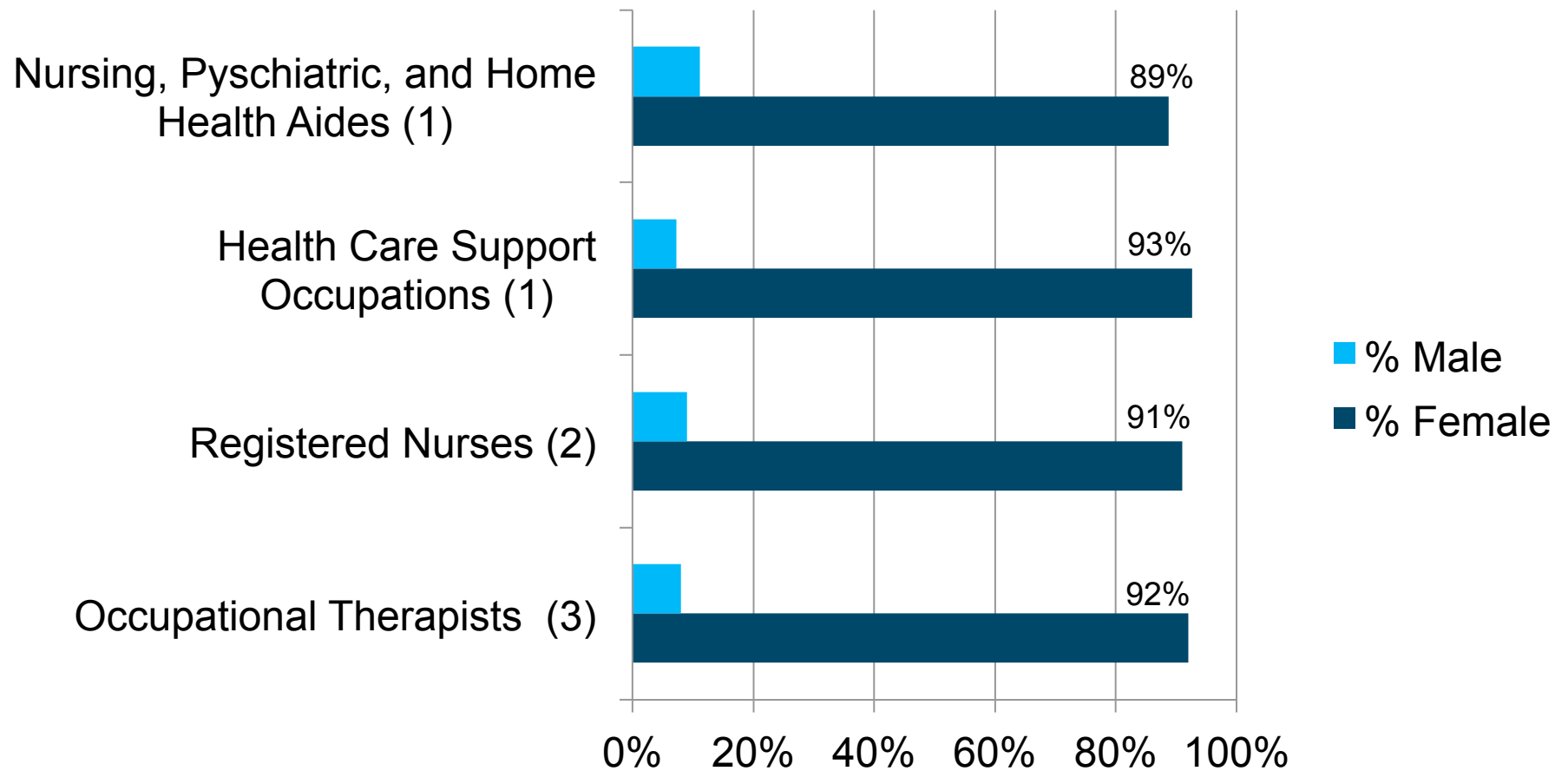
Source: Avalere Health analysis of 2011 Medicare Current Beneficiary Survey, Access to Care file.





Key Findings: Home Health Workforce

Among Workforce Employed by HHAs, Vast Majority are Women



Sources:

1: BLS Women in the Labor Force 2012 Data Book (Table 18) <http://www.bls.gov/cps/wlf-databook-2012.pdf>

2: HRSA, The US Nursing Workforce: Trends in Supply and Education, April 2013 (Table 3)
<http://bhpr.hrsa.gov/healthworkforce/reports/nursingworkforce/nursingworkforcefullreport.pdf>

3: American Occupational Therapy Association, 2010,
<http://www.aota.org/-/media/Corporate/Files/EducationCareers/Prospective/Workforce-trends-in-OT.PDF>



Women Face Risk of Job Loss

PRIOR TO HOME HEALTH REBASING			PROJECTED IMPACT OF HOME HEALTH REBASING			
Number of Home Health Agencies (HHAs)	Number of Home Health Patients	Number of Home Health Jobs	Percent of HHAs that are Projected to be Driven to Net Loss*	Number of HHAs that are Projected to be Driven to Net Loss	Number of HH Patients Now Served by HHAs that are Projected to be Driven to Net Loss	Number of HH Jobs Now in HHAs that are Projected to be Driven to Net Loss
11,409	3,439,520	1,140,403	40%	4,908	1,419,021	498,159

Based on the proportion of female workers within professions commonly employed by home health agencies, women face risk of job loss due to the projected impact of home health rebasing.

* Home Health Prospective Payment System (HHPPS) Final Rule for CY2014, page 72291.





Key Findings: Family Caregivers

Women Serve as the Majority of Informal Caregivers

- Women provide the majority of informal caregiving to spouses, family, and friends and often serve as manager of care and surrogate decision-maker.¹
- Between 59% and 75% of all informal caregivers in the U.S. are women.²
- The average caregiver is 46 years old and working.³
- The value of informal caregiving provided by women ranges from \$208 to \$265 billion per year.²

Sources - Dobson | DaVanzo analysis of published literature:

1. Navale-Waliser M, Feldman PH, Gould DA, et al (2002), When the caregiver needs care: The plight of vulnerable caregivers. *American Journal of Public Health*, 92(3), 409-413.

2: Arno, PS (2002). The economic value of informal caregiving. Paper presented at the annual meeting of the American Association for Geriatric Psychiatry

3: MetLife Mature Market Institute, National Alliance for Caregiving, & The National Center on Women and Aging. (1999, November). *The Metlife juggling act study: Balancing caregiving with work and the costs involved*.

4: Calculation based on estimates of total economic value of informal caregiving (\$354 billion per year) from Arno PS, Viola D (2009). The Caregiving Continuum: Costs & Benefits Reconsidered. The Hilltop Institute Symposium: *Examining the Evidence Base for State Policymakers*.

