

# 2024 Snapshot

## State of Unmet Need for Home-Based Medical Care in U.S.

*Data Source: 2023 Traditional Medicare Claims, Centers for Medicare & Medicaid Services (CMS)*

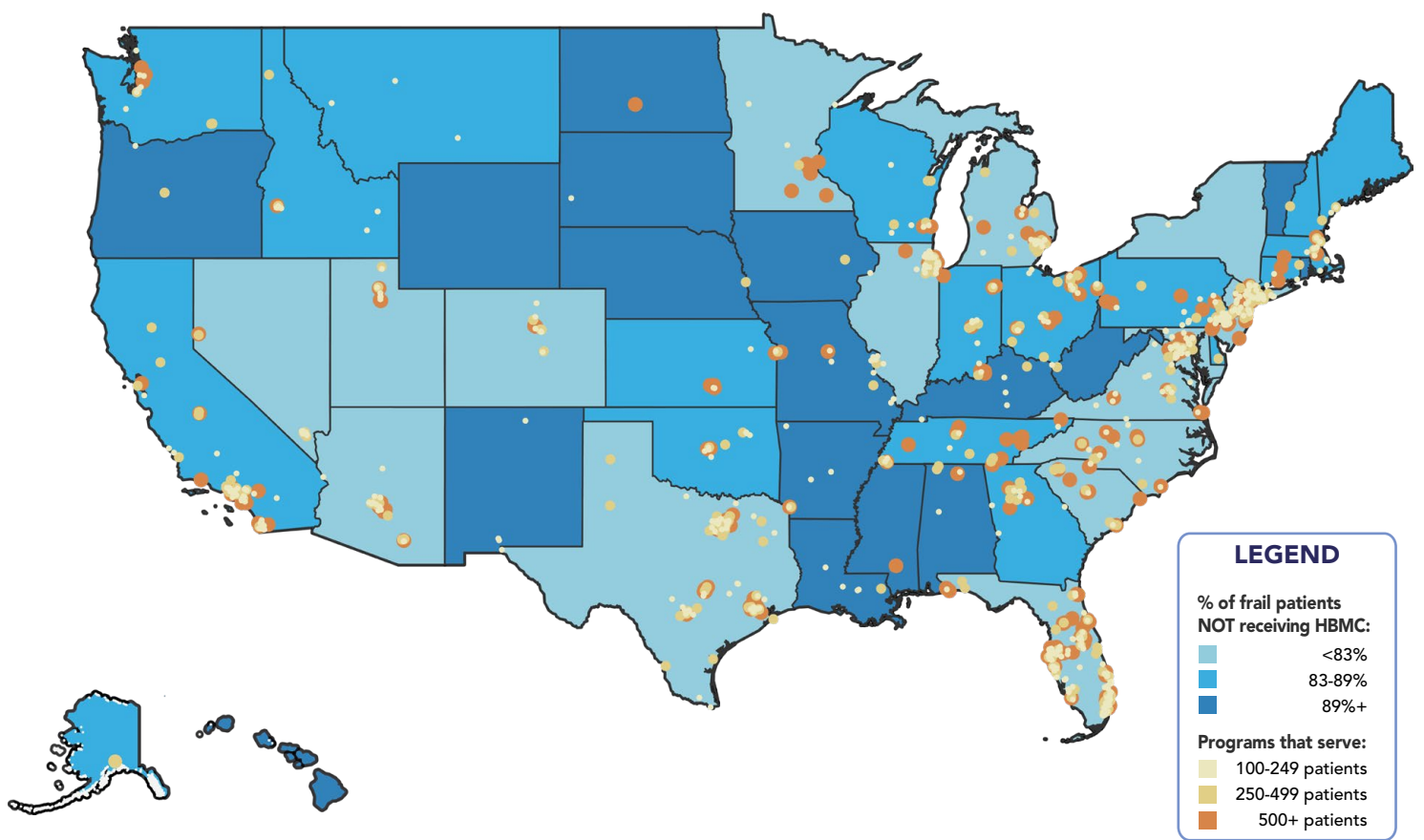
- More than 7 million Americans who are either homebound or challenged to leave home need home-based medical care (HBMC).\*
- Over 5.9 million of these people cannot access HBMC primarily due to a workforce shortage and the need for payment reform.
- At least 12,000 providers are needed to meet the need. Today, there are only 3,000.
- The majority of HBMC programs are small, serving about 100-249 patients.

### Demand vs. Supply:

#### U.S. Map of Unmet HBMC Needs and Provider Base

The map below, using data from Centers for Medicare & Medicaid Services (CMS) accessed through HCCI's Confer Analytics<sup>®</sup> platform, illustrates:

- Areas (shaded) where HBMC needs of frail<sup>†</sup> older adults are NOT being met.
- The locations (dots) of HBMC programs of varying sizes.



### KEY TAKEAWAYS

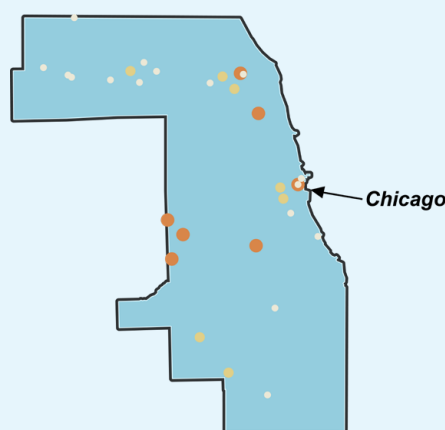
- In 36 states, more than 83% of frail patients in need of HBMC are not receiving it.
- In states such as NV, FL, SC, AZ, and UT where there are more HBMC programs, a higher percentage (~20%) of frail patients have received HBMC.
- In contrast, states like WV, SD, IA, and NM can be considered HBMC 'deserts,' with over 90% of frail patients not receiving the care they need.
- HBMC programs are often concentrated in large metropolitan areas (e.g., Tampa, Chicago, New York), leaving frail patients in rural counties with significant challenges accessing care.

To see the full interactive U.S. map, including state/county maps like this one, go to [bit.ly/HBMC-map](https://bit.ly/HBMC-map)



Please access through a desktop for the best viewing experience

#### Cook County, Illinois



\*COVID challenges and adaptations among home-based primary care practices: lessons for an ongoing pandemic from a national survey. (Ritchie, C.S., Gallopyn, N., Sheehan, O.C., Sharieff, S.A., Franzosa, E., Gorbenko, K., ... & Leff, B. 2021; Journal of the American Medical Directors Association, 22(7), 1338-1344.)

\*The terms "Home-Based Medical Care (HBMC)" and "Home-Based Primary Care," often used interchangeably, represent a model that combines home-based care for medical needs with intense management, care coordination, as well as long-term services and supports (LTSS) when needed. HBMC interventions have been proposed as an alternative way of organizing and delivering care that may better address the needs, values, and preferences of chronically ill, frail, and disabled patients who have difficulty accessing traditional office-based care, primary care, or newer models of care that also require office visits. Source: [www.effectivehealthcare.ahrq.gov](http://www.effectivehealthcare.ahrq.gov) Published online: November 19, 2014

<sup>†</sup>Frailty is theoretically defined as a clinically recognizable state of increased vulnerability resulting from aging-associated decline in reserve and function across multiple physiologic systems such that the ability to cope with every day or acute stressors is comprised. (Fried LP, Tangen CM, Walston J, et al. Frailty in older adults: evidence for a phenotype. JGerontolA BiolSciMedSci. 2001;56(3):M146-M156. [PubMed] [Google Scholar] [Ref list])

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