

Emerging trends in healthcare

UT Health Law Conference
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PwC Health Research Institute



Trump's health policy proposals: From "repeal and replace" to the "art of the deal"

"Repeal and replace"

- Major change and uncertainty
- Raise deficit and uninsured
- Popular provisions too

The art of the deal

- Touted success in the boardroom / in negotiations
- But what about gridlocked Congress / many competing interests
- Medicaid block-grants / x-state selling may face tough odds in Congress

Free market principles

- Business-like free-market approach to the healthcare industry
- Expanded use of consumer tax-advantaged HSAs
- Provider and pharma pricing transparency / call out specific companies

Insurers are working on a tight timeline for the next Affordable Care Act enrollment season

June 2017

Deadline for insurers to submit rate tables for qualified health plans to CMS

July 2017

CMS reviews revised qualified health plan applications

August 2017

Deadline for service area petition

Final deadline for issuer changes to qualified health plan applications

September 2017

States send CMS final plan recommendations

Issuers send signed agreements confirmed plan lists and final plan crosswalks to CMS

October – November 2017

CMS sends certification notices with countersigned agreements and final plan lists to issuers

Open enrollment begins



Source: CMS: "Key Dates for Calendar Year 2017: QHP Certification in the Federally-facilitated Marketplaces"

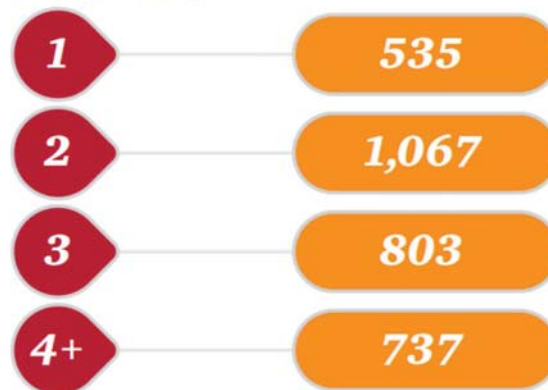
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11

As insurers question their participation in the Affordable Care Act exchanges, consumers may face even fewer options

Number of carriers offering 2017 on-exchange coverage

Number of counties



*Data is based on 2017 participation, Silver metal tier.

Note: States that price health plans by zip code may have varying carriers within a single county.

Sources: PwC Health Research Institute and Strategy& analysis of Qualified Health Plan data from HealthCare.gov, the Robert Wood Johnson Foundation, and exchange data for the following states: Colorado, Washington, Minnesota, New York, Vermont, Rhode Island, Idaho, California, Connecticut, Massachusetts, Washington DC and Maryland.

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10

Health reform legislation will fall along a continuum with vastly different outcomes for the healthcare industry

Increase in the uninsured compared with ACA, by 2026 (millions)



Scenario 1:
Repeal
+32 million



**American Health
Care Act**
+24 million



Scenario 2:
Replace
+12 million



Scenario 3:
Repair
+6 million

Source: PwC Health Research Institute and Strategy& analysis of the Annual Social and Economic Supplement to the Current Population Survey and Congressional Budget Office publications. Note: Estimates for Scenarios 1, 2 and 3 based on analysis of 2025. The Affordable Health Care Act (AHCA) estimates are based on the Congressional Budget Office's 13 March 2017 analysis of what the bill would accomplish in 2026.

Things to track going forward

New faces



Dr. Scott Gottlieb
Nominee for FDA
Commissioner



Dr. Tom Price
HHS Secretary



Seema Verma
CMS Administrator

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