

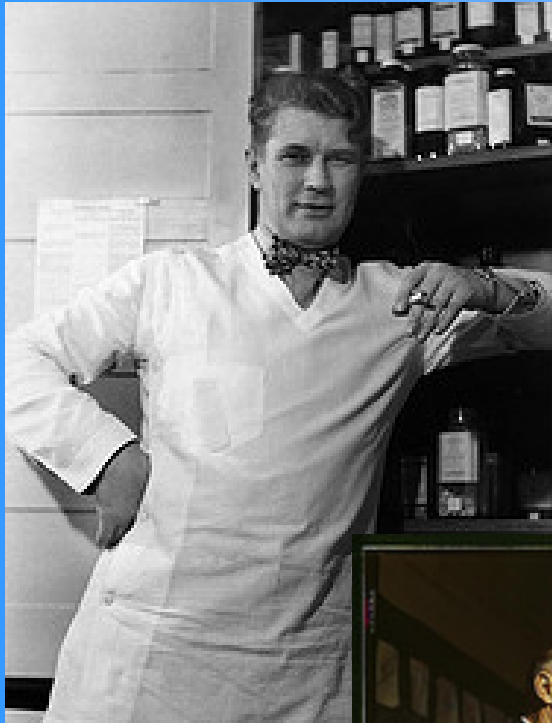


Overview of the Policy and Regulatory Environment

Caroline Ridgway, JD
Retail Clinic Summit
Philadelphia, PA
March 1, 2010



That was then...



- Physician as trusted advisor and community leader.
- Modern medicine has gone relatively unchallenged, with largely unchecked system growth.



- As a society, we face:
 - Poor access to even routine, basic care.
 - A drastically inflated cost structure.
 - An insufficiently supported safety-net.
 - An increasingly scarce primary care workforce.
 - Overwhelming disparities.
 - Mediocre quality outcomes.



Change has been slow to come

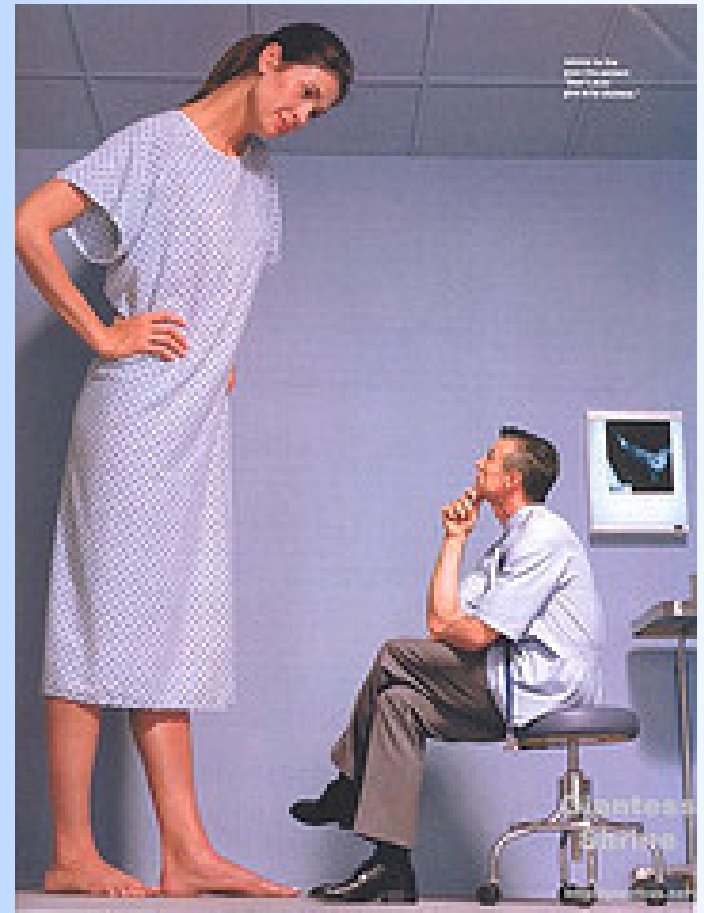
Consumers and policymakers have been hesitant to question the longstanding dominance of the medical industry.





Until recently...

Patients are (rightly) demanding more from healthcare.





Disrupting the Old Model



Convenient Care has been termed a “**disruptive innovation**” for the impact it has had on thinking about healthcare.





Standard Responses to Change?

Option 1: Ignore



Option 2: Destroy





2007: First Challenges

amednews.com
— THE NEWSPAPER FOR AMERICA'S PHYSICIANS —

PROFESSIONAL ISSUES

AMA meeting: Delegates seek more oversight of retail clinics

The AMA house tries to ensure the clinics don't get special treatment from regulators and insurance companies, and don't compromise quality of care.



Also First Policy Challenges

amednews.com
— THE NEWSPAPER FOR AMERICA'S PHYSICIANS —

PROFESSIONAL ISSUES

Physicians pushing state lawmakers to regulate burgeoning retail clinics

Alarmed by the rapid growth of retail health clinics, some physician organizations are beginning to move past voluntary guidelines toward strict regulation.



The Industry Responds

Standing room only at *DrSN* clinic summit

By ANTOINETTE ALEXANDER WITH ADDITIONAL REPORTING FROM MICHAEL JOHNSEN

PHILADELPHIA — “You’re model is a model whose time has come,” Rosemarie Greco, a top advisor to Pennsylvania Gov. Ed Rendell, told attendees last month at the first-ever Retail Health Clinic Summit. Greco’s keynote speech captured the tone of the first-of-its-kind, half-day conference focused on the emerging trend of convenient care clinics in

retail facilities, which was produced by *Drug Store News* and *Retail Clinician* magazines in partnership with the Convenient Care Association.

Convenient care is here to stay as it bolsters access to health care, closes the socioeconomic gap that is indicative of today’s health care system, enjoys a high patient satisfaction rating and, most important, saves lives every day. That was the key message Hal Rosenbluth, chairman of clinic

operator Take Care Health and president of the Convenient Care Association, had for attendees of the March 19 summit.

“To think that less than a year ago there wasn’t even a CCA, but here we are today with more than 200 people attending a conference,” Rosenbluth noted during his state of the industry address. “It is truly remarkable and I think a testament to the rapid expansion and acceptance of [this] new concept in the delivery of health care.”

Such clinics first emerged at retail in 2000. The number of clinics remained few until last year when more than 300 clinics operated by more than 20 companies began opening their doors. The projections are that the number of clinics will double this year and reach the thousands in 2008 and beyond, Rosenbluth said.

“What brings the group together under the umbrella of the CCA is that they all are united for a common purpose and bond: the need and desire

for providing affordable and accessible health care for all Americans,” noted Tine Hansen-Turton, director of the CCA, during her opening remarks. “It is a need that can’t be ignored with 47 million uninsured and probably another 30 million underinsured.”

In her address, Greco, who serves as director of health care reform under Rendell, talked about the issues of access and affordability of health care for Pennsylvanians, noting that the convenient care industry both enhances access and reduces costs. She specifically discussed Pennsylvania’s health care reform plan—dubbed Prescription for Pennsylvania—especially as it relates to the convenient care industry and nurse practitioners.

The standing-room-only

CCA issues quality standards

PHILADELPHIA, Pa. — In an effort to ensure consistent, high-quality care at retail-based health clinics, the Convenient Care Association unveiled at the Retail Health Clinic Summit last month a new set of standards that clinic member operators are required to meet.



Hal Rosenbluth

The standards, CCA president and chairman of clinic operator Take Care Health Hal Rosenbluth said, go “well beyond” those suggested by the American Medical Association and other major medical bodies, with

specific requirements for licensure, quality control and physician collaboration, among some key areas.

For a complete list of CCA’s 10 standards, log onto www.drugstorenews.com or www.retailclinician.com.



Keynote speaker Rosemarie Greco of Pennsylvania Gov. Ed Rendell’s office told attendees at the inaugural Retail Health Clinic Summit in Philadelphia that the convenient care model “is a model whose time has come.”

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Demonstrating Our Commitment

Quality Standards Comparison					
Category	Standard	AAFP	AAP	AMA	CCA
Scope of Practice	Well-defined	*		*	*
	Limited	*		*	*
Practice Guidelines	Evidence-based	*	*	*	*
Team-based Approach	Continuity of Care	*		*	*
	Compliance with practitioner oversight requirements	*	*	*	*
Referrals	Out of scope	*		*	*
	Follow-on care	*		*	*
	Encourage medical home	*	*	*	*
	Emergency response procedures	*			*
Electronic health record	Data aggregation	*		*	*
	Integration	*		*	*
Provider credentialing	All practitioners			*	*
Quality Monitoring	Peer review				*
	Collaborating physician review				*
	Compliance with evidence-based guidelines	*			*
	Quality and safety outcome analysis				*
	Patient satisfaction analysis				*
Compliance	OSHA			*	*
	CLIA				*
	HIPAA				*
	ADA				*
	CDC Infection Control Guidelines		*	*	*
Consumer empowerment	Health care choices				*
Price	Consumer transparency				*



Researchers/Consumers Agree

Quality of Care in the Retail Health Care Setting Using National Clinical Guidelines for Acute Pharyngitis

James D. Woodburn, Kevin L. Smith and Glen D. Nelson

Comparing Costs and Quality of Care at Retail Clinics With That of Other Medical Settings for 3 Common Illnesses

Ateev Mehrotra, MD; Hangsheng Liu, PhD; John L. Adams, PhD; Margaret C. Wang, PhD; Judith R. Lave, PhD; N. Marcus Thygeson, MD; Leif I. Solberg, MD; and Elizabeth A. McGlynn, PhD

New WSJ.com/Harris Interactive Study Finds Satisfaction with Retail-Based Health Clinics Remains High



Challenges Ongoing!



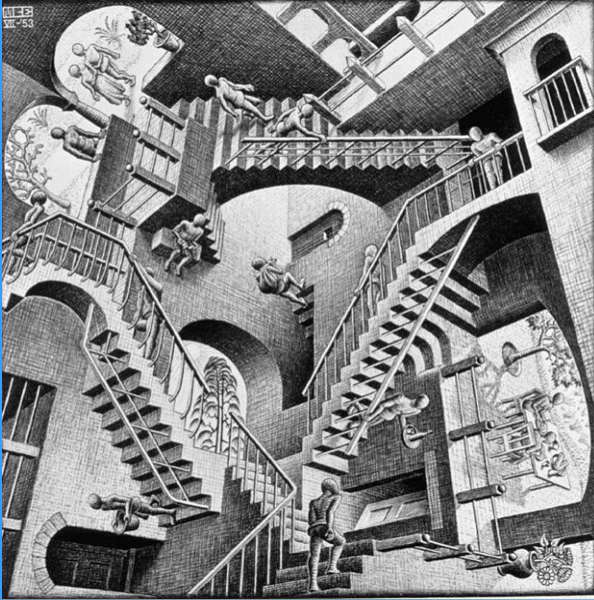


Federal?

- Legislatively, not as much. Reform bills in Congress would not have explicitly supported or limited convenient care.
 - We believe our industry is a crucial element of successful reform.
- Federal Trade Commission
- Centers for Disease Control and Prevention
- Centers for Medicare and Medicaid Services



Next Steps



- State-level issues
- Reform and federal policy
- Education and partnership building
- Driving awareness to create sustainability



Thank you!

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