







HEADWINDS & TAILWINDS FOR THE PAYOR COMMUNITY IN 2023

All Payors	Tailwinds  <ul style="list-style-type: none"> Emerging opportunities for payors to enter into innovative arrangements with newly independent providers and provider groups that have left health systems 	Headwinds  <ul style="list-style-type: none"> Growing payor discontent regarding upcoming coverage of the full cost of COVID-19 vaccines without cost-sharing and COVID-19 therapeutics as the federal government steps back from purchasing Upcoming expected volatility in enrollment and member mix as Medicaid redeterminations start in April 2023 [CAA23]
Pharmacy Benefit Managers	Tailwinds  <ul style="list-style-type: none"> Increasing competition for PBM services for employer plans and sponsors Growing opportunities for subcontracting due to the uptick in the adoption of pharmacy carveouts by state Medicaid programs Multi-year delay in the effective date of the drug rebate rule reduces pressure to abandon rebating practices in lieu of purchase price reductions [IRA] 	Headwinds  <ul style="list-style-type: none"> Increasingly anti-PBM regulatory and legislative landscape on both the state and federal levels, particularly from the Federal Trade Commission and both parties in Congress Growing antitrust scrutiny of PBM behavior with regards to network rate play and network leasing Uncertainty regarding the role of PBMs following the implementation of the IRA
Commercial & Employer Plans	Tailwinds  <ul style="list-style-type: none"> Emerging opportunities for innovation in coverage for reproductive healthcare services and travel benefits more broadly in response to the Dobbs decision Growing use of utilization management tools and other vendor solutions due to changes in risk adjustment Potential enrollment increases in the individual marketplace plans as individuals leave Medicaid Growing employer interest in testing disease management primary care models 	Headwinds  <ul style="list-style-type: none"> Increasing price and administrative pressure due to recent price transparency and surprise billing requirements Intensifying scrutiny regarding coverage of reproductive healthcare services in response to the Dobbs Supreme Court decision

CAA23 = The Consolidated Appropriations Act, 2023
IRA = The Inflation Reduction Act

EPSTEIN
BECKER
GREEN

EBG
advisors



National Health Advisors



www.ebglaw.com



www.ebgadvisors.com



National Health Advisors

www.nationalhealthadvisors.com



James Boiani

Washington, DC

JBoiani@ebglaw.com

202.861.1891



Amy K. Dow

Chicago

adow@ebglaw.com

312.499.1427



John Eriksen

Washington, DC

JEriksen@ebglaw.com

202.861.1853



Ted Kennedy

Stamford

EKennedy@ebglaw.com

203.326.7426



Mark E. Lutes

Washington, DC

mlutes@ebglaw.com

202.861.1824



David E. Matyas

Washington, DC

dmatyas@ebglaw.com

202.861.1833



Timothy Murphy

Boston

TMurphy@ebglaw.com

617.603.1077



Alaap Shah

Washington, DC

ABShah@ebglaw.com

312.499.1427



Lynn Shapiro Snyder

Washington, DC

lsnyder@ebglaw.com

202.861.1806



Joel Brill, M.D.

EBG Advisors

joel.brill@predictivehealth.com

443.663.1352



David J. McNitt

National Health Advisors

dmcnitt@thenationalgroup.net

202.496.3459