Market Assessment - Value-based Adherence Program Readiness Ranking

Scoring: Strong = 2, Partial = 1, Not public = 0 (maximum 12). **Tiers:** Ready Now = conversation ready; market posture and/or data present, score 7+. Ready with a Data Ask = need to vet supporting evidence, score under 7. Accelerator = manufacturer or vendor platforms a payer cannot contract with for the device service, but can support non-Accelerator.

#	Company / Program	Device	Type	Objective Data Signal	Active Outreach	Published Adherence Result	Cost Evidence	Payer Arrangement Precedent	Directly Contractable	Score /12	VBC Readiness
1	**Solventum (formerly KCI)** iOn Progress™ Program	NPWT	Manufacturer-supplier	Strong	Strong	Strong	Strong	Strong	Strong	12	READY NOW
2	**BetterNight** Clarity adherence platform	CPAP	Virtual sleep provider	Strong	Strong	Partial	Partial	Partial	Strong	9	READY NOW
3	**AdaptHealth** Sleep coaching & success programs	CPAP	National DME	Strong	Strong	Partial	Not public	Partial	Strong	8	READY NOW
4	**Apria (Accendra Health)** Apria Sleep Care/NPWT Support	CPAP + NPWT	National DME	Strong	Strong	Not public	Not public	Partial	Strong	7	READY NOW
5	**Rotech Healthcare** SleepWELL™ Program	CPAP	National DME	Strong	Strong	Not public	Not public	Not public	Strong	6	READY WITH A DATA ASK
6	**Lincare** Sleep support - SleepCircle® app	CPAP	National DME	Strong	Partial	Not public	Not public	Not public	Strong	5	READY WITH A DATA ASK
7	**Philips** Patient Adherence Services	CPAP	Manufacturer service to DMEs	Strong	Strong	Strong	Not public	Not public	Not public	6	ACCELERATOR
8	**ResMed** myAir™ + AirView™	CPAP	Manufacturer platform	Strong	Partial	Strong	Not public	Not public	Not public	5	ACCELERATOR
9	**rtNOW** PAP Adherence (1-to-1 RT model)	CPAP	Vendor to DMEs	Strong	Strong	Partial	Not public	Not public	Not public	5	ACCELERATOR
10	**VGM Group** Total Sleep Services	CPAP	Vendor to HMEs/DMEs	Strong	Partial	Partial	Not public	Not public	Not public	4	ACCELERATOR

Ranked by tier, then score. Ratings reflect public sources only, and most metrics are company-reported. A low score means "not public," not "not capable."

Based on publicly available information as of September 2026. For informational purposes only; not legal, financial, actuarial, clinical, or compliance advice.

What is public, where to enter the DAV framework, and the first ask

Company / Program	Market Stance	Public Performance Metrics	How to Build On It - questions teams can ask today
1. Solventum (formerly KCI) iOn Progress™ Program **NPWT | Score 12/12**	Payer-facing adherence program piloted Dec 2016; launch cited as 2017 Peformance-based payer agreement with Highmark announced Dec 2018	- 73.5% of patients increased therapy use the day after an adherence call (avg. +8 hrs). - Highmark claims: adjusted 90-day wound-related cost $11,119 vs. $14,752 without monitoring; $3,753 total savings per patient (3M-authored; unadjusted difference not significant).	Replicate the Highmark design in your own claims: run a 90-day adherent vs. non-adherent cost study with Solventum-supplied adherence data, then move to a composite scorecard on wound-related non-NPWT cost. Scope is device-specific (ActiV.A.C.™ with the monitoring module).
2. BetterNight Clarity adherence platform **CPAP | Score 9/12**	No named program but markets population-level adherence reporting to payers.	- Self-reported Medicare adherence of 75%–85%; 50,000+ patients monitored daily. - Other company pages cite 67% vs. 33% adherence and a 18–22% total-cost-of-care reduction for adherent patients; sources and methods not shown. Figures are inconsistent across pages.	Request its existing population and patient-level adherence reports, plus the methodology behind its adherence and cost claims. Strong candidate for a single-metric adherence scorecard where it already holds network status.
3. AdaptHealth Sleep coaching & success programs **CPAP | Score 8/12**	No formal payer-facing adherence program stated.	- CFO remarks (Mar 2026, secondary summary): adherence monitoring lifts adherence to over 80% vs. ~70% industry-wide. - Resupplies just under 3 times per year vs. an industry average closer to 2. - Operates capitated payer contracts (not adherence-based), indicating readiness for performance terms.	At rate renewal, request monthly patient-level adherence reporting and a 3-year retrospective adherent-patient list for the cost study. Ask for the definition and denominator behind the 80% figure.
4. Apria (Accendra Health) Apria Sleep Care; NPWT Support Team **CPAP + NPWT | Score 7/12**	No formal payer-facing adherence program stated but sleep coaches and data sharing supported.	- No adherence or cost results published. - Program elements: remote PAP monitoring, sleep coaches trained in motivational enhancement therapy, adherence data shared with physicians, Supplies on Schedule resupply. - Health-plan-facing materials describe coaching, reminders, and adherence monitoring for plan members.	Serves both CPAP and NPWT nationally: a candidate for a multi-device scorecard. Start with the CPAP cost study. Apria already sends adherence data to physicians, so a payer reporting feed extends an existing workflow.

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How this market assessment was built

Programs were identified through public company websites, press releases, trade publications, and peer-reviewed literature. Last updated in September 2026. Ratings are based only on what each organization has made public; programs were not contacted, and no figure has been independently verified. Company-funded or company-authored journal publications and studies are identified as such. Where an organization's own figures conflict, the conflict is noted rather than resolved. Program start years are listed only where a public source supports them. Market conditions and ownership change quickly; users of this assessment should verify current company and program details before use.

1	**Apria**. Empowering apnea patients: a personal touch of Apria (2025). https://www.apria.com/clinical-education-hub/empowering-sleep-apnea-patients-the-local-and-personal-touch-of-apria
2	**Apria**. Sleep Support. https://www.apria.com/services/sleep-apnea/support
3	**Apria and Byram**. Patient Direct health plan brochure. https://www.apria.com/hubfs/documents/ACMA-files-2024/PD465_Patient%20Direct_Brochure_Digital.pdf
4	Owens & Minor announces corporate name change to Accendra Health, Inc. Business Wire, Dec 18, 2025. https://www.businesswire.com/news/home/20251218694572/en/Owens-Minor-Announces-Corporate-Name-Change-to-Accendra-Health-Inc
5	**KCI** 10,000-patient milestone with iOn PROGRESS Remote Therapy Monitoring. Oct 25, 2018. https://www.biospace.com/kci-achieves-10-000-patient-milestone-with-ion-progress-remote-therapy-monitoring
6	**KCI** announces first-of-its-kind NPWT agreement with Highmark. Business Wire, Dec 18, 2018. https://www.businesswire.com/news/home/20181218005076/en/KCI-Announces-First-of-its-Kind-Negative-Pressure-Wound-Therapy-Agreement-with-Highmark-to-Improve-Patient-Engagement-Raise-Adherence-and-Lower-Costs
7	Griffin LP, Sifuentes MM. Remote monitoring saves costs in outpatient negative pressure wound therapy. Am J Manag Care. 2022;28(2):53-58. https://www.ajmc.com/view/remote-monitoring-saves-costs-in-outpatient-negative-pressure-wound-therapy
8	Griffin L, Casillas LL. Evaluating the impact of a patient-centered remote monitoring program on adherence to NPWT. Wounds. 2018. https://pubmed.ncbi.nlm.nih.gov/29584605/
9	**AdaptHealth** conference: CFO details CPAP recurring revenue. MarketBeat, Mar 2026 (secondary summary). https://www.marketbeat.com/instant-alerts/adapthealth-conference-cfo-details-cpap-recurring-revenue-faster-setups-and-capitated-contract-growth-2026-03-03/
10	Sleep Review. CPAP Adherence Solutions Guide (July 2026; vendor-submitted data). https://sleepreviewmag.com/sleep-diagnostics/home-testing/cpap-data/cpap-adherence-solutions-guide/
11	**BetterNight**. Better Night for Value Based Care. https://betterhealth.betternight.com/value-based-care/
12	**BetterNight**. Lowering costs and improving outcomes: a virtual-care sleep solution (2023). https://betternight.com/news/virtual-care-sleep-solution
13	**Rotech Healthcare**. SleepWELL. https://www.rotech.com/sleepwell/
14	**Lincare**. Sleep apnea usage compliance/insurance reqs. https://www.lincare.com/resources/Lincare-Learning-Center/Sleep-Apnea-Patients-Usage-Compliance-and-Insurance-Requirements
15	**Philips**. PAMS digital toolkit (company analysis). https://www.philips.com/c-dam/b2bhc/master/landing-pages/remote-services-toolkit/pr-home-delivery-and-remove-setup-pams-digital-toolkit.pdf
16	Impact of an extended telemonitoring and coaching program on CPAP adherence. PubMed 35858100. https://pubmed.ncbi.nlm.nih.gov/35858100/
17	**ResMed** news release: myAir and AirView compliance study. https://s24.q4cdn.com/283298860/files/doc_news/archive/de3c8e79-f453-4cb3-a09b-a18092fafc73.pdf
18	**ResMed** news release: myAir usage associated with high adherence to CPAP therapy. https://s24.q4cdn.com/283298860/files/doc_news/archive/3fa90086-b00b-48e2-9b9b-65998f4cfe3e.pdf

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