

HCAI Health of Primary Care in California Snapshot Workgroup

September 9, 2026

Agenda

9:00 a.m. **Welcome and Review of Meeting Format**

9:05 a.m. **Review of 2026 Primary Care Snapshot Timeline**

9:10 a.m. **Review Feedback from July Snapshot Workgroup Meeting**

9:20 a.m. **Preview of Select 2026 Primary Care Snapshot Indicator Data**

10:15 a.m. **Next Steps**

10:30 a.m. **Adjournment**

Primary Care Snapshot Workgroup Members

Providers & Provider Organizations



Eric Ball, MD

Chair, Board of Directors, American Academy of Pediatrics in California (AAP-CA)

Rene Bravo, MD

President, California Medical Association (CMA)

Lisa Folberg, MPP

Chief Executive Officer, California Academy of Family Physicians (CAFP)

Susan Huang, MD

Chief Medical Officer, America's Physician Groups (APG)

Melissa Marshall, MD

Chief Medical Officer, California Primary Care Association (CPCA)

Jeremy Meis, PA-C, MPH

Immediate Past President, California Academy of Physician Associates (CAPA)

Aimee Paulson, DNP, MSN

President, California Association for Nurse Practitioners (CANP)

Health Plans



Edward Juhn, MD, MBA, MPH

Chief Medical Officer, Inland Empire Health Plan (IEHP)

Todd May, MD

VP Medical Director, Health Net

Consumer Reps & Advocates



Selene Betancourt, MPP

Associate Policy Director, California Pan-Ethnic Health Network (CPEHN)

Diana Douglas, MA

Director of Policy and Legislative Advocacy, Health Access

Hospitals & Health Systems



Shunling Tsang, MD, MPH

Chair of Family Medicine, Riverside University Health System (RUHS)

Raul Ayala, MD, MHCM

Ambulatory Medical Officer, Adventist Health

Academic/SMEs



Kevin Grumbach, MD

Professor of Family and Community Medicine, UC San Francisco (UCSF)

Sunita Mutha, MD

Director, Healthforce Center at UCSF

Carlina Hansen, MHA

Senior Program Officer, California Health Care Foundation (CHCF)

Purchasers



Crystal Eubanks, MS-MHSc

VP of Care Transformation, Purchaser Business Group on Health (PBGH)

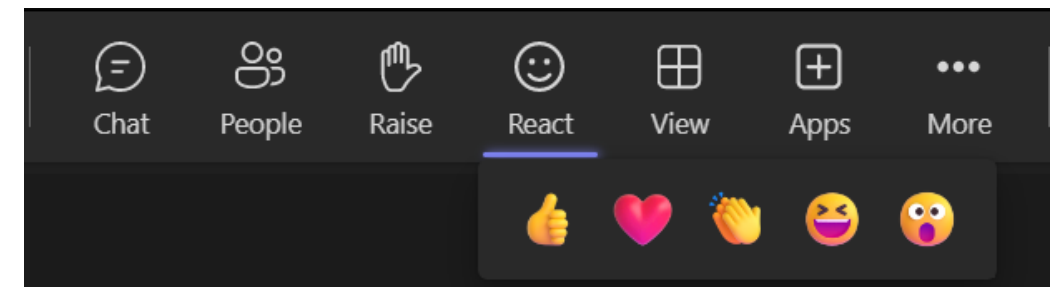
Meeting Format

Workgroup members may provide verbal feedback during the meeting. Non-workgroup members are welcome to participate during the meeting via the chat or provide written feedback to the HCAI team after the meeting.

Meeting recurs the second Wednesday of every other month from 9:00 a.m. – 10:30 a.m., with the following exception:

- Thursday, November 19th, 2026 (rescheduled due to Veterans Day holiday)

- Remote participation via Teams Webinar only
- We will be using reaction emojis, and chat functions



Review of 2026 Primary Care Snapshot Timeline

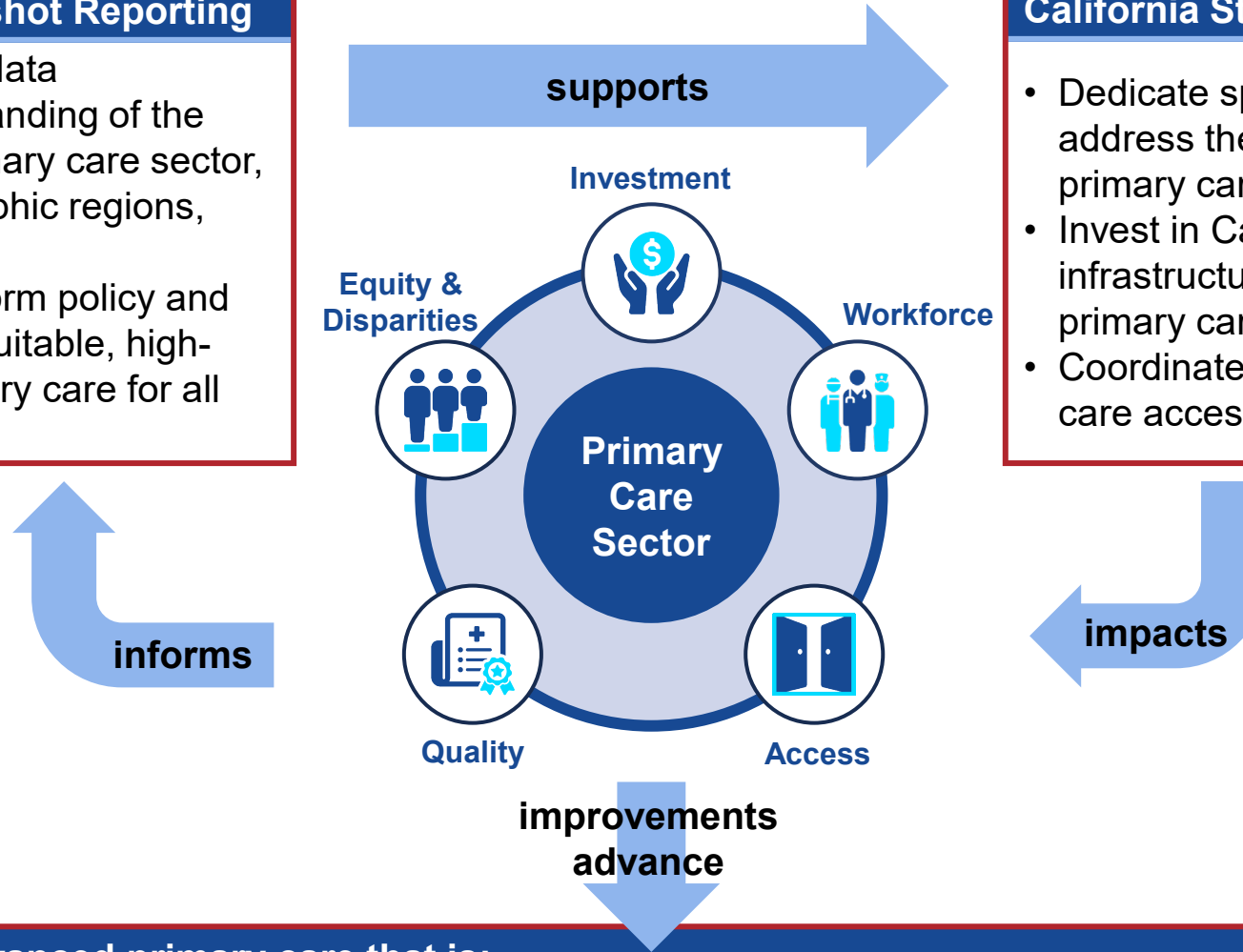
Primary Care Snapshot Overview

HCAI Primary Care Snapshot Reporting

- Curate relevant existing data
- Create a shared understanding of the health of California's primary care sector, statewide and by geographic regions, across five domains
- Identify challenges to inform policy and drive progress toward equitable, high-quality, sustainable primary care for all Californians

California Stakeholders' Actions

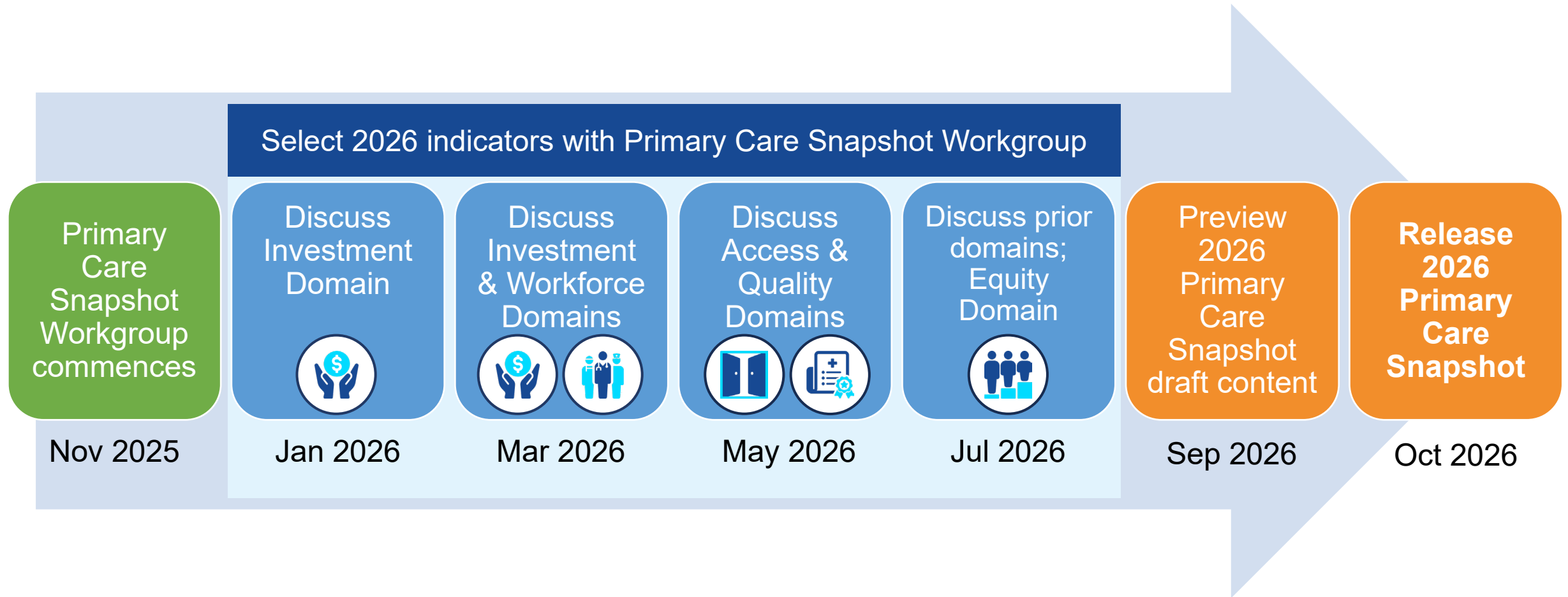
- Dedicate spending and resources to address the challenges facing the primary care sector in California
- Invest in California's primary care infrastructure, such as growing its primary care workforce
- Coordinate efforts to improve primary care access, quality, and equity



High-quality, advanced primary care that is:

- | | | | |
|----------------------|-----------------|-------------------------------|---------------------------------|
| • Accessible | • Team-based | • Person- and family-centered | • Coordinated |
| • Relationship-based | • Comprehensive | • Integrated | • Equitable to all Californians |

2026 Primary Care Snapshot Workgroup Timeline



Review of Feedback from July Snapshot Workgroup Meeting

July Snapshot Workgroup Feedback

Feedback	Response
Equity: Prioritize race/ethnicity and income level stratifications and explore opportunities to weave equity themes throughout all Snapshot domains; interest in exploring Equity as a standalone domain or integrating equity themes across all domains for 2027 interactive Primary Care Snapshot	• Race/ethnicity, Federal Poverty Level, and geography stratifications have all been prioritized for 2026 reporting in the Equity domain • HCAI is considering refining the Equity domain for 2027 by reporting all stratifications for each indicator within its original domain and incorporating new, equity-specific indicators (e.g., linguistic concordance) into the Equity domain
Access: Preference for patients without a primary care visit as the strongest utilization indicator	• Percent of Californians without a primary care visit has been incorporated as an indicator for reporting in the Access domain • HCAI continues to explore opportunities to capture primary care access from the patient perspective in future reporting
Workforce: Interest in future reporting that better captures geographic variation, workforce retention, and measures that reflect clinical practice	• HCAI continues to explore opportunities to report on the workforce based on primary care practice rather than licensure, along with retention in primary care after training and geographic distribution of primary care clinicians

Preview of Select 2026 Primary Care Snapshot Indicator Data

Preview of Select 2026 Primary Care Snapshot Data

- After review of all proposed indicators with the Snapshot Workgroup, HCAI assembled previews of select 2026 Primary Care Snapshot indicators across the five domains for Snapshot Workgroup input
 - Indicators previewed today prioritize findings aligned with key themes or takeaways
 - Not all planned 2026 Primary Care Snapshot indicators are included in this preview
- Visualizations and key takeaways are not yet finalized

2026 Primary Care Snapshot Indicators Previewed for Snapshot Workgroup Discussion

Domain	Presented Indicators
 Investment	Change in total primary care spending, statewide and by market
	Statewide primary care spending as a percent of total medical expense by 2034: Projections and benchmarks
	Primary care spending as a percent of total medical expense (TME)
	Primary care spending per member per year (PMPY)
	<i>Share of primary care spending by payment category</i>
 Workforce	Licensed primary care clinicians per 100,000 by clinician type
	<i>Number of new active primary care physician residents in California</i>
	Percent of primary care physician residents trained in community-based settings, by narrow and broad definitions (California vs. National)

Indicator previewed today

Indicator not previewed today

2026 Primary Care Snapshot Indicators Previewed for Snapshot Workgroup Discussion (continued)

Domain	Presented Indicators
 Access	<i>Percent of Californians who reported having a usual source of care</i>
	Type of usual source of care among Californians by insurance status
	Percent of insured Californians without a primary care visit by age groups
	Percent of insured Californians with continuous primary care over multiple visits
 Quality	California public purchasers' health plans performance at or above the market-specific benchmark on four care quality indicators
	Rate of preventable hospitalizations for chronic conditions by county

Indicator previewed today

Indicator not previewed today

2026 Primary Care Snapshot Indicators Previewed for Snapshot Workgroup Discussion (continued)

Domain	Presented Indicators
 Equity	Percent of Californians who reported having a usual source of care by federal poverty level (FPL)
	Percent of Californians who reported having a usual source of care by race and ethnicity
	Median distance to in-state primary care visits by rural and non-rural geography
	Percent of insured Californians without a primary care visit by rural and non-rural geography
	<i>Percent of insured Californians with continuous primary care over multiple visits by rural and non-rural geography</i>

Indicator previewed today

Indicator not previewed today

Discussion Questions for Select 2026 Primary Care Snapshot Data

- Discussion questions to keep in mind during review, which will be revisited after the data presentation:
 - Which findings from the previewed indicators stood out as most surprising or concerning?
 - Are there any opportunities to improve the actionability for California stakeholders on the key takeaways from the previewed indicators?
 - Are there any other key takeaways from the previewed indicators you suggest we emphasize?

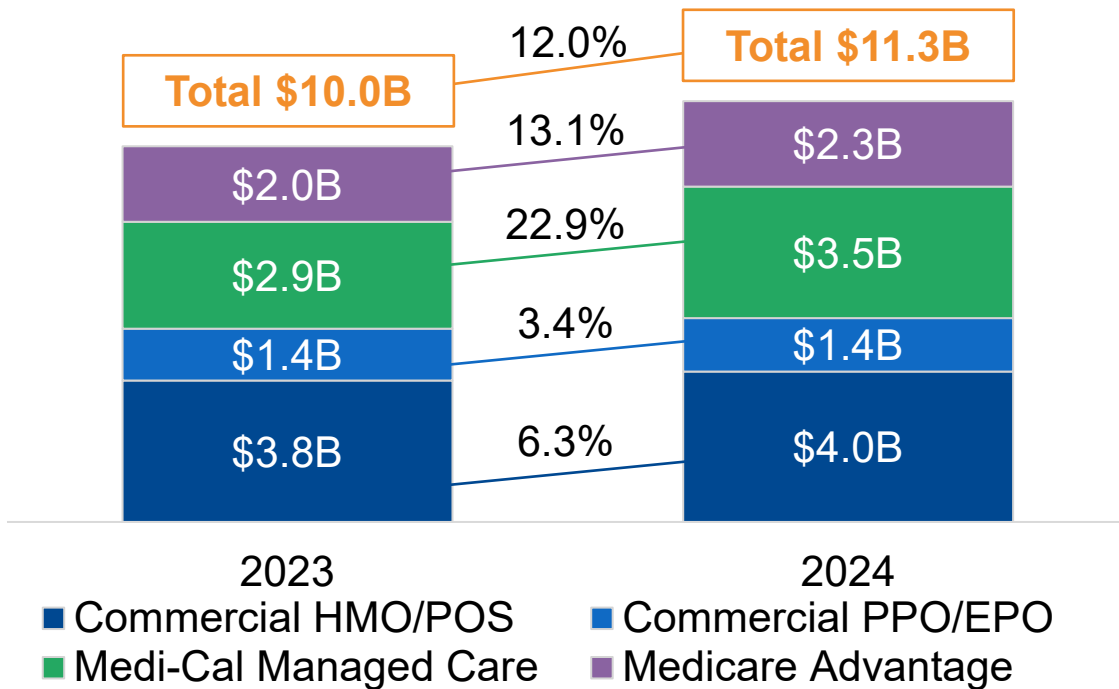
Preview of 2026 Primary Care Snapshot Data



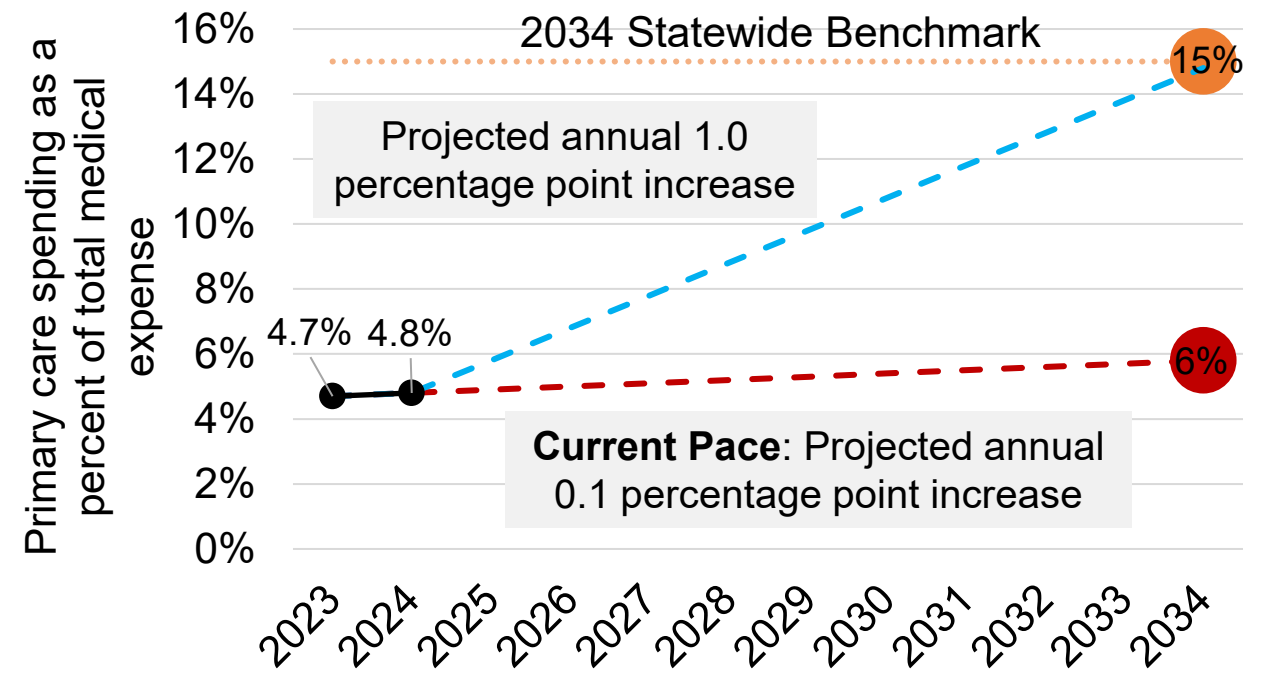
Investment

Investment Key Takeaway #1: While primary care spending is growing, it is not increasing fast enough compared to growth in overall health care spending to meet the state goal of 15% of total medical expense allocated to primary care by 2034.

Change in total primary care spending statewide and by market, 2023-2024



Statewide primary care spending as a percent of total medical expense by 2034: Projections and benchmarks



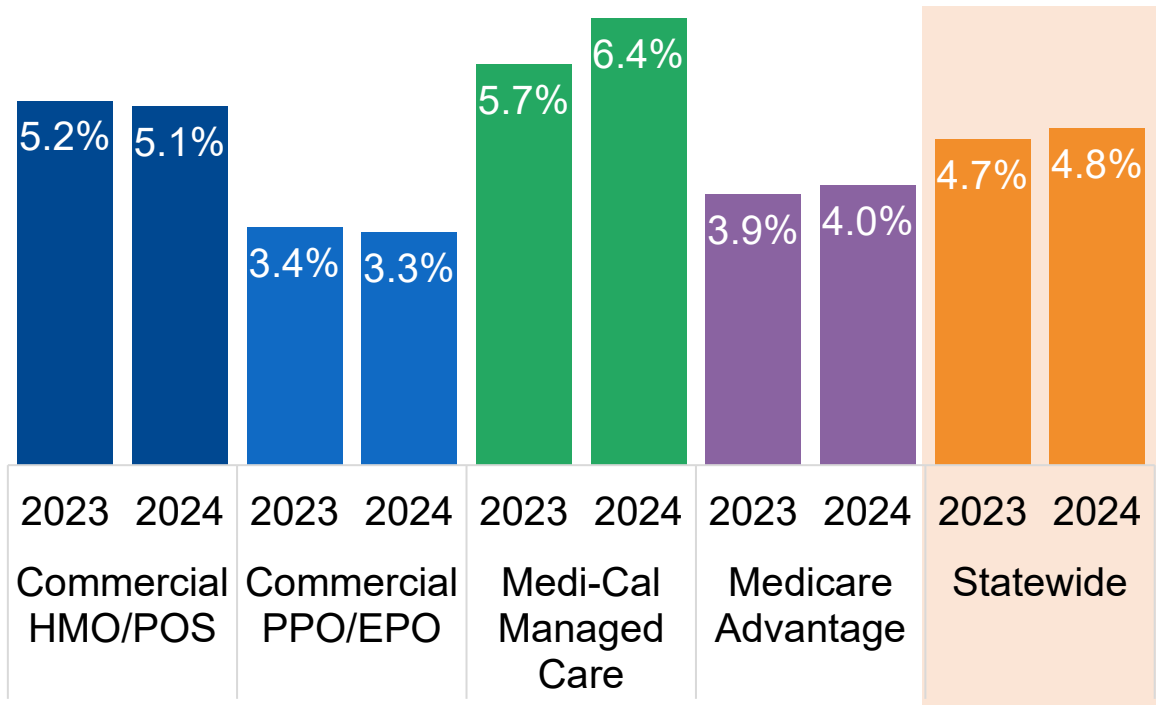
Preview of 2026 Primary Care Snapshot Data



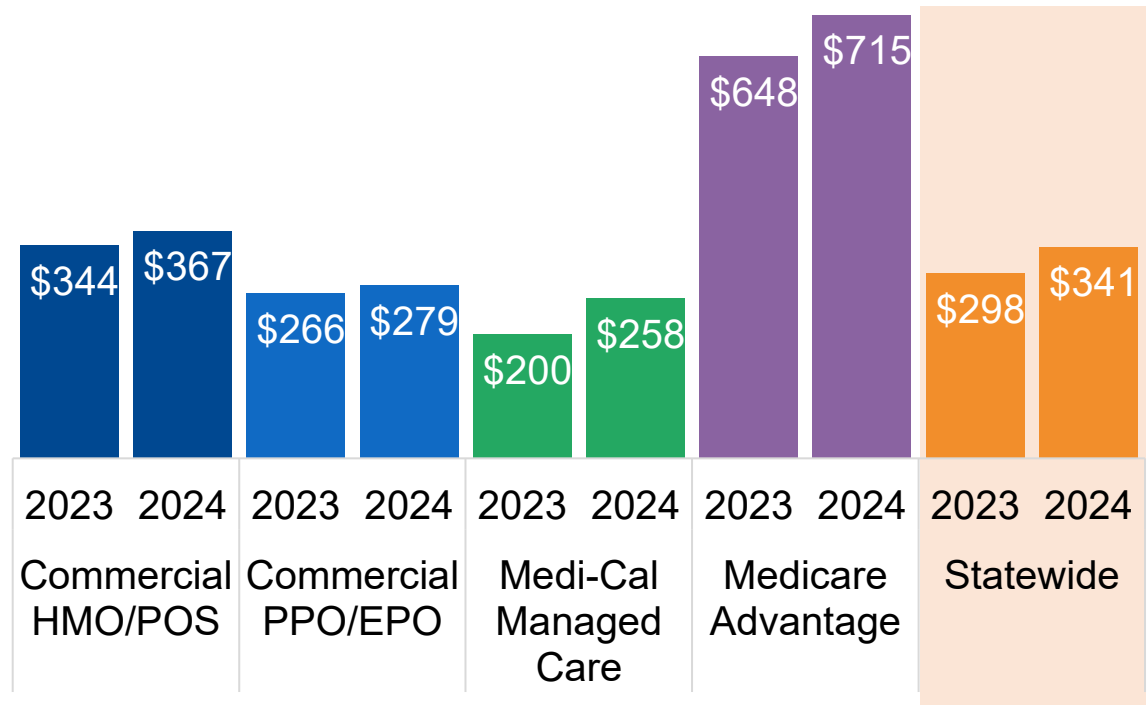
Investment

Investment Key Takeaway #2: The share of primary care spending has dipped in some markets, even while per member per year spending has increased.

Primary care spending as a percent of total medical expense (TME), 2023-2024



Primary care spending per member per year (PMPY), 2023-2024



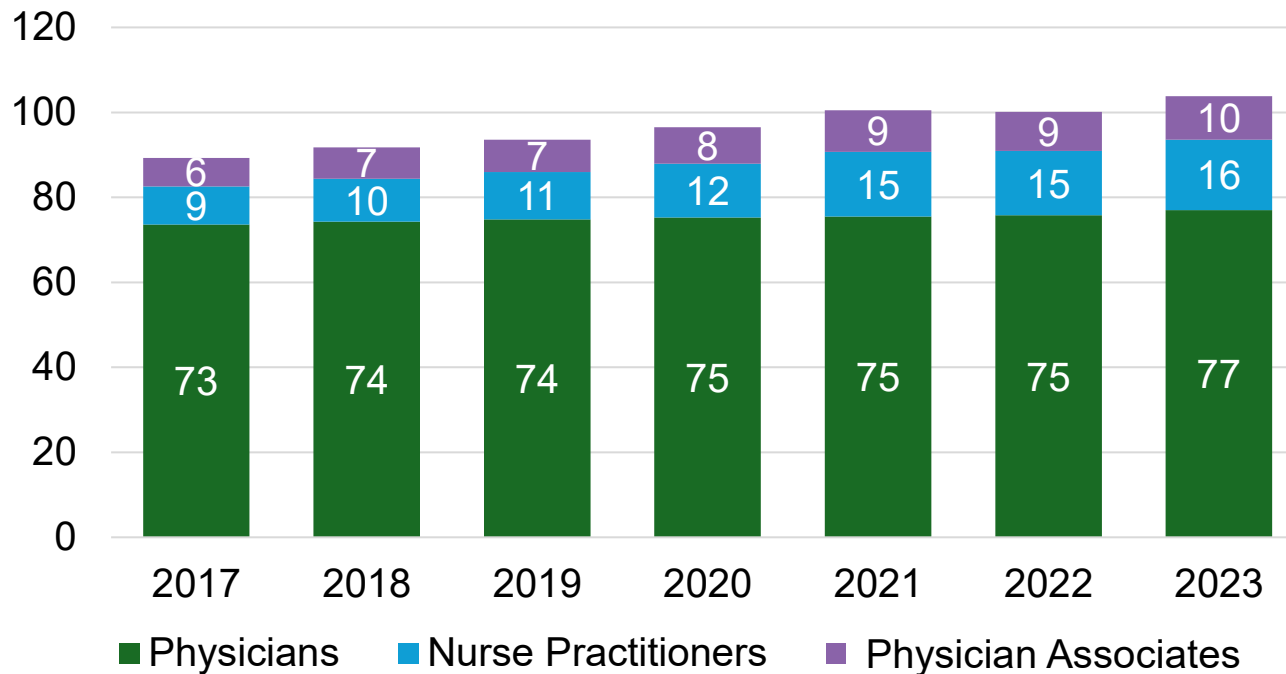
Preview of 2026 Primary Care Snapshot Data



Workforce

Workforce Key Takeaway #1: The number of primary care clinicians, which includes physicians, nurse practitioners, and physician associates, is expanding in California but does not yet meet Californians' healthcare needs.

Licensed primary care clinicians per 100,000 by clinician type, 2017-2023



California had 103 primary care clinicians per 100,000 residents in 2023, just under the national average (106).

Primary care physicians: California's average of 77 physicians per 100K residents is higher than the national average (67).

Nurse practitioners: California's average of 16 nurse practitioners per 100K residents is below the national average (28).

Physician associates: California's average of 10 physician associates per 100K residents is below the national average (11).

Note: While the data source uses the term "physician assistant," we use "physician associate" here in alignment with the professional title.

Source: [Milbank Memorial Fund Primary Care Scorecard Data Dashboard](#), 2026.

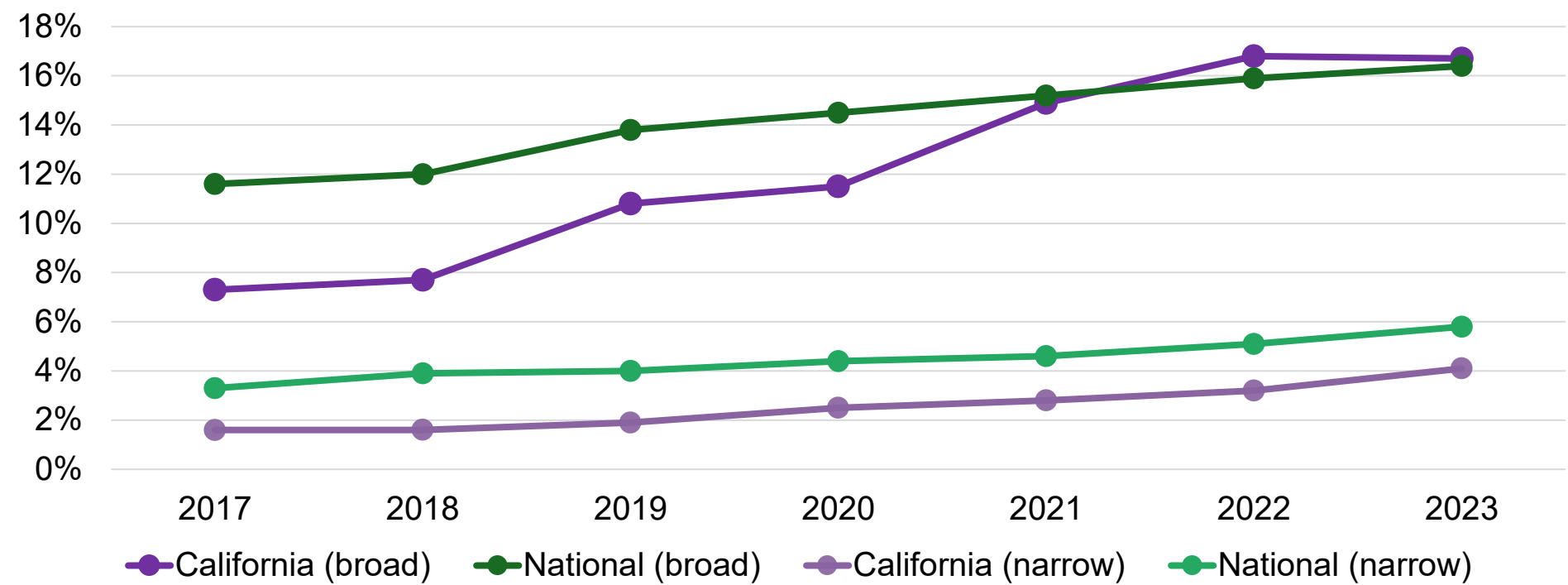
Preview of 2026 Primary Care Snapshot Data



Workforce

Workforce Key Takeaway #2: The number of California primary care physician residents trained in community-based settings is increasing. Based on the broad definition of community-based settings, these figures exceeded the national average in 2022 and 2023.

Percent of primary care physician residents trained in community-based settings, by narrow and broad definitions (California vs. National)

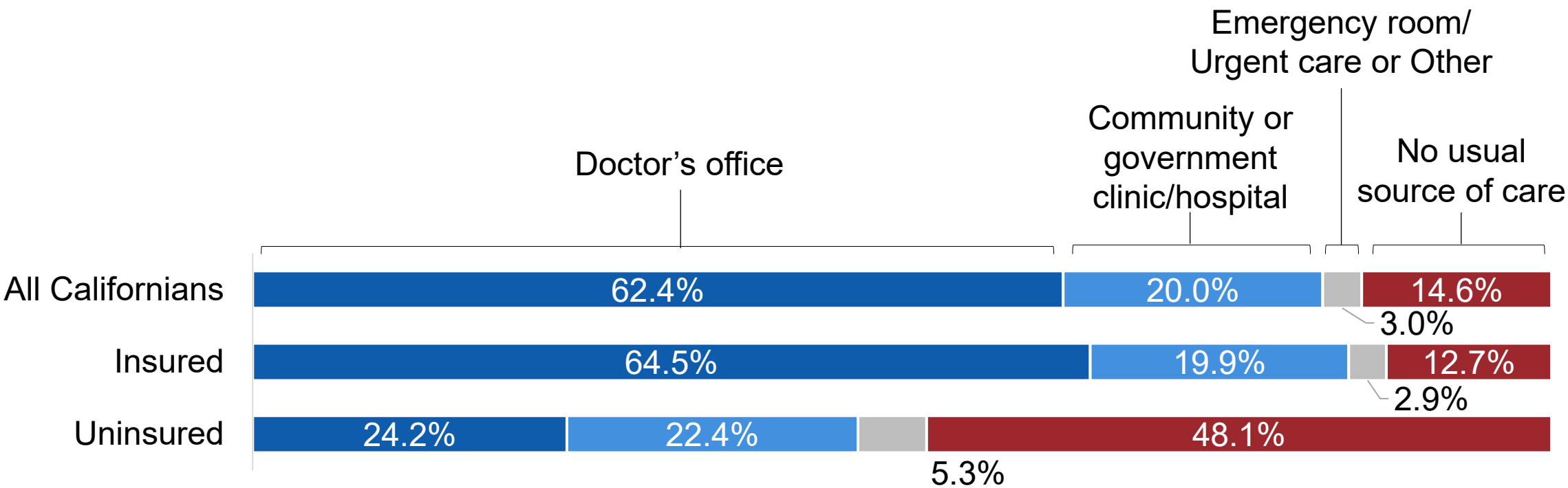


Preview of 2026 Primary Care Snapshot Data



Access Key Takeaway #1: While most Californians (85.4%) reported having a usual source of care, the state lagged behind the national average (90.3%). Furthermore, even Californians with a usual source of care may not be accessing high-quality, preventive primary care.

Type of usual source of care among Californians by insurance status, 2024



Note: “Doctor’s office” includes HMO and Kaiser. “Emergency room/Urgent care or Other” includes Emergency room/Urgent care and Some other place/No one place.

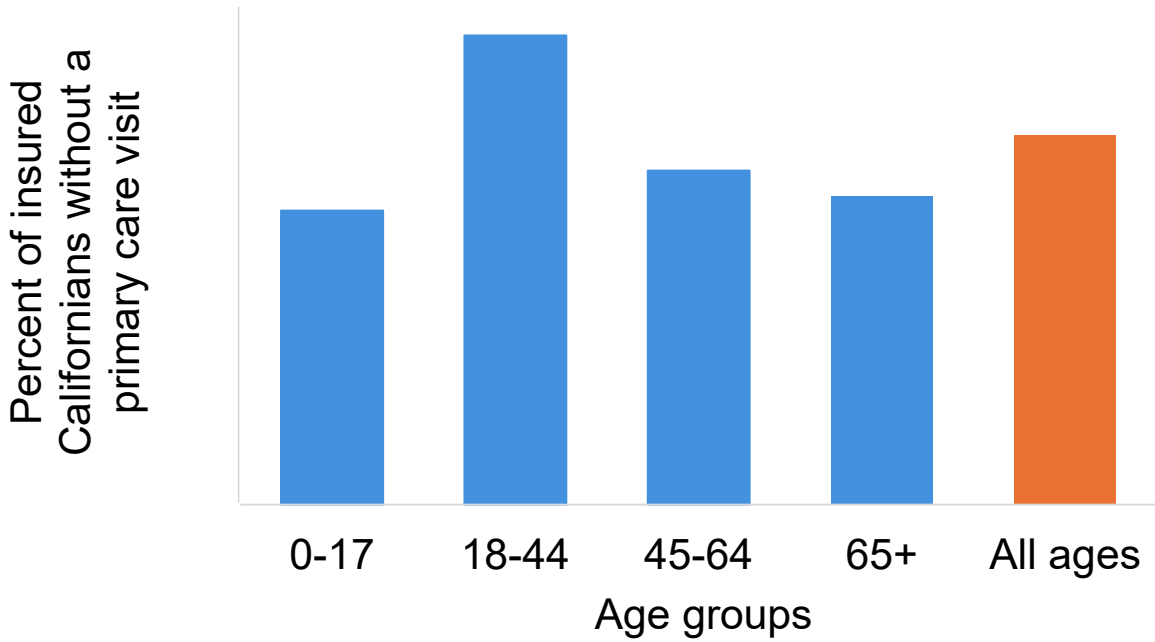
Source: 2024 California Health Interview Survey (CHIS)

Preview of 2026 Primary Care Snapshot Indicators

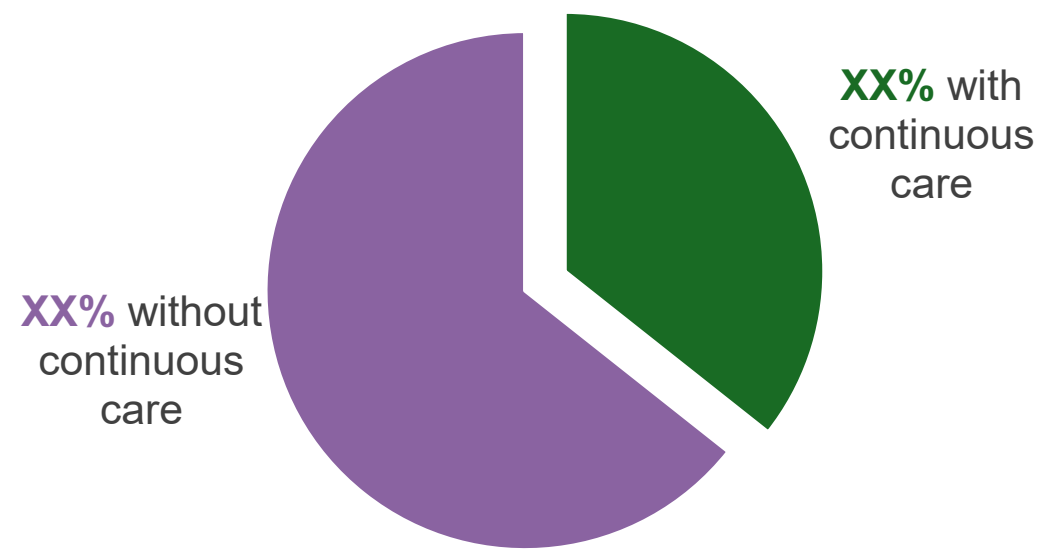


Access Key Takeaway #2: More than XX%* of insured Californians did not have a primary care visit in 2024 and even fewer received continuous care with the same primary care clinician over multiple visits.

Percent of insured Californians without a primary care visit by age groups, 2024*



Percent of insured Californians with continuous primary care over multiple visits, 2024*



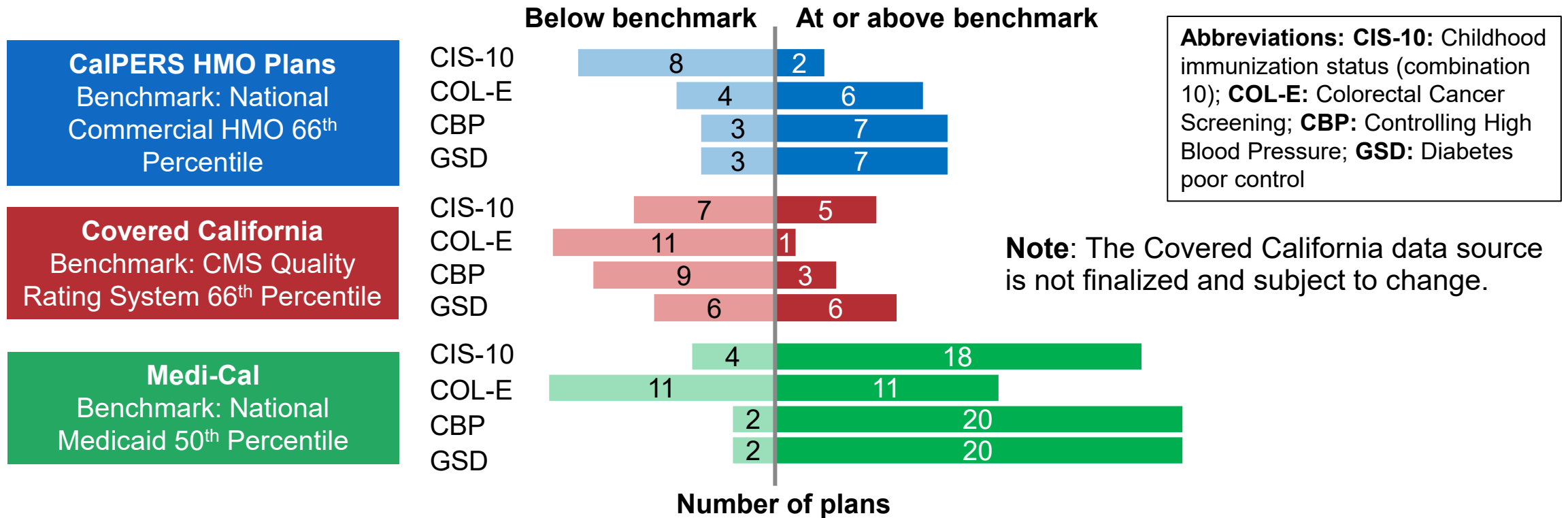
***Note:** Display is for illustrative purposes only.
Source: [HCAI Health Care Payments Data](#)

Preview of 2026 Primary Care Snapshot Data



Quality Key Takeaway #1: California health plans across all public purchasers had variable performance compared to market-specific national performance percentiles on core quality measures.

California public purchasers' health plans performance at or above the market-specific benchmark on four care quality indicators, 2024

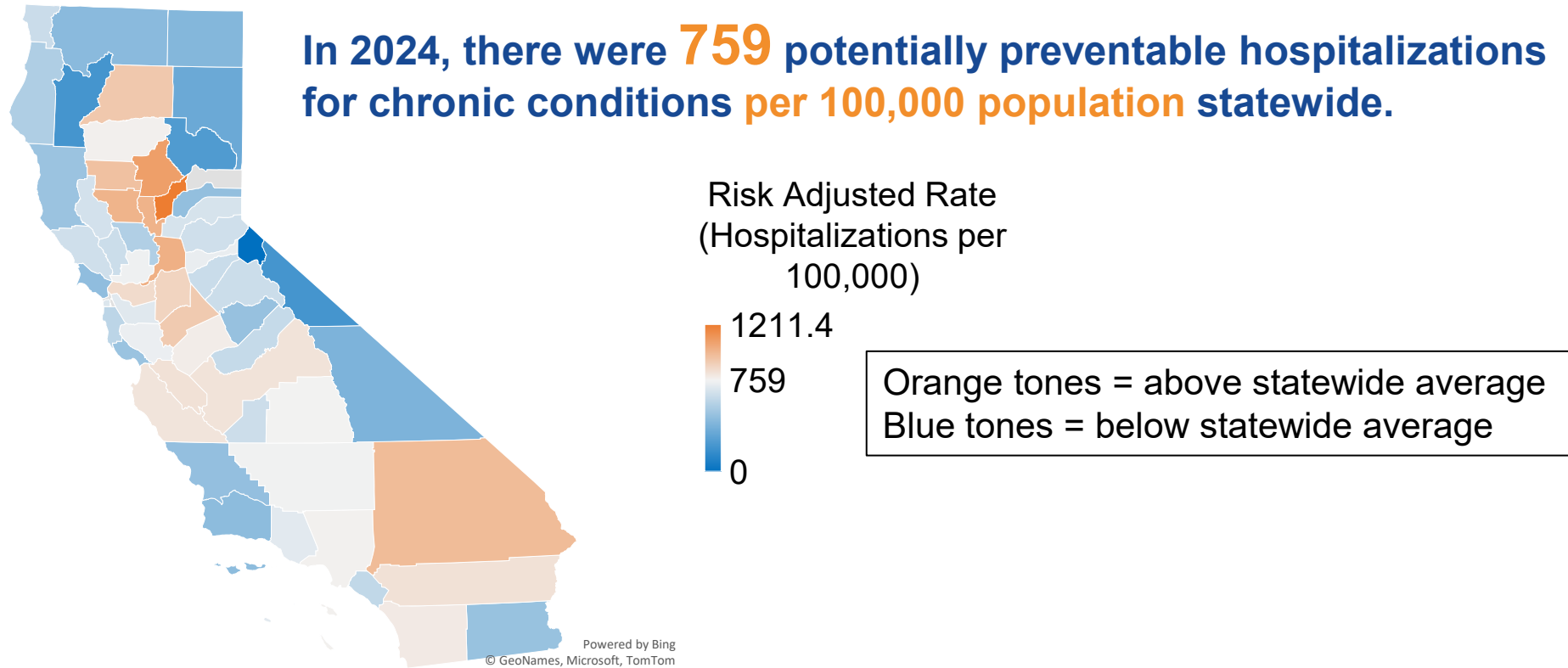


Preview of 2026 Primary Care Snapshot Data



Quality Key Takeaway #2: While California's rate of preventable hospitalizations for chronic conditions is lower than the most recently available national rate (841 per 100,000), these hospitalizations are disproportionately distributed across the state.

Rate of preventable hospitalizations for chronic conditions by county, 2024

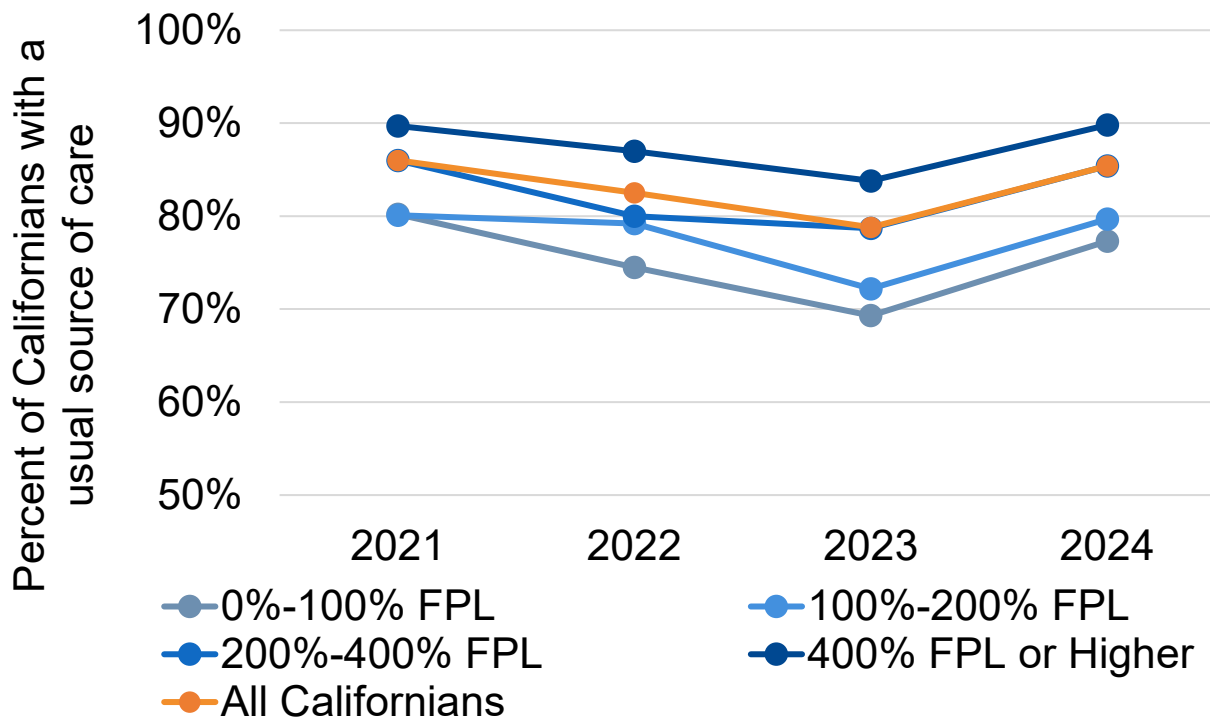


Preview of 2026 Primary Care Snapshot Data

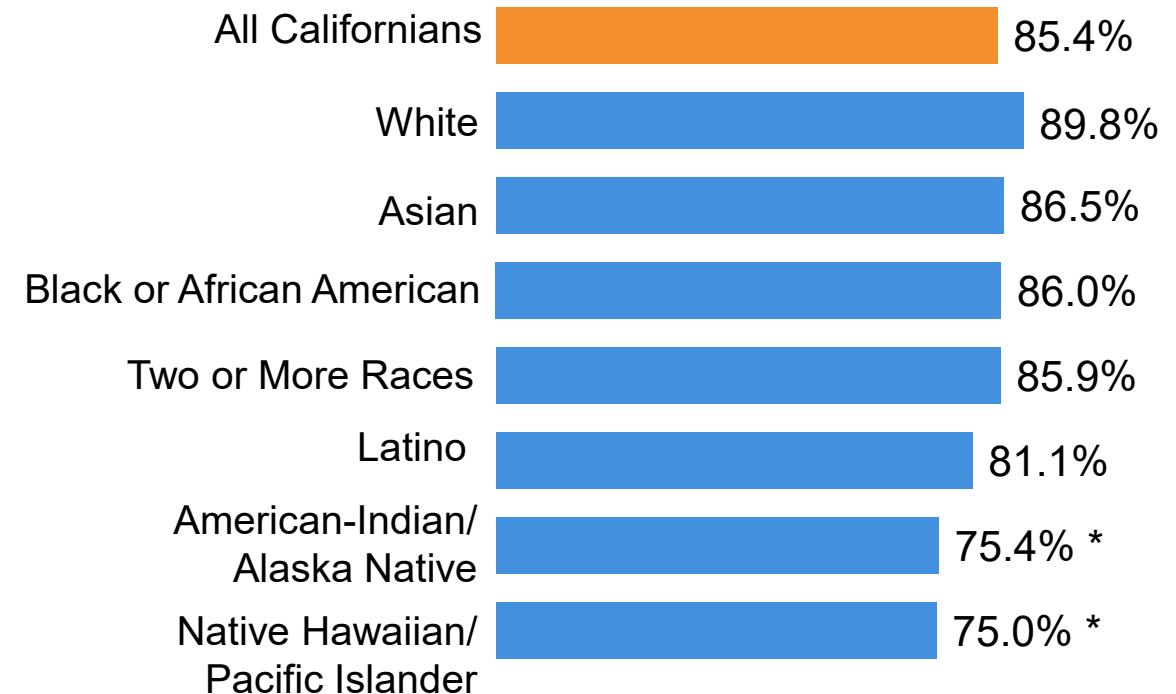


Equity Key Takeaway #1: Uneven rates of reporting a usual source of care across California, with notable differences by income and race and ethnicity, point to underlying disparities in access to primary care.

Percent of Californians who reported having a usual source of care by federal poverty level (FPL), 2021-2024



Percent of Californians who reported having a usual source of care by race and ethnicity, 2024



Note: Values with an asterisk (*) are based on a small sample size and should be interpreted with caution.

Source: [2024 California Health Interview Survey \(CHIS\)](#)

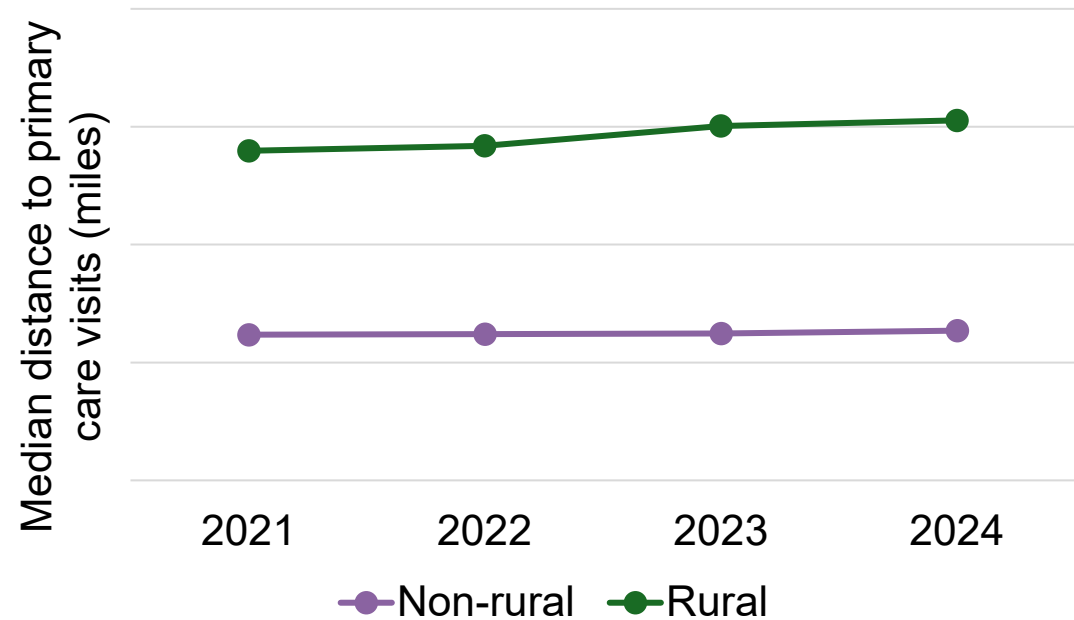
Preview of 2026 Primary Care Snapshot Indicators



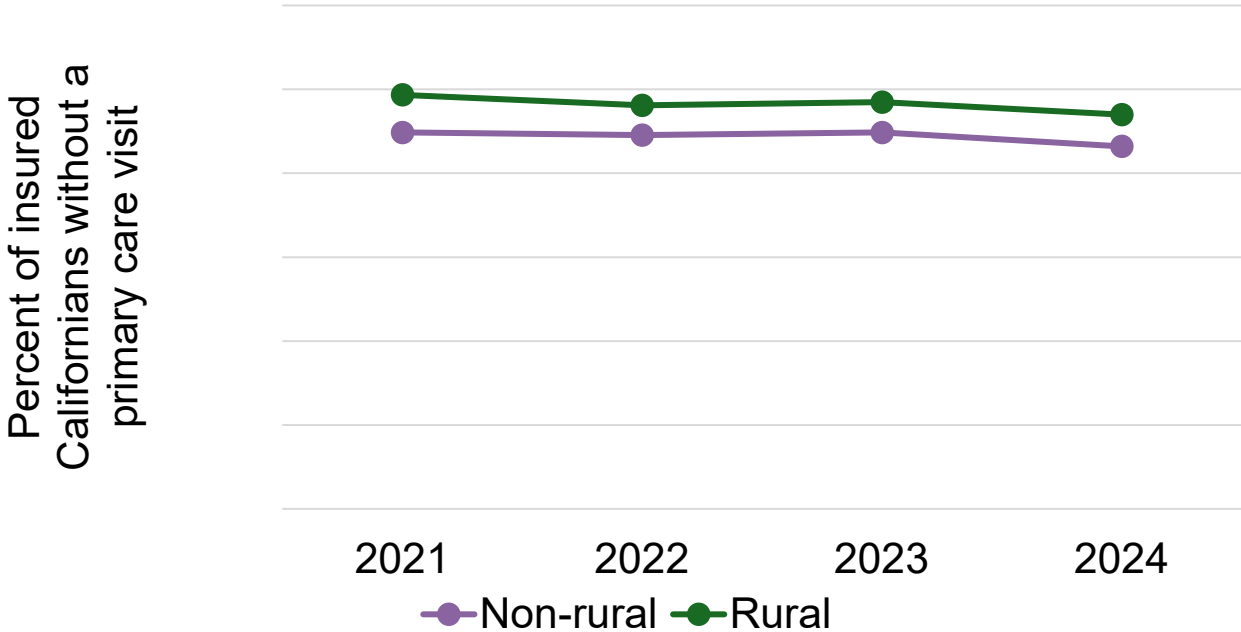
Equity

Equity Key Takeaway #2: Californians in rural communities must travel farther to access primary care. However, among residents who did utilize primary care, continuity of care was stronger in rural areas (XX%) than in non-rural ones (XX%).*

Median distance to in-state primary care visits by rural and non-rural geography, 2021-2024*



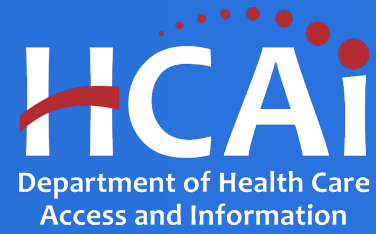
Percent of insured Californians without a primary care visit by rural and non-rural geography, 2021-2024*



*Note: Display is for illustrative purposes only.
Source: [HCAI Health Care Payments Data](#)

Discussion

1. Which findings from the previewed indicators stood out as most surprising or concerning?
2. Are there any opportunities to improve the actionability for California stakeholders on the key takeaways from the previewed indicators?
3. Are there any other key takeaways from the previewed indicators you suggest we emphasize?



Next Steps

Upcoming Snapshot Workgroup Opportunities for 2026 Primary Care Snapshot Promotions

- The 2026 Primary Care Snapshot is planned for release in October 2026
- HCAI is interested in gathering quotes from Snapshot Workgroup members to pair with the 2026 Primary Care Snapshot release
- HCAI plans to share the 2026 Primary Care Snapshot across the following platforms: LinkedIn, Twitter/X, Bluesky
- HCAI will prepare materials for Snapshot Workgroup members to share upon 2026 Primary Care Snapshot release to amplify reach to California audiences

Primary Care Snapshot Next Steps

1. Reach out to Miranda Werts (Miranda.Werts@hcai.ca.gov) with any additional feedback on data findings and actionability
2. HCAI will reach out to Snapshot Workgroup members for opportunities to share quotes for 2026 Primary Care Snapshot release
3. HCAI will finalize 2026 Primary Care Snapshot messaging and layout

Adjournment