

What Does eHI Do?

- Work with our members to influence policy
- Convene multi-stakeholders to build consensus
- Members contribute through virtual forums:
 - Meaningful Use and Health Reform Policy
 - Connecting Communities through Health Information Exchange
 - HIT Infrastructure for Accountable Care
 - Using Health IT to Coordinate Care
 - Data Analytics and Research
- Inform and mobilize through reports, weekly newsletters, educational events and policy alerts.



Housekeeping Issues

- All lines are muted
 - To ask a question or make a comment, please submit via the chat feature and we will address them in the order received at the appropriate time
- Today's webinar is being recorded.
 - Members can access slides and replays of any other webinar for free from eHI's store
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Overview of Our Agenda

- **Welcome and Introductions (11:00 – 11:05 AM)**
 - **Jason Goldwater**, Vice President of Research and Programs

- **Connected Health: The Drive to Integrated Healthcare Delivery (11:05 – 11:50 AM),**
 - **Rick Ratliff**, Accenture Global Managing Director Connected Health Services
 - **Greg Parston**, Former Accenture Director, Institute for Health & Public Service Value

- **Questions and Answers (11:50 AM – 12:25 PM)**

- **Closing (12:25 – 12:30 PM)**
 - **Jason Goldwater**, Vice President of Research and Programs



Health
Insight Driven Health

Connected Health: The Drive to Integrated Healthcare Delivery


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Connected Health – The Future of Integrated Healthcare Delivery

Speakers



Rick Ratliff

Accenture
Global Managing Director
Connected Health Services



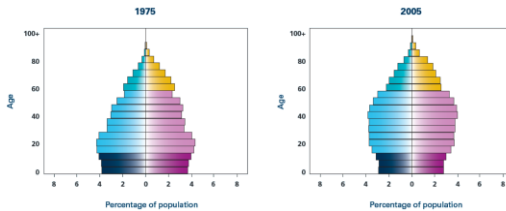
Dr. Greg Parston

Former Accenture
Director, Institute for Health
& Public Service Value

Global Healthcare

The need for change

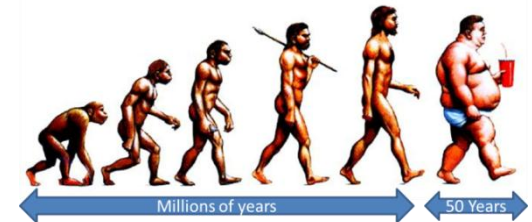
Aging Populations



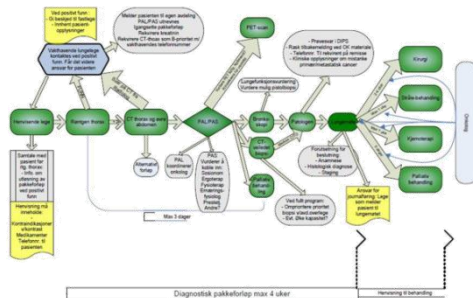
Increased Incidence of Chronic Disease



Decreasing Fitness of Populations



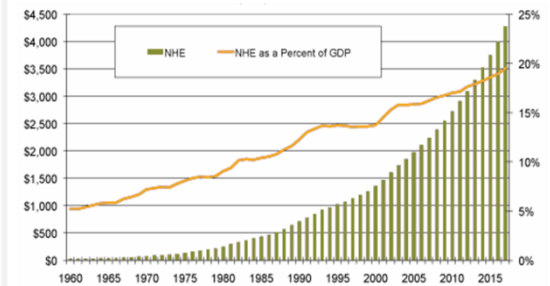
Increasing Patient Complexity



Lifestyle Diseases

- Atherosclerosis
- Chronic liver disease
- Cirrhosis
- Type 2 diabetes
- Nephritis
- Osteoporosis
- Acne
- Stroke
- Depression
- Obesity

Increasing Costs



Care Coordination Across the Continuum

The right care at the right time and at the right place



Health & Wellness

Immunizations
Diet
Exercise
Safety
Health/Wealth
Incentives
Coaching programs

Preventive Care

Screening tests and procedures, e.g..
Mammography
Colonoscopy
Blood Pressure
Screens

Acute Episodic

Scheduled and emergency procedures
Acute illnesses requiring hospital stays (e.g., pneumonia)

Chronic Care

Diabetic glucose monitoring and foot exams
CHF weight fluctuation monitoring
Asthmatics using peak flow meters

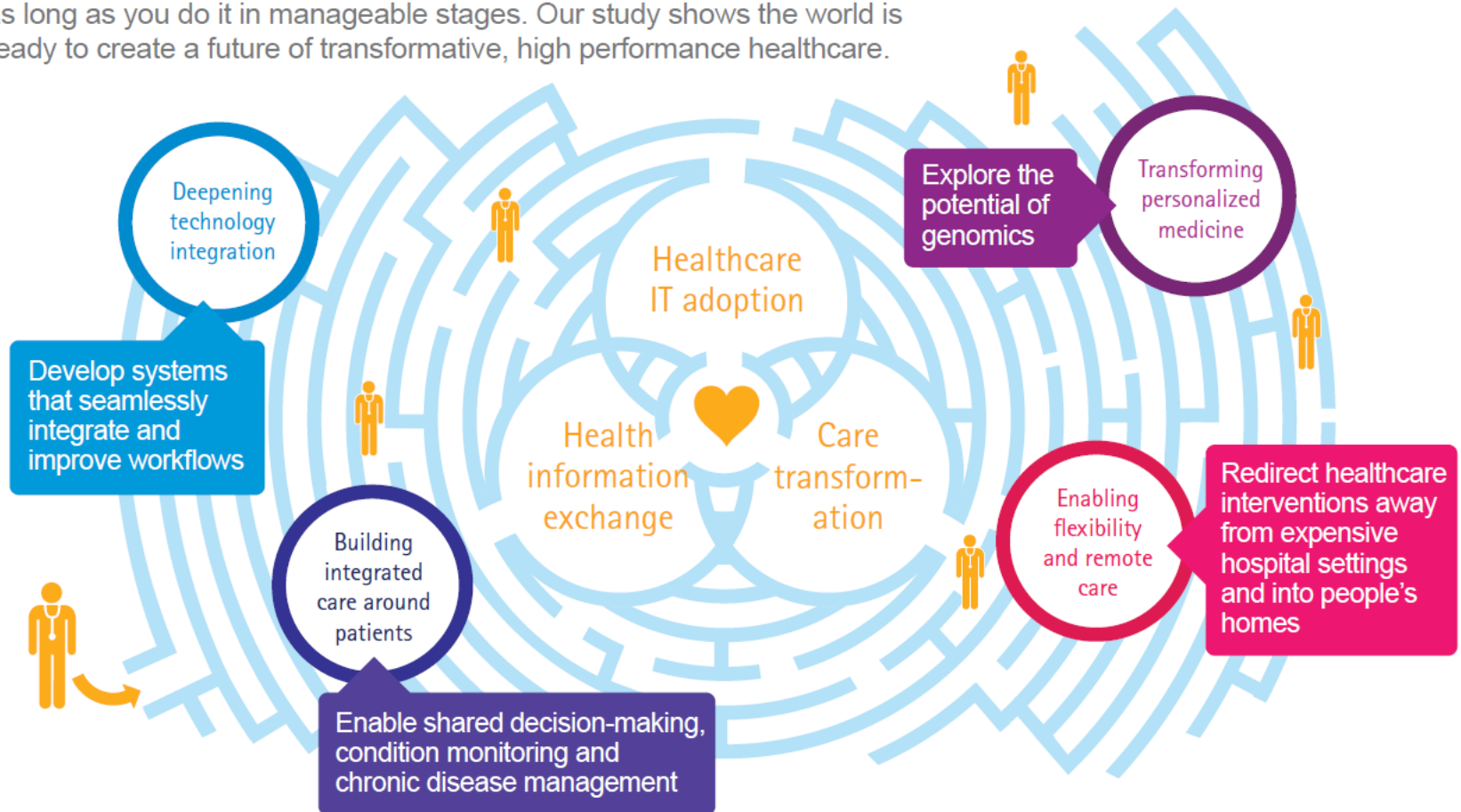
End of Life Care

Hospice care
Counseling for end-of-life treatment decisions

Connected Health Eco-system

Finding your way through the maze

Many roads converge to achieve a successful connected health journey – as long as you do it in manageable stages. Our study shows the world is ready to create a future of transformative, high performance healthcare.



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Connected Health Research Overview

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Global Connected Health Study

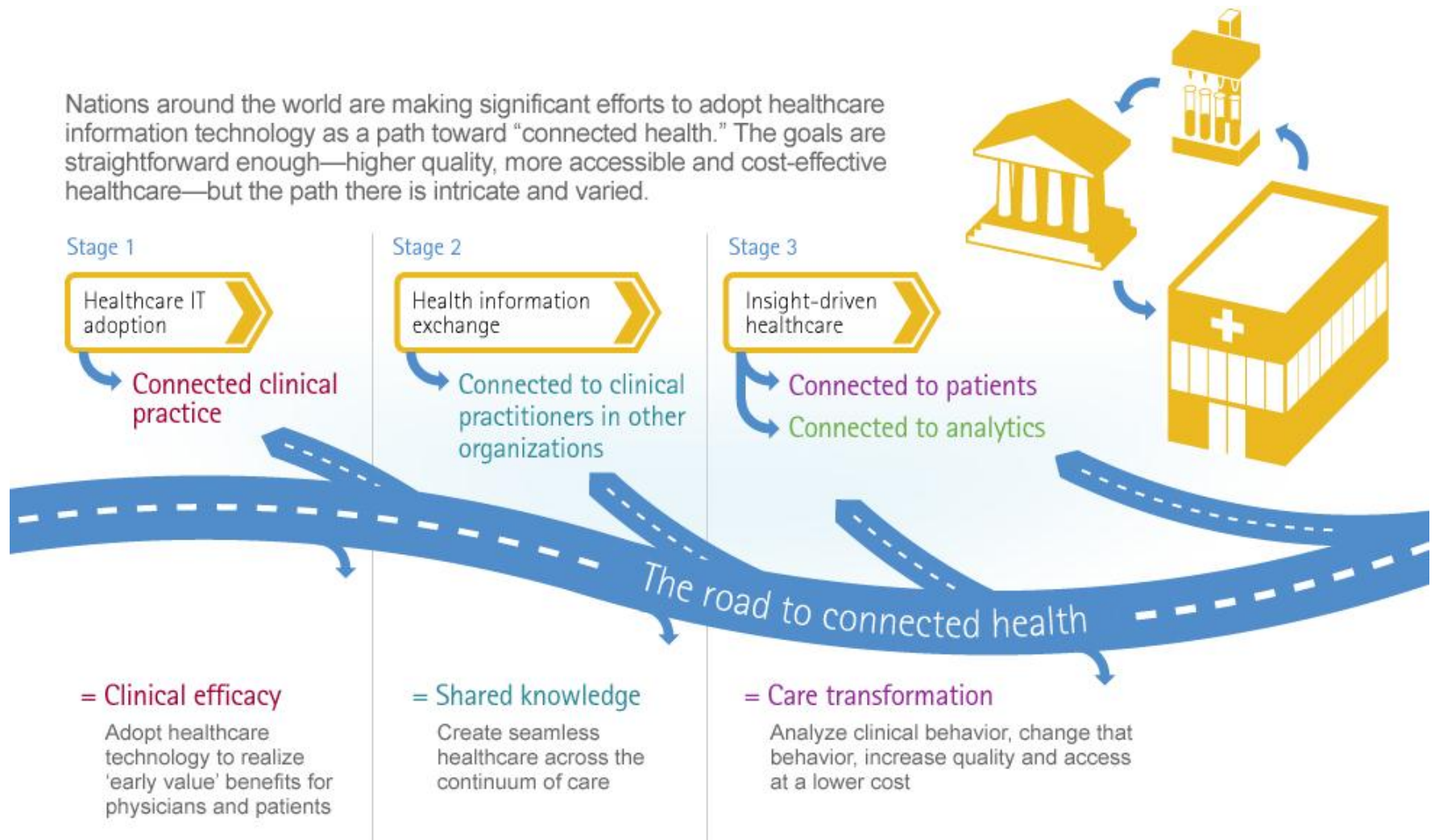
A view from eight countries



Making the Case for Connected Health

Various paths toward a similar objective

Nations around the world are making significant efforts to adopt healthcare information technology as a path toward “connected health.” The goals are straightforward enough—higher quality, more accessible and cost-effective healthcare—but the path there is intricate and varied.



Three Levels of Value Creation

Functionality, level
of integration etc

Clinical efficacy

- A more efficient processing system
- Fewer medical tests
- Improved patient safety and emergency care
- Improved patient experience

Shared knowledge

- Fewer medical errors and increased overall care quality
- Potential for cost savings

Care transformation

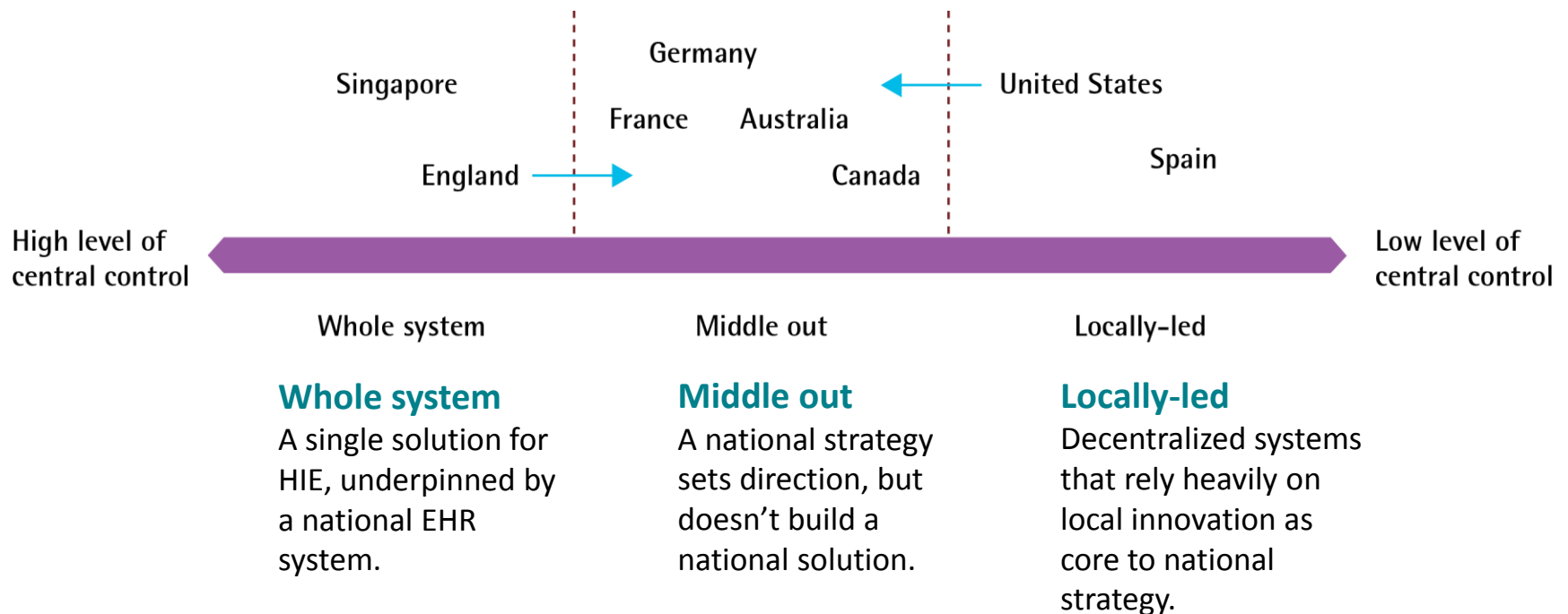
- Potential to dramatically accelerate clinical research
- More accessible and better developed measures of clinical performance
- Patient centered care/patient empowerment
- Increased public health monitoring and disease management

Note: There may be a short period where value is lost as the system 'beds in' after initial go live (e.g. disruptions to existing work flows)

Breadth of adoption
(e.g. number of organizations connected, volume/completeness of data)

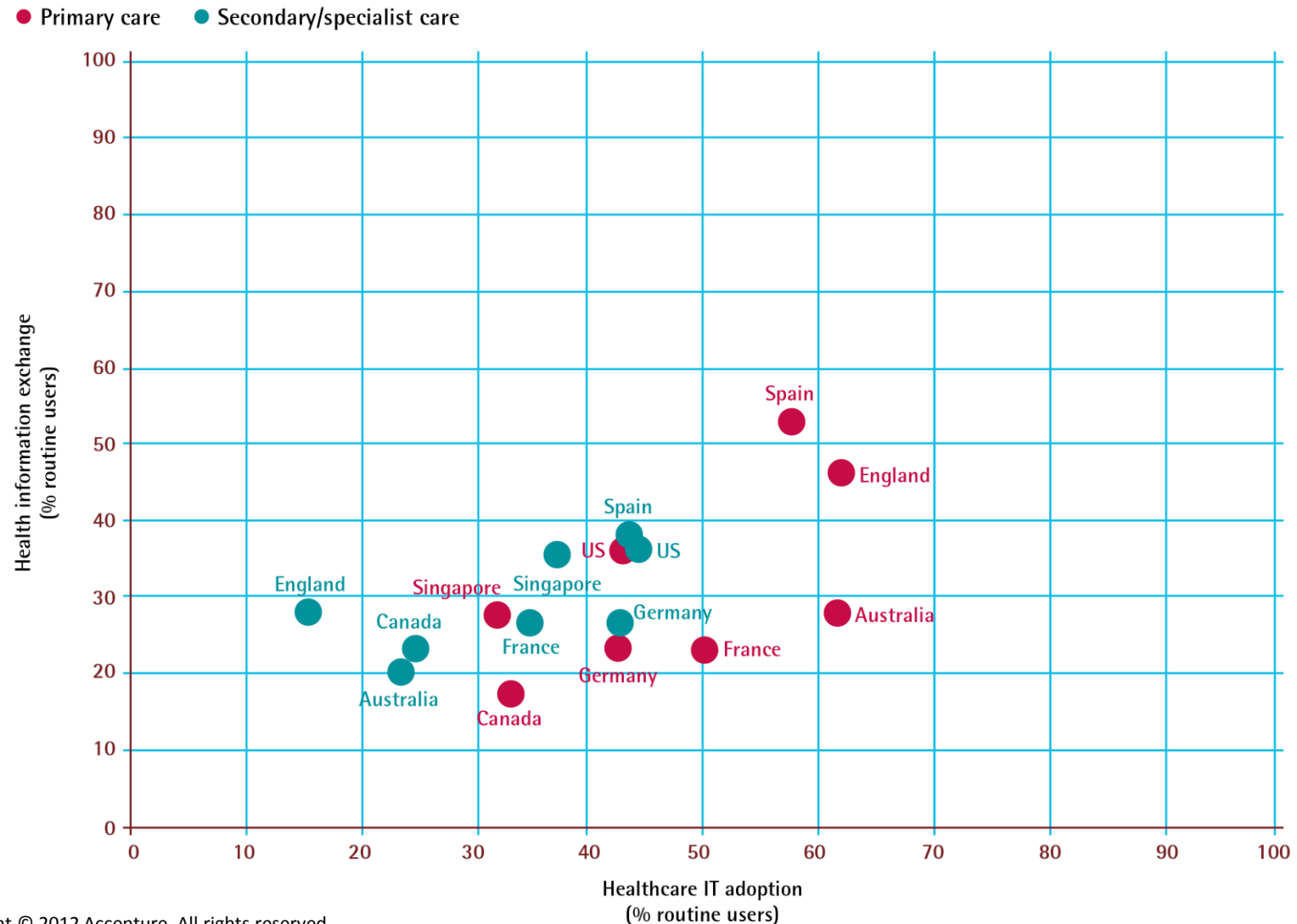
Path to Success

A spectrum of approaches by country



Connected Health Maturity Index

Progress toward data capture and interoperability



Progress Toward Connected Health

We focus specifically on the development of connected health in eight countries who all face similar challenges around how to improve quality, secure access and control cost.

Adoption of Healthcare IT and the extent of central control in approaches to connected health.

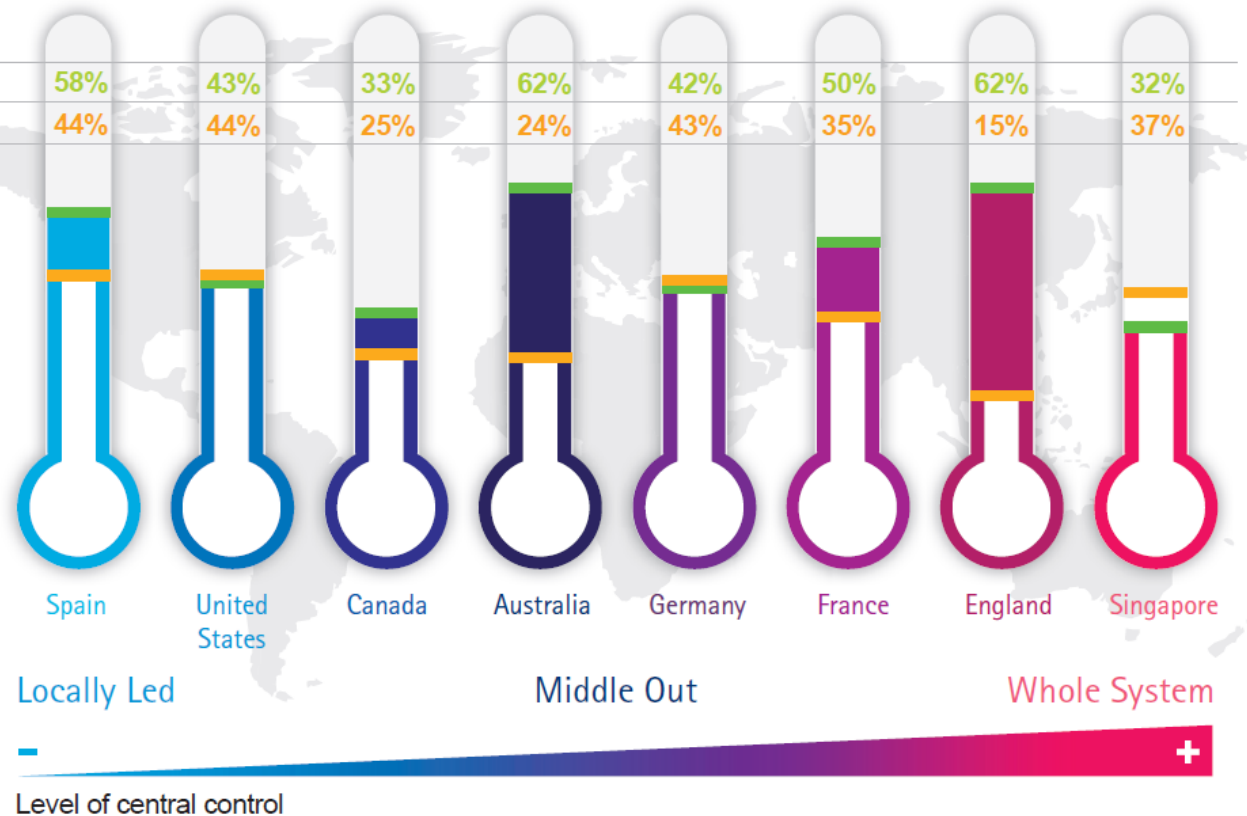
Adoption of Healthcare IT in

Primary Care

Secondary Care

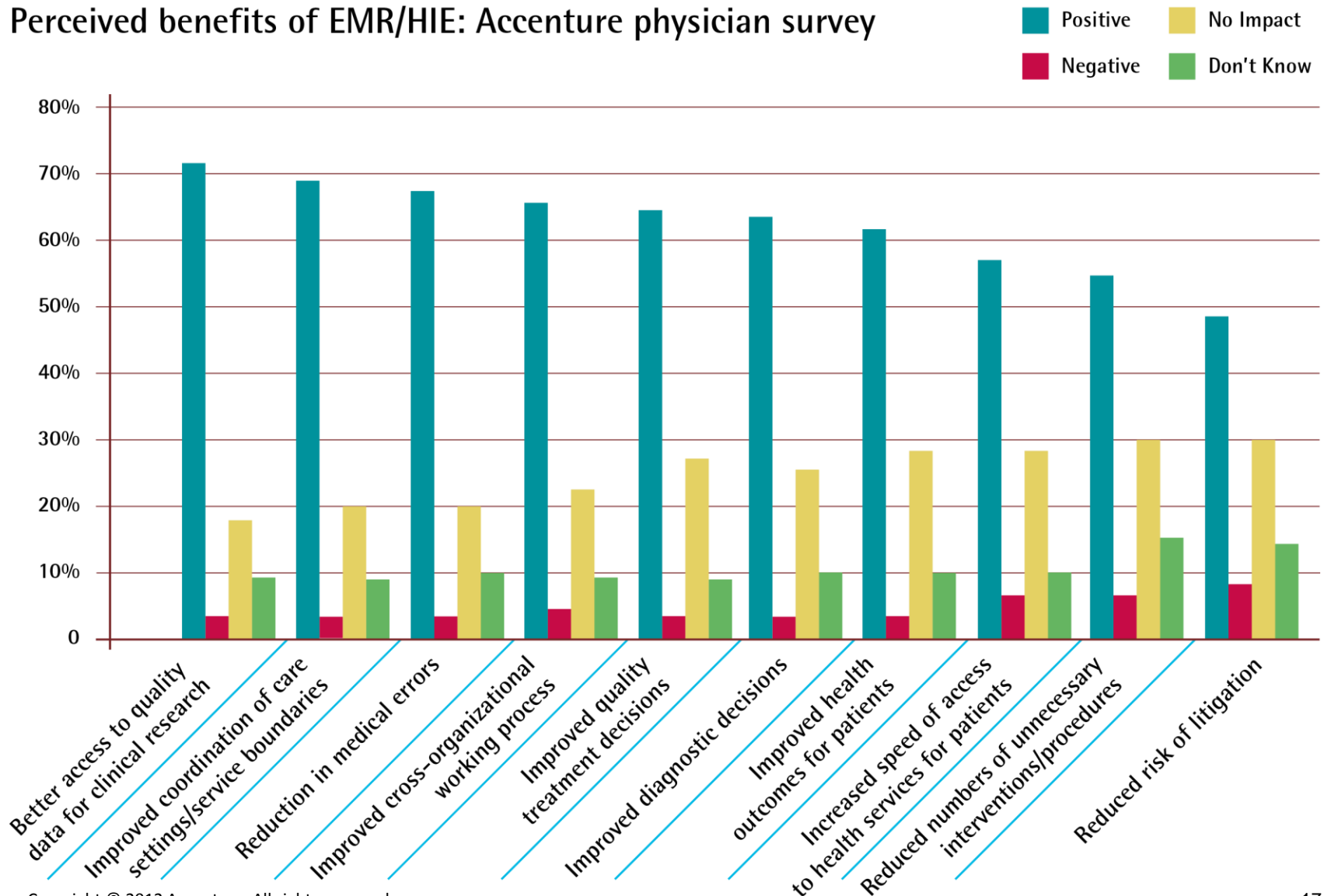
87%

of physicians believe there to be positive benefits from using healthcare IT.



“To what extent is the use of electronic medical records and health information exchange enabling the following benefits?”

Perceived benefits of EMR/HIE: Accenture physician survey



What is slowing down progress?

Top 5 barriers for doctors

1



Cost to my organization

2



Concerns over privacy and security of data

3



IT systems that can't 'talk' to each other

4



Excessive time required to input data

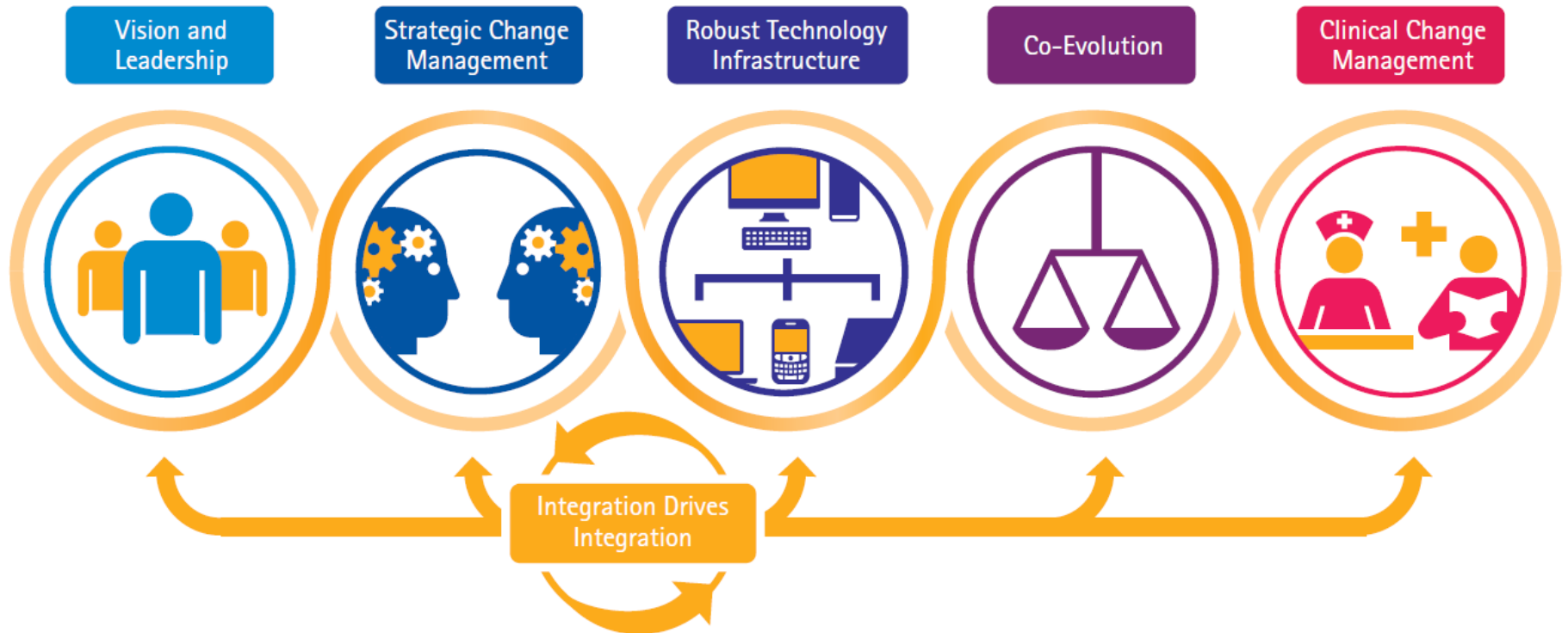
5



Lack of financial incentives

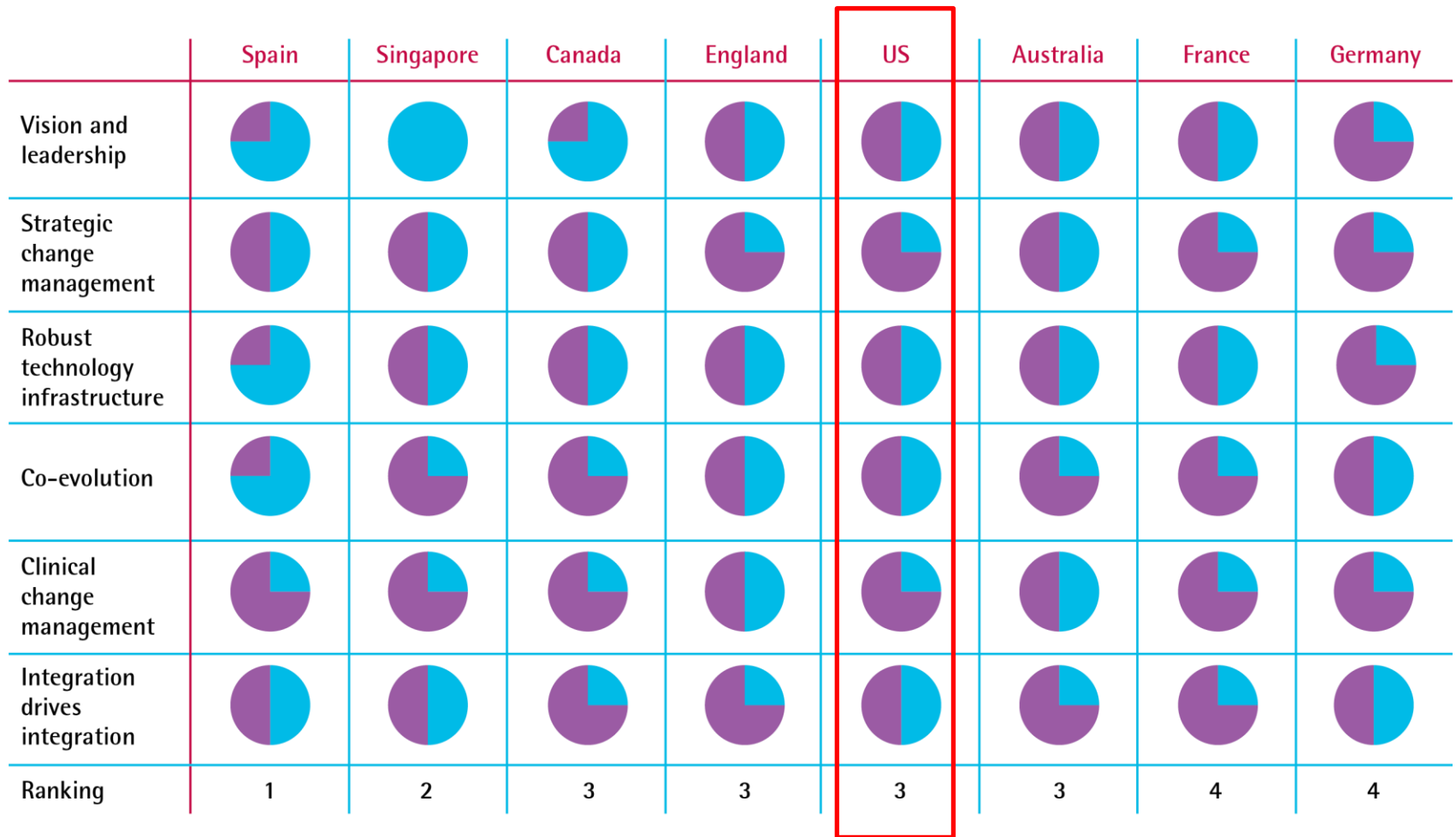
Dynamics of Successful Connected Health

The 6 dynamics lay a solid foundation



Progress Varies Across the Countries

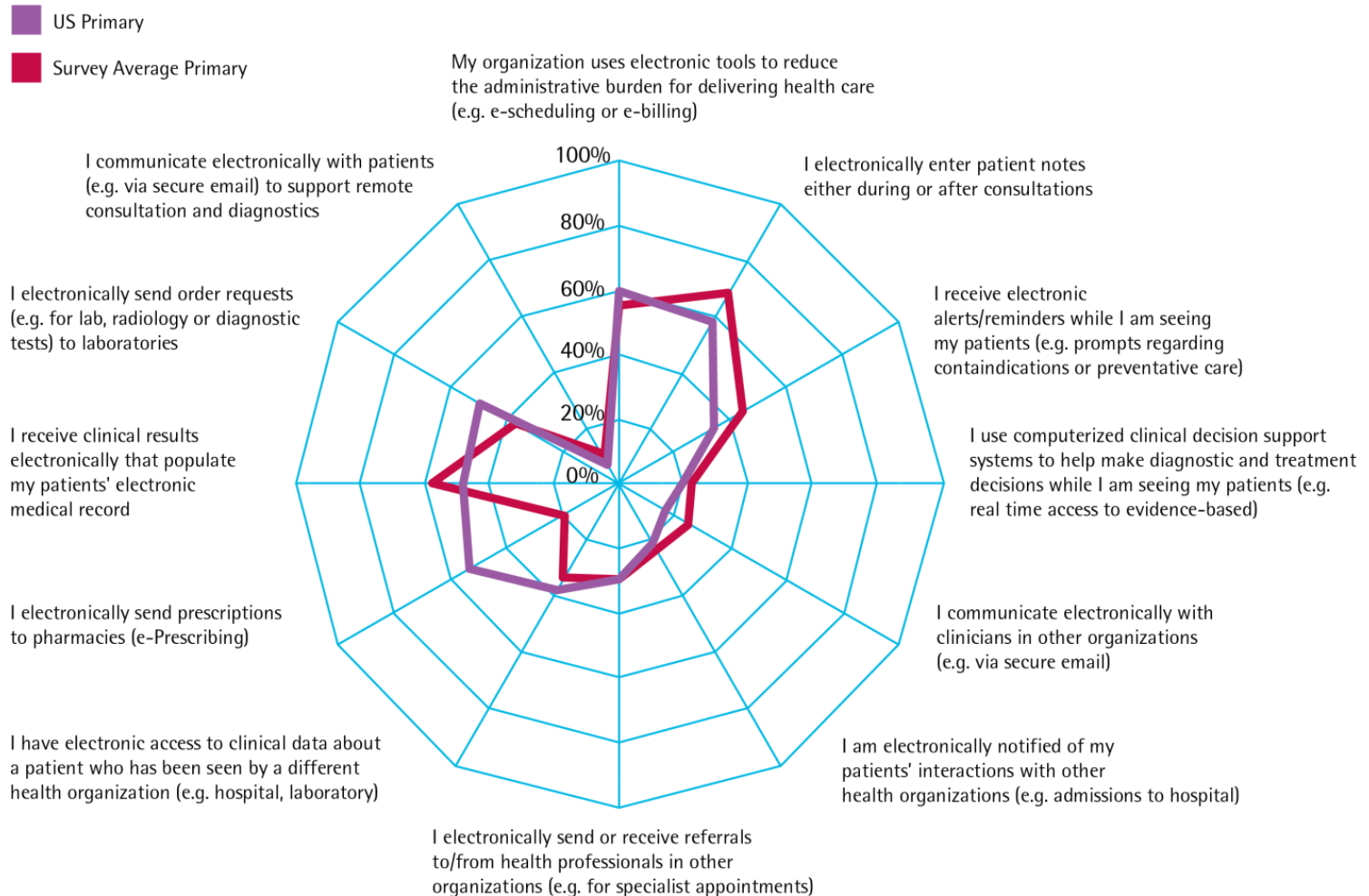
Success is determined based a balanced approach



= recognized need/initial steps
 = progress being made
 = strong performance
 = sustained excellence

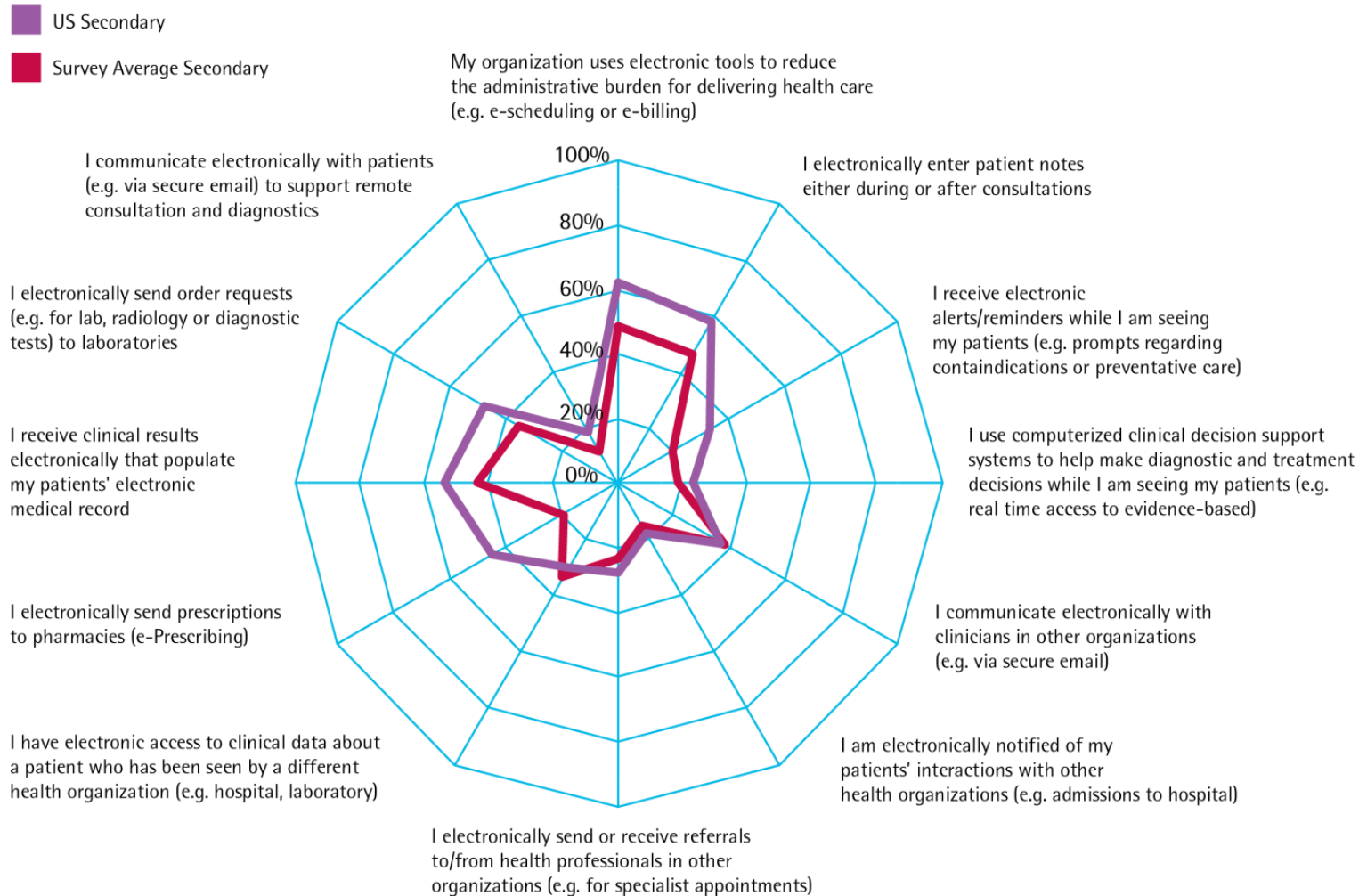
Healthcare IT Adoption and HIE

Primary Care - US



Healthcare IT Adoption and HIE

Secondary Care - US



Using Technology to Engage Patients

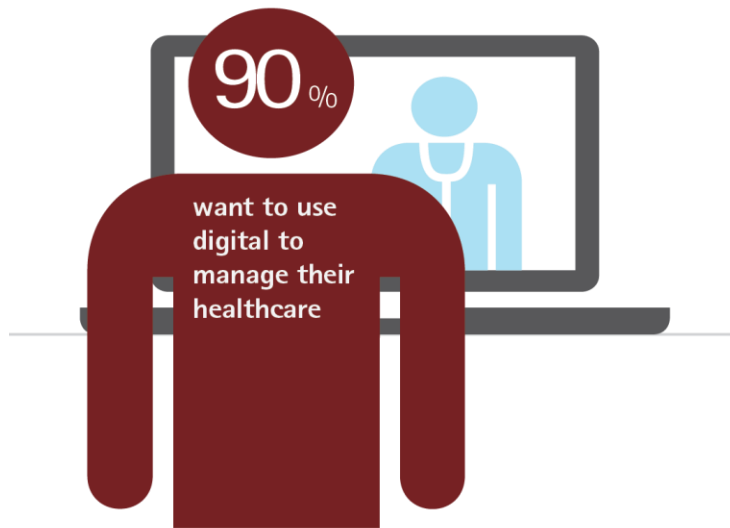
The US is making good progress

	US	Survey average	Australia	Canada	France	England	Germany	Singapore	Spain
Patients can electronically access their medical information	16.6%	8.2%	2.4%	2.8%	5.2%	6.7%	3.2%	42.6%	6.6%
Patients can electronically book/change/cancel appointments	16.8%	20.7%	2.6%	4.0%	7.6%	33.3%	22.8%	52.5%	44.9%
Patients receive electronic reminders when it is time for preventative or follow up care	18.8%	18.9%	19.8%	6.4%	8.0%	17.1%	16.9%	51.5%	32.3%
Patients can see health-related information during the consultation	26.6%	29.2%	41.5%	18.4%	28.3%	35.9%	24.8%	44.6%	22.6%
Patients can electronically request prescription refills	25.8%	20.6%	4.6%	7.2%	12.0%	33.3%	27.8%	29.4%	29.9%
Patients can communicate with me electronically, for example, through secure email or video conferencing	25.4%	27.4%	20.6%	19.2%	29.5%	16.7%	47.4%	45.1%	25.7%
Patients can use tele-monitoring devices to monitor and record their own health indicators and remotely inform me of their conditions	7.5%	7.5%	3.6%	4.4%	6.4%	8.2%	6.7%	26.5%	8.0%
Patients can electronically access health information/education to help them manage their own conditions	21.0%	19.3%	17.0%	14.2%	14.5%	25.9%	4.4%	39.2%	30.1%

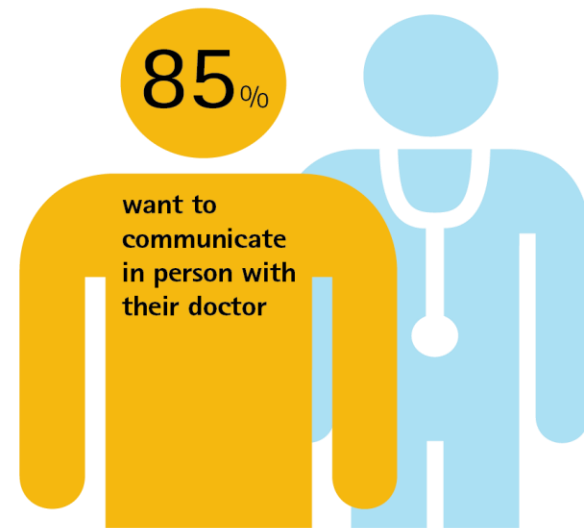
Patients Embrace eHealth Self Service

Face time with physicians is still important

Patients embrace eHealth
self-service options...



but not willing to sacrifice
personal interactions



Source: The Accenture Connected Health Pulse Survey, 2012

Patients Embrace eHealth Self Service

Preferred communication channels



90% of patients want online access to health information and education to help manage conditions

Prescriptions



The majority of patients want to refill prescriptions through digital channels:



Reminders



The majority of patients want to receive digital reminders for preventative or follow up care:



Appointments



The majority of patients want to book, change or cancel appointments through digital channels:



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Questions

Final Thoughts



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- **Greg Parston**



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Take Advantage of eHI Resources

■ Reports and Directories

- Vendor Report
- List of HIEs and Selected Vendors
- Sustainability Report

■ Upcoming Conference

- National Forum on Data and Analytics in Health Care
 - August 9, 2012
 - Gaylord National Resort and Convention Center, National Harbor, MD



eHI National Forum on Data and Analytics

- Join us August 9, 2012 at the Gaylord National Resort and Conference Center
- **Todd Park**, U.S. Chief Technology Officer just Confirmed as a keynote speaker!
- Topics to Include:
 - Transforming Data into Healthcare Intelligence in Today's Market
 - Best Practices Using Data to Manage Populations with Chronic Conditions
 - Leveraging Analytics to Facilitate Accountable Care
 - Using Analytics to Enable Transparency and Quality Improvement
 - Predictive Analytics to Improve Clinical Outcomes: Four (4) Organizations Share Their Experiences



National Forum on Data and Analytics in Health Care

Thursday, August 9, 2012

Gaylord National Resort and Convention Center

Forum registration is open

<http://www.ehealthinitiative.org/2012-ehi-national-forum-on-data-and-analytics-in-health-care/registration.html>

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