Digital Health and Patient Engagement: Healthcare's New Value Drivers

November 9, 2016

2:00 – 3:00 pm ET

**Audio for this webinar streams through the web. Please make sure the sound on your computer is turned on and you have speakers. If you need technical assistance, please contact ReadyTalk Customer Care: 800.843.9166.

Housekeeping Issues

- **All participants are muted**
  - To ask a question or make a comment, please submit via the chat feature and we will address as many as possible after the presentations.

- **Audio and Visual is through www.readytalk.com**
  - If you are experiencing technical difficulties accessing audio through the web, there will be a dial-in phone number displayed for you to call. In addition, if you have any challenges joining the conference or need technical assistance, please contact ReadyTalk Customer Care: 800.843.9166.

- **Today's slides will be available for download on our homepage at www.ehidc.org**

About eHealth Initiative

- Since 2001, eHealth Initiative has been advocating the value of technology and innovation in healthcare through research and education.

- eHI convenes its multi-stakeholder members, from across the healthcare ecosystem, to discuss how to transform healthcare through information and technology.

- eHI members released *The 2020 Roadmap*. The primary objective is enable coordinated efforts by the public and private sector to transform healthcare by the year 2020.

Multi-Stakeholder Leaders in Every Sector of Healthcare

The 2020 Roadmap
Key Focus Areas in 2016

- Interoperability

- Privacy & Security

- Business & Clinical Motivators

- Health IT Policy

- Data & Analytics

- Innovation

Upcoming Webinars

- November 17:
  - MACRA Quality Payment Program: Key Things to Know and Strategies for Success

- November 21:
  - Re-imagining Care Delivery: The Power of Technology

- November 30:
  - The State of Federal Funding for HIEs today

THIS WEBINAR WAS MADE POSSIBLE THROUGH THE GENEROSITY AND SUPPORT OF *accenture*!

SLIDES ARE AVAILABLE AT www.ehidc.org/resources

accenture

Insight Driven Health

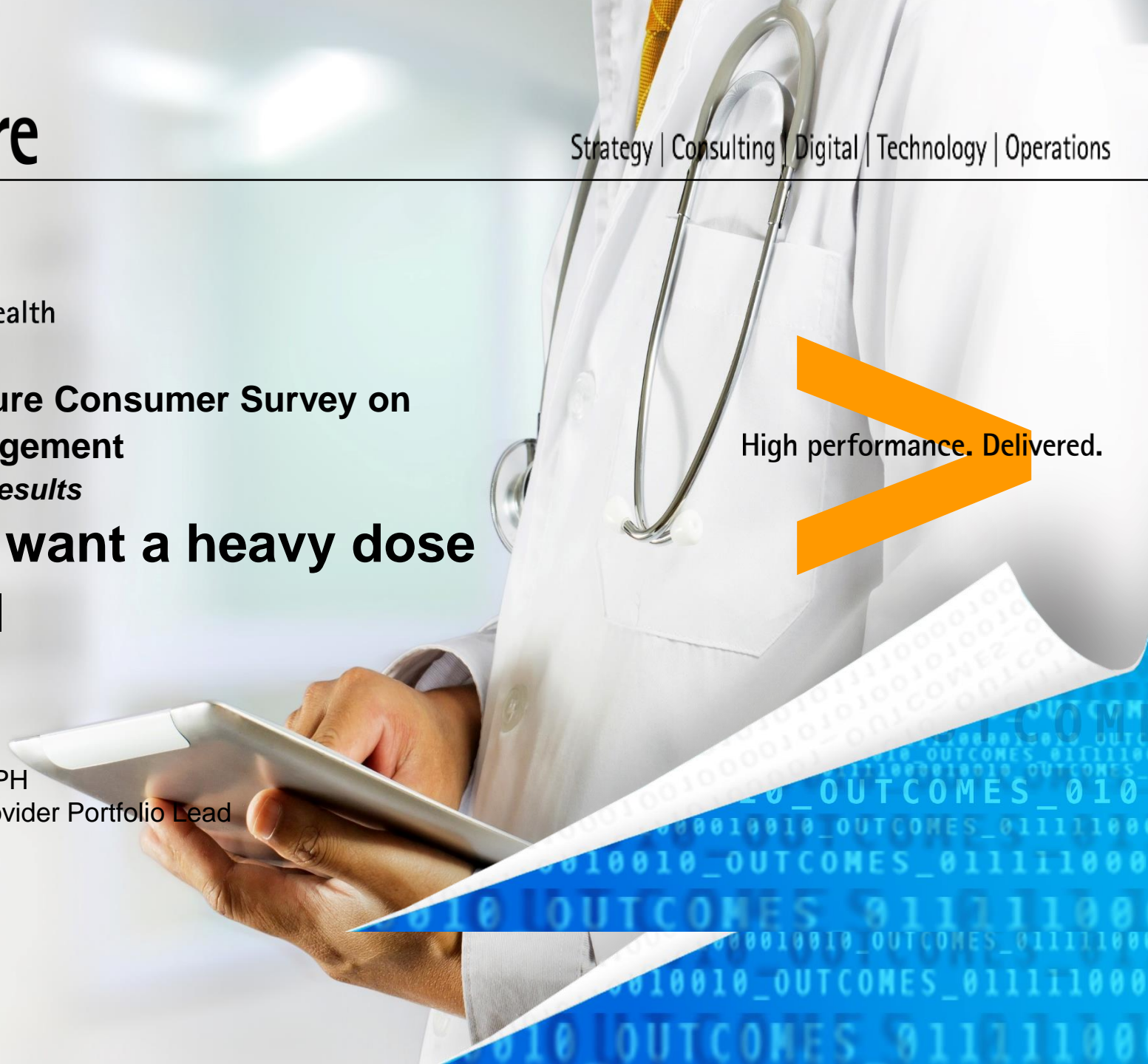**2016 Accenture Consumer Survey on Patient Engagement**
US Research Results

Patients want a heavy dose of digital

High performance. Delivered.

Presented by:

Kip Webb, MD, MPH
North America Provider Portfolio Lead
Accenture Health

2016 Accenture Consumer Survey on Patient Engagement

7 country survey of **7,840 consumers ages 18+**

Assess consumer attitudes toward health, the **healthcare system**, **electronic health records, healthcare technology** and their **healthcare providers' electronic capabilities**.

Australia (1013), **Brazil** (1006), **England** (1009), **Norway** (800), **Saudi Arabia** (852), **Singapore** (935), **United States** (2225)

Conducted by **Nielsen** on behalf of Accenture between **November 2015 and January 2016** (The US survey was conducted online between November 13 and December 2, 2015).
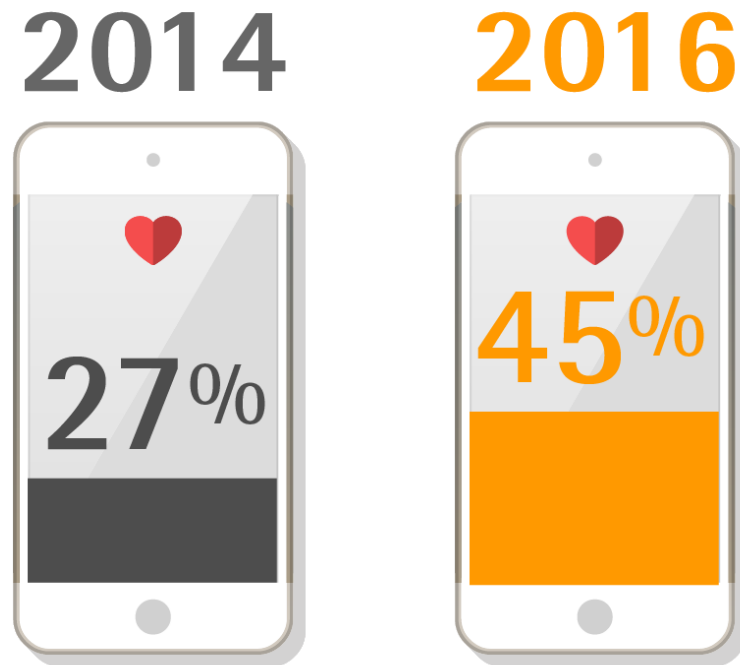
Where relevant, the survey **uses select findings** from the **2015 Accenture Doctors Survey and 2014 Accenture Consumer Survey** to compare doctor and consumer responses.

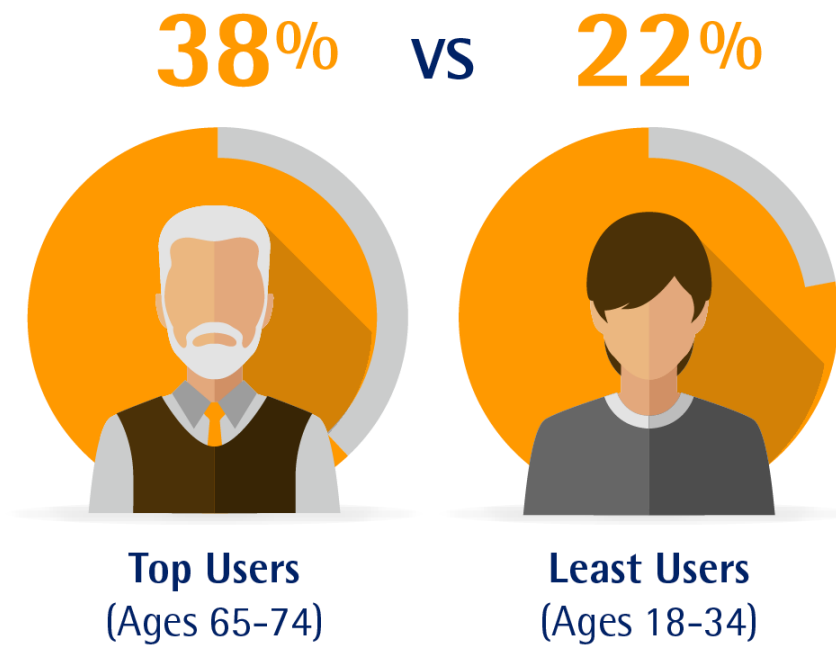**This presentation will explore the key findings from our US Research Results**

More US consumers with electronic health records are accessing their records

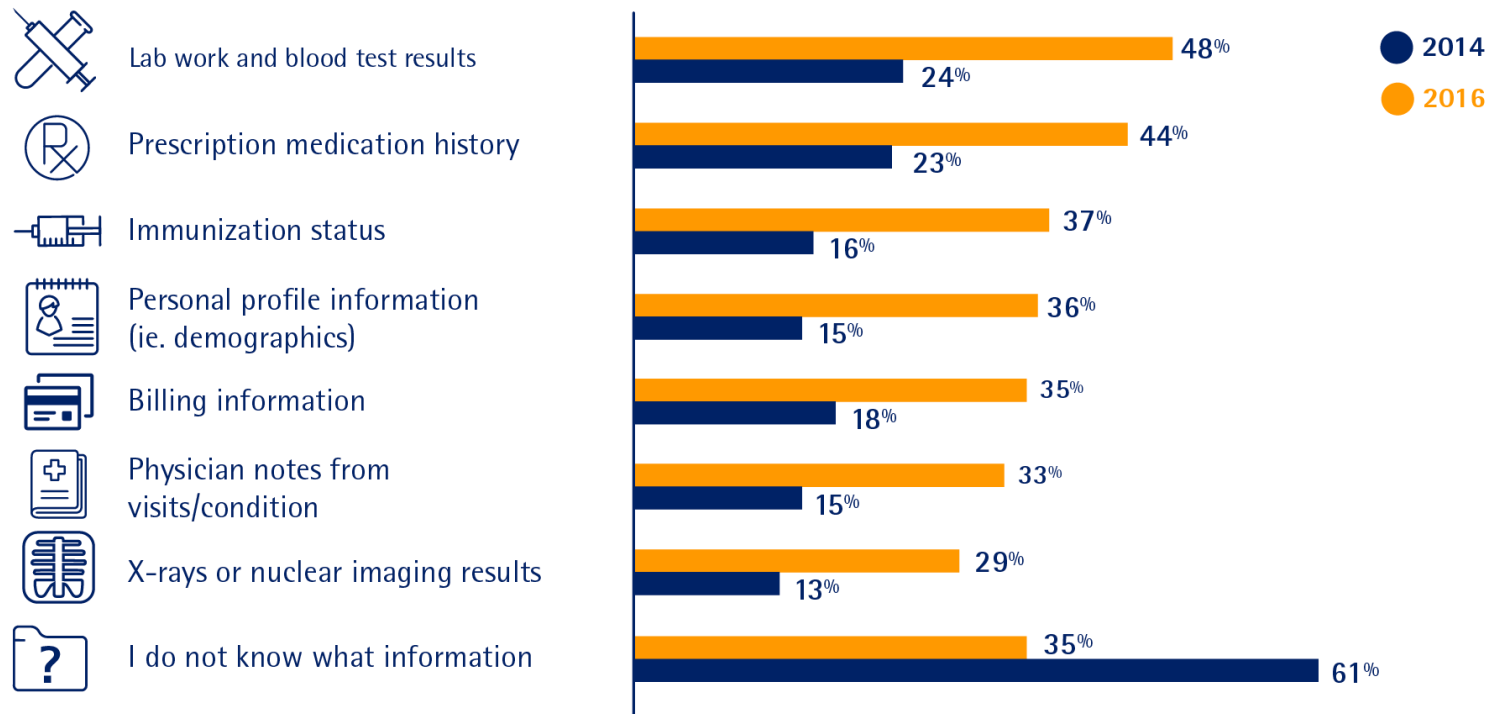**2014**

2016

27%

45%

Health technology users age 65-74 are most likely to have turned to their EHRs to manage health

38% **VS** **22**%

Top Users
(Ages 65-74)

Least Users
(Ages 18-34)

11

Consumers know more about what data they can access in their EHR

Lab work and blood test results — 2016: 48%, 2014: 24%

Prescription medication history — 2016: 44%, 2014: 23%

Immunization status — 2016: 37%, 2014: 16%

Personal profile information (ie. demographics) — 2016: 36%, 2014: 15%

Billing information — 2016: 35%, 2014: 18%

Physician notes from visits/condition — 2016: 33%, 2014: 15%

X-rays or nuclear imaging results — 2016: 29%, 2014: 13%

I do not know what information — 2016: 35%, 2014: 61%

● 2014
● 2016

12

Data that patients with EHRs find most helpful to health management

	Lab work and blood results	41%
	Physician notes from visits/condition	24%
	Prescription medication history	9%
	Personal profile information (ie. demographics)	5%
	Immunization status	5%
	X-rays or nuclear imaging results	5%
	Billing information	5%
	None of the above	6%
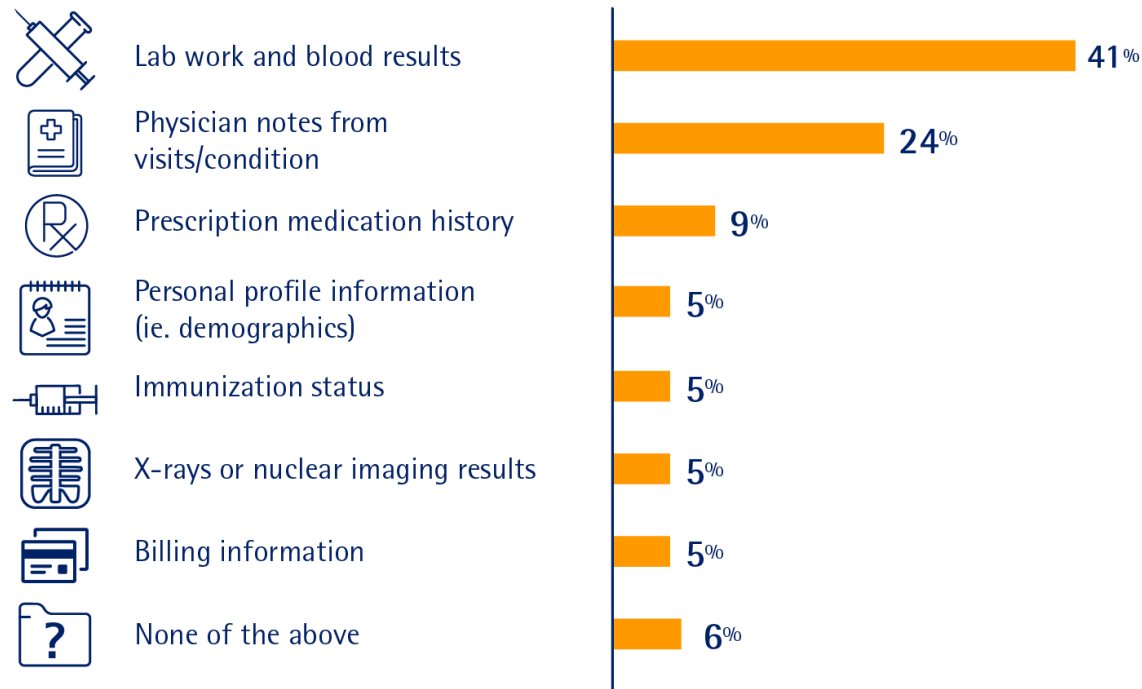
Most consumers think they should have full access to their EHR

Level of access a patient **should** have to EHR

Level of access patients **believe** they have access to

1%
7%
92%

Consumers

74%
7%
18%

Doctors

27%
24%
49%

● Full Access   ● Limited Access   ● No Access

14
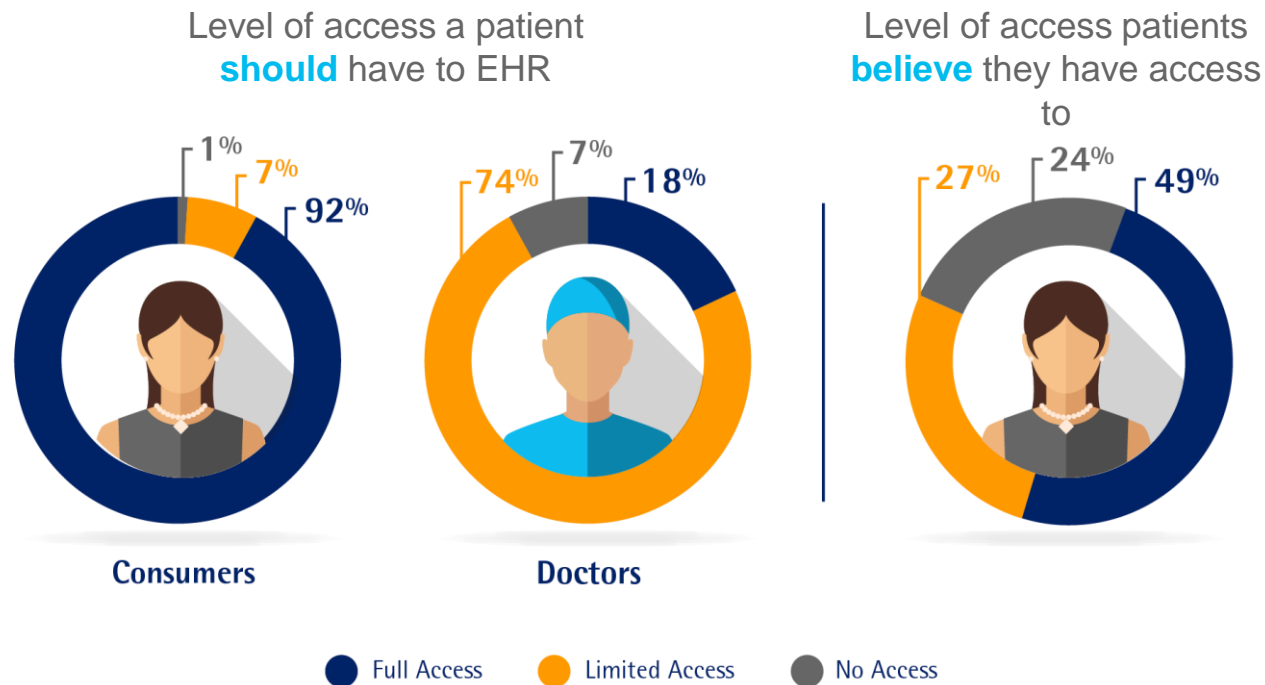
Consumers and doctors agree that patients should be able to update their EHR information

Demographics

Medical History

Symptoms

95% Demographic Information — Consumers 86%, Doctors 95%

Personal Medical History — Consumers 83%, Doctors 90%

Family Medical History — Consumers 89%, Doctors 93%

New Symptoms — Consumers 87%, Doctors 83%

Change in Symptoms — Consumers 86%, Doctors 84%
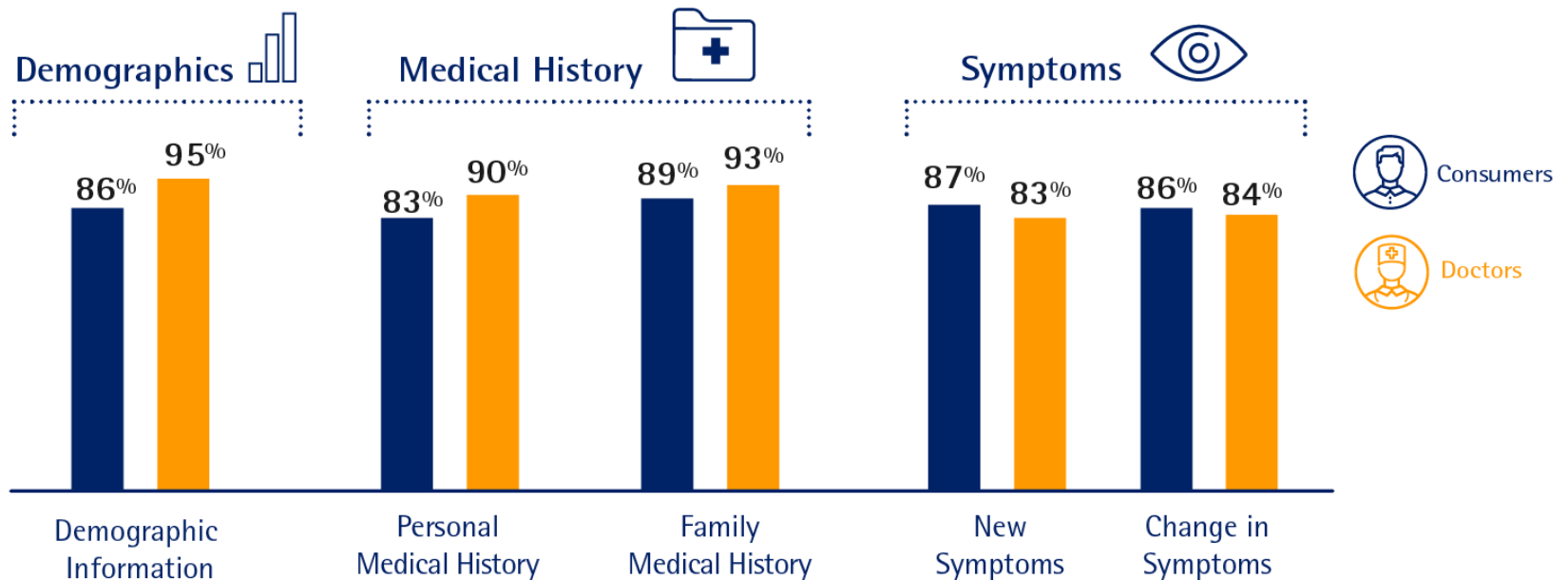
Consumers
Doctors

Consumers view EHR primarily as a tool for their doctors and themselves

My primary doctor	75%
Me	67%
My other doctors/specialists	55%
Anyone I give permission to	52%
Hospitals I visit	51%
Urgent care centers I visit	32%
Doctors/Specialists performing procedure in other country	30%

My pharmacy	28%
Family members	22%
Caregiver	20%
Retail clinics I visit	9%
An overseas health expert performing clinical analysis	8%
My employer	3%
The government	3%
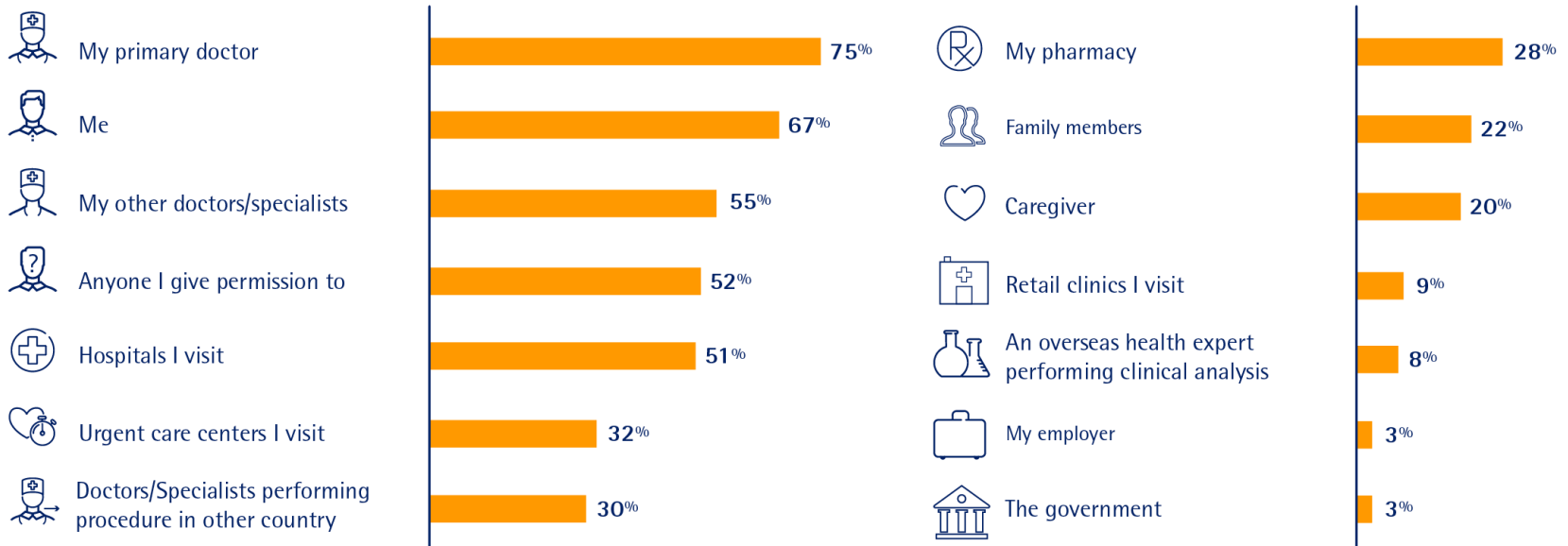
Use of health apps and wearables has doubled in the past two years among health technology users

2014 **2016**

Wearable technology
- 2014: 9%
- 2016: 21%

Mobile phone/ tablet app
- 2014: 16%
- 2016: 33%

17

The most popular health apps are Fitness and Diet/Nutrition

Fitness	Diet/ nutrition	Symptom navigator	Patient portal app	Health/ condition tracker	Medication tracker/ reminder/ manager	Chronic condition/ disease management
59%	52%	36%	28%	25%	12%	10%

18
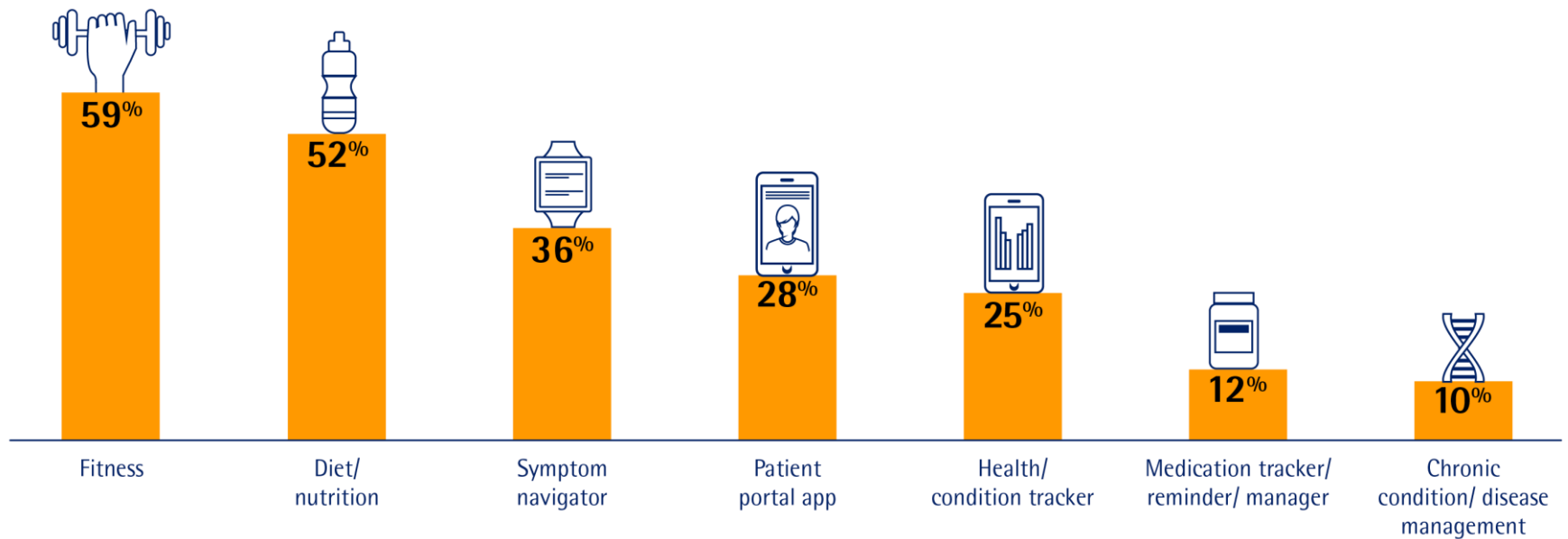
Consumers and doctors agree that using wearables helps patient engagement

CONSUMERS

19%
4%
77%

DOCTORS

12%
3%
85%

🟠 Helps 🔵 Hurts ⚫ Has no effect

19
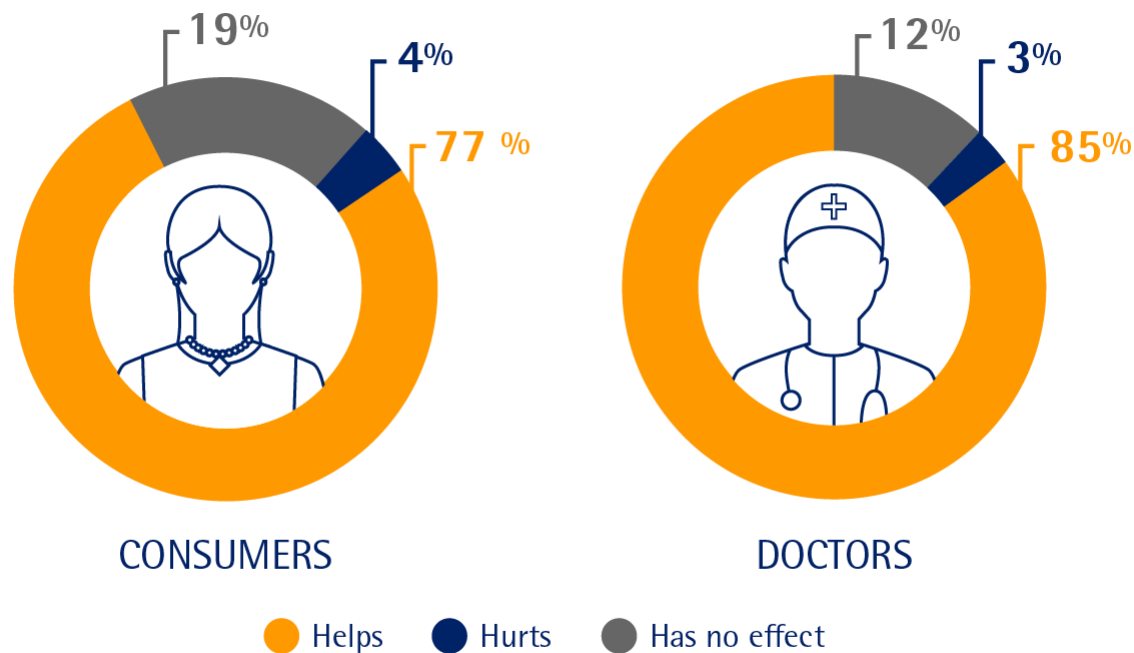
Most US consumers wear, or would be willing to wear, technology for health-tracking

78%

Fitness and lifestyle (only)
15%

Vital signs (only)
12%

Both
51%
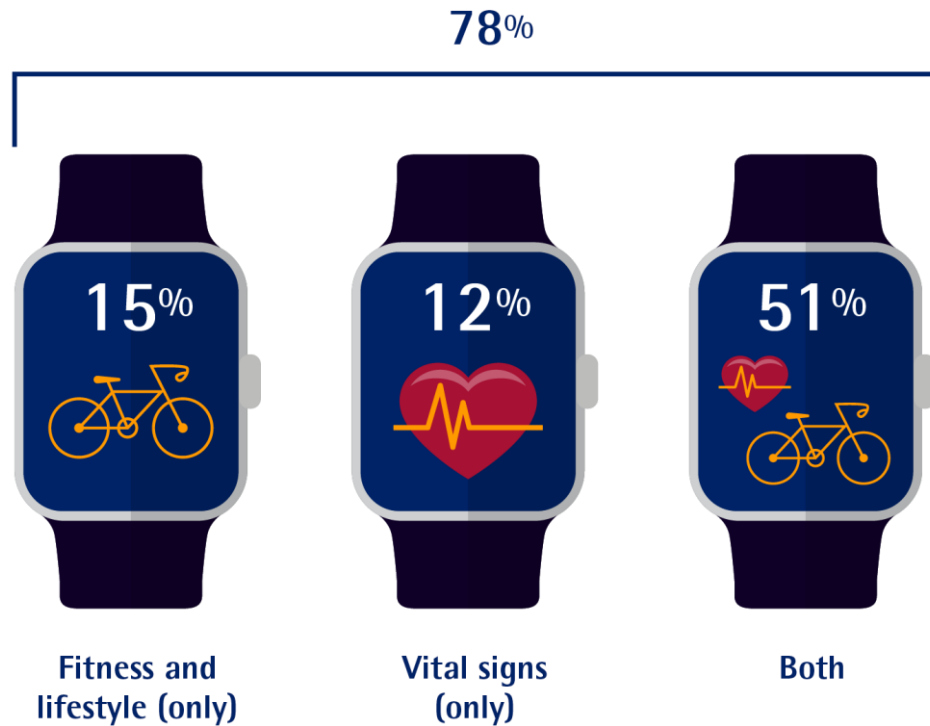
When recommended by a doctor, 3 in 4 consumers followed advice to wear technology to track health

Yes, 76%

No, 24%
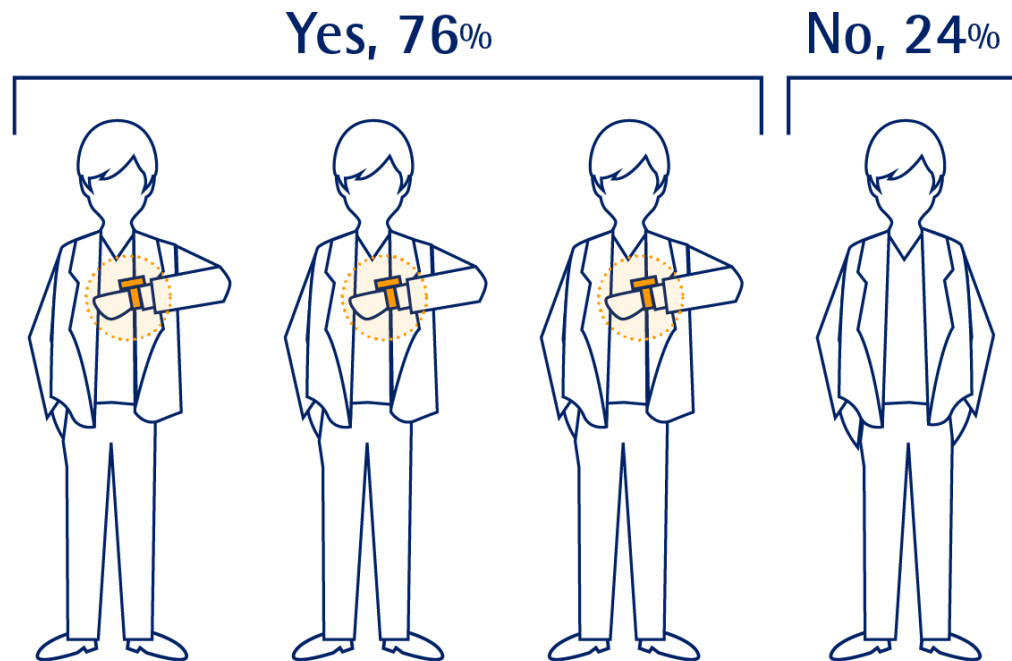
Most consumers are willing to share wearable or app data with a doctor or nurse

90% Doctor

87% Nurse/ Other HCP

72% Friend/ Family Member

63% Health Insurance Plan

38% Online community/ Other app users

31% Employer

22
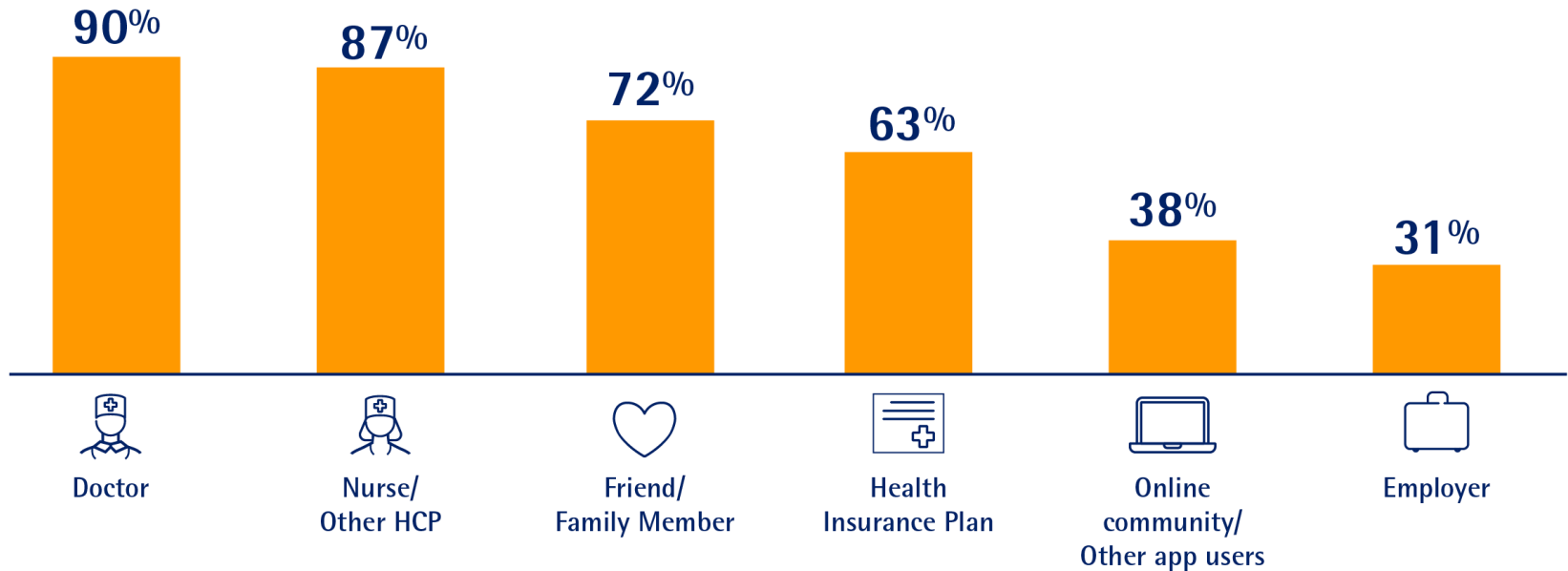
5 Questions that Every Provider Organization Should Ask

1   Does our organization have a digital strategy?

2   Patients are increasing looking for digital experiences similar to those they have in other aspects of their lives. How is our organization planning to meet this demand?

3   Since age of Hippocrates, doctors and patients have never seen eye-to-eye regarding data transparency. How is our organization helping to bridge this gap?

4   Patients are increasingly generating their own data. How is our organization enabling the aggregation of this data and using it to improve outcomes?

5   In light of increasing patient demands, how is our organization keeping healthcare information private and secure?
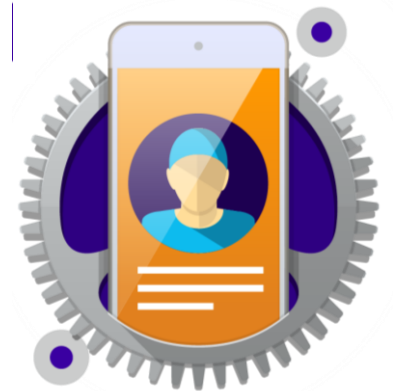
Thank You

Kip Webb, MD, MPH
Kip.webb@accenture.com
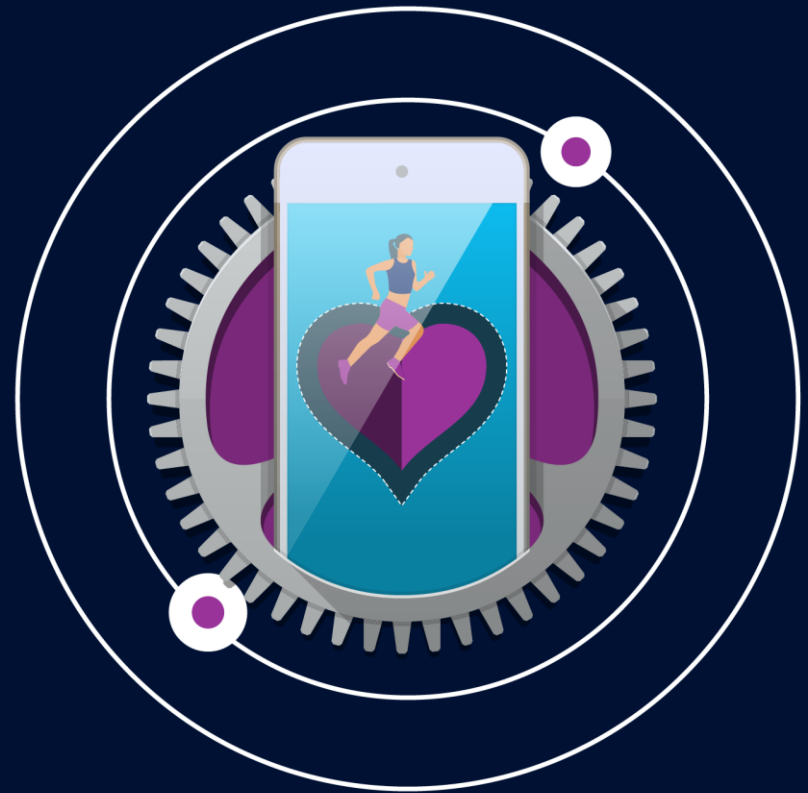
Method

With whom did Accenture work to conduct the quantitative survey?

Accenture worked with Nielsen, who was responsible for the entire project including recruitment, screening of respondents, questionnaire development, analysis and report development.

Are we confident in the quality of the respondents and that they meet the study criteria?

All participants are consumers, ages 18+, residing in the countries specified and nationally representative on age and gender. Participants' details are double verified and were rescreened for this study to ensure participant quality.

Who was surveyed?

Approximately, n=7840 consumers total, ages 18+, in the US, Australia, Brazil, England, Norway, Saudi Arabia, Singapore, and the US who agreed to take part in the survey. This report includes results for US respondents only (n=2225).

Was the questionnaire translated into the appropriate native language?

Yes, the survey was translated into: Portuguese (Brazil); Norwegian (Norway); Arabic (Saudi Arabia). English (localized) was used for England, Australia, Singapore, and Saudi Arabia (English and Arabic options offered).

How did Accenture recruit study participants?

In the US, respondents were contacted through direct email invitations and notifications; respondents are able to follow a unique link to the survey and complete it anonymously. Similar methods were used in other countries.

What did we do to ensure balance and a representative sample?

In the US, data were weighted by education, age by sex, race/ethnicity, region, and income to be nationally representative of the general population. However, because 2014 data were not weighted, all data for trended questions are not weighted. This is indicated on each slide.

Digital Health and Patient Engagement: Healthcare's New Value Drivers

Brandon Parkhurst MD, MBA, CPXP
Medical Director, Patient Experience
Marshfield Clinic

MISSION

To **enrich lives** through accessible, affordable compassionate healthcare.

DEFINITIONS

Activation-the knowledge, skills, ability, and willingness to manage a need; an individual's understanding of their role in a need.

Engagement-the actions taken to actively manage a need.

Activation

Engagement

Enriched Lives
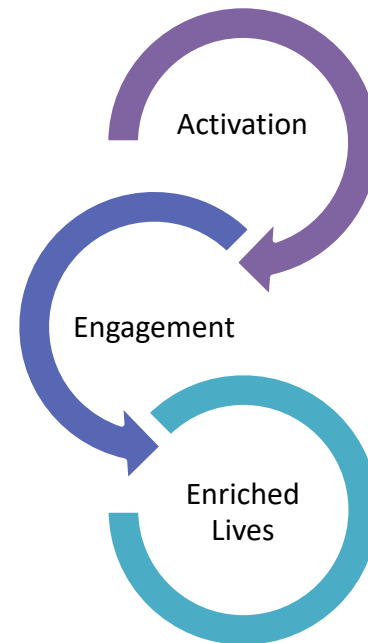
EHR HISTORY

"To visit the Marshfield Clinic, a longtime innovator in health information technology, is to glimpse medicine's digital future."

- New York Times
December 26, 2008

1985   Proprietary EHR launched

1994   EHR becomes legal record

2001   Patient Portal pilot

2003   EHR delivered at point-of-care (tablets)

2004   Patient Portal launched

2008   Largest patient record database in WI

2009   e-Prescribing

2011-2012   Portal registration promotion

2013   Patient Portal redesigned

2014   Secure messaging promotion

2017   Transition to re-platformed EHR

Marshfield Clinic
HEALTH SYSTEM

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

Active Conditions

Cough
(2016-present) History

Additional Resources: Procedures

Krames Staywell »   View procedures »
MedlinePlus »

Acute streptococcal pharyngitis
(2016-present) History

Additional Resources: Procedures

Krames Staywell »   View procedures »
MedlinePlus »

Well child visit
(2012-present) History

Additional Resources: Procedures

Krames Staywell »   View procedures »
MedlinePlus »

Fever 106 degrees F or over
(2016-present) History

Additional Resources: Procedures

Krames Staywell »   View procedures »
MedlinePlus »

Past Conditions

All past conditions and diagnoses listed below are in reverse order by the first date they were added to your record.

Nursemaid's elbow, left elbow, subsequent encounter~
(2014) History

Additional Resources:

Krames Staywell »
MedlinePlus »

Fever
(2014) History

Additional Resources:

Krames Staywell »
MedlinePlus »

Viral illness
(2014) History

Additional Resources:

Krames Staywell »
MedlinePlus »

Marshfield Clinic®
HEALTH SYSTEM

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

MESSAGING

➕ **Notice: In the event of a medical emergency, please dial 9-1-1 or your local emergency number.**

On behalf of: [▼]

To: [Cutlan, Kristin MD   ▼]

Category: [Health & Symptoms Questions   ▼]

Subject: [   ]

Message: [   ]

Marshfield Clinic®
HEALTH SYSTEM

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC

PATIENT ENGAGEMENT AT MARSHFIELD CLINIC
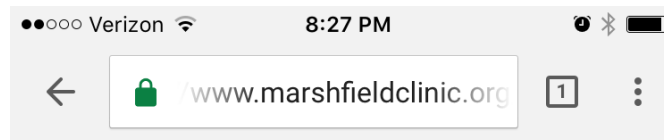
PATIENT COMMENTS ∧

Comments are from Press Ganey surveys. Slander, libel and private health information are removed.

Sort by: Most Recent ▼

July 15, 2016 ★★★★★

Dr. J. Oswald called me a few days later of how my shoulder was doing. He gave me a Cortisone shot.

June 07, 2016 ★★★★★

Dr. Oswald is an excellent provider.

May 24, 2016 ★★★★★

I have already recommended him to others and thanked the persons who

📞 Call | Request online

Marshfield Clinic®
HEALTH SYSTEM

FUTURE PLANS-2017

- Mobile app (iOS and Android)

- Open Notes

- Online Check-in
  - Acknowledge/reschedule/cancel appointments
  - Update demographic information
  - Update health information

- Incorporate Patient-Generated Health Data
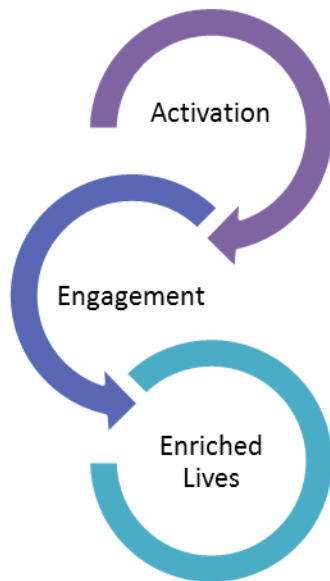 - Family History
  - Forms/Questionnaires

- Direct Appointing

SECURITY

RETURNING TO THE 5 QUESTIONS.

1. Digital strategy?
2. Aligning digital experiences?
3. Aligning transparency expectations?
4. Patient data integration?
5. Security?

Marshfield Clinic®
HEALTH SYSTEM

Questions and Answers!

- Please use the chat feature to ask questions

- Today's slides will be available for download on our homepage at www.ehidc.org

- If you have any questions, please contact Claudia Ellison, Claudia.Ellison@ehidc.org

THIS WEBINAR WAS MADE POSSIBLE THROUGH THE GENEROSITY AND SUPPORT OF *accenture*!

SLIDES ARE AVAILABLE AT www.ehidc.org/resources