The Changing Focus of Healthcare Delivery

Technology Implications for a Rapidly Changing Industry

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Background - Technology Strategy
THE U.S. HEALTHCARE ENVIRONMENT
Forces Reshaping US Healthcare
Shift to Value Based Care

- Measure and Improve Broader Sets of Outcomes
- Reduced cost of care
- Streamline performance
- Increased total economic value
Goals for US Healthcare System*

*Best Care At Lower Cost: The Path to Continuously Learning Health Care in America. Institute of Medicine Of the National Academies. September 2012.
Cost Drivers

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Complexity Drivers
Quality Drivers
How do we prepare for these challenges?

1. Re-design healthcare delivery: prepare for changing payment structures and consumer demand
2. Capture and use data to create actionable knowledge
3. Create incentives – payer/patient/provider
4. Change behavior
5. Link systems to manage complexity
6. Improve transparency
7. Enable consumers
8. Partner with patients
RE-THINKING HEALTHCARE TECHNOLOGY
Disruptive Technologies

http://www.youtube.com/watch?v=0B-jUOOrtks
Information Technology
Shared Data, Not Shared Systems

The Old Thinking
Single EMR Vendor Across All Sites

The New Thinking
HIE Connects Disparate EMRs
It's not the data, it's what you do with it.

Michael Koppenheffer on January 15, 2013
IT Investment Strategy

• Establish comprehensive electronic records that:
  – capture data from both traditional and non-traditional sources
  – allow data sharing across providers, health plans and consumers/patients.

• Place integrated care management analytics at the core of IT investment strategies.
  – Maximize use of care management resources, stratify and prioritize among large populations.
  – Have the ability to translate data into near-real-time, actionable insight for clinicians and care management staff.

• Anticipate growth in telehealth and virtual health services, requiring spend for videoconferencing, broadband network, and other enabling technologies
  – Particularly a challenge in rural areas where broadband and mobile connectivity is limited
Pace IT Expansion as Systems Pursue Greater Risk

**STAGE 1: Before Taking on Any Risk**
- **EMR**
  - Basic IT network connectivity for owned entities
- Patient-Facing Technology
  - Patient portal
  - Call center
- **Analytics**
  - Disease registry
  - Care management system

**STAGE 2: Initial Risk-Based Contracts**
- **EMR**
  - Add referral management
- **HIE/Data Warehouse**
  - Build HIE
- Patient-Facing Technology
  - Telemedicine capabilities
- **Analytics**
  - Disease registry
  - Care management system
  - Risk stratification system

**STAGE 3: Advanced Population Health Management**
- **HIE/Data Warehouse**
  - Refine/expand HIE
  - Create enterprise data warehouse
  - Add home monitoring data capture
- **Patient-Facing Technology**
  - Telemedicine capabilities
  - Text-based communication system

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Comments and Questions

Healthcare