

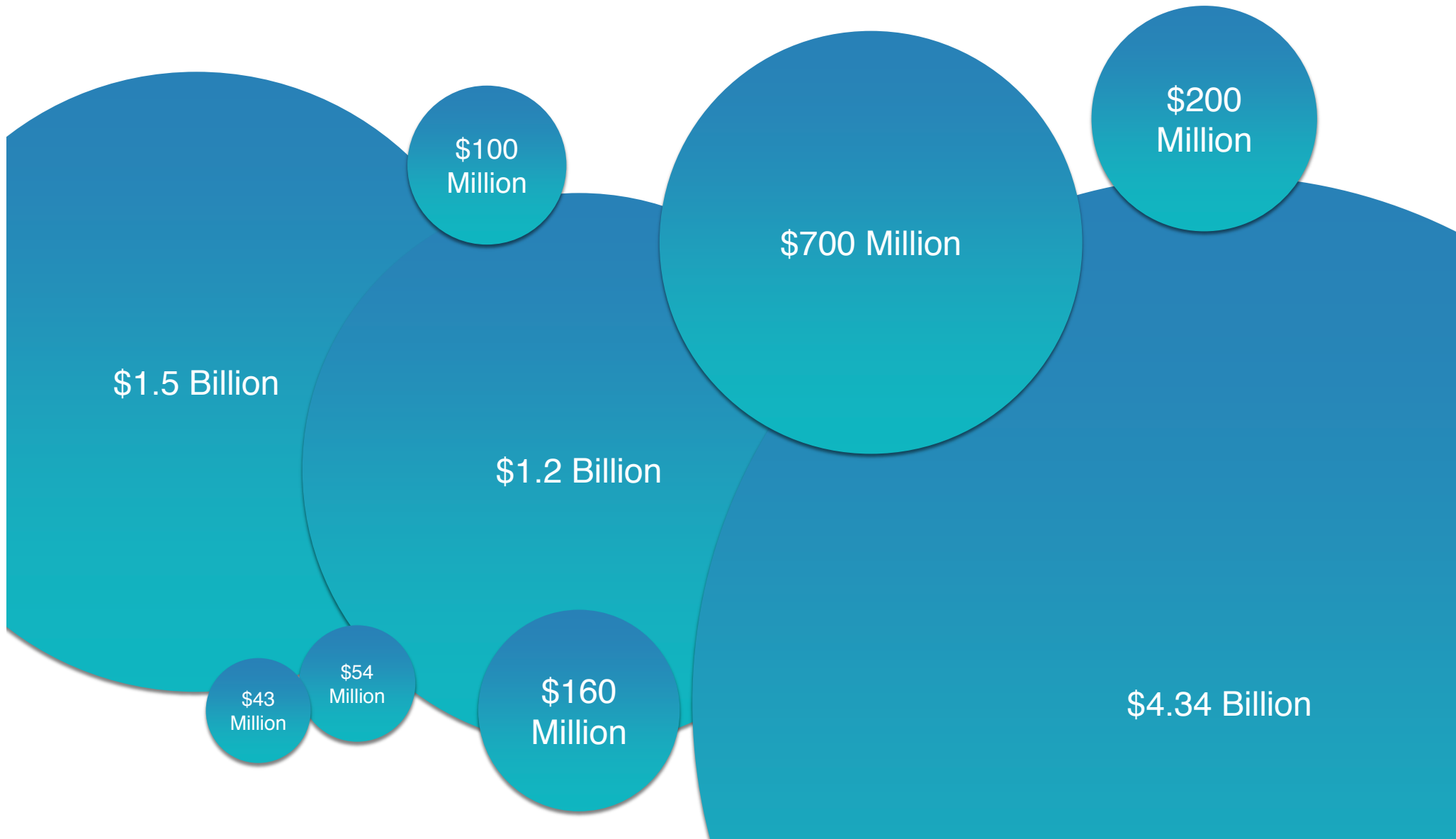
21st Century Patient Centered Care Delivery: A Reality Check

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A Decade of Investment



A \$35 Billion Foundation

- EHR Adoption
- Meaningful Use
- Patient Engagement
- Health Information Exchange
- Population Health Management

Additional Challenges

Ripping and Replacing Existing Departmental Systems that Frequently, Generally, Worked

Creating Many Years of Disruption,
Care Provider Angst, Financial Stresses

Efficiency, Operations, Regulatory Compliance: Check
Outcomes, Costs, Experience: ??

Follow the Money

Chronic Condition	Increase in Prevalence 2003 - 2023	Cost in 2003	Anticipated Cost in 2023
Overall Chronic Disease	42%	\$1.3 trillion	\$4.2 trillion
Cancers	62	\$319 billion	\$1,106 billion
Diabetes	53	\$132 billion	\$430 billion
Hypertension	39	\$312 billion	\$927 billion
Pulmonary conditions	31	\$139 billion	\$384 billion
Heart disease	41	\$169 billion	\$927 billion
Behavioral health disorders	54	\$217 billion	\$704 billion
Stroke	29	\$36 billion	\$98 billion

Follow the Money ...

Chronic Condition	General Prevalence in Western Economies
Diabetes	8%
Hypertension	24%
Asthma	7%
COPD	6%
Arthritis	21%
CHD	6%

Follow the Money ...

Chronic conditions consume
78% of US total healthcare spend

For the public sector, they account for
96 cents per dollar on Medicare,
83 cents per dollar on Medicaid

Individuals with a chronic condition require
a \$6,032 spend annually - 5x that for individuals
without such a condition

Secondary impact on productivity, global
competitiveness is in the hundreds of billions

21st Century Care

Is All About Individuals:

Involves Them

Moves More Care Closer to Them

Coordinates Care Around Them

21st Century Care ...

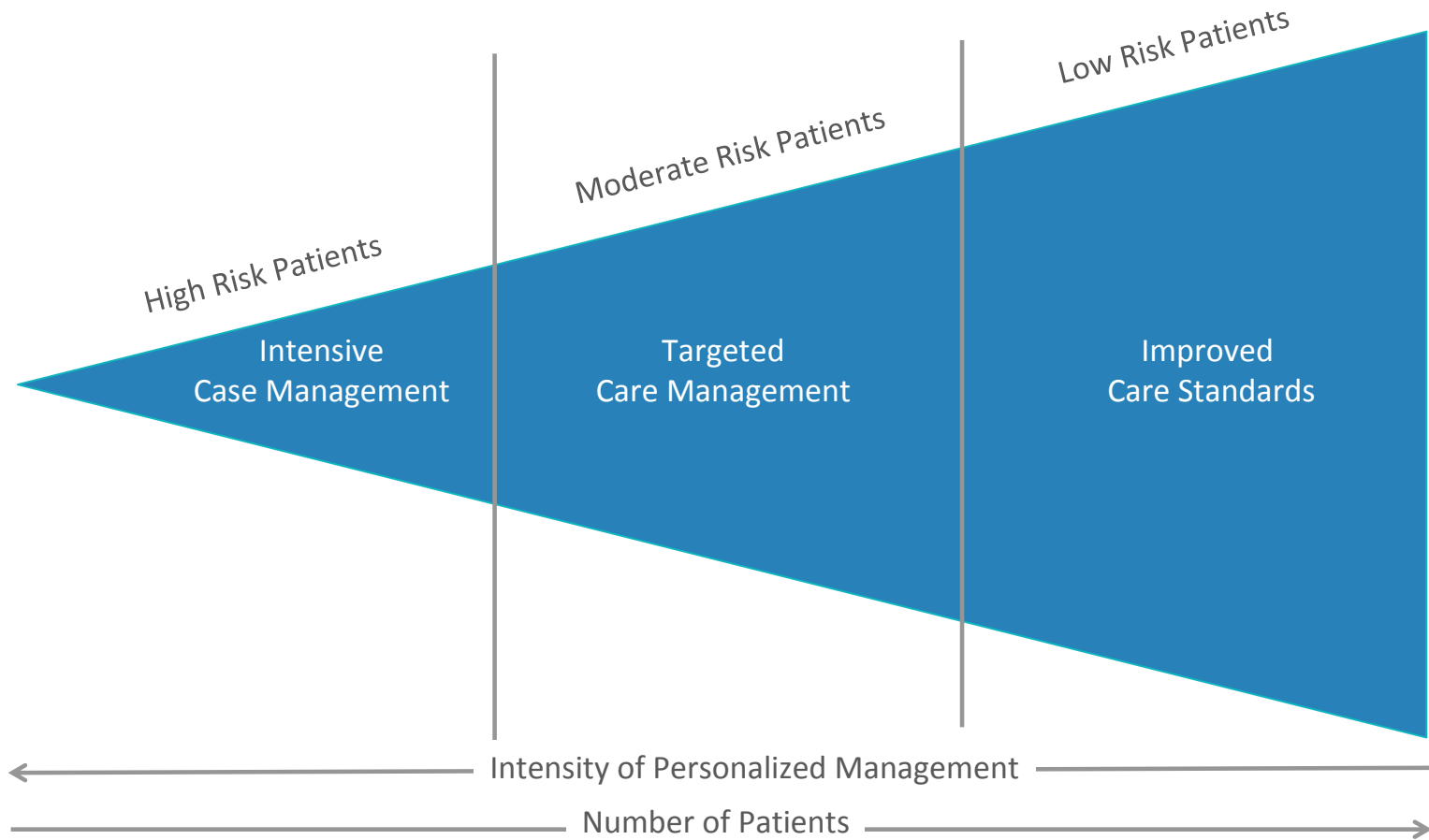
Is Informed and Responsive:

Longitudinal Records

Rapid Diagnostics

Biometric Wearables

An Model for Care



Supported self care



An Example: Greater Manchester

- 29 Trusts and Physician Groups
 - 2.9 Million people
- Longitudinal Health and Social Care Data
 - Shared Care Plan
 - Care-Team Coordination
 - Accelerators