



Welcome to

Better Together:

Patient Expectations and the Accountability Gap
Consumer Healthcare Survey Results

Press Conference

June 15, 2016

The Center for Total Health, Washington, D.C.



**COUNCIL OF ACCOUNTABLE
PHYSICIAN PRACTICES**
An affiliate of the AMGA Foundation



bettertogetherhealth

Shaping the Future of Healthcare

About Us



**COUNCIL OF ACCOUNTABLE
PHYSICIAN PRACTICES**

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The Council of Accountable Physician Practices (CAPP), an affiliate of the American Medical Group Foundation, is a coalition of visionary medical group and health system leaders.

We believe that physicians working together, backed by integrated services, systems, data and technology, can best shape and guide the way care is delivered so that the welfare of the patient is always the primary focus.

Why This Study?

- The post-ACA environment – major payers, regulatory environment – is now focused on care delivery re-design and payment mechanisms for value
- A continued need to understand progress the nation is making toward “accountability” in health care – from the perspective of the patients and the care delivery system.

Presenters



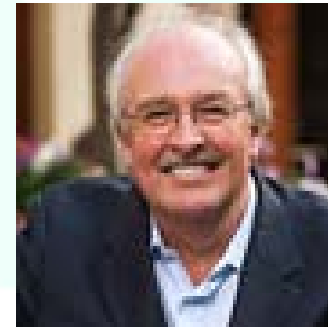
Laura Fegraus
Executive Director, CAPP



Humphrey Taylor
Chairman Emeritus,
The Harris Poll; co-founder,
Strategic Health Perspectives



Jennifer Colamonico
Vice president of Healthcare
Insights for Nielsen.



Ian Morrison
Author, consultant, and
healthcare futurist; co-founder,
Strategic Health Perspectives



Dr. Robert Pearl
Chair of CAPP; CEO of The
Permanente Medical Group and
the Mid-Atlantic Permanente
Medical Group.

Today at 1 p.m.

Better Together Health: Patient Expectations and the Accountability Gap www.bettertogetherhealth.org

Keynote Speaker: Senator Johnny Isakson (R-GA); Co-Chair Chronic Care Workgroup, Senate Finance Committee

Featured Speaker: Tim Gronniger, CMS

Host: Robert Pearl, MD: Chairman, CAPP; Executive Director and CEO, The Permanente Medical Group, President and CEO, Mid-Atlantic Permanente Medical Group

Moderator: Ceci Connelly, CEO, Alliance of Community Health Plans

Panelists:

Karen Cabell, DO: Billings Clinic

Regina Holiday: Patient Rights Advocate

Marc Klau, MD: Southern California Permanente Medical Group

Janet Marchibroda: Director, Bipartisan Policy Center, Health Innovation Initiative

Leana Wen, MD: Health Commissioner, Baltimore City



Shaping the Future of Healthcare

Jenny's Story

A video goes here



Introduction

- The next step in health reform after improved coverage is improvement of the care delivery system in terms of efficiency, quality and access
- “Accountable care” is the vision for improved care delivery
- “Accountable care” is more than ACOs
- CAPP believes that accountable care is experienced by patients through 5 key features and benefits

Accountable Care Patient Benefits

- Care team coordination
- Prevention
- 24/7 access
- Evidence-based medicine (treatments based on proof)
- Enabled by robust technology

The Accountable Care Experience of U.S. Consumers and Physicians

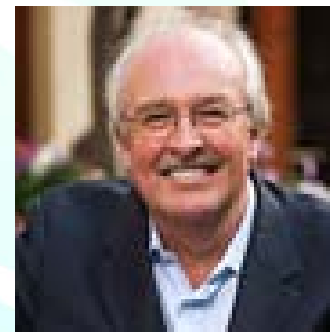
Results from surveys in partnership with
Nielsen Strategic Health Perspectives



Humphrey Taylor
Chairman Emeritus,
The Harris Poll; co-founder,
Strategic Health Perspectives



Jennifer Colamonico,
VP Healthcare Insights,
Nielsen's Strategic Health
Perspectives



Ian Morrison
Author, consultant, and
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Accountable Care Can Be Measured in Direct Patient Experiences

Care/Team
Coordination

24/7 Access
to Care

Treatment
based on Proof

Robust Health
Information Technology

Preventive
Primary Care



- Measures asked in a large online survey of US consumers (30,007 respondents) in March 2016 by Nielsen's Strategic Health Perspectives. Some measures can be tracked to Nielsen's prior work with CAPP in 2015.
 - Data weighted for representativeness; significance testing shown at 95% confidence interval
- Physician data shown from Nielsen's 2015 Survey of 626 US physicians unless otherwise noted.

Key Survey Takeaways

Care/Team Coordination

- Coordination is improving, and many patients are experiencing some aspect of it
- Coordination for those managing multiple conditions is not noticeably better than for healthier patients

24/7 Access to Care

- 24/7 access to care still not available to most patients
- Access to digital care also not available to most

Treatment Based on Proof

- Many docs—but not all—report they are using evidence-based treatment guidelines

Key Survey Takeaways

Health Information Technology

- Slow progress, but many are not using what they have
- Technology alone is not going to improve coordination – particularly if many older/sicker people don't want it

Preventive Primary Care

- Physician efforts in prevention not being heard by patients; there is a large gap around weight management
- Opportunities to improve physician efforts at helping patients prevent disease



Are Patients Experiencing Care Teams and Coordinated Care?

Care Coordination:

About Half the Time, Patient Information Is Still Not Shared Across Providers



Primary doctor's office...
Has access to any hospital or ER visit records
without me bringing them in

60%

My doctors are now able to share information
about my health and know my history
before I get to the appointment

49%

If my doctor is not available, I can see
another provider who has access to my
electronic records and information

63%

Base: Past 12 Month Doctor Visit/Doctor Has EMR
2016 Doctor (n=25,527)
2016 Doctor Has EMR (n=4,369)



64%

of physicians with EMRs receive information
on hospital discharge summaries

49%

of physicians with EMRs can share patients'
records electronically with clinicians outside
their practice

48%

of physicians are expanding the roles of
NP/PA in delivering care to patients

Base: US Physicians
Total 2015 (n=626)
Has EMR (n=502)

Care Coordination:

There Is a Gap Between Physician Follow-Up and the Patient Experience



Primary doctor's office...
Calls me if I don't make a follow up
appointment or fill a prescription

36%

Primary doctor's office...has a nurse or care
manager to help me stay on track or comply
with my treatment/instructions

37%

After discharge...received a follow up call or
visit from PCP within 2 weeks to find out how I
was doing and to review treatment instructions

30%



33%

of physicians are following up with patients to
see if they are complying with medication
and/or recommended treatment

40%

of PCPs offer a nurse or care manager to
help patients stay on track or comply with
treatment/instructions*

50%

of physicians with EMRs can share records
between hospital and private office visits

Base: Past 12 Month Doctor Visit or Hospitalization
2016 Doctor (n=25,527)
2016 Hospitalization (n=4,780)

Base: US Physicians
Total 2015 (n=626)
Has EMR (n=502)
*MD Answers 2016
Quick Quant 100 PCPs

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Are Patients Getting 24/7 Access to Doctors?

24/7 Access:

About One in Three Patients Has It; Gap in Awareness of 24/7 Phone Advice

Physician's office provides ...
evening and weekend hours

34%

Physician's office provides ...
a telephone line for medical advice available 24/7

38%

Physician's office provides ...access to an urgent
care center through the same medical group

38%

32%

of physicians provide evening and weekend
hours

58%

of physicians provide a telephone line for
medical advice available 24/7*

34%

of physicians provide access to an urgent
care center through the same medical group*

Base: All US Consumers
2016 (n=30,007)

Base: US Physicians
Total 2015 (n=626)
*MD Answers 2016
Quick Quant 100 PCPs

24/7 Access:

Close to Half of Patients Have Online Access to Information and Transactions



Physician's office provides ...A portal where you can log on and see your lab tests, imaging results or other sensitive information

48%

Physician's office provides ...Online appointment scheduling

42%

Physician's office provides ...Communication via an online secure messaging platform that requires you to set up a log-in and a password in order to ensure the protection of sensitive data

42%



50%

of physicians provide a portal where you can log on and see your lab tests, imaging results or other sensitive information

27%

of physicians report they provide online appointment scheduling

30%

of physicians provide communication via an online secure messaging platform

Base: All US Consumers
2016 (n=30,007)

Base: US Physicians
Total 2015 (n=626)
Has EMR (n=502)

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Are Physicians Using Evidence-Based Treatments?

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Evidence-Based Care:

Physicians Say They Use Guidelines,

But Most Patients Don't Recall Discussions About Them



In last appointment...
talked about the latest treatment options along
with traditional ones

39%

Base: Past 12 Month Doctor Visit
2016 (n=25,527)



65%

of physicians used evidence-based
guidelines to determine treatment

Base: US Physicians in
Group Practice
Total 2015 (n=530)

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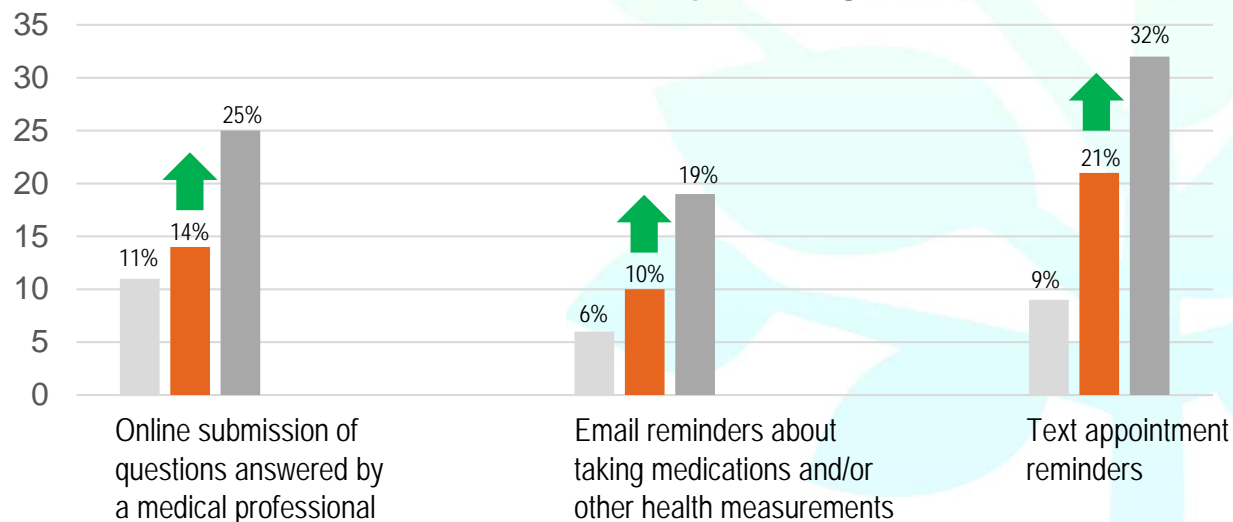
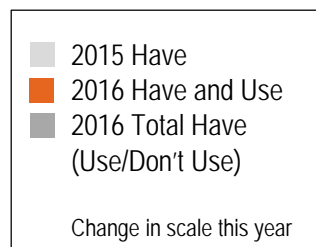


Are Physicians Utilizing Technology to Improve Care?

Technology:

Access to Electronic Engagement Is Increasing But Still Low

Percent of consumers who report having...



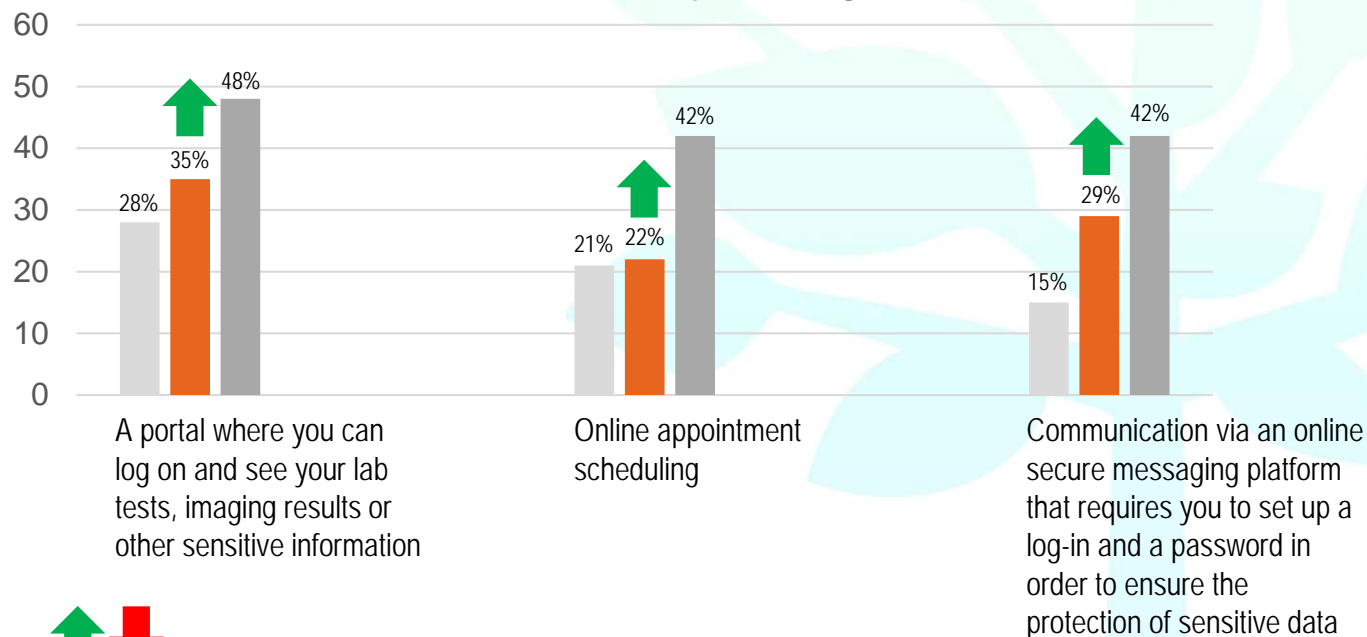
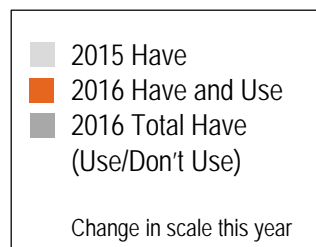
Significant increase/decrease

Base: All US Consumers
2015 (n=5014)
2016 (n=30007)

Technology:

Half to One-Third of Patients with Online Access Don't Use It

Percent of consumers who report having...



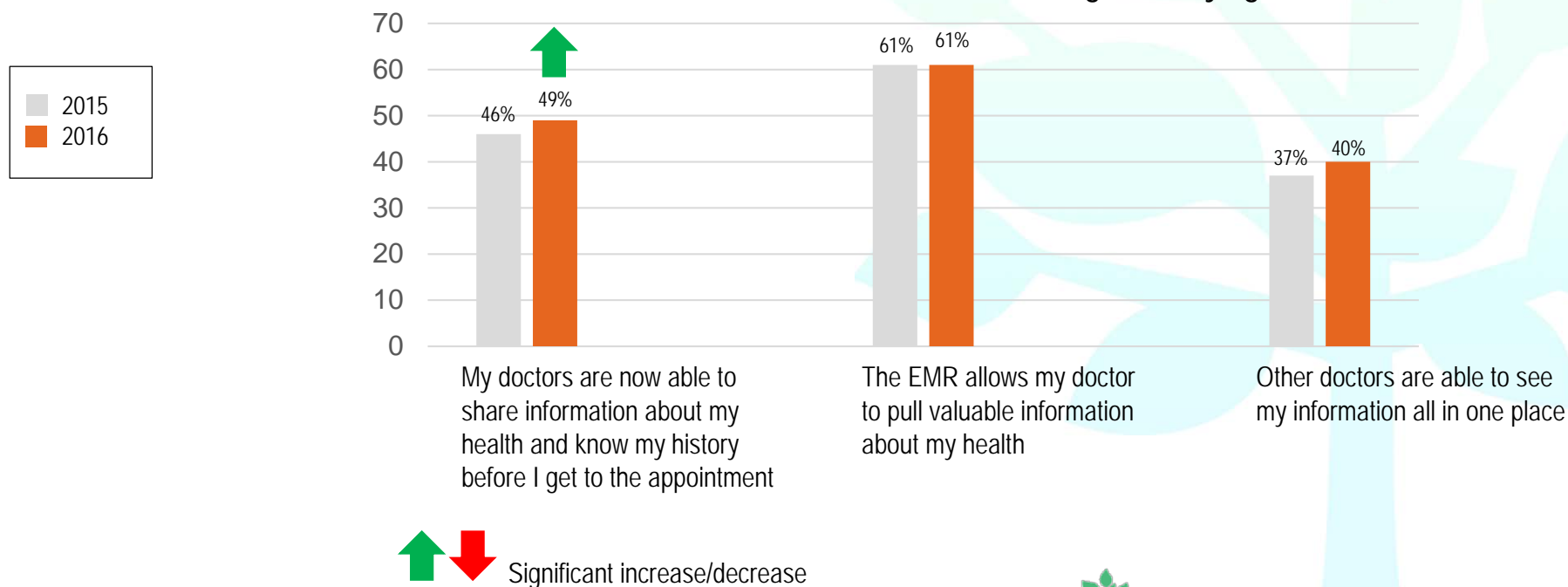
Significant increase/decrease

Base: All US Consumers
2015 (n=5014)
2016 (n=30007)

Technology:

Perception of Shared EMR Information Is Stable

Percent of consumers with doctor using EMR saying...

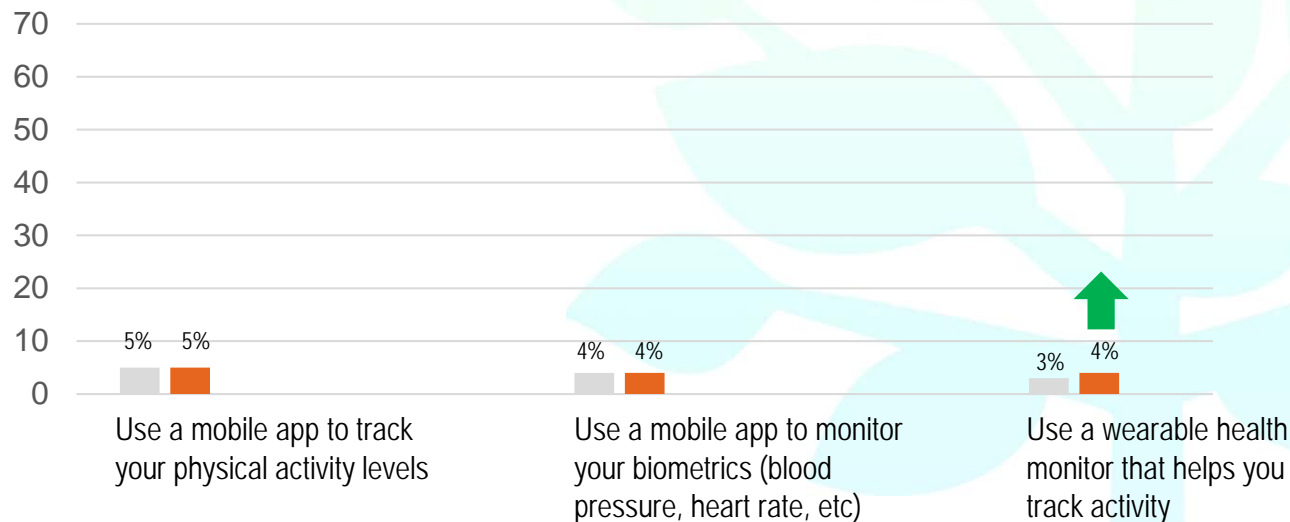
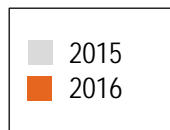




Base: Doctor Uses an EMR
2015 (n=1990)
2016 (n=4369)

Technology:

Patient-Physician Engagement Around Mobile Apps Remains Low

Percent of consumers who report primary care physician recommending...



  Significant increase/decrease

Base: All US Consumers
2015 (n=5014)
2016 (n=30007)



Are We Preventing Illness As Well As We Are Managing It?

Prevention:

Patients Don't Hear Doctors' Advice on Screenings and Weight Management

Patients who say PCP
has recommended...



Increase physical activity levels

22%

Adopt better eating habits

19%

Generally remind about preventive screenings

14%

Enroll in a weight loss program

5%

Base: All US Consumers
2016 (n=30,007)



90%

of PCPs often recommend patients increase
physical activity levels

90%

of PCPs often recommend patients adopt
better eating habits

89%

of PCPs often remind patient about
preventive screenings

52%

of PCPs often recommend patients enroll in a
weight loss program



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Prevention:

Doctors Starting to Suggest Mobile Devices But Patients Aren't Hearing Them

Patients who say PCP
has recommended...



Use a mobile app to track your
physical activity levels

5%

Use a mobile app to monitor your biometrics
(blood pressure, heart rate, etc...)

4%

Use a wearable health monitor that
helps you track activity

4%



In past 12 months...

52%

of PCPs have recommend patients use
mobile apps to track physical activity levels

45%

of PCPs have recommend patients use
mobile apps to monitor your biometrics
(blood pressure, heart rate, etc...)

40%

of PCPs have recommended patients use a
wearable health monitor that helps you track
activity

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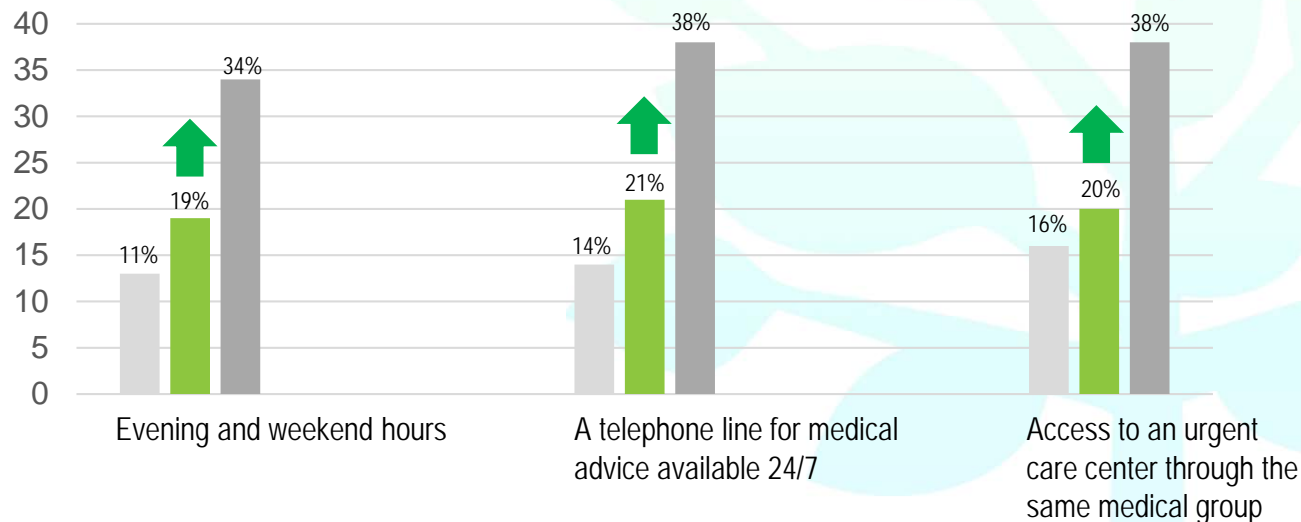
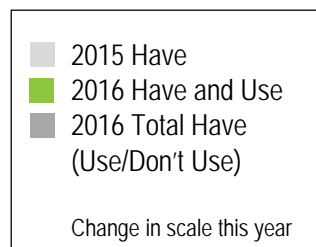


Is the Experience of Accountable Care and Coordination Improving Over Time?

24/7 Access:

Improving Slowly, But Not Always Used

Percent of consumers who report having...



Significant increase/decrease

Base: All US Consumers
2015 (n=5014)
2016 (n=30,007)

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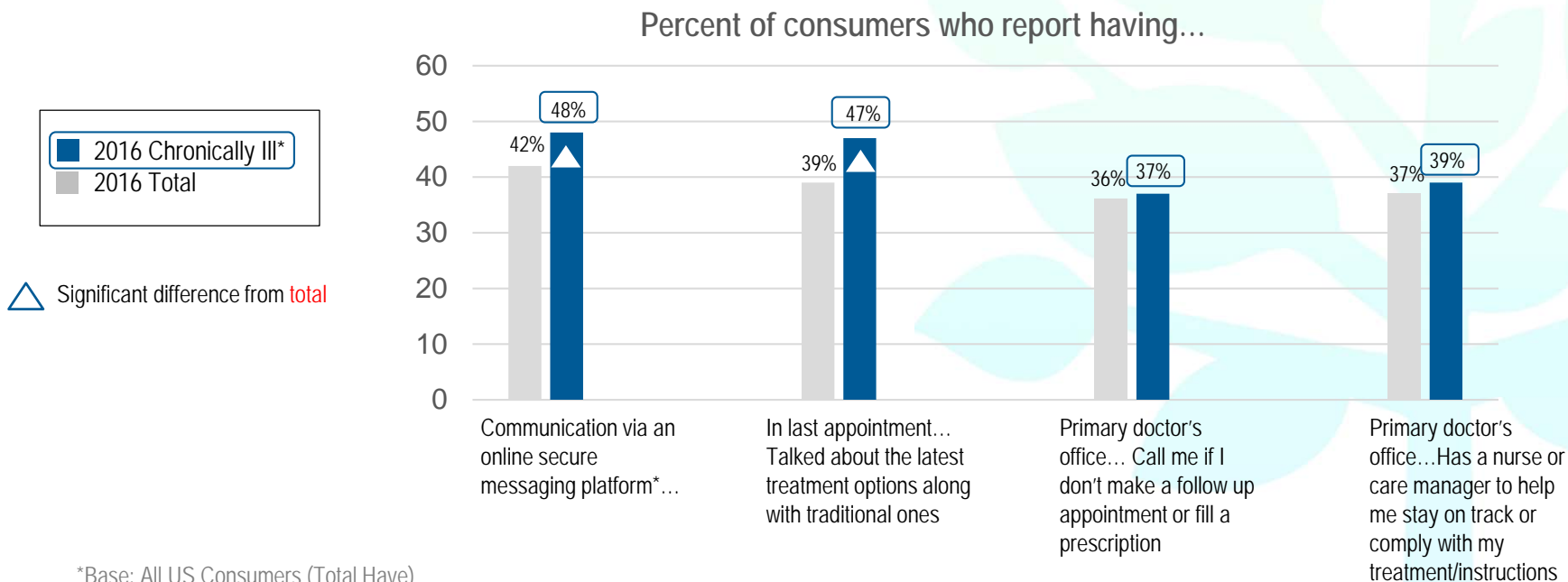
Treatment
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Care Coordination:

Patients with Multiple Chronic Illness Get Only Slightly More Coordinated Care



*Base: All US Consumers (Total Have)

2016 Total (n=30,007)

"Chronically Ill" = Patients with 3+ chronic conditions (N=13,260)

Base: Past 12 Month Doctor Visit

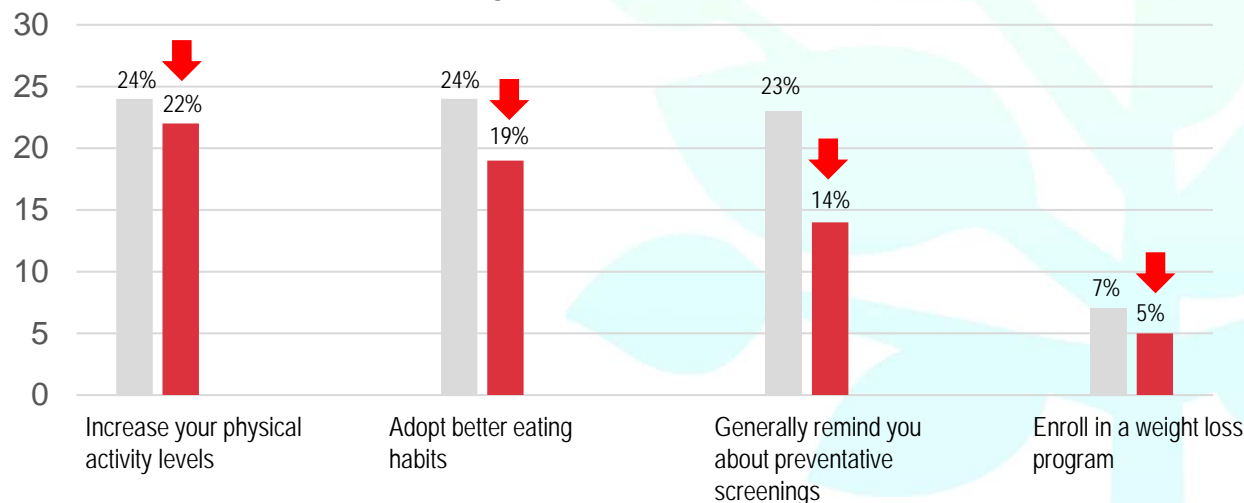
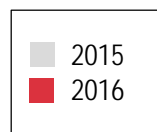
2016 Total (N=25,527);

"Chronically Ill" = Patients with 3+ chronic conditions (N=12,523)

Prevention:

Physician Messages Are Being Heard *Less Often*

Patients who say PCP has recommended...

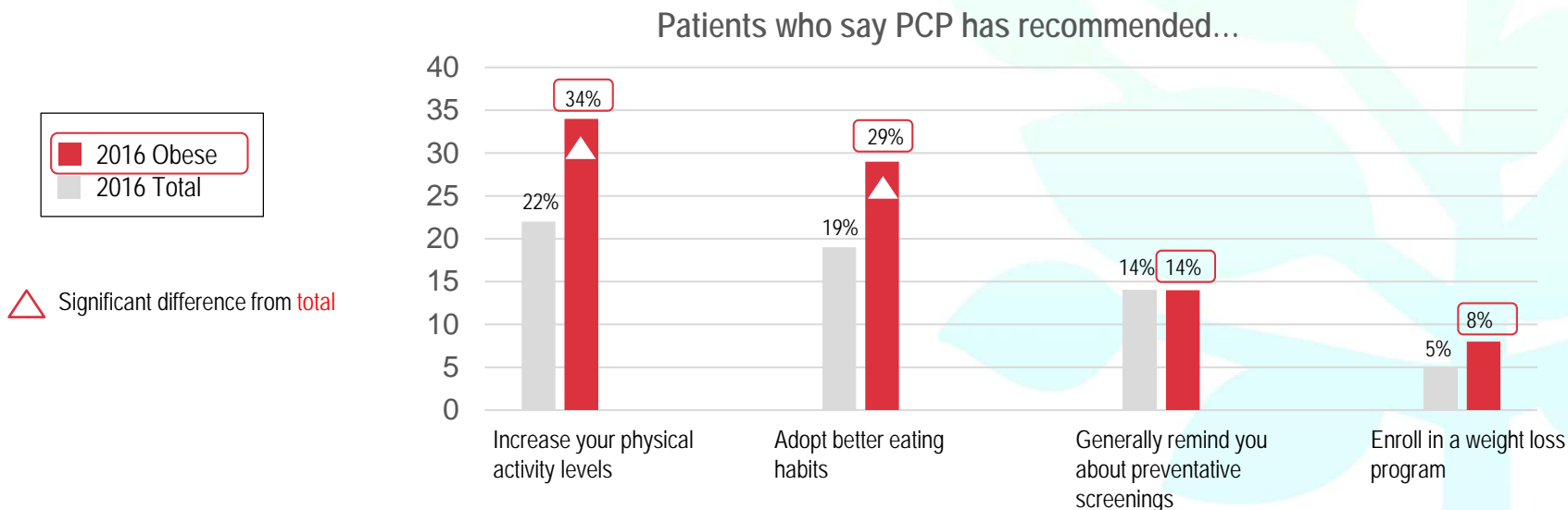


Significant increase/decrease

Base: All US Consumers
2015 (n=5014)
2016 (n=30007)

Prevention:

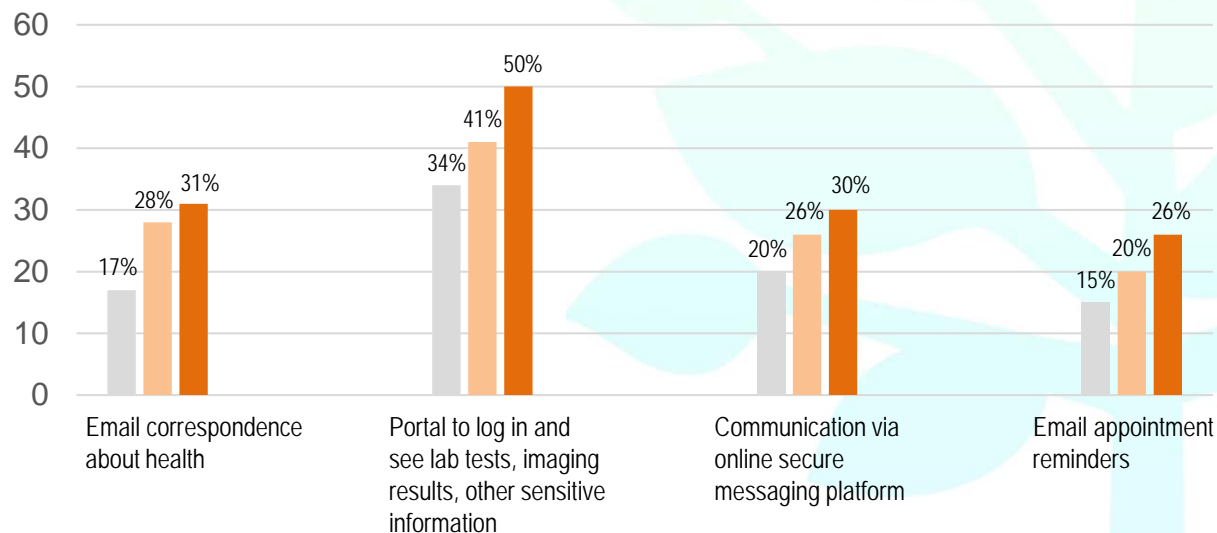
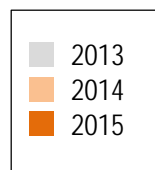
Amidst an Obesity Epidemic, Overweight Patients Are Not Getting Prevention Messages



Base: All US Consumers (Total Have)
2016 Total (n=30,007)
"Obese" = Patients with 40+ BMI (N=10,462)

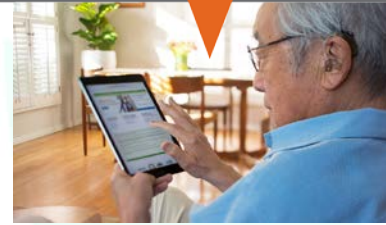
Technology:

Physicians are slowly moving towards high tech patient engagement



Significant increase/decrease

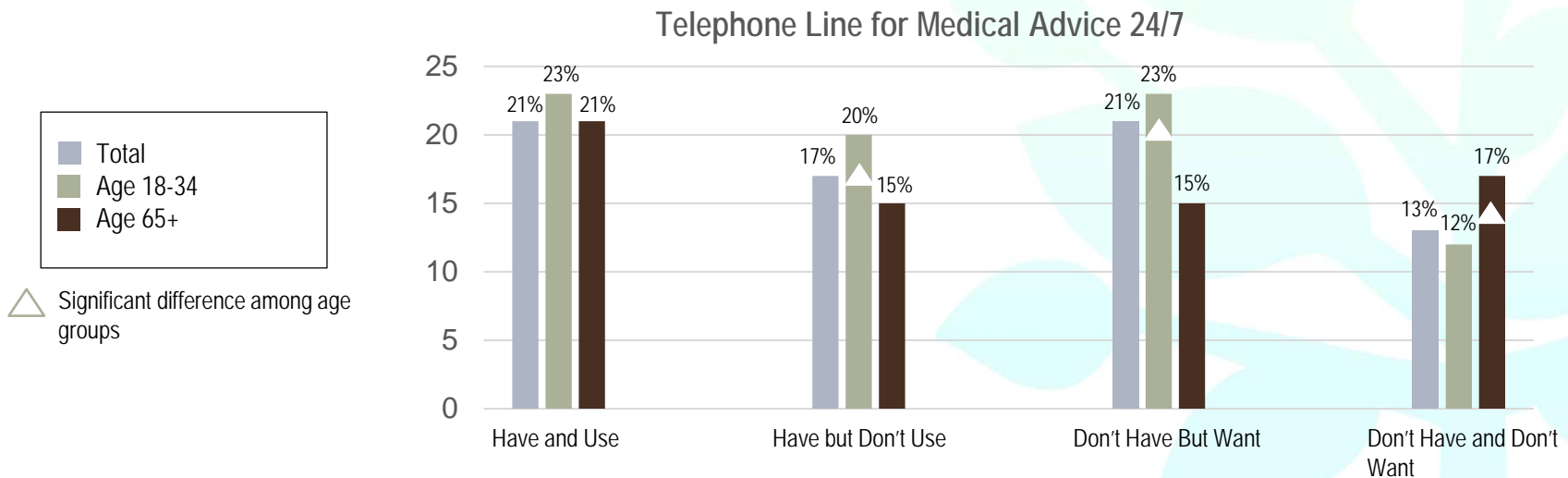
Base: US Physicians
Total 2015 (n=626)
2014 (n=600), 2013 (n=600)



What Are the Demographic Gaps in Usage of Key Technologies that Support Coordination?

Technology:

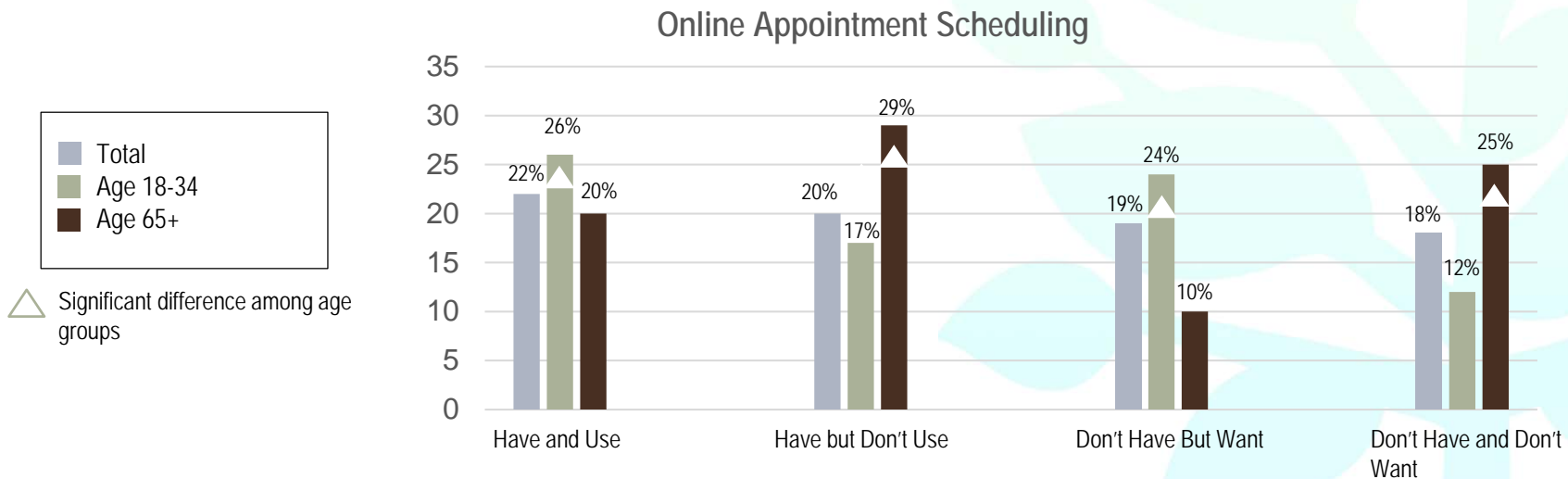
Seniors Are Less Open to Telephone Advice than Younger Patients



Base: All US Consumers (Total Have)
2016 Total (n=30,007)
Age 18-34 (N=7,348); Age 65+ (N=6,416)

Technology:

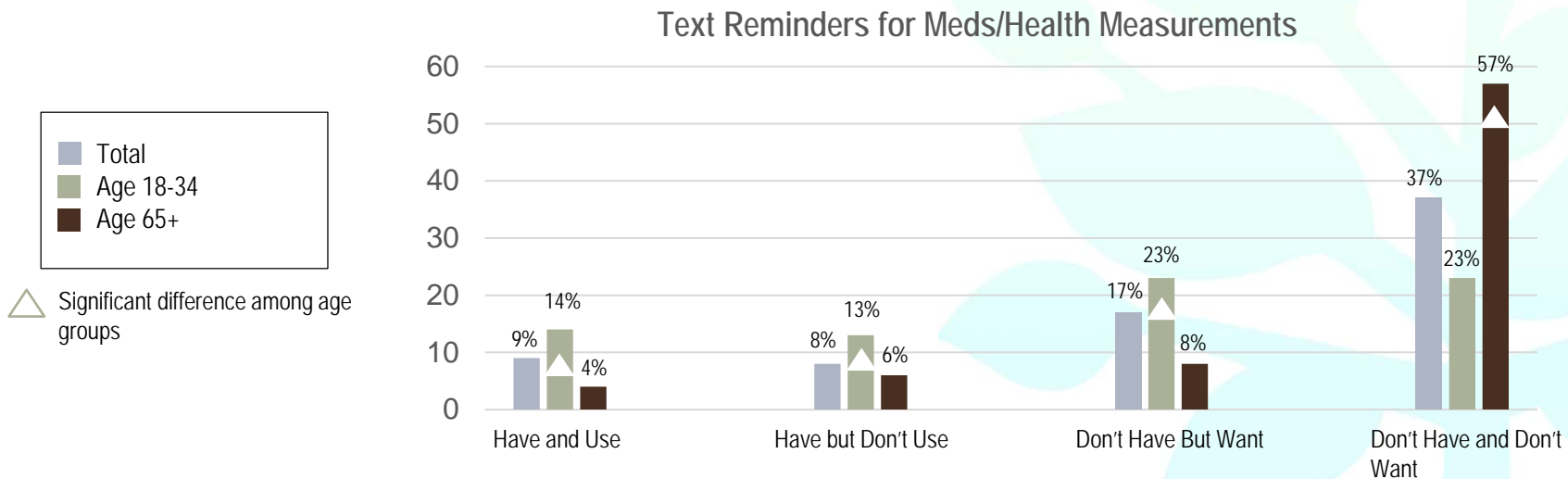
Older Patients Even Less Interested In and Likely to Use Online Scheduling Tools



Base: All US Consumers (Total Have)
2016 Total (n=30,007)
Age 18-34 (N=7,348); Age 65+ (N=6,416)

Technology:

Text Reminders Are Least Appealing to Older Patients

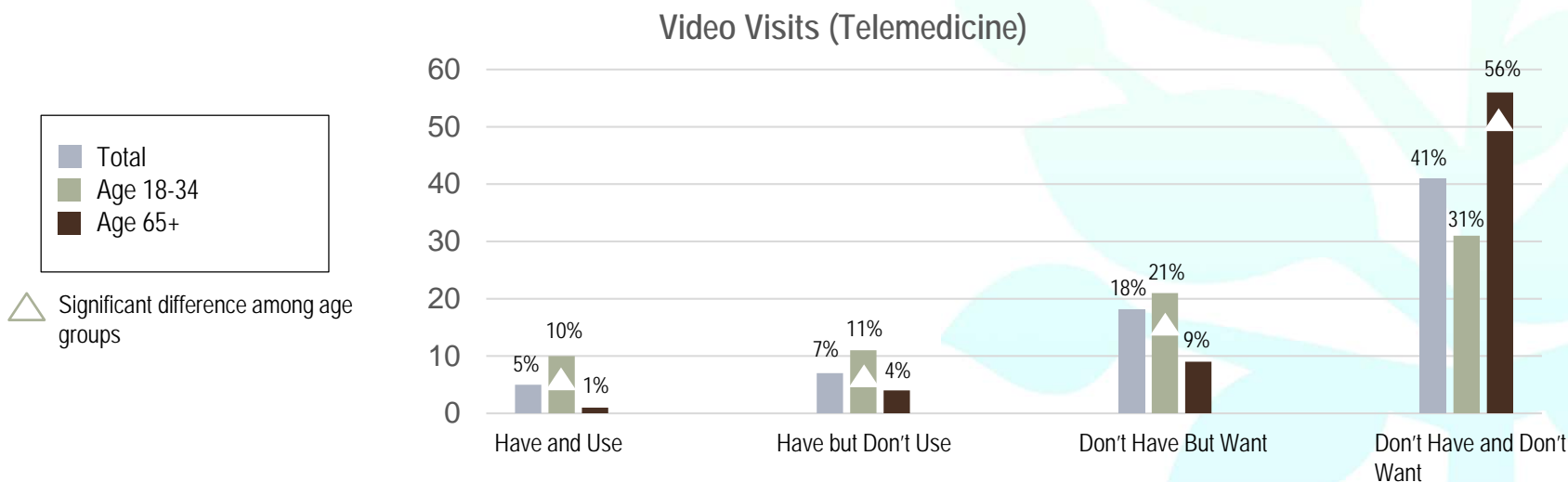


Base: All US Consumers (Total Have)
2016 Total (n=30,007)
Age 18-34 (N=7,348); Age 65+ (N=6,416)

Technology:

Video Visits Still Rare,

But Younger Patients Twice as Likely to Use and Want Them



11% of physicians say their compensation is in part based on "seeing patients online (telemedicine)"

Base: All US Consumers (Total Have)
2016 Total (n=30,007)
Age 18-34 (N=7,348); Age 65+ (N=6,416)



Research Conclusions



Patient Experience Report Card:

Coordinated, Accountable Care

Patients with chronic illness do not perceive more coordination of care

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ENCOURAGING

About half of patients are experienced coordinated care teams, and about one-third physician follow-up

NEEDS WORK

Only about one-third of patients have 24/7 access

ENCOURAGING

Most physicians report using evidence-based guidelines

NEEDS WORK

Use is growing but still rare; Some older adults not interested

TOO LOW FOR COMFORT

Most patients do not get the message, if one is delivered, especially around weight management

CAPP's Conclusions

- Need to continue to help Americans define quality in the new world of "accountable care"
- Continue to encourage greater system-ness and clinical integration
- Prevention and continued improvement of chronic care coordination must be the priorities
- Improve the effectiveness of counseling and preventive care
- Improve access to 24/7 care
- Medical groups to provide more education on the technology available; make sure staff understand how it can be used in lieu of more expensive options, like ER
- Find ways to give patients experience with this technology, to overcome older adults reticence to use it

Policy Levers to Close the Gap

- Payment reform – increase movement to value among all payers – to support system-ness and better outcomes
- More robust health information technology to improve sharing of info among providers and allow for easier access to providers by consumers
- Standardize quality measures in language consumers understand and that are relevant to healthcare today