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.
About Us

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
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 healthcare futurist; co-founder,
Strategic Health Perspectives
Accountable Care Can Be Measured in Direct Patient Experiences

- 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%
- Of physicians with EMRs receive information on hospital discharge summaries: 64%
- Of physicians with EMRs can share patients’ records electronically with clinicians outside their practice: 49%
- Of physicians are expanding the roles of NP/PA in delivering care to patients: 48%

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

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
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%
- Of physicians provide evening and weekend hours: 32%
- Of physicians provide a telephone line for medical advice available 24/7: 58%
- Of physicians provide access to an urgent care center through the same medical group: 34%

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

- 48% of physicians provide a portal where you can log on and see your lab tests, imaging results or other sensitive information.
- 42% of physicians report they provide online appointment scheduling.
- 42% of physicians provide 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.

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

Base: US Physicians
Total 2015 (n=626)
Has EMR (n=502)
Are Physicians Using Evidence-Based Treatments?
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%

65% of physicians used evidence-based guidelines to determine treatment

Base: Past 12 Month Doctor Visit 2016 (n=25,527)
Base: US Physicians in Group Practice Total 2015 (n=530)
Are Physicians Utilizing Technology to Improve Care?
Technology:
Access to Electronic Engagement Is Increasing But Still Low

Percent of consumers who report having...

- **Online submission of questions answered by a medical professional**
  - 2015 Have: 11%
  - 2016 Have: 14%
  - 2016 Have and Use: 25%
  - Change in scale this year: Significant increase

- **Email reminders about taking medications and/or other health measurements**
  - 2015 Have: 6%
  - 2016 Have: 10%
  - 2016 Have and Use: 19%
  - Change in scale this year: Significant increase

- **Text appointment reminders**
  - 2015 Have: 9%
  - 2016 Have: 21%
  - 2016 Have and Use: 32%
  - Change in scale this year: Significant increase

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...

- A portal where you can log on and see your lab tests, imaging results or other sensitive information
  - 2015 Have: 28%
  - 2016 Have: 35%
  - 2016 Total Have (Use/Don't Use): 48%

- Online appointment scheduling
  - 2015 Have: 21%
  - 2016 Have and Use: 22%
  - 2016 Total Have: 42%

- 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
  - 2015 Have: 15%
  - 2016 Have: 29%
  - 2016 Total Have: 42%

Change in scale this year

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...

- **My doctors are now able to share information about my health and know my history before I get to the appointment**
  - 2015: 46%
  - 2016: 49%

- **The EMR allows my doctor to pull valuable information about my health**
  - 2015: 61%
  - 2016: 61%

- **Other doctors are able to see my information all in one place**
  - 2015: 37%
  - 2016: 40%

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...

<table>
<thead>
<tr>
<th>Mobile App Activity</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use a mobile app to track your physical activity levels</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Use a mobile app to monitor your biometrics (blood pressure, heart rate, etc)</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Use a wearable health monitor that helps you track activity</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

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%

- 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

Base: All US Consumers 2016 (n=30,007)
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 recommended patients use mobile apps to track physical activity levels
- 45% of PCPs have recommended 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

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

- Evening and weekend hours: 2015 Have = 11%, 2016 Have = 19%, 2016 Total Have (Use/Don't Use) = 34%
- A telephone line for medical advice available 24/7: 2015 Have = 14%, 2016 Have = 21%, 2016 Total Have (Use/Don't Use) = 38%
- Access to an urgent care center through the same medical group: 2015 Have = 16%, 2016 Have = 20%, 2016 Total Have (Use/Don't Use) = 38%

Change in scale this year

Base: All US Consumers
2015 (n=5014)
2016 (n=30,007)
Care Coordination:
Patients with Multiple Chronic Illness Get Only Slightly More Coordinated Care

Percent of consumers who report having...

- Communication via an online secure messaging platform*: 48% (Chronically Ill) vs. 42% (Total)
- In last appointment… Talked about the latest treatment options along with traditional ones: 47% (Chronically Ill) vs. 39% (Total)
- Primary doctor’s office… Call me if I don’t make a follow up appointment or fill a prescription: 37% (Chronically Ill) vs. 36% (Total)
- Primary doctor’s office… Has a nurse or care manager to help me stay on track or comply with my treatment/instructions: 39% (Chronically Ill) vs. 37% (Total)

*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...

- Increase your physical activity levels: 24% (2015), 22% (2016)
- Adopt better eating habits: 24% (2015), 19% (2016)
- Generally remind you about preventative screenings: 23% (2015), 14% (2016)
- Enroll in a weight loss program: 7% (2015), 5% (2016)

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

Patients who say PCP has recommended...

- Increase your physical activity levels: 34% (Obese) vs. 22% (Total)
- Adopt better eating habits: 29% (Obese) vs. 19% (Total)
- Generally remind you about preventative screenings: 19% (Obese) vs. 14% (Total)
- Enroll in a weight loss program: 8% (Obese) vs. 5% (Total)

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

- Email correspondence about health:
  - 2013: 17%
  - 2014: 28%
  - 2015: 31%

- Portal to log in and see lab tests, imaging results, other sensitive information:
  - 2013: 34%
  - 2014: 41%
  - 2015: 50%

- Communication via online secure messaging platform:
  - 2013: 20%
  - 2014: 26%
  - 2015: 30%

- Email appointment reminders:
  - 2013: 15%
  - 2014: 20%
  - 2015: 26%

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

Significant difference among age groups

Have and Use
- Total: 26%
- Age 18-34: 20%
- Age 65+: 29%

Have but Don't Use
- Total: 20%
- Age 18-34: 17%
- Age 65+: 19%

Don't Have But Want
- Total: 24%
- Age 18-34: 10%
- Age 65+: 18%

Don't Have and Don't Want
- Total: 25%
- Age 18-34: 12%
- Age 65+: 18%

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

![Text Reminders for Meds/Health Measurements](image)

- **Total**: 57%
- **Age 18-34**: 23%
- **Age 65+**: 23%

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<thead>
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<th>Total</th>
<th>Age 18-34</th>
<th>Age 65+</th>
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<td>14%</td>
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<td>9%</td>
</tr>
<tr>
<td>Have but Don't Use</td>
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<td>6%</td>
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</tr>
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<td>23%</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Don't Have and Don't Want</td>
<td>57%</td>
<td>23%</td>
<td>37%</td>
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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

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<th>Have and Use</th>
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<tr>
<td>56%</td>
<td>31%</td>
<td>41%</td>
<td>56%</td>
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<tr>
<td>7%</td>
<td>4%</td>
<td>9%</td>
<td>21%</td>
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<tr>
<td>10%</td>
<td>1%</td>
<td>18%</td>
<td>41%</td>
</tr>
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</table>

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
Patients with chronic illness do not perceive more coordination of care

- **ENCOURAGING**
  - Care/Team Coordination
  - About half of patients are experienced coordinated care teams, and about one/third physician follow-up

- **NEEDS WORK**
  - 24/7 Access to Care
  - Only about one/third of patients have 24/7 access

- **ENCOURAGING**
  - Treatment based on Proof
  - Most physicians report using evidence-based guidelines

- **NEEDS WORK**
  - Robust Health Information Technology
  - Use is growing but still rare; Some older adults not interested

- **TOO LOW FOR COMFORT**
  - Preventive Primary Care
  - 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