Consumer Trends in a Brave New World of Patient Engagement

February 2018
Great Expectations...are we meeting them?

Friday
9:45 p.m.

Saturday
7:27 a.m.

Saturday
7:10 a.m.

Saturday
7:40 a.m.

Saturday
9:19 a.m.

Saturday
9:45 a.m.

www.planetree.org
What’s at Risk

Every customer experience failure costs an average 65% revenue loss, compared to what could have been earned from that person during the following year.  

Source: Timetrade

65% revenue loss

Influence Health Consumerism Report, 2017
Patient-Centered Care, *Fast Forward*

**KEY POINTS:**

- The Patient-Engagement revolution is here
- Technology is accelerating that revolution
- Expectations are growing around cost, convenience, access and quality
- Patients and their families will play larger roles as members and captains of their own healthcare teams
The ‘ideal patient’ circa 1990s

“...the ideal patient has no family, asks no questions, and does exactly what the doctor tells them to do...”
Care must be accountable to engaged patients, families and consumers.
Building a patient-centered system accountable for quality and value based on what matters to people

1. Healthcare service quality improvements must be tied to consumer preferences and related emerging ‘personalized’ technologies.

2. Rapid adoption of proven patient & family engagement strategies & metrics is essential for successfully competing in a value-based care system.

3. Organizational PCC strategies must align with policy and regulatory trends focusing on engagement of patients and families.

4. Putting patients first begins with visionary leadership that integrates PCC into the strategic plan as a quality imperative.
Understanding the changing consumer healthcare landscape
A new federal rule on the exchange of health data removes legal barriers that stop medical laboratories from providing lab test results directly to patients and their designees, such as developers of their personal health records systems. The rule preempts laws in 13 states and lifts a federal exemption effective in 26 more states.
“...law allows people to get blood tests at lab without doctor’s orders...to empower themselves”

In Arizona, No Doctor’s Note Needed For Blood Tests

A new Arizona law went into effect in July that allows people to get blood tests at the lab without a doctor’s orders.

Critics say it will lead to excessive testing, and leave the customers confused trying to interpret results. But labs that offer a new menu of tests say it puts healthcare firmly in the hands of the individual.

**Dr. Robert Stern**, medical director at Sonora Quest Laboratories in Phoenix, spoke with *Here & Now*'s Peter O’Dowd about what the law means for the state’s healthcare customers. He said the law and new test offerings come partly as a response to America's increasingly on-demand culture, as well as to many patients’ desire to empower themselves.
“...2015 law allowing people to get blood tests at lab without doctor’s orders expands...”

Do-it-yourself lab testing without doc's orders begins

Ken Alltucker, The Republic | azcentral.com Published 2:19 p.m. MT July 7, 2015 | Updated 4:05 p.m. MT July 7, 2015

Health-care consumers can buy any test that a medical lab sells without a doctor's orders under a state law that took effect Friday.
“Direct To Consumer Advertising...treats consumers as people who deserve to know the compounds they take into their bodies”
Yelp your doctor...or hospital

The Best 10 Doctors near East Orlando, Orlando, FL

Businesses: Cardiologists, Cosmetic Surgeons, Dermatologists
Health & Medical: Ear Nose & Throat, Family Practice, Gastroenterologist, Internal Medicine, Naturopathic/Holistic, Obstetricians & Gynecologists, Ophthalmologists, Orthopedists, Pain Management, Pediatricians, Podiatrists, Psychiatrists

More categories: Radiologists, Sports Medicine, Surgeons

$ $ $ $ $ Open Now All Filters

Ad UroGyn Specialists of Florida
Obstetricians & Gynecologists
7 reviews
801 N Orange Ave
Orlando, FL 32801
(407) 333-0496

Dr. Walker, turned out to be a compassionate doctor, who exceeded my expectations as a Urogynecologist. I will now use UroGyn Specialist of Florida, for all my Obstetrics and... read more

Ad Affinity Med Spa
Chiropractors, Massage Therapy, Weight
1 review
779 N Alafaya Trl
Orlando, FL 32828

Mo' Map
Redo search when map moves

www.planetree.org
The industry’s version of ‘Global Quality Ratings’

CMS Five-Star Rating

In place now:
- Nursing facilities
- Hospital HCAHPS (added Spring 2015)
- Dialysis centers
- Medicare Advantage Plans
- Home health agencies (started July 2015)

- Overall hospital rating (2016)
How useful is Hospital Compare to the average consumer?

8 screens in and not very useful...
Patient Engagement

Yelp proving to be reliable for hospital reviews, addresses 12 more measures than HCAHPS scores

The authors of a Health Affairs report also suggested that policymakers could use Yelp to identify which quality measures are most important to doctors and patients.

- **Yelp is the most widely used commercial website in the United States for hospital ratings.**
- **Only 6% of Americans had even heard of the Hospital Compare website.**
A Look at the Numbers

Patients are turning to review sites in increasing numbers:

- Yelp: 27%
- Healthgrades: 26%
- RateMDs: 26%
- Vitals: 11%
- Zoe Doc: 7%
- Other: 3%

Percentage of patients who used online review sites to find a doctor:
- 2013: 25%
- 2014: 42%

Before selecting a Doctor:
- 61%

When do patients use online reviews?

To evaluate a current Doctor:
- 20%

After selecting a Doctor:
- 19%
Uber Healthcare is here…with competitive pricing

The On-Demand Doctor
Several startups are putting a high-tech spin on old-fashioned house calls:

<table>
<thead>
<tr>
<th>SERVICE</th>
<th>CITY/STATE</th>
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<tbody>
<tr>
<td>For a flat fee of $99, the service promises to send a doctor in under an hour</td>
<td>Los Angeles, San Francisco and Orange County, Calif.</td>
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<tr>
<td>Dispatches doctors or nurses via Uber for $200 per urgent-care visit; $75-$100 for a wellness check</td>
<td>New York City, San Francisco</td>
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<tr>
<td>Nurse conducts initial visit and can video chat with doctor; $150 for an urgent-care house call; prices vary</td>
<td>Atlanta, New York City</td>
</tr>
<tr>
<td>Nurse practitioners consult via video for $50 or in-person visit for $200; $50 per month for unlimited visits</td>
<td>Minneapolis, Wisconsin and North Dakota</td>
</tr>
<tr>
<td>Responds to non-emergency 911 calls; offers on-scene care instead of ER visit; $200-$300</td>
<td>Denver</td>
</tr>
</tbody>
</table>

Source: the companies

“Over 14 million consumers have plans with high deductibles and copays, and that number continues to grow as employers, large and small, offer those plan designs to their employees…”

USA Today, January 15, 2016
Uber Healthcare is here...and it's transparent

How We Work

House Calls:
House Call Fee + Time-Based + Distance Fee

$100 + $400/Hr + See Table

<table>
<thead>
<tr>
<th>Zone</th>
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<th>Distance Fee</th>
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your calls and emails

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Doctors' Virtual Consults With Patients To Double By 2020

“We’ve seen growth in reimbursement,” Roeen Roashan, medical technology analyst with IHS said “…payers are focused on virtual consultation....”

- 2015: 1 million virtual doctor visits
- 2016: 1.2 million virtual doctor visits
- 72% of hospitals have telemed programs
- 52% of MD groups have telemed programs
- 74% of big employers offer telemed benefits

*American Telemedicine Assoc. Avizia survey Mar 2016 WSJ
• Between 10-12% of patients are reported to have access to their doctors via text or email*

• 50% of primary care visits in the US could be conducted via email with no effect on outcomes**

• E-Visits current pricing range: $35-$75, $15 co-pay with insurance coverage

*Deloitte report in WSJ 2015; **Mayo Clinic eVisit trial 2014*
Majority of medical practitioners still do not use email despite desire by 93% of consumers

- Barrier: lack of reimbursement mechanisms in fee-for-service models
- Barrier: misunderstanding HIPPA
- Barrier: poor workflow integration

36% of patients exchanging health info via email reported reduced in-person visits (Kaiser Permanente 2015)

Brookings Institute 2015; Beckers Health IT 2014; Kaiser Permanente 2015
• “A huge aspect of success in transition to value is getting patients to engage in their own care.”

• 50-60% of consumers engage over the phone or web

• Remote health monitoring can extend reach of the clinical team with trigger alerts that prompt a call to patients for phone-based management when needed
Do-It-Yourself disease management via phone Apps enables aspects of care to be self-administered at home.
Self-administered out-patient parenteral antibiotic therapy improves outcomes

A team that includes a case manager, social workers, pharmacists, and transitional care nurses assesses which patients are eligible for the program, trains them, and monitors them.

Between 2009 and 2013, outcomes of self-administering patients were compared with patients whose medications were administered by a nurse.

They found that patients who self-administered the medication at home had similar or better outcomes than patients who had a nurse’s assistance with the medication.

**CONCLUSION:** patients are probably capable of more than we give them credit for
The Quantified Self: The Personal Wearable Technology (PWT) Revolution comes home

- Smart pill bottle glows blue when it's time to take a pill, if not opened beeps turns red
- Digital pills text doctor to say you’ve taken them
- Underwear with 3-D motion sensors deploys airbags to protect from falls
- Unit measures temperature, heart rate and hemoglobin in 10 seconds held to forehead

4.9 billion devices in 2016 projected growth: 20 billion by 2020

(Gartner Company 2016)
Turning the foundation of our healthcare system on its head
Patient and consumer centric approaches are a major priority to healthcare leaders, but not yet a capability.

- **Priority...**
  - 66% say consumerism is an above-average priority

- ...Not a capability
  - 23% have capability to develop consumer insights
  - 16% have capability to activate strategies based on insights

KaufmanHall, Consumer in Healthcare ebook 2016
Leadership must address common barriers to action

- **Resistance to change**
  - “There’s already too much change happening in our industry, doctors feel slighted when we talk about the needs of ‘consumers’…”

- **Lack of urgency**
  - “Let’s wait and see where things go with healthcare reform and then react…”

- **Competing priorities**
  - “First we have to implement Epic, then remodel the OR, then apply for Magnet, then implement HRO, then…”

- **Lack of clear evidence**
  - “Will engaging patients and families improve our outcomes?”
The Evidence-Base for Patient and Family Engagement

2016 Scientific Advisory Panel Project Goals:

*Develop a common understanding of elements essential for creating and sustaining patient and family engaged care culture in healthcare settings.*

*Identify the scientific evidence-base supporting the connection of those elements to outcomes identified in the quadruple aim.*
Harnessing Evidence and Experience to Change Culture: A Guiding Framework for Patient and Family Engaged Care

Susan B. Frampton, Ph.D., Planetree; Sara Guastello, Planetree; Libby Hoy, PFCPartners; Mary Naylor, Ph.D., F.A.A.N., R.N., University of Pennsylvania School of Nursing; Sue Sheridan, M.B.A., M.I.M., D.H.L., Patient-Centered Outcomes Research Institute; Michelle Johnston-Fleece, M.P.H., National Academy of Medicine

January 2017

ABSTRACT | Patient and family engaged care (PFEC) is care planned, delivered, managed, and continuously improved in partnership with patients and their families (as defined by the patient) in a way that integrates their preferences, values, and desired health outcomes. This vision represents a shift in the role patients and families play in their own care teams, as well as in ongoing quality improvement efforts.

Practical Examples of PFEC in Action

Annotated bibliography

Logical framework to guide implementation

Download for free at planetree.org/designation-2/.
If Amazon every decides to get into healthcare, watch out!

Amazon-Berkshire-JPMorgan's venture: Reactions from 3 health

The three companies on Tuesday said they plan to launch a health care company for their 1.2 million U.S. employees.

Dr. Ashish Jha, health policy researcher at the Harvard School of Public Health, tweeted, "A lot of very smart people are skeptical about the new Amazon/JPM/Berkshire endeavor. I'm much more bullish: Amazon know[s] consumers. Opportunities are enormous. You don't need to solve everything to change the market."

Elizabeth Mitchell, CEO, Network for Regional Healthcare Improvement, said, "These businesses understand customer service. Reorienting health care to being customer focused is exactly what is needed and will require massive and overdue change."

John Driscoll, CEO, CareCentrix, said, "There's no question that these outsiders have a deep interest in providing higher quality care at lower costs to patients."
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