

2012

Healthcare TRENDTRACKER

**Real Data on Adoption,
Outcomes & ROI**

Note: This is an authorized excerpt from *2012 Healthcare Trendtracker: Real Data on Adoption, Outcomes & ROI*. To download the entire report, go to <http://store.hin.com/product.asp?itemid=4405> or call 888-446-3530.

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Note from the Executive Editor

Welcome to the Healthcare Intelligence Network's *2012 Healthcare Trendtracker: Real Data on Adoption, Outcomes and ROI*. We are pleased to deliver this year's quick reference of activity on the most important healthcare initiatives impacting the industry today:

Accountable Care Organizations (ACO)*
Diabetes Management
Healthcare Case Management*
Reducing Hospital Readmissions*
Patient Registries
Patient Experience and Satisfaction
Reducing Avoidable Emergency Room Use*
Medication Adherence*
Patient-Centered Medical Home*
Telehealth

We hope this resource will be a starting point for your organization in the development of interventions reshaping healthcare delivery. Its easy-to-skim tables are designed to provide an executive summary of current year trends, and where available (see asterisked topics above), year-over-year activity. These qualitative metrics are derived from market research by the Healthcare Intelligence Network.

Typical data includes:

- ✓ Program adoption
- ✓ Target populations
- ✓ Target health conditions
- ✓ Program components
- ✓ Care team members
- ✓ Supporting technologies
- ✓ Program delivery
- ✓ Program success metrics
- ✓ Program ROI

Your business and the individuals in your care will benefit from the data contained in the *2012 Healthcare Trendtracker: Real Data on Adoption, Outcomes and ROI*.

Should you need more information, we have a full library of benchmarks, case studies and training webinars on all of these initiatives. Contact us today at 888-446-3530 so that we may help support your program launch.

Melanie Matthews, HIN executive vice president and chief operating officer



Using This Report

The 2012 Healthcare Trendtracker is intended as a resource for healthcare organizations searching for comparable data and means to measure implementation and progress. It is also a helpful planning tool for organizations preparing to launch initiatives in these areas.

Each healthcare initiative is introduced with an overview of the qualitative data culled from the latest survey, followed by a high-level look at responses. Where available, year-over-year data is also included.

For many surveys, one of the largest responding sectors is composed of respondents identifying their organization type as “Other.” We include data from this sector to present a complete picture of survey responses.

Here are some additional tips for using this report:

- ✓ See how you measure up: Scan this report for your sector, and see how your program compares to others. Note where you are leading and where you are behind.
- ✓ Evaluate your efforts: Think about where you have been focusing your efforts in each area. Look for trends in the data in this report. Look for benchmarks set by your sector and others.
- ✓ Set new goals: Use the data in this report to set new goals for your organization, or to raise the bar on existing efforts.
- ✓ Use it as a reference book: Keep this report accessible so you can refer to it in your work. Use these data to support your efforts in this area.

If you have questions about the data in this report, or have feedback for our team, don't hesitate to contact us at info@hin.com or 732-449-4468.

About the Healthcare Intelligence Network

The Healthcare Intelligence Network (HIN) is an electronic publishing company providing high-quality information on the business of healthcare. In one place, healthcare executives can receive exclusive, customized up-to-the-minute information in five key areas: the healthcare and managed care industry, hospital and health system management, health law and regulation, behavioral healthcare and long-term care.



Trend: Reducing Avoidable ER Use

With consensus widespread that much of emergency room use is avoidable and preventable, healthcare is working to staunch the flow and expense of avoidable ED use and point low-acuity patients in the direction of appropriate care.

In its September 2011 “Reducing Avoidable Emergency Room Visits” e-survey, the Healthcare Intelligence Network continued to document the programs and capture the steps organizations are taking to reduce avoidable use of the hospital ER. Through responses provided by 134 healthcare organizations to 20 multiple choice and open-ended questions, the survey results reveal that patient education and urgent care or walk-in centers continue to be the preferred approaches to prevent inappropriate use of the ER; that case managers continue to be an integral part of the solution both in the ER and the primary care office, and that more organizations are engaging PCPs to help in their efforts to reduce low-acuity ER visits.

Survey Highlights

- ✓ Nearly 70 percent of respondents have programs to curb avoidable ED usage; this figure has jumped by 10 percent from 2007, and remained consistent since 2010.
- ✓ High utilizers continued to be the top contributors to avoidable ER use, according to 30.2 percent of respondents. Of this population, pain management was the most frequently presented problem, as reported by 42 percent of organizations, a 25 percent increase from 2010. Medication non-adherence was reported as the second most presented problem, consistent with figures from last year.
- ✓ Nearly 50 percent of respondents used phone follow-up within two days to reduce avoidable ER visits by patients recently discharged from the ED or hospital. Redirecting non-emergent patients overtook funding as the greatest barrier to launching a program to reduce ER use.
- ✓ Sixty-seven percent of respondents used patient education programs to discourage avoidable ER visits; like last year, urgent care or walk-in centers were also used as a deterrent by about 41 percent of respondents to discourage avoidable use.
- ✓ A nurse-only advice line was used by 41.2 percent of the population to combat avoidable ER visits, a jump of 11 percent from last year, and case managers continued to be an integral part of the solution in both the ED (33.3 percent) and primary care office (23.5 percent.)
- ✓ About 30 percent of responding organizations said it is too early to determine ROI generated by their programs.



	All	Health Plans	Physician Organizations
Challenge in Reducing Avoidable ER Visits			
Staffing	2.2%	0%	11.1%
Care access	15.6%	23.1%	11.1%
Identifying high-utilizers	2.2%	0%	0%
PCP collaboration	24.4%	15.4%	33.3%
Hospital provider collaboration	15.6%	30.8%	11.1%
Redirecting non-emergent patients	28.9%	30.8%	11.1%
Funding case manager/social worker	6.7%	0%	11.1%
Other	4.4%	0%	11.1%
Percentage of Reduced Avoidable ER Visits			
0 to 5 percent	15.9%	7.7%	11.1%
6 to 10 percent	20.5%	15.4%	22.2%
11 to 20 percent	11.4%	23.1%	0%
21 to 30 percent	0%	0%	0%
31 percent or more	6.8%	7.7%	11.1%
Don't know	11.4%	0%	11.1%
Too early to tell	29.5%	46.2%	33.3%
Other	4.5%	0%	11.1%
Program ROI			
Don't know	44.4%	30.8%	44.4%
Less than 2:1	6.7%	7.7%	0%
Between 2:1 and 3:1	4.4%	7.7%	11.1%
Between 3:1 and 4:1	4.4%	0%	0%
Higher than 4:1	2.2%	7.7%	0%
Too early to tell	37.8%	46.2%	44.4%
Greatest Barrier to Launching Program			
Staffing	0%	0%	0%
Care access	0%	0%	0%
Identifying high-utilizers	7.1%	0%	0%
PCP collaboration	14.3%	0%	100%
Hospital provider collaboration	7.1%	0%	0%
Redirecting non-emergent patients	28.6%	0%	0%
Funding for case manager/social worker	7.1%	100%	0%
Other	35.7%	0%	0%

