

2014 Healthcare Benchmarks

The Patient-Centered Medical Home

Seventh Edition

Note: This is an authorized excerpt from *2014 Healthcare Benchmarks: The Patient-Centered Medical Home*.
To download the entire report, go to <http://store.hin.com/product.asp?itemid=4832> or call 888-446-3530.

2014 Healthcare Benchmarks: Patient-Centered Medical Home

64 healthcare organizations describe their efforts in patient-centered medical homes, including the most formidable challenge of medical home creation, average number of participating physicians, specialists in the medical home and much more.

“Patient-centered scheduling is [the most effective process used in our medical home].”

> Hospital/Health System

“[In the next 12 months, our medical home will participate in a medical home neighborhood by] developing a more comprehensive system for primary care physicians, specialist, etc. to be linked.”

> Health Plan

“Certification/recognition has been the [biggest barrier to PCMH adoption by our organization].”

> Disease Management

“NCQA PCMH [is the most effective tool used by our medical home].”

> Physician-Hospital Organization



2014 Healthcare Benchmarks: Patient-Centered Medical Home

This special report is based on results from the Healthcare Intelligence Network's seventh comprehensive industry survey on patient-centered medical homes conducted in March 2014.

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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.

Executive Summary

Having established a firm foundation by providing over two decades of patient-centered care, the medical home model is poised for a makeover, expanding into medical neighborhoods and opening the door to specialists' enhanced role in care coordination—two new metrics documented in the seventh comprehensive Patient-Centered Medical Home (PCMH) survey by the Healthcare Intelligence Network (HIN).

The annual percentage of respondents implementing the medical home model continues to rise, with a high of 58 percent reporting PCMH adoption, up from 52 percent in 2012, when the survey was last conducted. The percentage of respondents with at least a fifth of patients assigned to medical homes more than doubled in the last two years, from 27 to 50 percent. Today's medical home is especially welcoming to Medicaid beneficiaries, who were targeted by only 3 percent of medical homes in 2012 but now are included in 37 percent of respondents' patient-centered approaches.

Prepared to take their medical homes to the next level of care in the year to come, almost half—48 percent—have joined or expect to join a medical home neighborhood, defined as “a strong foundation of transformed primary care practices aligned with health systems and specialists to insure that care is maximally coordinated and managed.

At the same time, 37 percent of 2014 respondents identified practice transformation, or the process of adopting the attributes of the patient-centered medical home model, as the most formidable challenge of medical home creation.



58% of survey respondents report patient-centered medical home adoption.

“Lack of care coordination reimbursement was the biggest challenge to medical home creation.”

Survey Highlights

- ✓ In new metrics from this year's survey, nearly half of respondents (46 percent) include specialists in their patient-centered medical homes. With an eye toward care coordination, the inclusion of case managers in medical homes jumped from 56 percent in 2012 to 76 percent in 2014.
- ✓ Today's medical homes are a little more crowded, with three-quarters of respondents reporting 21 or more physicians participating, up from 58 percent in 2012.
- ✓ Undaunted by recent studies to the contrary, all 2014 respondents with medical homes believe the model can reduce cost and improve care delivery.

Key Findings

Program Components

- ✓ In 2014, medical homes are twice as likely to include a social worker on the care team as they were in 2012, while the presence of pharmacists and health coaches remained constant.
- ✓ Respondents have become more efficient at medical home construction, with 29 percent requiring less than year for this process, versus 5 percent in 2012.
- ✓ The use of telemonitoring in medical homes has nearly doubled in the last two years, from 10 percent in 2012 to 18 percent this year.

Results and ROI

- ✓ Fifty-six percent saw no change in reimbursement levels as a result of adoption of the medical home model.
- ✓ More than half —57 percent—reported a drop in emergency room visits that they attributed to medical home implementation.
- ✓ Satisfaction with the medical home model by patients and providers did not vary significantly from 2012 to 2014.



Care coordinators are often embedded in physician offices with case managers.

“Full risk capitation reimbursement models are in place in the medical home.”

Successful Work Flows, Processes and Tools in PCMHs

- ✓ *“Care coordinators embedded in our physician offices working with our case managers.”*
- ✓ *“Monitoring. We fundamentally changed how we operate daily and monitor that change. We incorporated our goal measures into the very fabric of what we do.”*
- ✓ *“Electronic communications that include actionable data and access to patients to initiate the change, focus on minimal hassle to MD office.”*
- ✓ *“Using templates in our electronic medical record (EMR) for pre-visit planning and coordination of relevant visits.”*
- ✓ *“Patient-centered scheduling.”*

About the Survey

The seventh comprehensive Patient-Centered Medical Homes survey was administered in March 2014 via the Healthcare Intelligence Network Web site at <http://www.hin.com>. Respondents were invited to take the survey via e-mail, e-newsletter and social networking reminders throughout the month. A total of 64 healthcare companies responded to the survey, which asked 31 questions on medical homes, with multiple responses possible on some questions. Some questions were open-ended, inviting write-in responses. Not all surveys were fully completed. Data is qualitative, and results were compiled by the Healthcare Intelligence Network.

Respondent Demographics

Responses to the March 2014 survey on the patient-centered medical home were submitted by 64 organizations. Of 30 respondents identifying their organization type, 20 percent were health plans, 17 percent were primary care providers, 13 percent were community health centers, 13 percent were hospital/health systems, and 23 percent categorized their organization type as ‘Other.’

Using This Report

This benchmarking report 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 readying initiatives in this area.



57% reported a drop in ER visits attributed to medical home implementation.

“Our challenge in starting a medical home is the integration of patient data.”

The initial charts and graphs presented represent results from all respondents; images in subsequent sections depict data from high-responding sectors. (Figure titles begin with the segment they represent; for example, All, Health Plans, Hospitals, etc.)

Often, one of the largest responding sectors is composed of respondents identifying their organization type as “Other.” In general, we do not depict results from this segment because it represents a wide range of organization types, including consultants and product vendors. However, you will always find a graph indicating the demographics of respondents.

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 this 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.

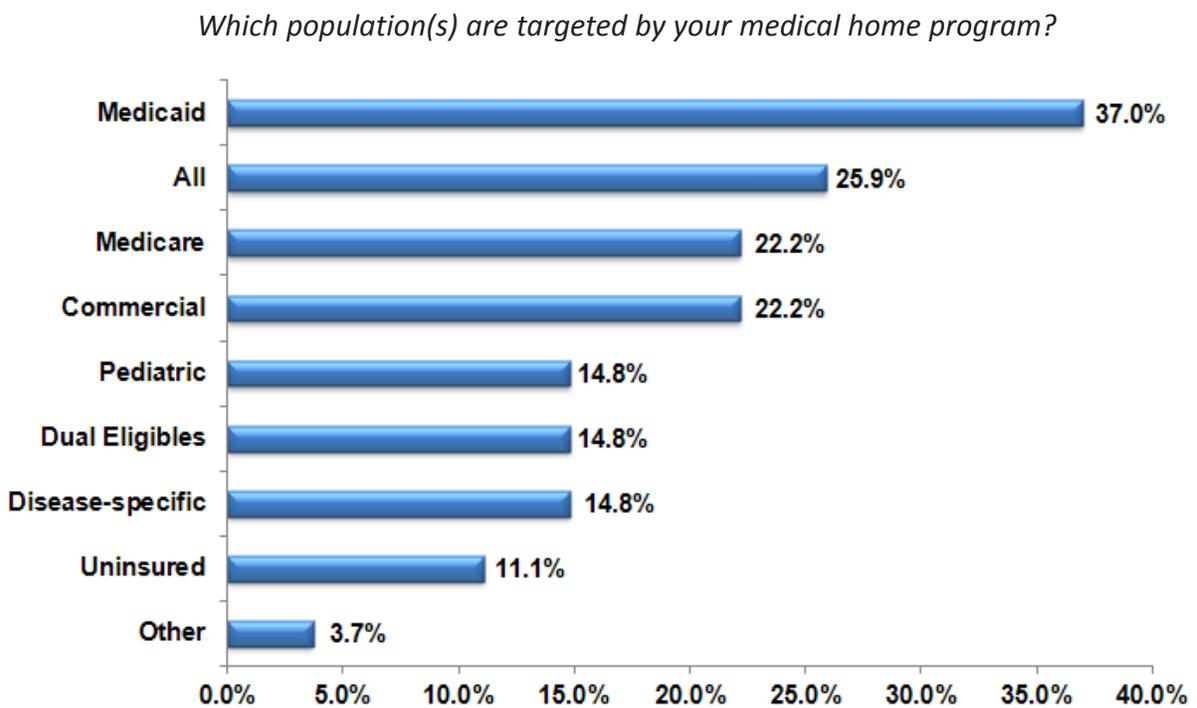
If you have questions about the data in this report, or have feedback for our team, don't hesitate to contact us at info@hin.com or 732-449-4468.



***The use of
telemonitoring in
medical homes
has nearly
doubled in the
last two years.***

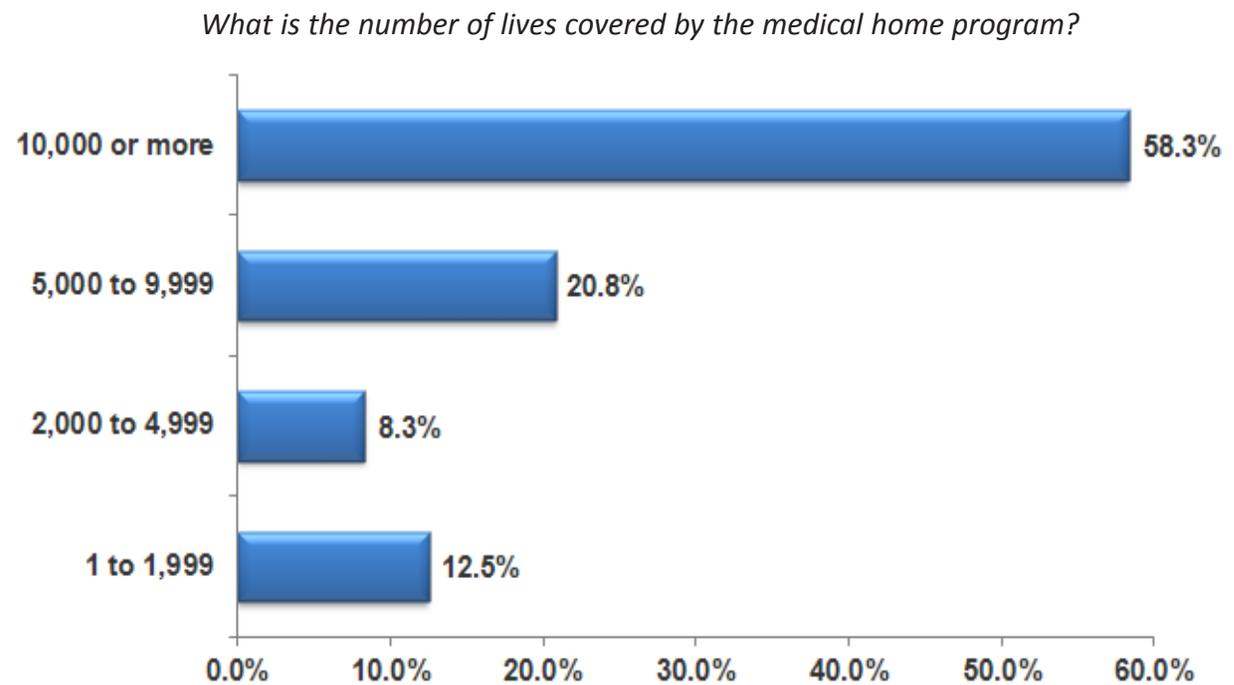
***“Our most
effective
program
workflow is
having our nurse
coordinator
screen the
patient prior
to seeing the
physician.”***

Figure 3: All - Targeted Populations



HIN PCMH Survey
March, 2014

Figure 4: All - Lives Covered by the Medical Home



HIN PCMH Survey
March, 2014