



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



## COUNCIL OF ACCOUNTABLE PHYSICIAN PRACTICES

An affiliate of the AMGA Foundation

**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](http://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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Strategic Health Perspectives

# 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)

Care/Team  
Coordination

24/7 Access  
to Care

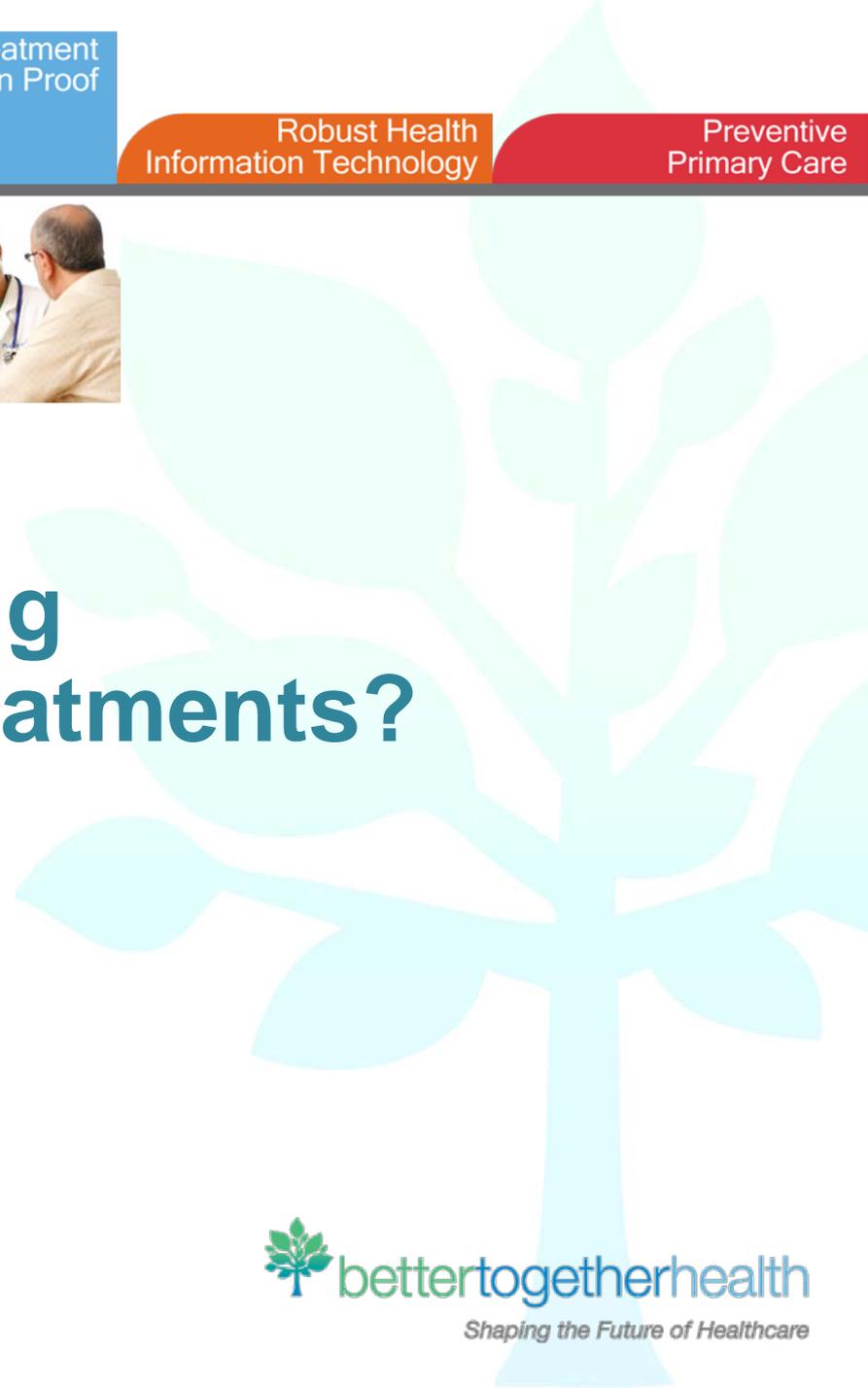
Treatment  
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# Are Physicians Using Evidence-Based Treatments?



Care/Team  
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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%



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)

 **bettertogetherhealth**

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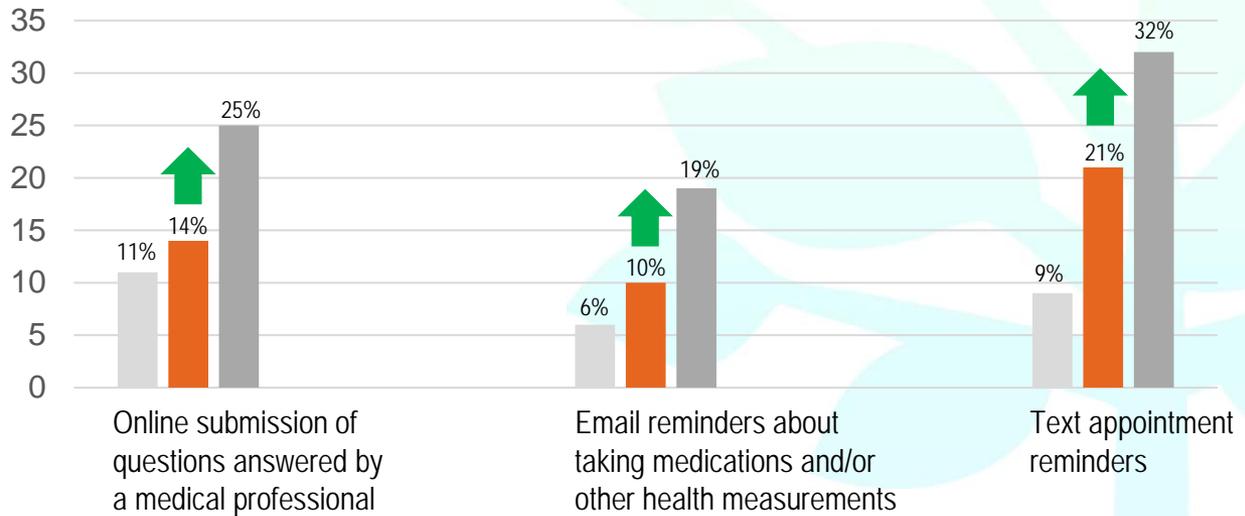
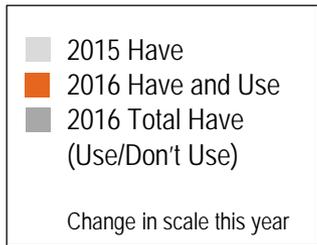


# Are Physicians Utilizing Technology to Improve Care?

# Technology:

## Access to Electronic Engagement Is Increasing But Still Low

Percent of consumers who report having...



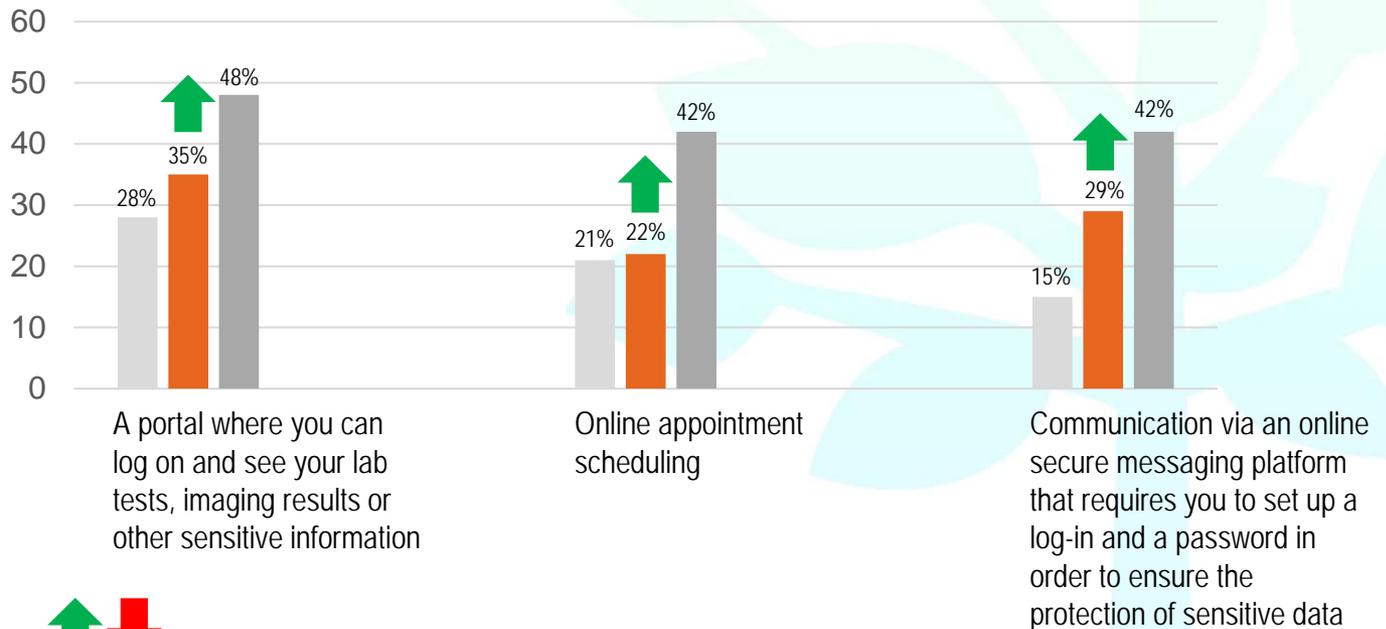
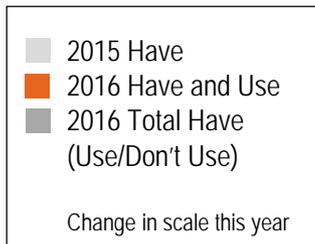
↑ ↓ Significant increase/decrease

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...

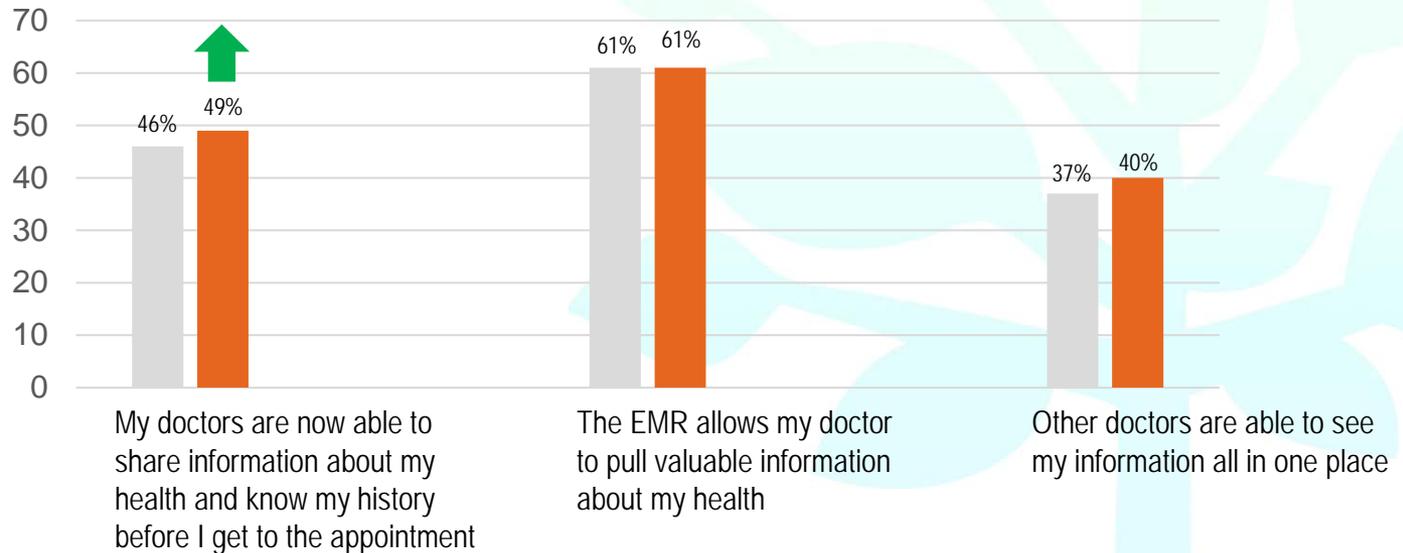
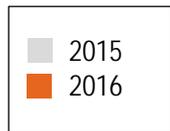


Base: All US Consumers  
 2015 (n=5014)  
 2016 (n=30007)

# Technology:

## Perception of Shared EMR Information Is Stable

Percent of consumers with doctor using EMR saying...



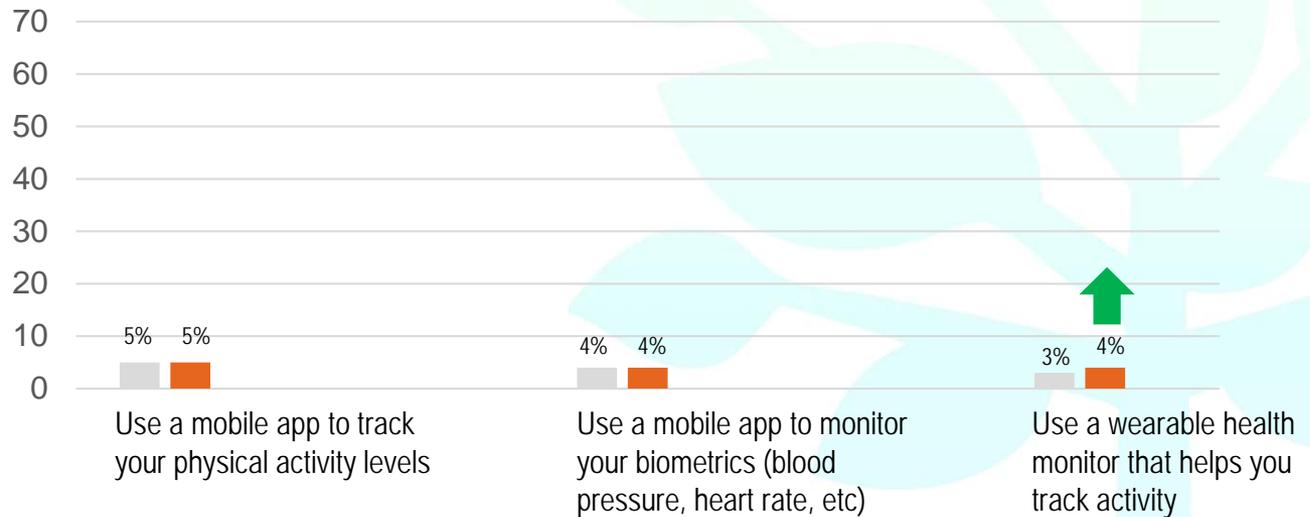
↑ ↓ Significant increase/decrease

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)

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# 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 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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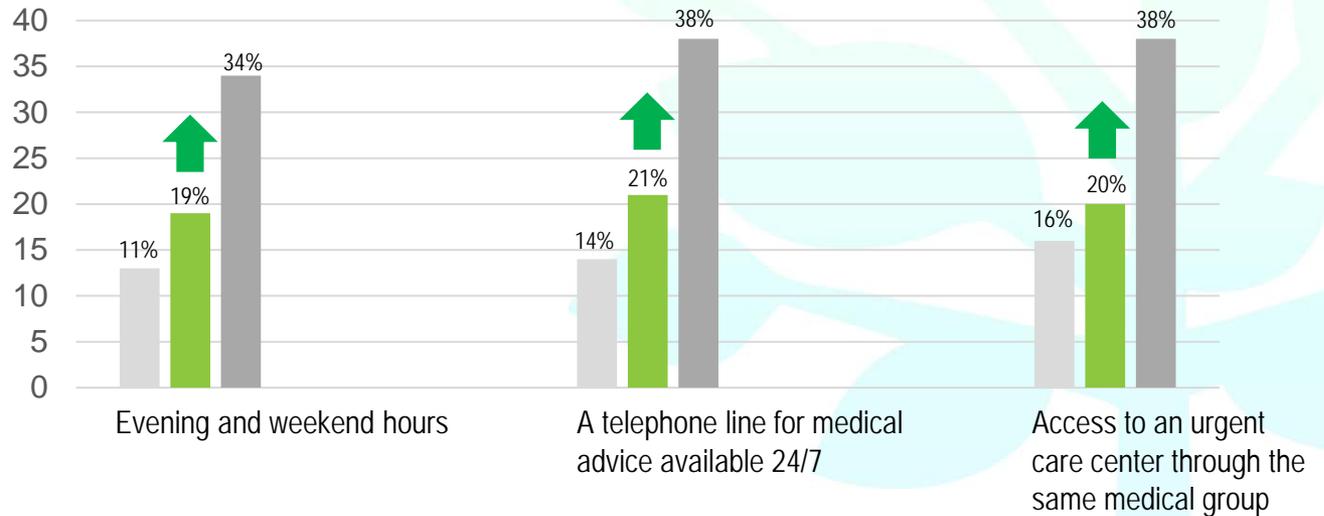
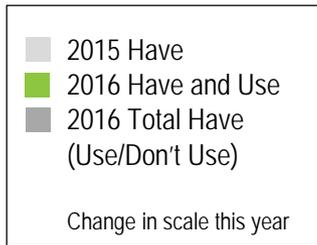


# Is the Experience of Accountable Care and Coordination Improving Over Time?

# 24/7 Access:

## Improving Slowly, But Not Always Used

Percent of consumers who report having...



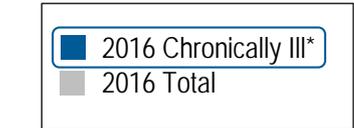
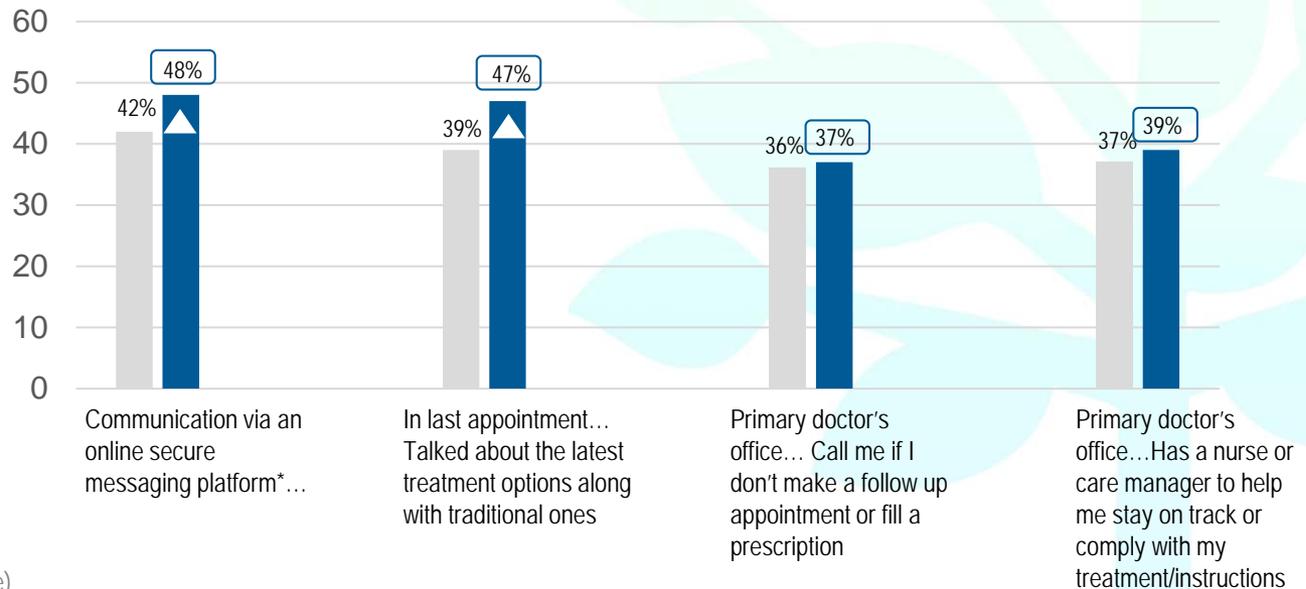
↑ ↓ Significant increase/decrease

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

# Care Coordination:

## Patients with Multiple Chronic Illness Get Only Slightly More Coordinated Care

Percent of consumers who report having...



△ Significant difference from 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

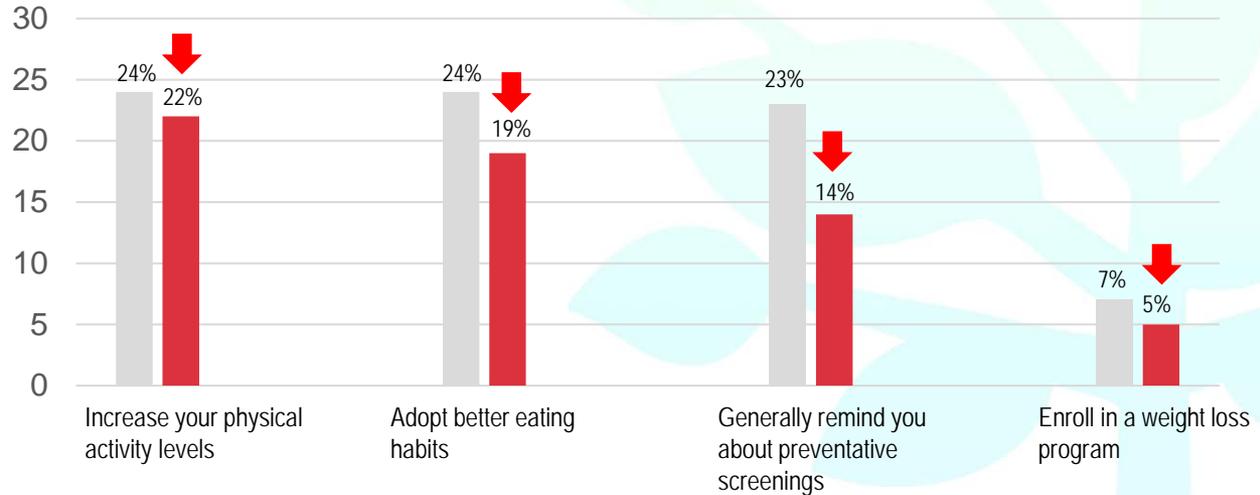
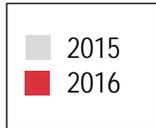
2016 Total (N=25,527);

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

# Prevention:

## Physician Messages Are Being Heard *Less Often*

Patients who say PCP has recommended...



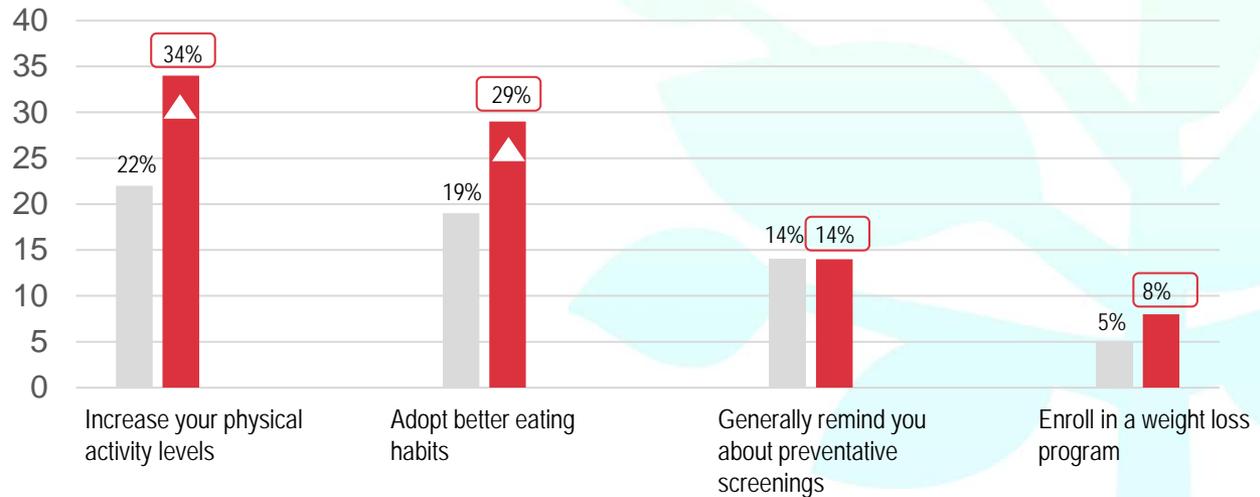
↑ ↓ Significant increase/decrease

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...



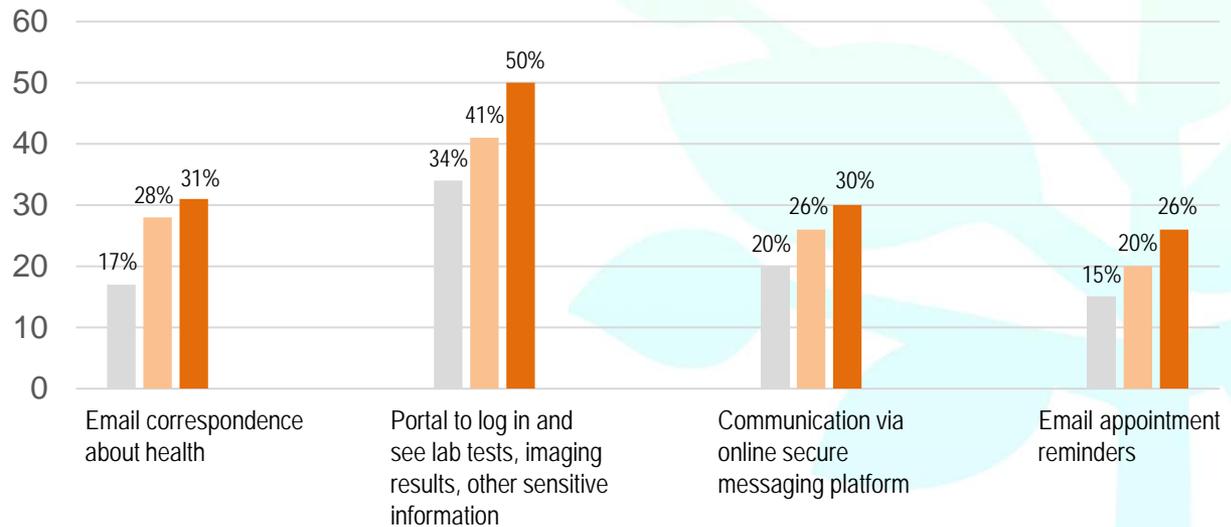
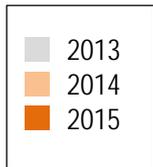
■ 2016 Obese  
■ 2016 Total

△ Significant difference from 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



↑ ↓ Significant increase/decrease

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

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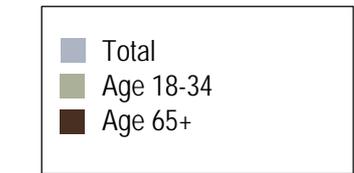


# What Are the Demographic Gaps in Usage of Key Technologies that Support Coordination?

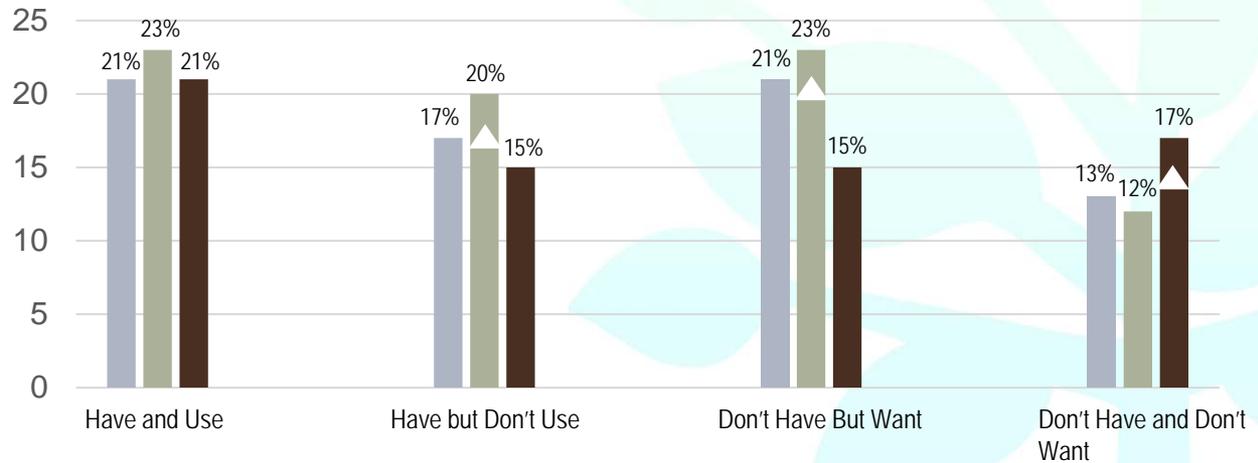
# Technology:

## Seniors Are Less Open to Telephone Advice than Younger Patients

Telephone Line for Medical Advice 24/7



△ Significant difference among age groups

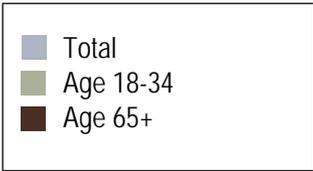
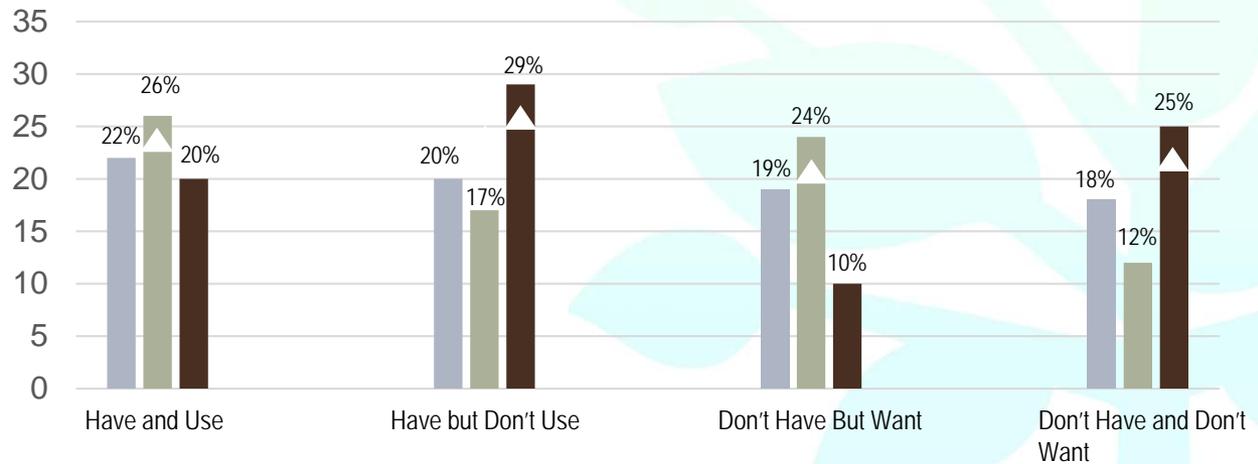


Base: All US Consumers (Total Have)  
 2016 Total (n=30,007)  
 Age 18-34 (N=7,348); Age 65+ (N=6,416)

# Technology:

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

Online Appointment Scheduling



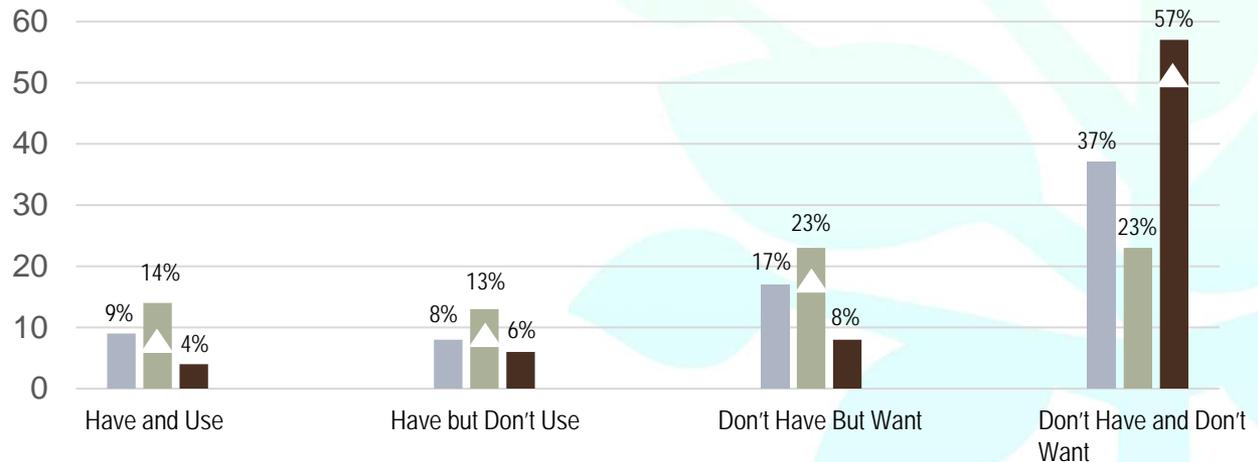
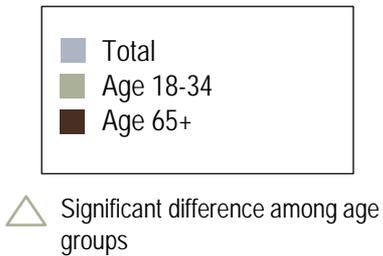
△ Significant difference among age groups

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



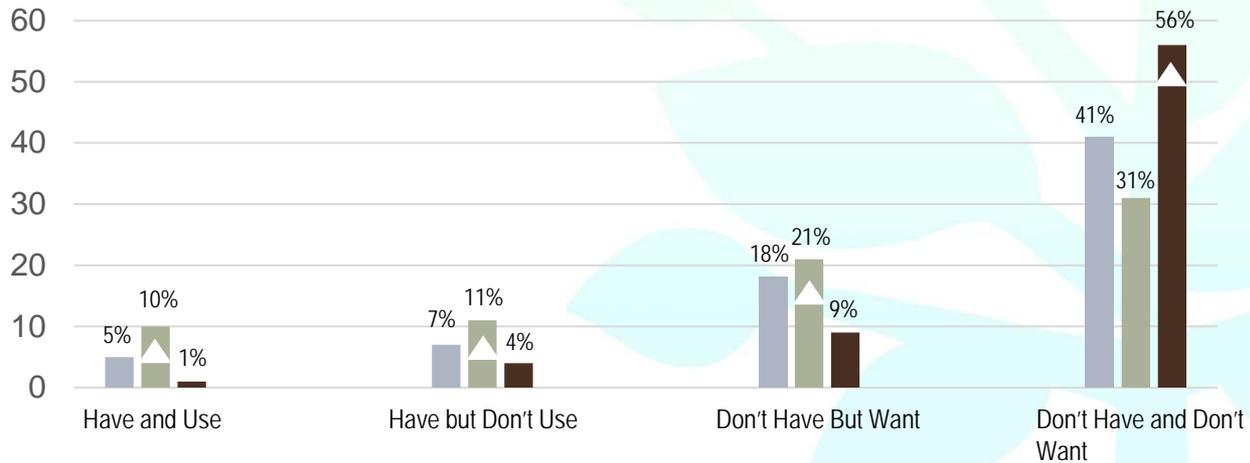
Base: All US Consumers (Total Have)  
 2016 Total (n=30,007)  
 Age 18-34 (N=7,348); Age 65+ (N=6,416)

# Technology:

Video Visits Still Rare,

But Younger Patients Twice as Likely to Use and Want Them

Video Visits (Telemedicine)



■ Total  
■ Age 18-34  
■ Age 65+

△ Significant difference among age groups

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