A look at trends in Population Health

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Healthcare Information and Management Systems Society (HIMSS)

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Study methodology and demographics

**Methodology 1**: Web based survey
Dates of Data Collection: 09/15/16 – 09/23/16
Target Audience: C-Suite, VP/Director of IT, Clinical Systems and Clinical Analytics
Number of Respondents: 104

**Organization Type**
- Hospital, multi-hospital, integrated delivery: 69%
- Critical access hospital: 19%
- Academic medical center: 7%
- Other: 5%

**Organization Size**
- Greater than 501 beds: 18%
- Less than 50 beds: 25%
- 251-500 beds: 19%
- 101-250 beds: 20%
- 50-100 beds: 18%
- Less than 50 beds: 25%

**Methodology 2**: HIMSS Analytics® LOGIC™
Date of Database: July 31, 2016
Target Audience: U.S. Hospitals
Study methodology and demographics

**Patients Served**
- Less than 50,000 patients: 35%
- 50,000-100,000 patients: 22%
- 100,001-500,000 patients: 20%
- Greater than 1 million patients: 10%
- Unsure: 7%

**Patients Under Risk Contracts**
- Less than 1 Percent: 16%
- 1 to 10 Percent: 20%
- 11 to 25 Percent: 12%
- 26 to 50 Percent: 8%
- Greater than 50 Percent: 5%
- Unsure: 33%

*Note: The charts are pie charts showing the distribution of patients served and patients under risk contracts.*
Year over year uptick in population health initiatives

Does your organization currently employ initiatives or programs focused on Population Health?

For the purposes of this study, Population Health was defined as improving the health outcomes for a defined population in a specific geographic area.

- Organizations that have employed population health initiatives or programs has grown year over year from roughly 67 percent in 2015 to 76 percent in 2016. While the level of programs seems to be moving in the right direction as value-based care becomes more prominent across the healthcare industry, there is still work to be done in sustaining these programs and improving population outcomes on a broader scale.

- There are many factors that go into population health, such as the assumption of risk, alternative payment models, patient and physician engagement/adoption. As organizational programs begin to mature, the ability to focus on all of the moving parts will set up models for other organizations to follow.

Yes 76%
No 23%
Unsure 1%

n= 104
The level of patients under risk contracts across organizations has showed incremental gains from a year ago. 2016 showed a drop in the lower percentages of patients under at risk contracts (less than 1 percent; 1 percent to 10 percent) with an increase across all of the larger percentage categories of 11 percent or greater.

Due to the level of data now available, organizations seem to have better risk visibility and are gradually able to take on higher levels of risk.
Initiative/Program mix relatively consistent

Which of the following programs or initiatives is your organization currently focused on for population health?

- **Chronic disease management**: 2016: 77.2%; 2015: 83.7%
- **Wellness/preventive health**: 2016: 72.2%; 2015: 79.8%
- **Clinically integrated network**: 2016: 50.6%; 2015: 49.0%
- **Patient centered medical home**: 2016: 51.9%; 2015: 50.0%
- **At-risk payment structure**: 2016: 32.9%; 2015: 28.8%
- **At-risk cost structure**: 2016: 19.0%; 2015: 17.3%

### Observations

- The focus of hospital programs or initiatives has gone relatively unchanged year over year. There have been slight declines in chronic disease management and wellness/preventive health but both are significantly more employed than other initiatives. However, it is too soon to determine if these initiatives are trending down.

- With the incremental increase in the level of risk taken on by healthcare organizations it makes sense to see slight increases in the at-risk payment and cost structure programs. Given the direction of the market it will be interesting and important to see the level of adoption in these categories increase in the coming years.
Nearly 50 percent of organizations surveyed have up to three population health initiatives in place, lending support to the increase in overall employment of population health initiatives.

As programs begin to mature there should be an increase in the number of initiatives in place across organizations. However this could take some time to develop as there are multiple factors that can contribute to the success and sustainability of these programs.
Gains being made for population health model

Does your organization have plans to employ initiatives or programs focused on Population Health?

- Yes 56%
- No 28%
- Unsure 16%

The level of organizations with plans to employ initiatives or programs around population health is encouraging as 56 percent indicated they have plans versus roughly 50 percent in 2015.

The move from volume to value based care seems to be taking hold across the healthcare space. As organizations become more comfortable with implementing this model of care and program success and standardization become more prevalent, implementation of these programs by late adopters should allow for a more streamlined approach.
Challenges around Population Health Strategies

What overall challenges (i.e.: internal, external, general market) is your organization encountering around your population health strategy?

TECHNOLOGY
Many of the challenges organizations currently face with their population health strategy involve technology, specifically with a lack of understanding around the technology needed to move forward, solution standards, and solutions that address specific organizational needs. Challenges with specific functionality included the need to improve analytics for savings/risk contracts, reporting and performance measurement, and care coordination.

RESOURCES
Organizations are finding challenges with the level of resources they can dedicate to the implementation and sustainability of population health initiatives. Resource challenges include physician adoption, internal knowledge about what needs to be done, proper implementation and roll out of programs, and working with payers.

DATA
Capturing external data from payers and leveraging internal data for analytical needs contributes to population health struggles. Organizations are finding it difficult to combine clinical and claims data to strengthen risk inferences, improving data quality and integrity, and aggregating data from different sources.
Population health adoption by EMRAM stage

High EMRAM hospitals are the most likely adopters of population health technology

EMRAM Stagen=1,845

n=1,845
Hospitals that are part of a multi-hospital system are more likely to have adopted population health. Less than a quarter of single hospital health systems are using population health compared to nearly 45% of hospitals in multi-hospital systems. However, less than 7% of stand alone hospitals using population health have inpatient revenues below $1 million per bed compared to nearly 10% of hospitals in multi-hospital systems.
Acute occupancy rates at hospitals using population health

Population Health adopters averaged lower acute occupancy rates than non-adopters. Hospitals with 501+ beds that adopted population health average 36% lower occupancy rates than non-adopters.
Predictive Analytics and Population Health

- Over 66% of the U.S. hospital market is greenspace for population health solutions

- And 6% of those hospitals are approaching the investment inflection point

- 1% are actively buying

- 5% are at or above the investment inflection point but have yet to begin actively buying
HCOs Likely to Invest in Population Health

Hospitals above the smooth are more likely to buy.
Hospitals in the upper right are more likely to buy than hospitals in the lower left.

Data from HIMSS Analytics® LOGIC™, n=1,637
Predictive Analytics and Population Health

Detailed View: Population Health Inflection Point
These high EMRAM hospitals, with speciality beds over 9% of staffed beds and Average Daily Census over 40% of staffed beds are Buyers. Hospitals above the smooth are buying now.

Data from HIMSS Analytics® LOGIC™. n= 115
HIMSS Analytics Toolkit

LOGIC™
Unique Relationships
Built collaboratively with Healthcare Organizations.

CapSite
Industry Expertise
Lead by former CIOs and vendor executives.

Market Insight
Deep Data
Proprietary data blended with the best available partner sources and data exhaust.

Advisory Services
Consultative Insight
More than just theory. Executable insights.

Health IT Actionable Insights
We drive the health IT market in the direction it needs to go

**EMRAM**
EMR Adoption Model

**O-EMRAM**
Outpatient EMR Adoption Model

**AMAM**
Analytics Maturity Adoption Model

**CCMM**
Continuity of Care Maturity Model

**DIAM**
Digital Imaging Adoption Model

**Improved Patient Care and Health IT Insights**
94% of hospitals using Population Health use one of these six EMR vendors. Yet, less than a third of hospitals are using a solution from their EMR vendor for population health. More than 65% of hospitals using these EMR vendors choose a different vendor for population health. But more than 75% of hospitals using these vendors for population health also use their EMR.