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Missing Patients May Slow Hospital's Later Stage Progress Toward Meaningful Use of Electronic Health Information, Finds PwC Survey

New York, February 23, 2011 -- Hospitals are spending billions of dollars on health information technology tools required for "meaningful use" of electronic medical records (EMR), but unless patients use them, hospitals may not reap the federal stimulus payments they're hoping for. That's the conclusion of a new report published today, *Putting Patients into Meaningful Use*, by PwC's Health Research Institute. PwC's research found that only 14 percent of consumers said they get their medical records electronically from their physician's office, and 30 percent don't know why they would need to. PwC suggests that hospitals need to build in patient input earlier to comply with Stage 2 of the government's "meaningful use" requirements.

"Successful use of electronic health information will ultimately be measured in better patient outcomes, higher quality and reduced costs," said Bruce Henderson, director and national leader of the EHR-HIE Practice, PwC. "Health systems need to have both patients and physicians actively using the health information to make care decisions, and they aren't there yet. To 'engage' consumers in these benefits they first need to understand what consumers want. Then, they need to build new, technology-enabled healthcare delivery processes around patient preferences and convenience, which means changing how clinicians work."

In a survey of 1000 US consumers, PwC found the following:

- One-half of patients said that to get their health information, they still call their physician's office or hospital for a paper record. Eleven percent of consumers don't know how to get their health record at all.
- Of those who can access their medical record electronically, only one third (34 percent) share the information with primary care physicians and specialists.
- While basic information about prescriptions and appointments are readily available to consumers who have electronic access to medical records, more than half (55 percent) can't access lab results or physician visit notes.
- Only 13 percent of consumers say they have ever been asked by their doctor or hospital what they think about EMRs, despite the fact that more than half (56 percent) said they would be willing to talk about what they'd like available in an EMR and how they'd like to use it.

- When asked how they would like electronic health information to be used, the top answer (66 percent) was for physicians to follow-up on their condition, followed by scheduling appointments (59 percent) and to learn about treatment information (53 percent).
- Thirty-five percent of consumers would like their physician to use the information to monitor their compliance with current treatments, and 34 percent said they would like their physician to be able to monitor their health condition, such as blood pressure, remotely via a device that automatically sends information.
- Approximately one-quarter of respondents would like to share electronic health information with family members to better understand family medical history.

Raising the Bar on Meaningful Use

The U.S. is embarking on the largest investment in health information technology ever, using stimulus funding as a financial incentive for health organizations to adopt electronic health records and use the information in meaningful ways. The U.S. Department of Health and Human Services (HHS) has outlined a three-stage process for achieving meaningful, with each stage calling for higher standards of patient engagement, physician use and collaboration.

In January 2011, HHS published Stage 2 proposed standards for meaningful use, which may require hospitals to offer 80 percent of patients with the ability to view and download their health information via a web-based portal within 36 hours of discharge. Doctors and other providers must have at least 20 percent of their patient populations electronically accessing their health information, including the ability to see diagnostic test results. Healthcare providers that want a greater share of stimulus funding to offset HIT investments must meet these minimum requirements by October 2012. Providers that don't achieve Stages 1, 2, and 3 will be penalized starting in 2015 through decreasing Medicare reimbursements.

While 90 percent of 300 provider executives surveyed by PwC in the spring of 2010 said they expected to achieve "meaningful use" standards before the Medicare penalties kick in, their confidence is waning slightly as new realities set in and health organizations rethink their work plans to devote more attention on engaging external stakeholders. By the fall of 2010, only 82 percent of those surveyed say they expect to achieve "meaningful use" goals on the government's timetable.

According to PwC, there are significant access, social and educational barriers that hospitals and physicians are working to overcome. One is a gap in expectation between what patients and physicians want, and conflicting views about turnaround time. An example cited in PwC's report is a hospital whose internal research found that physicians thought 45 days was a reasonable timeframe for making test results available electronically, while patients expected this information within 30 minutes.

"A patient's medical record and the health information within it should not be a history lesson. Those days are over," said Henderson. "To be meaningful, health information needs to be relevant, actionable, integrated into care and treatment decisions and available in real-time."

PwC's research found progress in many areas. Nearly one-third of health systems said they are now incorporating patient input into their "meaningful use" initiatives, up from 19 percent in the spring of 2010. And approximately 50 percent of health systems are now providing assistance to physicians, who need support tools for using electronic health information in their clinical work.

As consumer awareness and demand for electronic health information grows, the market will become more competitive, and health systems will increasingly compete with other providers, health insurers and third-party commercial online vendors, says PwC. Its paper outlines steps health organizations should consider taking with designing, implementing and promoting personal health records.

A full copy of PwC's report Putting Patients into Meaningful Use is available for download at: www.pwc.com/us/MUpatients. The report is the third in a series of reports on the IT implications of health reform and other regulatory requirements.

Methodology

In the fall of 2010, PwC's Health Research Institute commissioned an online survey of 1,000 U.S. adults representing a cross-section of the population in terms of insurance status, age, gender, income, and geography. The survey collected data on consumers' perspectives on health reform topics and preferences related to their healthcare usage. In addition, HRI commissioned in fall 2010 an online survey of more than 300 healthcare executive and conducted 16 in-depth interviews with thought leaders and executives in the healthcare arena, including hospital providers and consumer advocacy groups.

About PwC's Health Research Institute (HRI)

PwC's Health Research Institute (www.pwc.com/hri) provides new intelligence, perspectives, and analysis on trends affecting all health-related industries. HRI helps executive decision makers navigate change through primary research and collaborative exchanges. Its views are shaped by a network of professionals with executives with day-to-day experience in the health industry.

About PwC's Health Industries Group

PwC's Health Industries Group (www.pwc.com/healthindustries) is a leading advisor to public and private organizations across the health industry, including payers, providers, academic institutions, health sciences, biotech/medical devices, pharmaceutical companies, employers and new non-traditional market participants in the dynamic healthcare space. PwC has a network of more than 4,000 professionals worldwide and 1,200 professionals in the U.S. dedicated to the health industries.

PwC's Health Industries' clients include 40 of the top 100 hospitals in the U.S. and 16 of the 18 best hospitals as ranked by US News & World Report; all 20 of the world's major pharmaceutical companies; all of the top 20 commercial payers in the U.S.; municipal, state and federal government agencies and many of the world's preeminent medical foundations and associations. Follow PwC Health Industries at <http://twitter.com/PwCHealth>.

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