



ADAMSGABBERT

Right Solutions. Right People.

**Missouri HealthNet
Health Information Technology Survey
Survey Findings
November 3, 2010**



- Survey Background/Approach
- Survey Response/Survey Population
- EHR Adoption
- EHR Stimulus Incentives
- HIE Availability and Use
- Findings and Observations

What organizations sponsored the survey effort?

- Department of Social Services
 - MO HealthNet
 - Missouri Office of HITECH

What organizations assisted with reminder messages?

- Missouri Academy of Family Physicians
- Missouri Chapter of the American College of Physicians
- Missouri HIT Assistance Center
- Missouri Hospital Association
- Missouri Osteopathic Association of Physicians and Surgeons
- Missouri Primary Care Association
- Gateway EDI

Who did we team with to conduct the survey?

- Selected an experienced consulting team with:
 - Adams-Gabbert as the consulting partner
 - Cactus Software as the technology partner
 - Patriot Marketing as the marketing and communication partner

1. Created a mailing list from Missouri Medicaid and Licensure databases
2. Mailed survey invitation letters containing unique respondent keys
3. Published electronic survey on secure website
4. Utilized a call center to place outbound reminder calls and to answer inbound support calls
5. Sent multiple communications via constituent newsletters and e-mail distribution lists
6. Closed the survey and summarized survey responses

What was the project timeline?

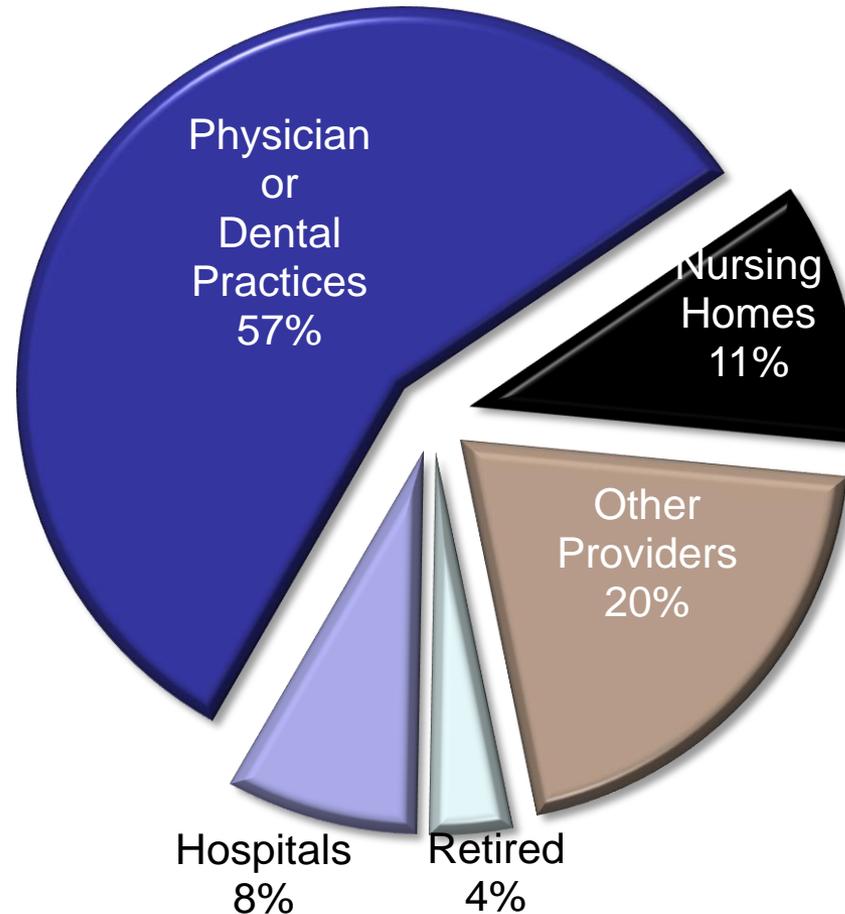
Missouri Health Information Technology (HIT) Survey



How many surveys were accessed?

| | | |
|---|-------------------|-----|
| Initial Raw Data Provider Count | 41,808 | |
| After removal of duplicates/certain provider types excluded | 27,615 | |
| After grouping (survey invitations generated) | 18,616 | |
| After removal of incorrect addresses/returned mail | 18,209 | |
| Surveys “Completed” | 2,122 | 12% |
| Surveys “Linked” (Multiple keys linked to one survey) | 497 | +2% |
| Surveys “In Progress” (surveys started but not completed) | 2040 | |
| Physicians Represented by 2122 Surveys | 9,320 | 33% |

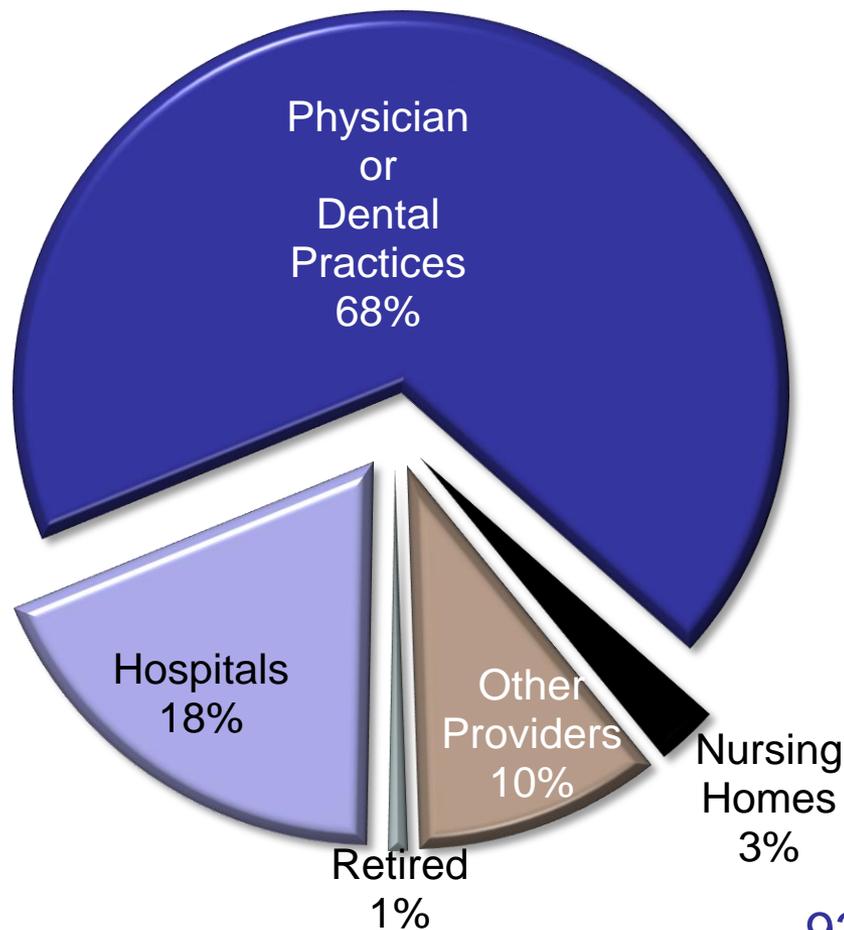
How many surveys were completed?



2122 Surveys

Based on Provider Type provided by respondent

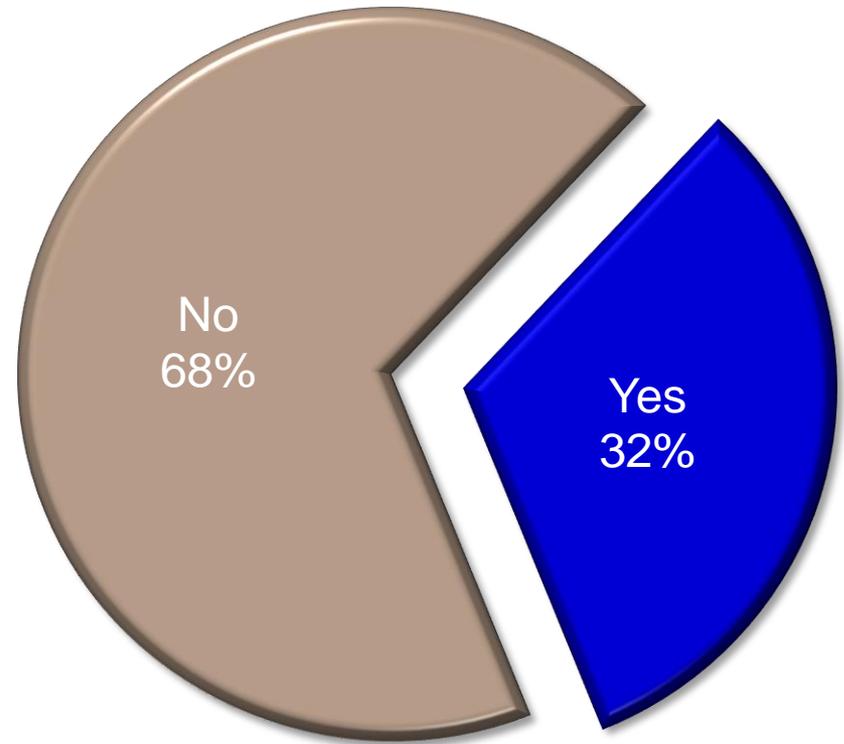
How many physicians were represented by the surveys?



Based on Provider Type provided by respondent

Survey Question # 12. Does your organization currently use an EHR system?

| | |
|--------------|-------------|
| Yes | 604 |
| No | 1285 |
| Total | 1889 |

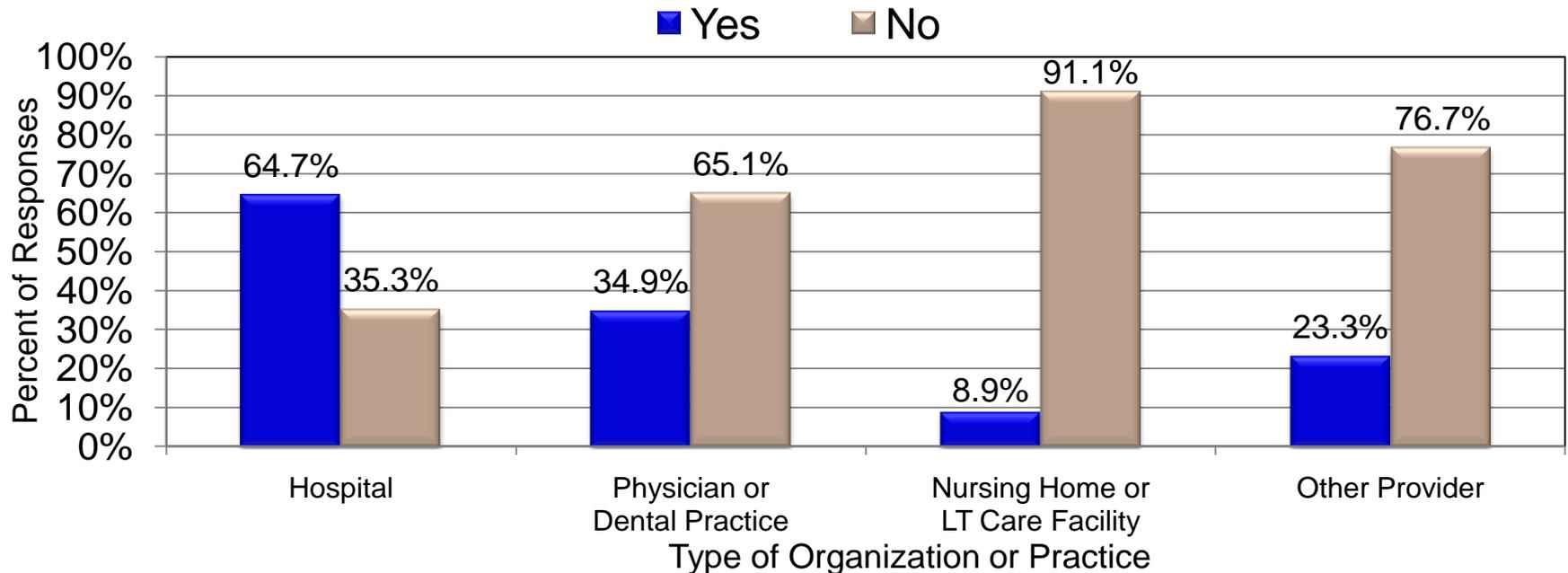


Note on Physician Counts

| | |
|-----|------|
| Yes | 5197 |
| No | 2932 |

Note: Question # 12 responses are based on total completed surveys

Survey Question # 12. Does your organization currently use an EHR system? By Type of Organization or Practice



Note: Question # 12 responses are based on total completed surveys

Survey Question # 13. What is the name of your current EHR vendor company?

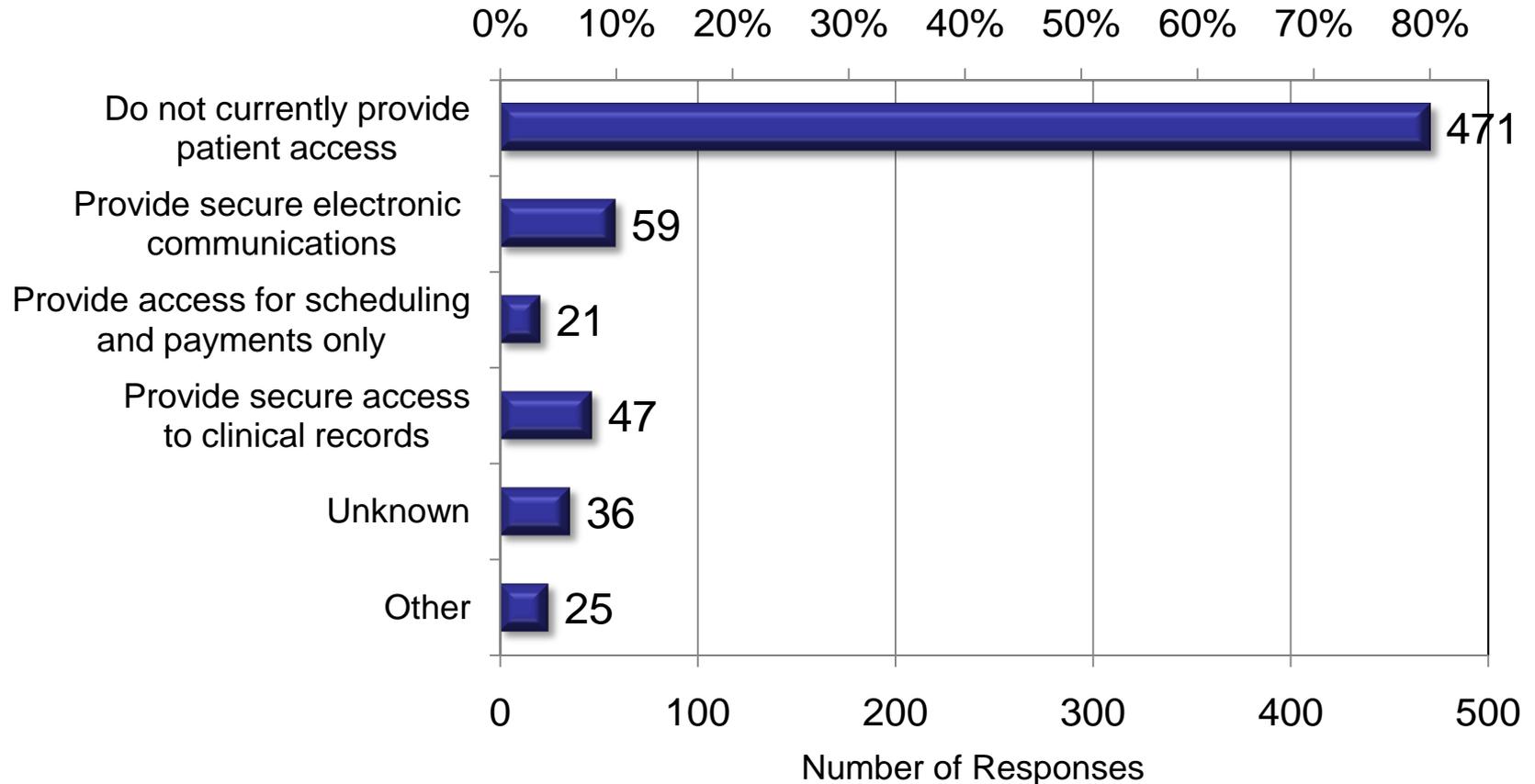
| | | |
|--|------------|----------------|
| Allscripts | 30 | 5% |
| Other | 287 | 49% |
| NextGen Healthcare Information Systems | 36 | 6% |
| eClinicalWorks | 30 | 5% |
| Meditech | 28 | 5% |
| McKesson Provider Technologies | 27 | 5% |
| Cerner | 25 | 4% |
| EPIC Systems | 24 | 4% |
| GE Healthcare/Centricity | 21 | 4% |
| eMDs | 17 | 3% |
| EHSMed | 11 | 2% |
| CPSI | 10 | 2% |
| Sage Software | 10 | 2% |
| Eclipsys | 5 | 1% |
| Greenway Medical Technologies | 5 | 1% |
| Athena | 4 | 1% |
| Pulse System | 4 | 1% |
| Aprima | 3 | 1% |
| Healthland | 2 | 0% |
| Siemens | 2 | 0% |
| Totals | 581 | 100.00% |

Other responses included:

- Amazing Charts EMR(6)
- American Health Tech (4)
- Dentrix (12)
- Eaglesoft (16)
- OfficeMate (7)
- Point Click Care (4)
- Practice Fusion (4)
- Soapware (6)

Note: Question # 13 responses are based on total respondents who have EHR systems

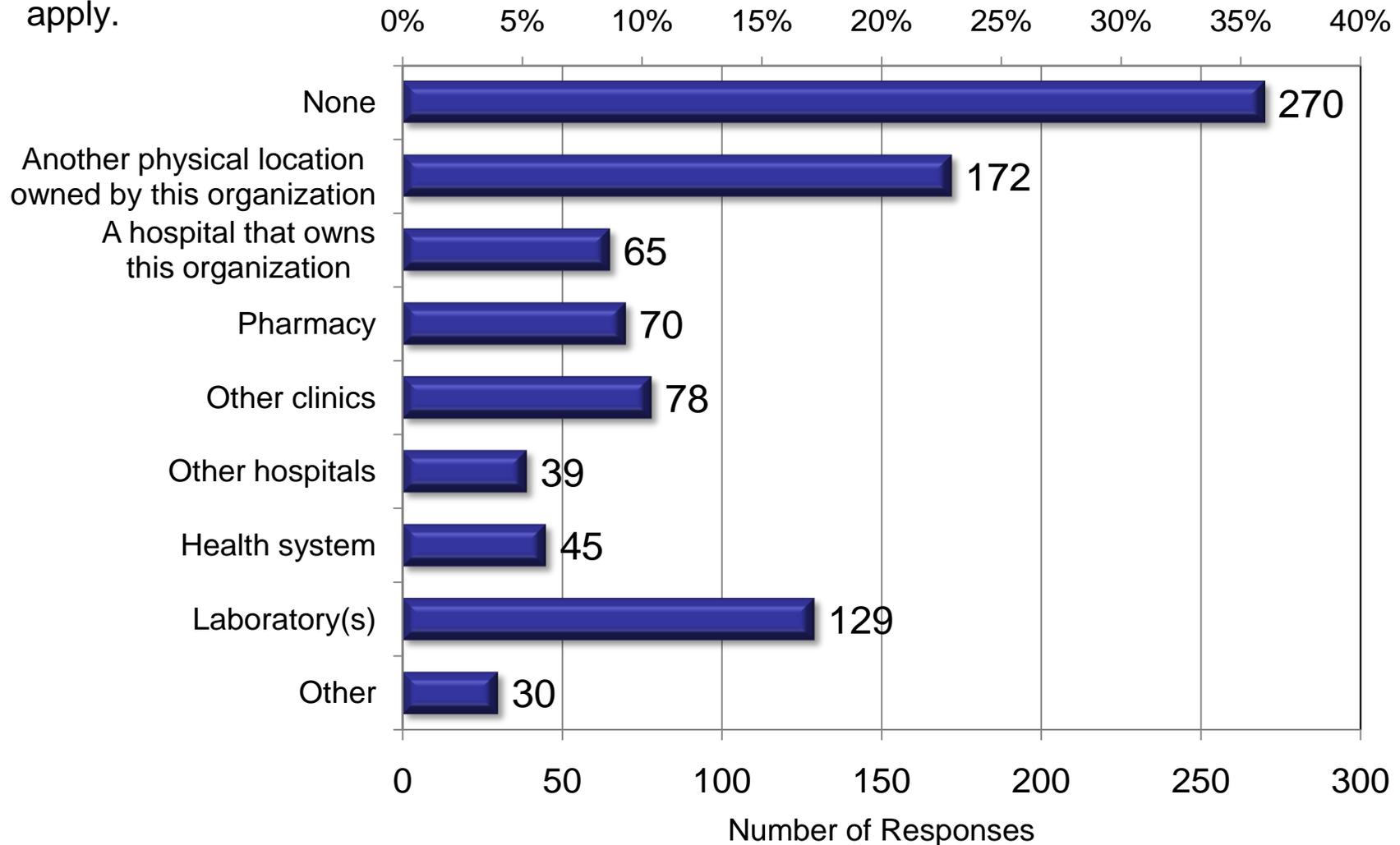
Survey Question # 19. Does your organization currently provide a means for patients to electronically access their personal health information? Please check all that apply.



Note: Question # 19 responses are based on total respondents who have EHR systems

EHR Adoption

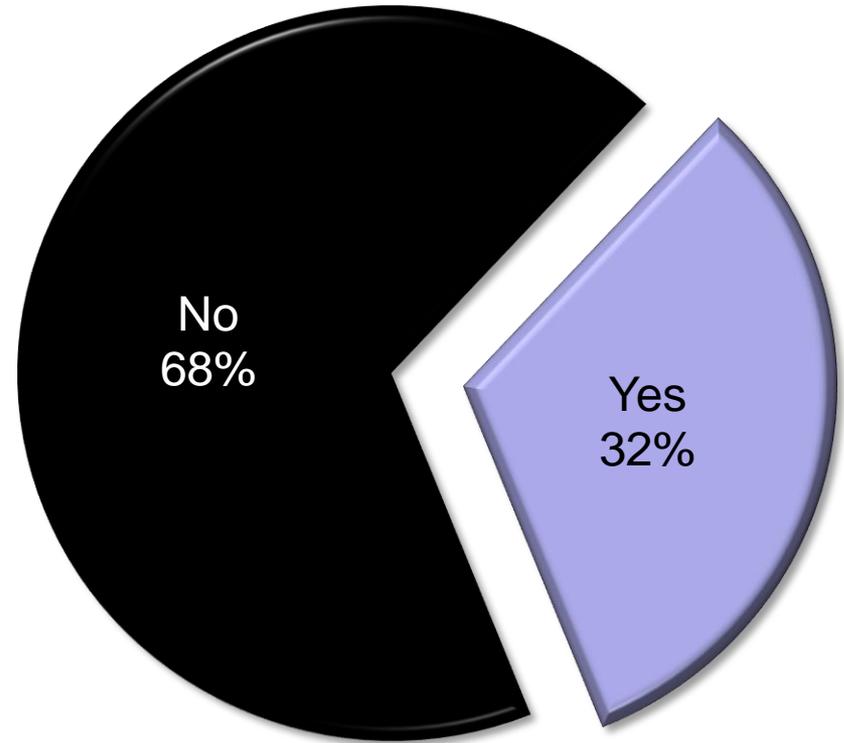
Survey Question # 20. Is your EHR connected to any of the following? Please check all that apply.



Note: Question # 20 responses are based on total respondents who have EHR systems

Survey Question # 12. Does your organization currently use an EHR system?

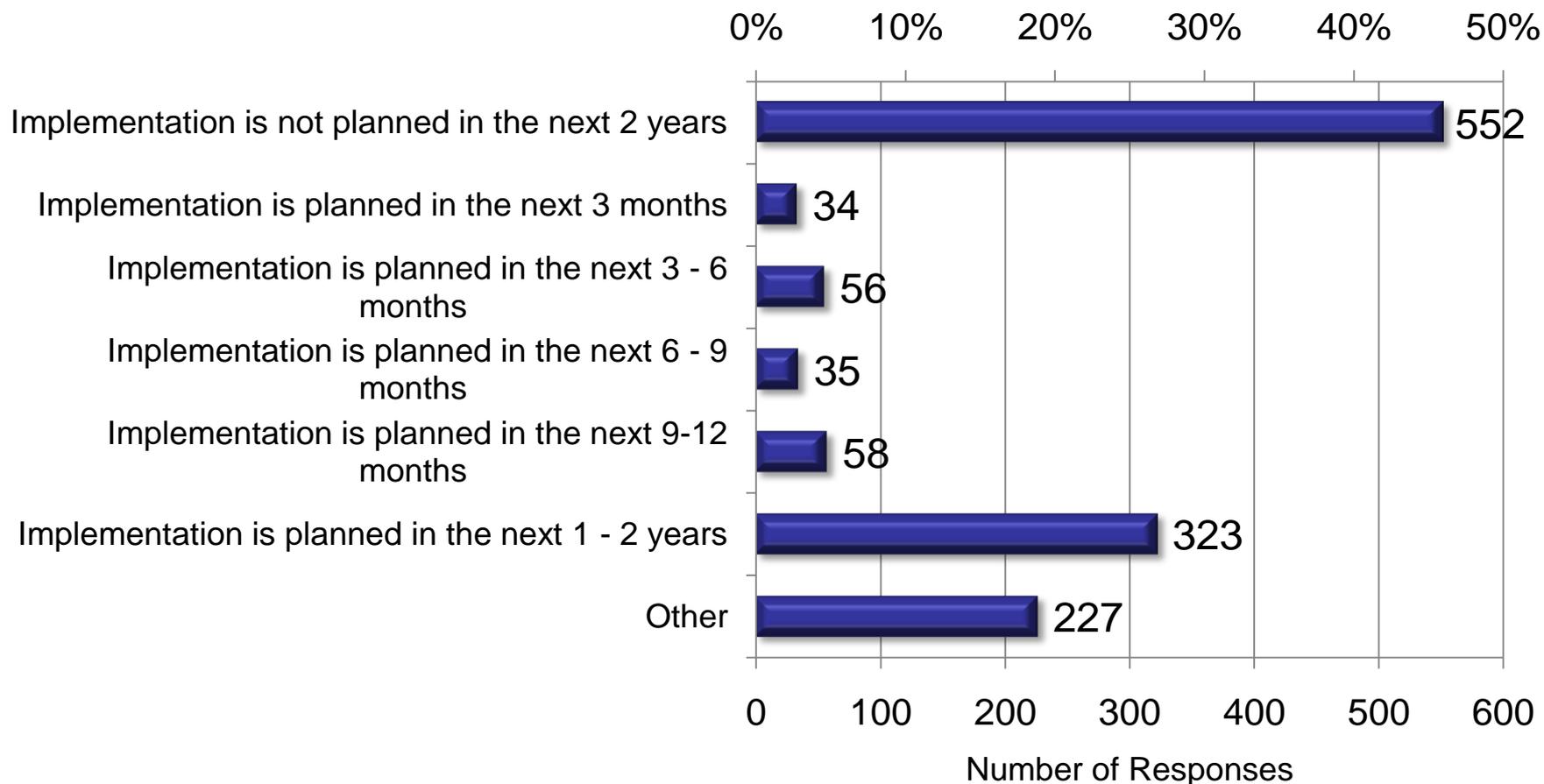
| | |
|--------------|-------------|
| Yes | 604 |
| No | 1285 |
| Total | 1889 |



Survey Questions # 27-30 that follow are for those who answered “No” to this question.

Note: Question # 12 responses are based on total completed surveys

Survey Question # 28. What is the degree of Electronic Health Record implementation readiness in your organization?



Note: Question # 28 responses are based on total respondents who do not have EHR systems

Survey Question # 30. Please check the main reasons your organization does not expect to invest in Electronic Health Records (EHR) in the foreseeable future. Check all that apply.

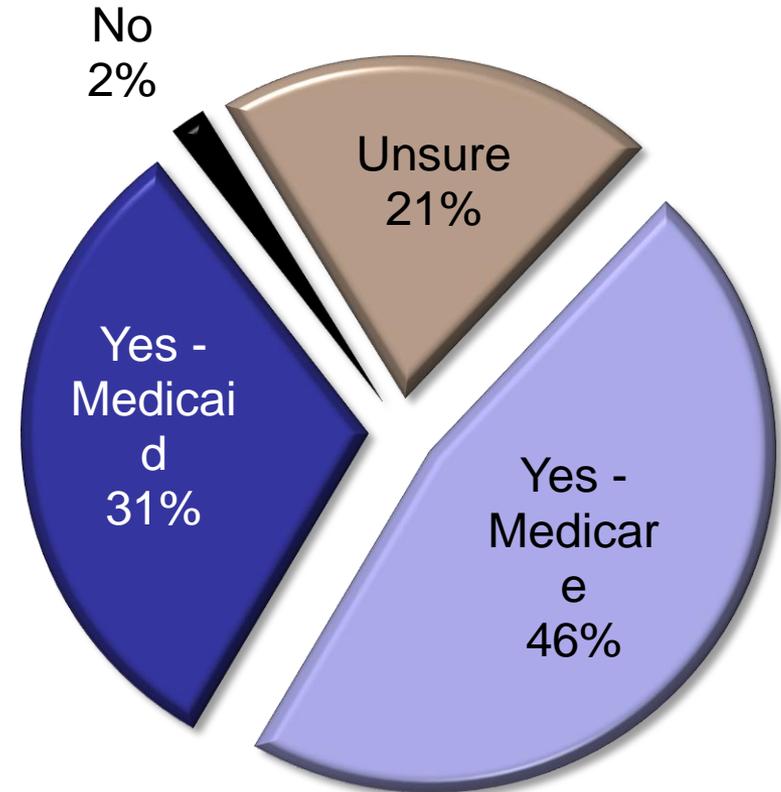
| | Count | Percent of Respondents |
|---|-------|------------------------|
| Too expensive | 311 | 56% |
| Decreased productivity during implementation resulting in decreased revenue | 228 | 41% |
| Confusing number of EHR choices | 222 | 40% |
| Staff does not have the expertise or technical capacity to use an EHR | 129 | 23% |
| Fear of Transition | 102 | 18% |
| Other | 101 | 18% |
| Concern that EHR choice will quickly become obsolete | 88 | 16% |
| EHRs lack interoperability with other systems resulting in high interface costs | 82 | 15% |
| Privacy and security concerns, including HIPAA | 81 | 15% |
| Limited resources | 79 | 14% |
| Limited broadband access | 71 | 13% |
| Staff is satisfied with paper-based records system | 49 | 9% |
| No currently available EHR product satisfies our needs | 41 | 7% |

Note: Question # 30 responses are based on total respondents who do not have EHR systems and Include multiple responses

EHR Stimulus Incentives

Survey Question # 5. Will you seek incentives for EHR implementation from Medicare or Medicaid? Check all that apply. (excludes nursing homes) (hospitals are eligible to apply for both Medicare and Medicaid incentives)

| | |
|----------------|------------|
| Yes – Medicare | 277 |
| Yes - Medicaid | 186 |
| No | 10 |
| Unsure | 123 |
| Total | 596 |



Note: Question # 5 responses are based on total respondents who plan to apply for provider stimulus incentives excluding nursing homes and includes multiple responses for hospitals

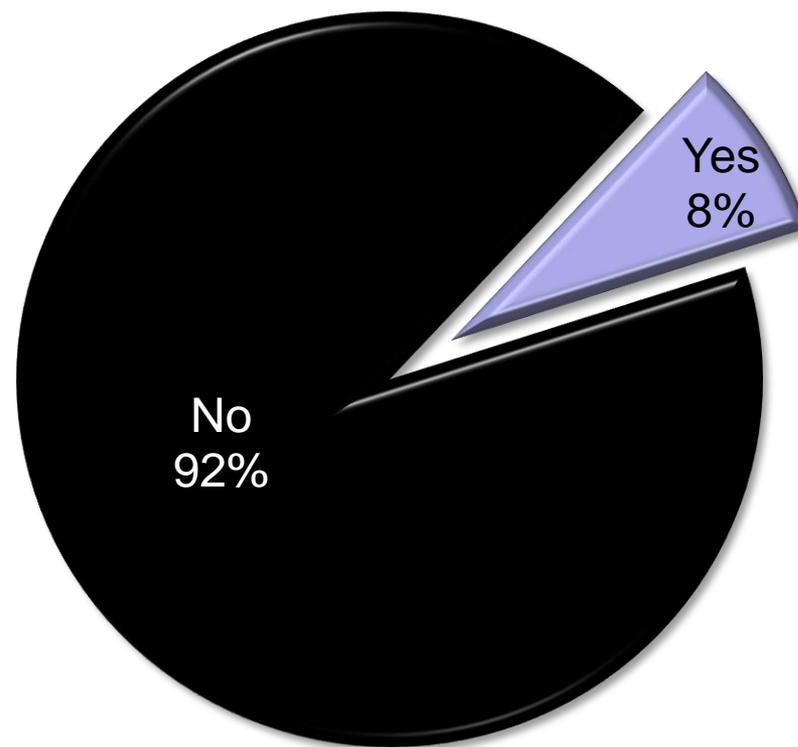
HIE Availability and Use

Survey Question # 31. Does your company currently participate in a Health Information Exchange (HIE)?

| | |
|--------------|-------------|
| Yes | 153 |
| No | 1733 |
| Total | 1886 |

Note on Physician Counts

| | |
|-----|------|
| Yes | 1705 |
| No | 6420 |



Note: Question # 31 responses are based on total completed surveys

HIE Availability and Use

Survey Question # 32. Please provide the name of the Health Information Exchange (HIE)?

| | |
|--|----|
| Gateway EDI | 10 |
| St. Louis HIN | 7 |
| Epic | 5 |
| Lewis & Clark Information Exchange (LACIE) | 4 |
| Relay Health | 4 |
| MD Datacorp | 3 |
| NextGen | 3 |
| Dentrix | 2 |
| GoogleHealth | 2 |
| Zirmed | 2 |
| | |
| | |

Note: Question # 32 responses are based on total respondents who participate in HIE

Survey Question # 33. What barriers do you face in participating in Health Information Exchange (HIE)? Check all that apply.

| | Count | Percent of Respondents |
|---|-------|------------------------|
| Limited funds | 685 | 40% |
| Limited resources | 539 | 31% |
| Limited broadband access | 387 | 22% |
| Vendor does not support HIE | 363 | 21% |
| Other | 351 | 20% |
| No barriers | 237 | 14% |
| Legal, privacy and security concerns, including HIPAA | 124 | 7% |
| Product does not support HIE | 107 | 6% |

Note: Question # 33 responses are based on total respondents who do not participate in HIE and include multiple responses

What did we learn?

- Technology Readiness

- Technology infrastructure for internet access is available
- EDI and web based systems are in use statewide
- Email has become the preferred method of contact
- Technology support and direction is needed
- Very limited use of technology for patient access

- EHR Adoption

- EHR solutions today involve a wide variety of software products and tools
- More detailed information and education is needed
 - What does EHR deliver for my patients and my practice?
- Technology support with EHR selection and implementation is needed
- Costs, resource requirements to transition from paper are key concerns

What did we learn? (continued)

- HIE Availability and Use

- HIE is an evolving concept with a significant amount of interest
- Physicians generally don't know what HIE is
- More detailed information and education is needed
 - Will HIE be relevant to my practice?
 - What does HIE deliver for my patients and practice?
 - When will HIE be available?
 - How will we interface with HIE?
- Technology support and direction for HIE is needed

- EHR Incentives

- More detailed information about EHR technology incentives is needed
 - What level of incentives are available?
 - How will EHR incentives impact my organization or practice?
 - When will incentives be available?
 - How will we apply for incentives?
 - What vendors and products will be certified?

What did we learn? (continued)

- Challenges Reaching Providers (especially physicians)
 - No e-mail addresses
 - 409 letters in returned mail for wrong address
 - Only 50% of records had phone numbers (of those 5% wrong numbers)
 - No hierarchical structure to the data. So, there was no reliable way to associate groups, clinics, or physicians to hospitals.
 - Inconsistent use of provider types
- Other
 - More effective communication with providers is needed
 - Current provider data needs to be updated
 - Survey findings reinforce the need for a statewide provider repository
 - Future provider surveys need to be more focused

Questions?

