State of Electronic Health Records Systems in PACE

2012 Member Survey Analysis

NPA Member EHR Survey

- 84 PACE and 2 Pre-PACE Organizations (POs) were surveyed nationwide in the first half of 2012(100% response rate)
- 62 POs (69.8%) reported utilizing an EHR
  - In 2010 survey, 36 POs reported utilizing an EHR

Adoption Rates

In 2010 81.9% of respondents had been using an EHR for less than 5 years

In 2012 66.6% of respondents had been using an EHR for less than 5 years

Vendors

- The top four vendors hold 52% of the PACE EHR market*
- POs reported using 18 different vendors
  - 16 different systems reported in 2010
  - 4 vendors from 2010 were dropped in 2012 and replaced by new companies
- In 2010, 10 of 16 EHRs (62%) had only one client
- In 2012, 8 of 18 EHRs (44%) had only one client
- This shows a decrease in fragmentation and suggest the market is adapting to select favorable EHR vendors

***Based on 83% of members (52) who identified their EHR system**

Member Ratings and Market Share of EHR Vendors

(Scale from 1-5; 5=Very Satisfied; 4=Satisfied; 3=Somewhat Satisfied; 2=Disappointed; 1=Very Disappointed)

EHR System	# Clients	Average Rating	Market Share
Mediture	15	4	24.0%
PACE Care	10	2.7	16.0%
Centricity	4	3.5	6.0%
McKesson	4	3	6.0%
NextGen	3	3.5	5.0%
Allscripts	2	2	3.2%
EpicCare	2	5	3.2%
Suncoast	2	3.5	3.2%
American data	1	3	1.6%
CH Mack	1	2	1.6%
CMHC	1	1	1.6%
CareVoyant	1	3	1.6%
Cerner	1	2	1.6%
Momentum	1	2	1.6%
PPMS	1	4	1.6%
Prelude	1	4	1.6%
PrimeSuite/Cognify	1	5	1.6%
Vitera	1	3	1.6%

2010 vs 2012 Vendors

EHR Program	2010 Clients	Market Share	2012 Clients	Market Share	% Change
Mediture	4	12.1%	15	24.0%	+11.9%
PACE Care	8	24.2%	10	16.0%	-8.2%
Centricity	3	9.0%	4	6.0%	-3.0%
McKesson	3	9.0%	4	6.0%	-3.0%
NextGen	1	3.0%	3	5.0%	+2.0%
Allscripts	1	3.0%	2	3.2%	+.2%
EpicCare	3	9.0%	2	3.2%	-5.8%
Suncoast	2	6.0%	2	3.2%	-2.8%
American Data	0	0.0%	1	1.6%	+1.6%
CH Mack	0	0.0%	1	1.6%	+1.6%
CMHC	0	0.0%	1	1.6%	+1.6%
CareVoyant	1	3.0%	1	1.6%	-1.4%
Cerner	1	3.0%	1	1.6%	-1.4%
Momentum Healthware	1	3.0%	1	1.6%	-1.4%
PPMS	0	0.0%	1	1.6%	+1.6%
Prelude	0	0.0%	1	1.6%	+1.6%
PrimeSuite/Cognify	0	0.0%	1	1.6%	+1.6%
Vitera	0	0.0%	1	1.6%	+1.6%

Note: 33 members identified their EHR vendor in 2010 while 52 members did so in 2012

Vendor Information

- The top vendors from 2010 to 2012 remained Mediture, PACE Care, Centricity,Epic Care, Mckesson, NextGen, Allscripts and Suncoast Solutions

Vendor Information

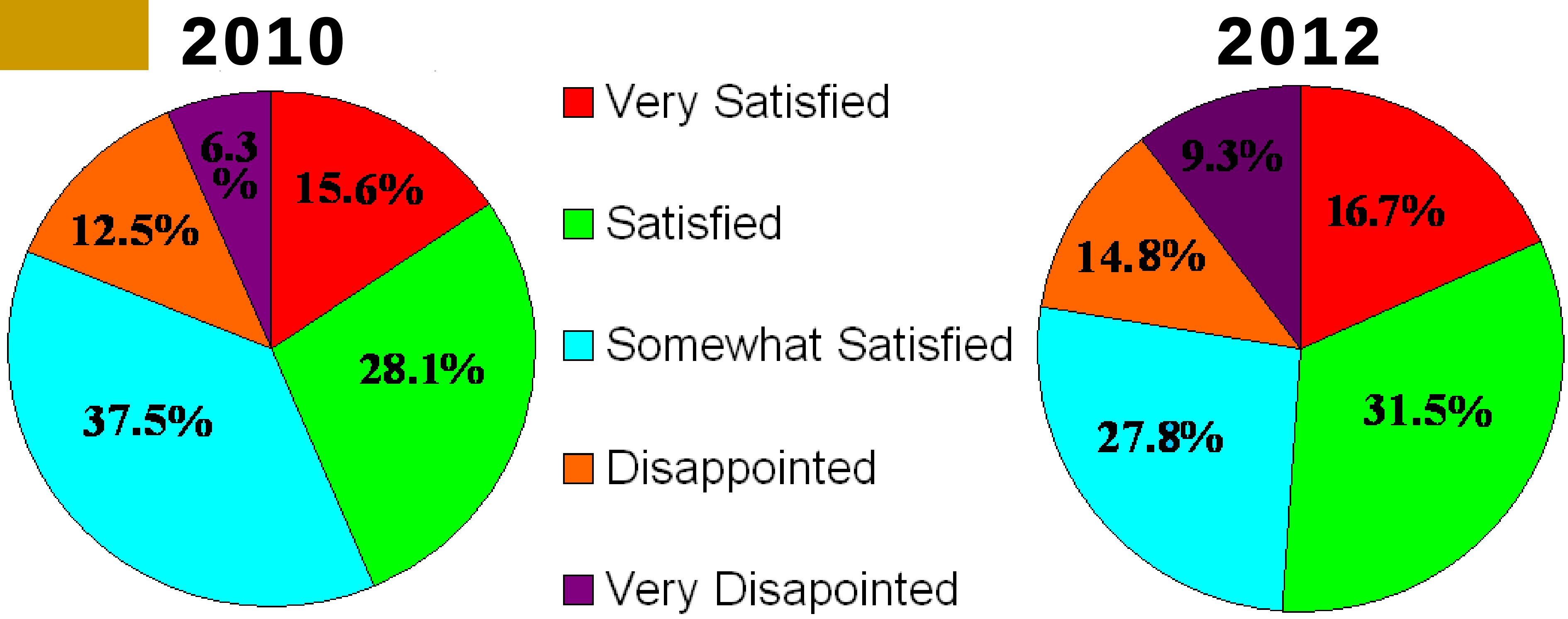
- Top Vendors
  - TruChart by Mediture –24% of market
    - Average rating of 4 (Very satisfied to satisfied)
    - Increased market share by 11.9% in 2012 by gaining 15 clients
  - PACE Care by RTZ Associates – 16% of market
    - Average rating of 2.5 (Somewhat satisfied to disappointed)
  - Centricity – 6% of market
    - Average rating 3.5
  - McKesson – 6% of market
    - Average rating 3

Satisfaction

- From 2010 to 2012 average satisfaction with EHR systems decreased by 3.6%
  - 2010 26 of 32 (81.2%) of POs reported being satisfied with their EHR
  - 2012 38 of 49 (77.6%) of POs reported being satisfied with their HER
- However, in 2012 more POs were “Very Satisfied” and fewer were “Very Disappointed” with their EHR

Satisfaction Rates

- NOTE: Not all POs surveyed provided satisfaction data



HITECH EP Incentive Payments

- Of the 31 POs who provided information on participation in the **Health Information Technology for Economic and Clinical Health** (HITECH) Act incentive payment program for Eligible Professionals (EPs):
  - 19.4% (6) receive Medicaid incentives
  - 12.9% (4) receive Medicare incentives
  - 67.7% (21) receive no incentives

Components of EHRs

- Compared to 2010, utilization of all EHR functional components increased
  - Intake ↑ 8.3%
  - Assessment ↑ 12.5%
  - Care Planning ↑ 12.5%
  - Clinical progress notes and records ↑ 3.1% to 100%
  - Scheduling ↑ 9.4%

What functional components are offered and utilized

- Strong correlation between low availability rates and low utilization rates

Functional Component	Avaliability Rate	Utilization Rate
Clinical progress notes and records	100.0%	100.0%
Assessment	98.0%	93.8%
Admission	89.8%	81.3%
Care Planning	89.8%	81.3%
Intake	87.8%	83.3%
Scheduling	87.8%	75.0%
Utalization	67.3%	60.4%
Claims Management	53.1%	25.0%
Encounter Reporting (5010 compliant forms)	42.9%	27.1%

What’s missing?

- 35.3% of member EHRs offer accounts receivable tracking
- 53.1% of member EHRs offer claims management
- 42.9% of member EHRs offer encounter reporting
- Members have expressed desire for lab interfacing within their EHRs
- 64.7% of member EHRs are capable of exporting data files for DataPACE2 submission
- Of those who don’t have the capability, only 21.2% have approached their vendor for assistance with exporting data to DataPACE2 for benchmarking

Accommodations for PACE

- In 2010 72.7% of respondents reported that PACE specific modifications had been made to their EHR
  - In 2012 that number rose to 78%
- Increasing numbers of vendors realize it is necessary to tailor their EHR products to the specific needs of PACE

Cost

- First year implementation and training
  - 22 members provided data
  - Cost varied greatly
  - Ranged from $6,000 to $1.2 million
  - Average was $245,008.95
- Annual EHR cost
  - 28 members provided data
  - Average was $63,323.32
  - 57% (16) reported annual cost under $50,000

Purchase vs lease

- Virtually identical purchase and lease rates in 2010 and 2012
- 2010:
  - 58.1% Purchased
  - 41.9% Leased
- 2012:
  - 57.1% Purchased
  - 42.9% Leased

Web-based vs Installed

- 2010
  - 65.6% Installed
  - 34.4% Web-based
- 2012
  - 63.3% Installed
  - 36.7% Web-based

Future implementation

- In 2010 only 32.6% of respondents planned on purchasing an EHR within the year
- In 2012 63% plan to purchase an EHR within the year

What members want from NPA

- In 2010 members emphasized the importance of satisfaction evaluations of EHR products
- In 2012 their emphasis had shifted to the importance of developing strategic partnerships with EHR vendors and developing a standardized data set for PACE

Conclusions

- Claims management and encounter reporting capabilities are not readily available and therefore not widely used within PACE EHRs

- About 50% of POs utilizing an EHR system capable of generating 5010 compliant forms are still contracting with claims management and encounter reporting submission vendors

- Implementation costs vary greatly depending on the size of your program and its needs

- Emphasis needs to be placed on the importance of EHR data extraction for use with DataPACE2

Conclusions

- PACE specific modifications are necessary in nearly all existing EHR systems
- Emphasis needs to be placed on receiving HITECH/HIT incentives for EHR use
- EHR adoption looks to dramatically increase in 2012 and 2013
- The development of partnerships with EHR vendors to create favorable pricing and functionality is a top necessity for NPA members
- The development of a standardized data set for PACE will foster evolution of PACE specific EHR products