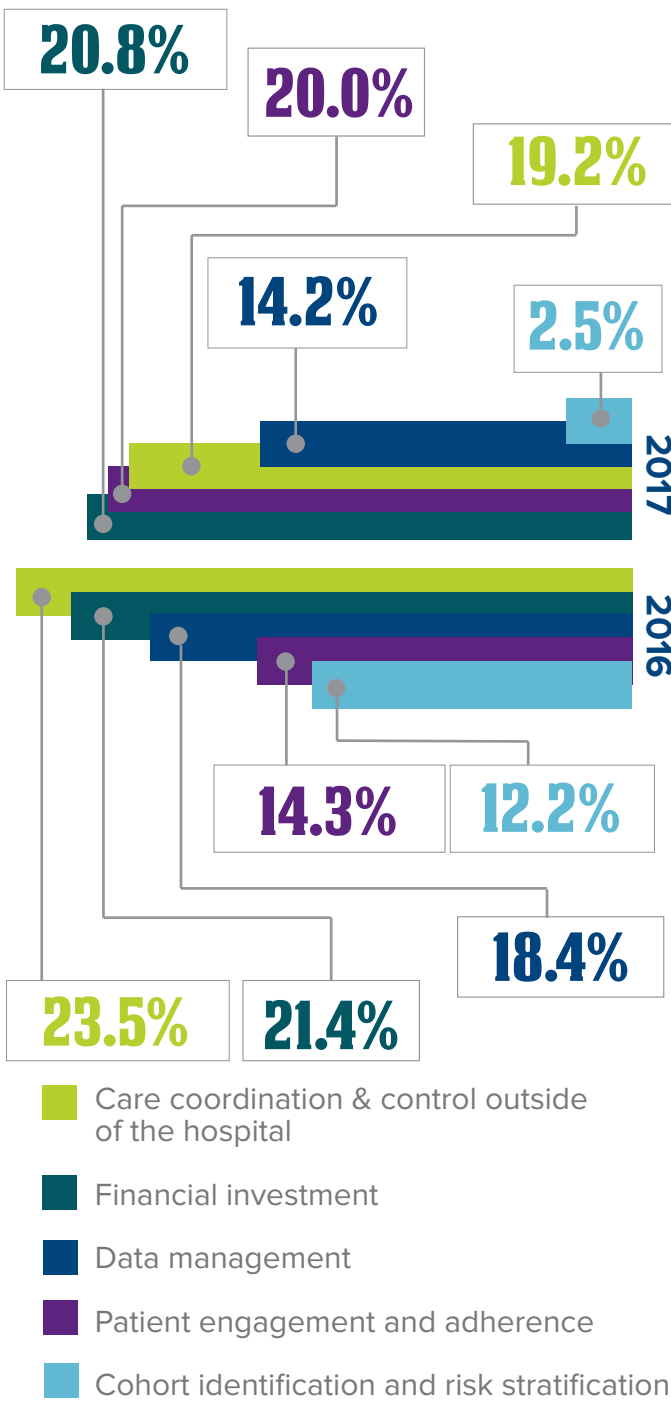# HEALTHCARE IT's EVOLUTION IN 2017
Connecting care for continuous health

Hospitals and IDNs have been investing in new technologies that support collaborative care across the continuum, according to surveys conducted from 2013-2016 by HIMSS Analytics on behalf of Philips Healthcare. In this 2017 survey update, as hospitals and IDNs look to expand their population health initiatives to achieve value-based care, they are looking more carefully at technologies that are cost-effective and operationally effective, and continue to put the patient in the center of care, whether it be within their four walls or increasingly in the home and their communities. Of the 120 respondents:

84% represented standalone hospitals or IDNs

55% identified as C-level executives

26.7% identified as IT directors

ROLE OF HEALTHCARE IT SHIFTS

As patient-centered care continues to expand into the community, diagnostic imaging centers, ambulatory surgery centers and urgent care have seen increases in the deployment of IT systems.

physician offices
84%
compared to **89%** in 2016, **91%** in 2014/2015 and **78%** in 2013

ambulatory
61%
compared to **52%** in 2016, **47%** in 2014/2015 and **47%** in 2013

urgent care
60%
compared to **52%** in 2016 **45%** in 2014/2015 and **32%** in 2013

diagnostic imaging
68%
compared to **56%** in 2016 **43%** in 2014/2015 and **41%** in 2013

patient homes
36%
compared to **38%** in 2016 **42%** in 2014/2015 and **30%** in 2013

EMTs
22%
compared to **27%** in 2016 **26%** in 2014/2015 and **17%** in 2013

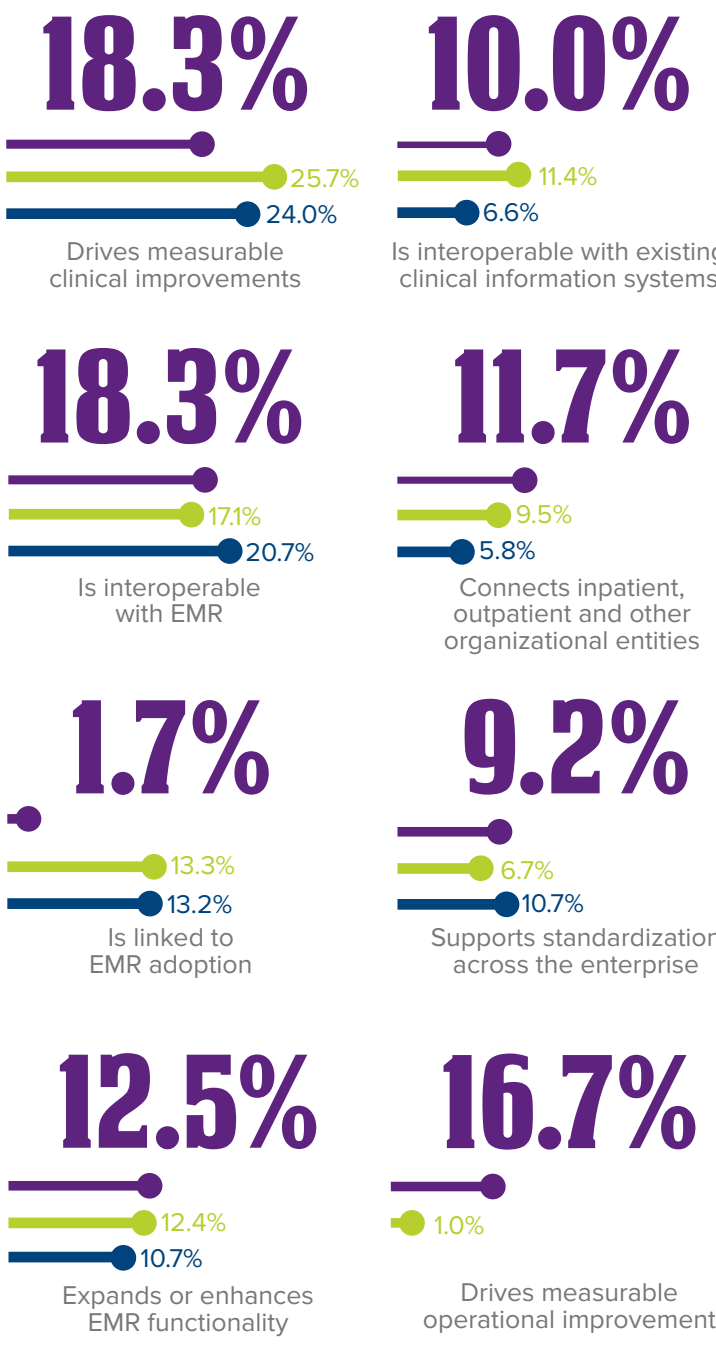## CHALLENGES IN POPULATION HEALTH MANAGEMENT

While care coordination is still a challenge overall, more respondents ranked financial investments and patient engagement and adherence as the biggest single population health challenge.

2017
- 20.8%
- 20.0%
- 19.2%
- 14.2%
- 2.5%

2016
- 14.3%
- 12.2%
- 18.4%
- 23.5%
- 21.4%

Legend:
- Care coordination & control outside of the hospital
- Financial investment
- Data management
- Patient engagement and adherence
- Cohort identification and risk stratification

The percentages above represent respondents who selected the option as the biggest challenge. On a scale of 1 to 3, with 1 being the biggest challenge and 3 being the third biggest challenge.

OPERATIONAL IMPROVEMENT A KEY CONSIDERATION FOR PURCHASING DECISIONS
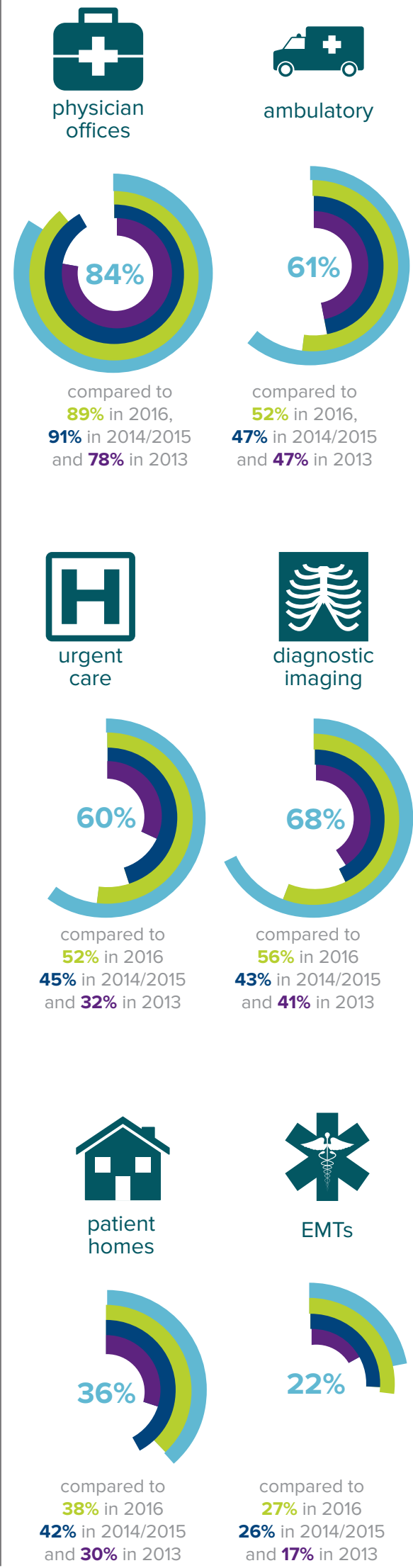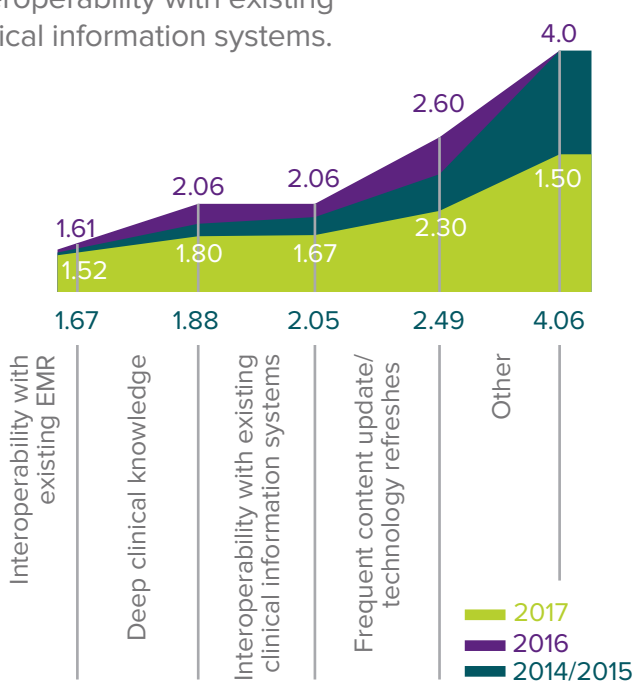
While driving measurable clinical improvements is still the most important consideration for clinical technology purchasing decisions, driving measurable operational improvement has significantly risen in importance.

18.3% Drives measurable clinical improvements
- 25.7%
- 24.0%

10.0% Is interoperable with existing clinical information systems
- 11.4%
- 6.6%

18.3% Is interoperable with EMR
- 17.1%
- 20.7%

11.7% Connects inpatient, outpatient and other organizational entities
- 9.5%
- 5.8%

1.7% Is linked to EMR adoption
- 13.3%
- 13.2%

9.2% Supports standardization across the enterprise
- 6.7%
- 10.7%

12.5% Expands or enhances EMR functionality
- 12.4%
- 10.7%

16.7% Drives measurable operational improvement
- 1.0%

Legend:
- 2017
- 2016
- 2014/2015

The percentages above represent respondents who selected the option as the most important on a scale of 1 to 5, with 1 being the most important and 5 being the least important.
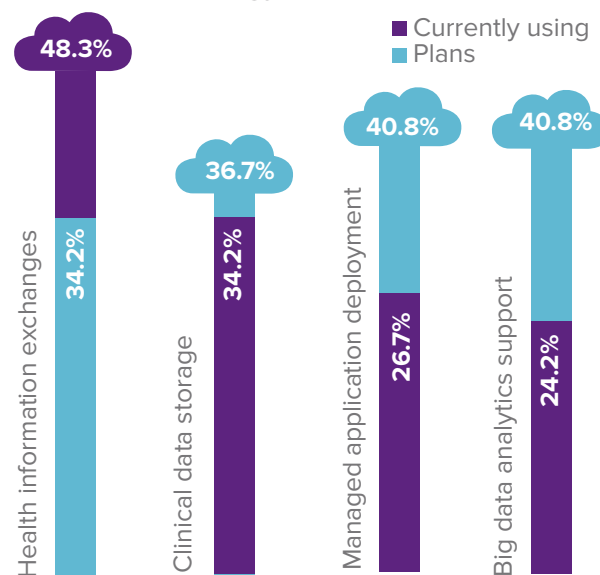
INTEROPERABILITY IS KEY

Healthcare organizations signaled that they want to partner with a clinical informatics vendor that has expertise in interoperability with existing clinical information systems.

- Interoperability with existing EMR: 1.61 / 1.52 / 1.67
- Deep clinical knowledge: 2.06 / 1.80 / 1.88
- Interoperability with existing clinical information systems: 2.06 / 1.67 / 2.05
- Frequent content update/technology refreshes: 2.60 / 2.30 / 2.49
- Other: 4.0 / 1.50 / 4.06

Legend:
- 2017
- 2016
- 2014/2015

(Importance was rated on a 1 to 5 scale with 1 being the most important and 5 being the least important. For those who ranked "other" as the most important, support, reliability and ease of use were the most common attributes listed.)
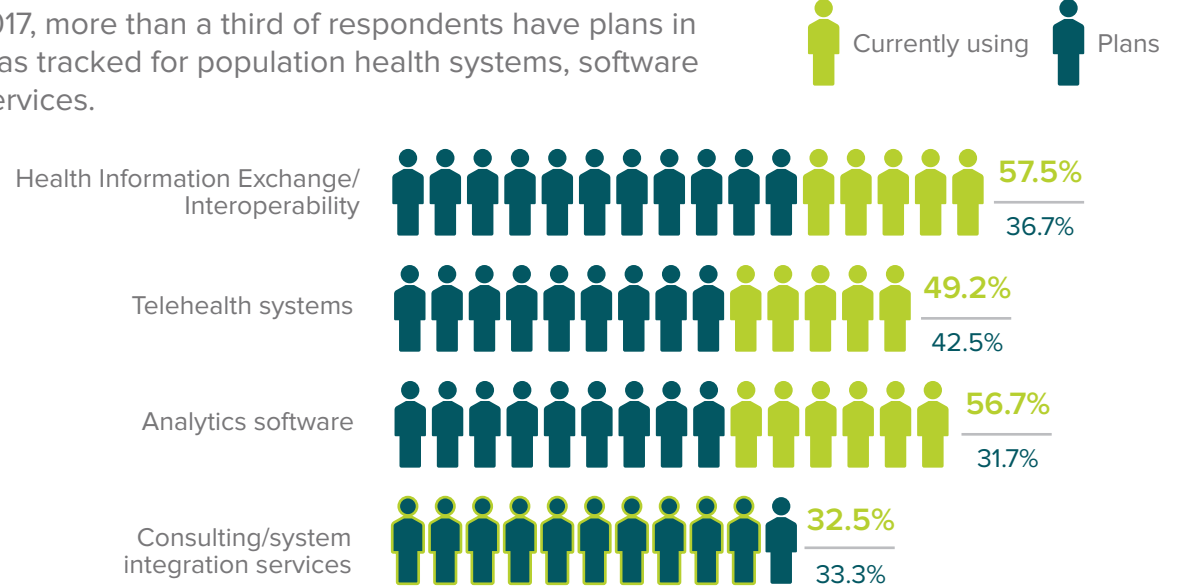
CLOUD-BASED TECHNOLOGY

Healthcare organizations increased their use of cloud-based technology for HIEs in 2017.

Legend:
- Currently using
- Plans

- Health information exchanges: 48.3% / 34.2%
- Clinical data storage: 36.7% / 34.2%
- Managed application deployment: 40.8% / 26.7%
- Big data analytics support: 40.8% / 24.2%

POPULATION HEALTH PLANS

For 2017, more than a third of respondents have plans in all areas tracked for population health systems, software and services.

Legend:
- Currently using
- Plans

- Health Information Exchange/Interoperability: 57.5% / 36.7%
- Telehealth systems: 49.2% / 42.5%
- Analytics software: 56.7% / 31.7%
- Consulting/system integration services: 32.5% / 33.3%

PROGRAM IMPLEMENTATION

Among the population health management areas currently being focused on in 2017 by healthcare organizations, the biggest increases in use are in acute-care programs, home monitoring devices and aging well or elderly care programs.

Legend:
- Currently using
- Plans

- Hospital discharge/30-day readmission programs: 66.7% / 25.0%
- Acute-care programs: 75.8% / 17.5%
- Patient education programs: 61.7% / 28.3%
- Chronic patient management programs: 53.3% / 31.7%
- Home monitoring devices: 35.0% / 45.8%
- Aging well or elderly care programs: 34.2% / 42.5%
- Mobile wellness monitoring devices (mHealth): 20.8% / 58.3%