

# Delivering Health Care

**Pam Potter, MBA, CMPE, FACHE, FHFMA**  
**HFMA South Texas Fall Symposium**  
**San Antonio – October 21, 2019**

# Disclosure

As a matter of compliance, individually I have no relevant financial relationships or decision making associations with the products or services described, reviewed, evaluated or compared in this presentation. Houston Methodist Hospital, my employer, does have financial relationships with many of the companies and government agencies mentioned.



How are your patient volumes trending?



# Where Did The Patients Go?

Patient Access  
Telemedicine  
Patient Demand  
Market Demand  
*Service vs. Experience*


# Patient Access

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- Traditional call
  - Voicemail?
  - Hold?
  - Disconnect?
  - Rude?
  - Ask the same questions over and over at each office, can't someone just share my information?
  - You or your primary care doctor will have to send your medical records, fill out forms, we will get back to you to let you know if you can be a patient, really, when?


# Patient Access

- Traditional call
  - Voicemail?
  - Hold?
  - Disconnect?
  - Send your medical records, we will get back to you
- Patient portals 


Houston Methodist MyChart

https://mychart.houstonmethodist.org/mychart-prod/


telemedicine No results Options




HOUSTON  
**Methodist**  
LEADING MEDICINE




**Communicate with your doctor's office**  
Get answers to your medical questions from the comfort of your own home



**Access test results sooner**  
No more waiting for a call or letter — access results and your doctor's comments as soon as they're ready



**Pay your bill securely**  
Review your medical bills and send secure payments online



**Schedule and review appointments**  
Schedule your next appointment, or view details of your past and upcoming appointments

Ver en Español

Username  
HFMA

Password  
●●●●●●●●

**SIGN IN**

[Forgot Username?](#) [Forgot Password?](#)

**New User?**

**SIGN UP NOW**

**PAY BILL AS GUEST**

MyChart® licensed from Epic Systems Corporation © 1999 - 2016


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Download on the App Store GET IT ON Google Play

# Patient Portal




personalized messaging, appointment reminders, updates  
Text – email – call

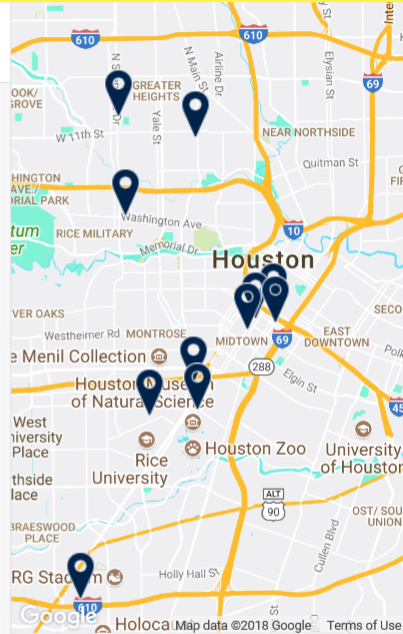
# Patient Access

- Traditional call
  - Voicemail?
  - Hold?
  - Disconnect?
  - Send your medical records, we will get back to you
- Patient portals
- ZocDoc 



Family Physician      houston      insurance carrier and plan      🔍

	Wed Mar 21	Thu Mar 22	Fri Mar 23
 <p><b>Dr. Adnan Yousuf, MD</b> Primary Care Doctor ★★★★★ "It was an awesome visit, then Dr and his staff were all very respectable,..." 1200 Binz St, Houston, TX 77004 Within 3.5 miles</p>	11:15 am	11:45 am	—
	12:15 pm	12:45 pm	—
	12:45 pm	1:15 pm	—
	1:15 pm	1:45 pm	—
 <p><b>Diana Sutton, FNP, MSN</b> Nurse Practitioner ★★★★★ "I love this office and both the providers I have now seen there. They are all..." 2 Chelsea Blvd., Houston, TX 77006 Within 3 miles</p>	—	9:30 am	—
	—	10:30 am	—
	—	11:00 am	—
	—	—	—
 <p><b>Dr. Rhonda Barnes Jordan, MD</b> Family Physician ★★★★☆ "DR WAS AWESOME BUT WAIT TIME WAS HORRIBLE..." 2636 South Loop West, Houston, TX 77054</p>	8:00 am	8:00 am	8:00 am
	8:30 am	8:30 am	8:30 am
	9:00 am	9:00 am	9:00 am
	more	more	more




Find doctors and make appointments online

Managing your healthcare is easier than ever before with Zocdoc. Just search for a doctor in your insurance network, see available times, and book an appointment on the spot! You can

[Read More](#)

# Patient Access

- Traditional call
  - Voicemail?
  - Hold?
  - Disconnect?
  - Send your medical records, we will get back to you
- Patient portals
- ZocDoc
- Pharmacy clinics 



Services Insurance & pricing Pay bill Why choose us

Find a clinic

ZIP code, or city and state



Home > Resources > Hold My Place In Line

## Hold My Place In Line



### Find the clinic with the shortest wait time.

Then just walk in or save a spot. Here's how:

1. Enter your ZIP code into the clinic locator here or in the CVS Pharmacy® app.



2. You'll see a list of nearby clinics and their wait times, if any.

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[Find a clinic to get started >](#)

# Patient Access

- Traditional call
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  - Send your medical records, we will get back to you
- Patient portals
- ZocDoc
- Pharmacy clinics
- Insurance website access





PHO CARE

SAVED

PHO CARE

PHO CARE

- 4 & higher (28)
- All (31)

PATIENT REVIEWS

- 5 stars (3)
- 4 & higher (28)
- 3 & higher (23)
- 2 & higher (24)
- 1 & higher (28)
- All

RESULTS (31)

SPECIALTY

- Orthopedic Surgery (28)
- Pediatric Orthopedic Surgery (3)

LANGUAGE

- Arabic (1)
- Czech (1)
- French (3)
- German (2)
- Greek (1)
- Spanish (1)

GENDER

- All
- Male (27)
- Female (4)

ACCEPTING PATIENT STATUS

- Accepting All Patients (1)

HOSPITAL AFFILIATIONS

**Blum, Henry J, MD**  
Orthopedic Surgery  
★★★★★ (1 Review)

5425 West Loop S Ste 2400  
Bellevue, TX 77621  
+1 713-888-3550 more  
3.8 Miles Away

[View Additional Locations](#) |  
[View Employment Information](#)

Orthopedic Surgery - Services Not  
Meets Average Cost | [VIEW ALL SERVICES & COSTS](#)

[SCHEDULE APPOINTMENT](#)



**Likover, Larry L, MD**  
Orthopedic Surgery  
★★★★★ (1 Review)

902 Friesland Dr Ste 208  
Houston, TX 77024  
+1 713-465-0508 more  
10.2 Miles Away

[View Additional Locations](#) |  
[View Employment Information](#)

Orthopedic Surgery - Services Not  
Meets Average Cost | [VIEW ALL SERVICES & COSTS](#)

[SCHEDULE APPOINTMENT](#)

**Hanson, Darrell Scott, MD**  
Orthopedic Surgery, Pediatric Allergy Immunology  
★★★★★ (1 Review)

4701 Farris St R 8  
Houston, TX 77030  
+1 832-623-1100 more  
0.2 Miles Away

[View Additional Locations](#) |  
[View Employment Information](#)

Orthopedic Surgery - Services Not  
Meets Average Cost

[VIEW ALL SERVICES & COSTS](#)

**Caudle, Abigail Suzanne, MD**  
Orthopedic Surgery, Surgery  
★★★★★ (1 Review)

1515 Rescortia Blvd  
Houston, TX 77030  
+1 713-762-6161 more  
+1 800-362-1811 more  
0.3 Miles Away

[View Additional Locations](#) |  
[View Employment Information](#)

Orthopedic Surgery - Services Not  
Above Average Cost

[VIEW ALL SERVICES & COSTS](#)



# Patient Access

- Traditional call
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  - Hold?
  - Disconnect?
  - Send your medical records, we will get back to you
- Patient portals
- ZocDoc
- Pharmacy clinics
- Insurance website access
- *Telemedicine, well maybe an empty lobby is good?  
Lets see....*



# Access and Telehealth



*Ok, it is convenient!*

## Patient focused

Engages on patient terms

Aligns accountability while giving patients decision support

Opportunity to see behaviors in the patients environment

## Reimbursement is lagging but currently offset by

Patient travel time

Transportation concerns or difficulties for elderly, disabled patients

Parking

Work schedule, other conflicts

Children, middle of night illnesses

Assists patients in understanding what is urgent or emergent



# Setting up Telehealth

- Have a business case or don't do it
- Select infrastructure and vendor partners
- Understand your patient base and their acceptance
  - GenZ cohorts prefer video/text over person to person engagement
- Operationalize
  - Understand regulatory guidelines and laws for your state
  - Prioritize exam types, dermatology, colds, sinus, post operative visits
  - Start small, learn and expand
  - Advertise, by providing patient education about the technology

# Setting up Telehealth

- Reimbursement
  - 2019 Medicare Proposed Fee schedule includes payment for beneficiaries connecting virtually with their doctor using telecommunications technology
    - Place of service code: 02
    - Modifier GQ: Asynchronous
    - Modifier 95: Synchronous – interactive audio and video for CPT (★) codes
  - Commercial insurance now approving and paying on a plan to plan basis

# Telehealth Market

- Market demanding “connected, coordinated, and convenient care”
- Benefits from the physician perspective
  - 66% Improved access to care
  - 52% Improved patient satisfaction
  - 45% Staying connected with patients and caregivers
- Barriers
  - Lack of reimbursement
  - Complex licensing requirements
  - High cost of technology
  - Reliability and security

# Telehealth Market

- Consumer participation
  - 23% have had video visits
  - 57% are willing to try
- Physician participation
  - 14% have capability for video visits
  - 18% plan to add this capability in the next year or two

# eVisits

- Non-Face-to-Face On-Line Medical Evaluations
  - asynchronous
- Distinction between an eVisit and simple patient messaging or e-mail
  - Must include history taking, diagnosis, and intervention
  - Secure portal access and communication in an asynchronous manner
  - Not in real time
- Portal eVisits link triggers a structured written questionnaire
  - Past medical history
  - Medication allergies
  - Pharmacy information
  - Closed and open-ended questions relevant to the condition.

# eVisits

- Physician reviews the answers and patient's EMR
  - Documents medical findings
  - ePrescribe prescriptions
  - Electronic lab orders
  - Formulates a diagnosis and decides on treatment
- If a physician determines an eVisit is not appropriate
  - Patient requested to make a office appointment
  - eVisit information is still included in the EMR
  - Patient is not charged for both the eVisit and office visit.

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Requires licensing in several states or groups of doctors covering multiple states

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State to state medical board and rules

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Camera quality important

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Providers continually tasked to meet the standard of care

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Antibiotic use tracked, new patient visits narcotics not prescribed

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Over time medical records focusing on interactions and “hopefully” less about check boxes for billing

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Telehealth Watch

# Patient Access – What Drives Demand?

Watch volume trends  
Who is providing new  
technologies?

Are virtual completers entering  
your market?

Make it easy for patients to  
access their care

Understand what the patient  
population wants

What drives demand?

Your closed on Wednesday  
afternoons, and I have the  
same copay at a pharmacy  
clinic – I'm sick now doctor.

Opening for CVS,  
Walmart

Doctor, are you  
open Sundays?





# Demand = function of multiple variables

## Population

- Shifts in population *growth and distribution*

## Epidemiology

- Changes in *disease incidents and prevalence* due to behavioral, sociocultural and environmental influences and prevention measures

## Policy

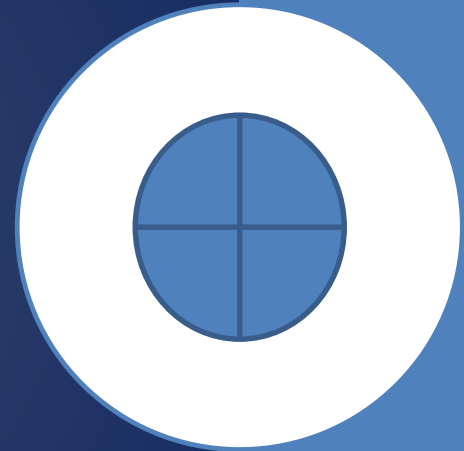
- Federal Policy (e.g. MACRA), National *payment mandates* for specific services (mental health) and *insurance coverage*

## Innovation and technology

- Shift the *site of care, utilization* of resources or approach to *disease management*

## Systems of CARE

- Changes in utilization due to better *care coordination*, provider integration across various sites of care, facilitated by payment models



- New competitors and innovative partnerships competing for market share
- Narrow Networks
  - Analytics – cost of episodic care
    - KNOW YOUR COST
  - Self-Insured employers and insurance companies
- Cost Shifting, Reimbursement
  - Payor mix changes
  - Self-Insured employers
  - Accountable Care Organizations
  - Medicare Part C – Advantage plan risk
  - Ancillary services: risk or reward?
  - Pricing transparency either on your terms or someone else's

# Organizational Differentiation

- Competitive landscape
  - Embrace transparency
  - Include pricing in transparency
  - Actively manage online reputations
- Regulatory shifts
- Redefine technology
  - Enable expansive access
  - Address practical consumer needs

# Organizational Differentiation

- Market expectations
  - Organizations have to be open, available and convenient
- Consumer reports on health
  - Minimize critical service flashpoints
  - Avoid negative interactions pushing patients away
  - Prioritize positive encounters over luxury amenities
  - Consumer centric billing and payment practices
- Unique partnerships
  - Build durable relationships
  - Monitor landscape for potential out of the box partnerships

Delivering consistent, exceptional experience, proactively anticipating patients' comprehensive clinical and non-clinical needs.

# Are You Meeting Patient Expectations?

Now What About Market Expectations?

- Multiple methods for appointment scheduling
- Notices to patients when the providers schedule is behind
- Interactive messaging by text or portal
- Map access, parking information for appointments
- Help with selecting a primary care physician and subsequent specialist referrals
- Care coordination to assist patients in deciding level and timing of care
- Same-day or next-day appointments with primary care or for injuries with specialist physicians
- Access to digital health tools
- Ability to view test results
- Request prescription renewals and pay bills electronically
- Submit home monitoring data online
- Connect through their smartphone, tablet, or personal computer

# Unique Partnerships to Meet Market Demand?

- CVS Health to acquire Aetna
- Cigna to acquire Express Scripts
- UnitedHealth's Optum to buy DaVita Medical Group = 300 medical clinics
- Walgreens pursues smaller deal with Rite Aid
- Catholic Health Initiatives, Dignity Health to combine keep both CEO's – Dignity to run operations for 139 hospitals \$28B
- Community Health System' hospital divestiture spree of 30 hospitals to try to avoid bankruptcy in 2018
- Advocate, Aurora Health Care to merge into \$11B health system with
- Advisory Board finalizes \$1.3B deal with UnitedHealth's Optum, establishing new business divisions
- Amazon, JPMorgan Chase & Co. and Berkshire Hathaway are forming an independent healthcare company focused initially on new technologies to serve their U.S. employees
- Walmart in Early-Stage Acquisition Talks With Humana
- OptumCare has closed on a \$28 million deal for Reliant Medical Group, MA

# Health Care

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**What merger mania means for health care - Mar. 8, 2018 - CNN Money**  
<https://money.cnn.com/2018/03/08/...mergers...express-scripts-consolidation/index.html>  
2 days ago - So it's unclear if antitrust regulators will greenlight this deal -- or the Cigna-Express Scripts combination. But don't be surprised if more health care companies succumb to the urge to merge as well, even as they wait for signs from Washington. **Walgreens** (WBA), which recently agreed to buy a big chunk of ...

**Buyout Talk Intensifies As Express Scripts And Humana Shed Assets**  
<https://www.forbes.com/.../buyout-talk-intensifies-as-express-scripts-and-humana-shed...>  
Nov 29, 2017 - 26, 2016. (Photo: Luke Sharrett/Bloomberg). As reports sweep the healthcare industry about a coming wave of consolidation, Humana is the latest subject of media and financial reports that the health plan is preparing for a merger. Humana has been cutting costs, employees and selling non-core assets as ...

**Cigna's \$67 billion acquisition of Express Scripts will change the way ...**  
<https://www.marketwatch.com/industries/health-care>  
8 hours ago - s \$67 billion acquisition of middleman pharmacy-benefit manager Express Scripts Holding Company, announced Thursday, marks the veritable end of ... Rx. UnitedHealth shares dipped 0.1% in Thursday trade, and shares of other health insurers — including Anthem, Aetna Inc. AET, +0.64% and Humana ...

**A CVS-Aetna deal could force Wal-Mart to buy Humana, analyst says**  
<https://www.cnbc.com/.../a-cvs-aetna-deal-could-force-wal-mart-to-buy-humana-anal...>  
Dec 1, 2017 - Another giant health-care industry acquisition could happen if CVS Health closes its \$66 billion deal for health insurer Aetna.

**What CVS-Aetna Deal Could Mean for Pharmacy Benefit Managers**  
<https://www.insurancejournal.com/news/national/2017/10/30/469641.htm>  
Oct 30, 2017 - A merger of CVS and Aetna would create a healthcare behemoth and put huge pressure on standalone players such as Express Scripts Holding Co. and Walgreens Boots Alliance Inc. Express Scripts would become the last major standalone pharmacy-benefit manager not allied with a major insurer.

**The CVS-Aetna Merger: Who Wins and Who Loses? | Fortune**  
[fortune.com/Health/Aetna](https://fortune.com/Health/Aetna)  
Dec 3, 2017 - This is not good news for Walgreens or other retail pharmacies, primarily because it gives CVS more durability and flexibility through diversification. Dark talk is also swirling around

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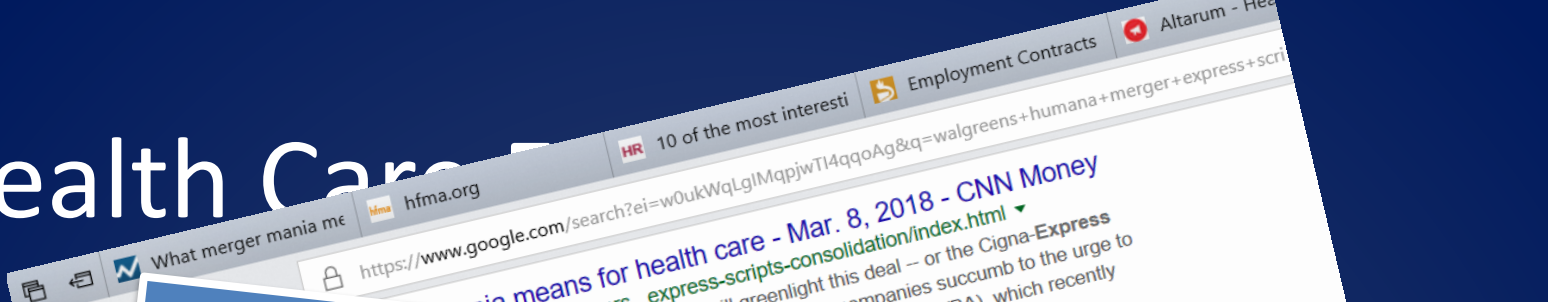
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Chapin White, senior policy researcher at the RAND Corporation, said **the AMAZON, BH, CHASE is most likely to impact hospitals** because about \$1 trillion of all healthcare spending goes through them. "And there's just hundreds of billions of dollars in revenues to hospitals from aggressive pricing," White said.

The partnership's effort to bypass hospital systems may start with lab tests and then move on to using artificial intelligence to reduce the use of physicians and **"do a complete end-run around physicians and the hospitals who run the system currently,"** White said.

Reported by: Rich Daly, HFMA



Dec 1, 2017 - A \$66 billion deal for health...

<https://www.insurancejournal.com/news/national/2017/10/30/> - A merger of CVS and Aetna would create a health insurer with a major insurer.

[fortune.com](https://fortune.com) > Health > Aetna

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That Walmart is in the preliminary stages of buying health insurer Humana is raising concerns that the merger will result in renewed pressure for hospitals to **lower prices for patients, while creating increased competition in the primary-care and outpatient care markets** that systems depend on for growth. The Wall Street Journal, April 2018.

Humana's top growth initiative this year is the acquisition of a major stake in **Kindred Healthcare**, one of the country's leading providers of hospice and home-healthcare services. Further, Humana is in the midst of launching a provider operations brand called **Conviva**, consisting of health clinics and outpatient medical practices in Florida and Texas; and the company may seek to expand its provider operations nationally. *Forbes.*

...physicians and  
...white said.  
Reported by: Rich Daly, HFMA

**What CVS-Aetna Deal Could Mean**  
<https://www.insurancejournal.com/news/national/2017/10/30/1710301001.html>  
Oct 30, 2017 - A merger of CVS and Aetna would create a health insurer with pressure on standalone players such as Express Scripts Holding Co. and Inc. Express Scripts would become the last major standalone pharmacy-benefit with a major insurer.

**The CVS-Aetna Merger: Who Wins and Who Loses? | Fortune**  
[fortune.com](http://fortune.com) > Health > Aetna  
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# Health Care

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WOONSOCKET, R.I., August 8, 2018 —CVS Health (NYSE: CVS) today announced that MinuteClinic, the company's retail medical clinic, is rolling out a new virtual health care offering for patients with minor illnesses and injuries, skin conditions and other wellness needs. MinuteClinic Video Visits, a telehealth offering, will **provide patients with access to health care services 24 hours a day, seven days a week from their mobile device.**

**NATIONWIDE** where allowed.

CVS Newsroom

The CVS-Aetna Merger: What  
fortune.com > Health > Aetna  
Dec 3, 2017 - This is not good news for Walgreens or other retailers.  
gives CVS more durability and flexibility through diversification. Dark talk

# Market Focus - Population Health Elements

## Care Management

- Deliver individualized care
- Coordinate between providers and facilities
- Identify barriers to better health outcomes

## PCP Network

- Clinical Integration of care team
- Emphasis on patient access
- After hours care plan

## Clinical Decision Making

- Identify and stratify health risk
- Predictive analytics for resource allocation
- Quality and utilization reports

## Patient Strategy

- Engage and educate
- EHR Portals, Apps, wireless health monitoring
- Telemedicine



Can we create an information-powered health system quickly enough to meet patient and purchaser expectations?



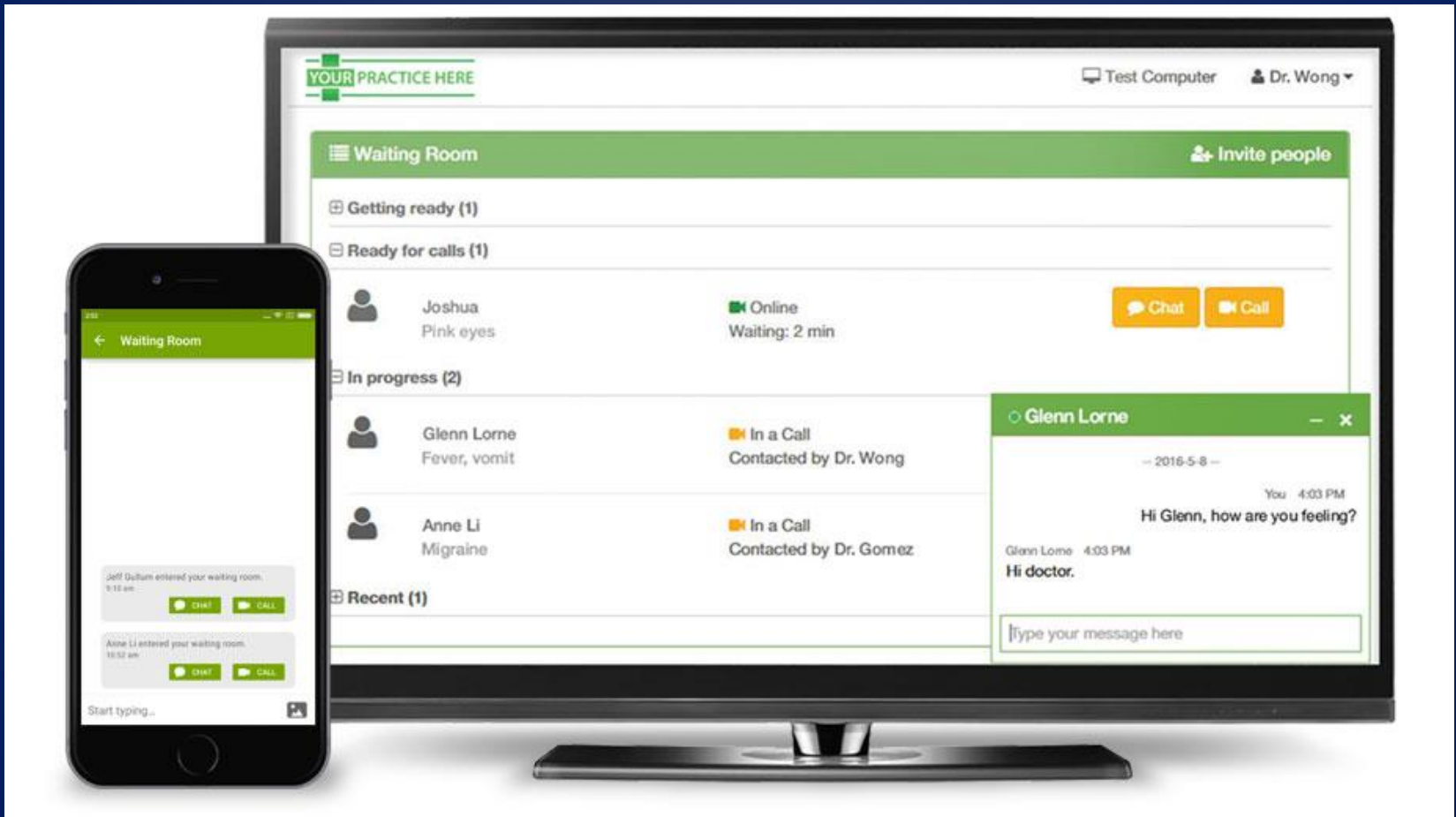
How “patient-centered” are our institutions?  
How “patient-centered” should they be?



Are we putting enough emphasis on care coordination, health IT and the impact on the patient experience?

## Positioning for the Future

# Patients! eConnectivity



**CMS 2019  
Medicare Part B  
Fee Schedule:  
Advancing Virtual  
Care Access**

- Pay clinicians for virtual check-ins –brief, non-face-to-face assessments via communication technology;
- Pay for Rural Health Clinics (RHCs) and Federally Qualified Health Centers (FQHCs) for communication technology-based services and remote evaluation services that are furnished by an RHC or FQHC practitioner when there is no associated billable visit
- Pay clinicians for evaluation of patient-submitted photos or recorded video
- Expand Medicare-covered telehealth services to include prolonged preventive services

# Telehealth Medical Board Links

AR

<https://www.armedicalboard.org/Professionals/pdf/REGULATION%2038%20Effective%2012-25-16.pdf>

LA

<http://www.lsbme.la.gov/sites/default/files/documents/Laws/Practice%20Acts/Physician/Physician%20Practice%20Act%207%202015%20.pdf>

MS

<http://billstatus.ls.state.ms.us/2014/pdf/history/SB/SB2646.xml>

MS

<http://billstatus.ls.state.ms.us/documents/2013/pdf/SB/2200-2299/SB2209SG.pdf>

OK

[http://www.okmedicalboard.org/download/877/sb726\\_Telemedicine\\_Law\\_Nov\\_1\\_2017.pdf](http://www.okmedicalboard.org/download/877/sb726_Telemedicine_Law_Nov_1_2017.pdf)

OK

[http://www.okmedicalboard.org/download/724/Telemedicine\\_Rules-Final\\_1014.pdf](http://www.okmedicalboard.org/download/724/Telemedicine_Rules-Final_1014.pdf)

TX

<http://tmb.state.tx.us/page/laws-gc-faqs-telemedicine>

TX

<https://legiscan.com/TX/text/SB1107/2017>

# Telehealth Laws and Policies



State specific  
information

Credit to: The Center for Connected Health  
Policy <http://cchpca.org>.





**The  
PATIENT  
Is  
IN**

## Patient Access

Be there when the decision for care is made

## Telemedicine

Help patients select the right care at the right time

## Patient Demand

What does your patient population want

Can you deliver price, transparency and communicate value

## Market Demand

*Service vs. Experience*

*-connected, coordinated, and convenient care*



Any eQuestions?

*Contact Information:*

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*Specialty Physician Group*

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