
PATIENT PORTALS

Patient Engagement: The Holy Grail of Meaningful Use

research and report provided by ReactionData



Find out which vendors are getting the best results, characteristics of providers meeting the 10% threshold, and the missing feature in portals that could lead to state law violations.

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Introduction

This report is unique for two reasons: 1) it's data is only weeks old, and 2) it's free. Traditional market research reports come out 6 months after the initial questions were asked and these reports can cost \$10,000 or more. That means the results are rather stale by the time it gets to you. Again, the data in this report is literally only a few weeks old and it's free.

I know what I'm talking about – I ran research for the most prominent healthcare market research firm in the world. I saw that business was speeding up and getting more competitive. This pointed to a rapidly evolving need for much better data, data in large quantities yet also being very current. So I created ReactionData to do just that.

My team built a proprietary ecosystem that gets a remarkable amount of targeted data very quickly (we call lots of specific data that was collected very rapidly Smart Data). It allows us to create and produce reports like this quickly and with no researcher overhead. This enables us to provide incredibly timely reports to the industry at no cost. But more importantly, it's lightning fast. The data you get in this report is just about as current and fresh as it can possibly be. The only way to get more current data would be to roll the dice, mine Twitter, and see what you can come up with.

It is very important to note that we aren't producing these reports to make money from the reports (as evidenced by our reports being free). Rather we're producing them to prove that it is absolutely possible to get all the data you need in just a matter of days and to illuminate areas of healthcare where we think timely data could prove useful to vendors and provider organizations alike.

You Can Use it Too

Our system isn't a secret, nor is it restricted to the public industry reports we produce. Many global healthcare companies already use our ecosystem to get the data they need – customer satisfaction, conjoint analysis, win/loss, prospect research, event/trade show feedback and demo scheduling, advertising/message testing, etc.

If you'd like to learn how you can get better, faster data to run your business, shoot me an email or give me a call. I'll show you how to get Smart Data in a matter of minutes.

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Executive Summary

Patient engagement is a hot topic in the world of healthcare today. In fact, many highly influential individuals such as Steve Wilkins believe it is the “holy grail of healthcare”. Simply put, installing an EHR is just the first step; getting the patient to now engage somewhere in their healthcare process electronically is crucial in healthcare reform. To the point, the American Recovery and Reinvestment Act (2009 Stimulus) requirement of obtaining at least 10% patient engagement has been called ‘impossible’ or ‘unrealistic’ by many in the industry. Indeed, the administration eventually reduced the requirement to 5% to accommodate this concern.

ReactionData, a pioneer of Smart Data, used its proprietary solution to gather data from over 200 healthcare provider Chief Medical Officer, CIO’s, and other relevant decision-makers from US-based healthcare organizations over a recent three week period.

Based upon this research:

- Meeting the 10% engagement threshold initially set forth by Meaningful Use Stage 2 is indeed possible, though only a small percentage of providers currently are doing it.
- Larger hospitals are more likely to succeed at this requirement than smaller providers.
- This is still a relatively new area of development so all product lines evaluated have flaws of some kind. However, clients of certain vendors are getting better results than clients of other vendors.
- Most patient portals tend to lack quite a few features that providers would find useful. These specific features are detailed within this report. These include:
 - Functionality for specialists
 - Integration of data with EHRs and other systems
 - Appointment scheduling in portal
 - Streamlined patient enrollment
 - Bill pay
 - Many solutions contain a serious limitation that could lead to healthcare providers violating state laws or limiting the engagement of parents and minors.

Meaningful Use Stage 2

Is the 10% Threshold Possible?

Is your patient portal really working; is it really getting patients to log on and access their information? That's, literally, the billion dollar question. What we found out was that yes indeed, in quite a few instances, it is possible.

In fact, in some cases there are hospitals that are blowing past getting 20% of patients engaging with their patient portal. Think about that for a moment – there are hospitals where more than a fifth of their patients are proactively interacting in some capacity with their health information online. That is not only fantastic; it's also incredibly encouraging. It proves that patient engagement really can happen.

Unfortunately, however, nearly two-thirds of organizations are struggling to get even 5% of their patients to engage. (see Figure 1)

Basically, meeting the 10% requirement is possible, even though most providers are struggling to do so.

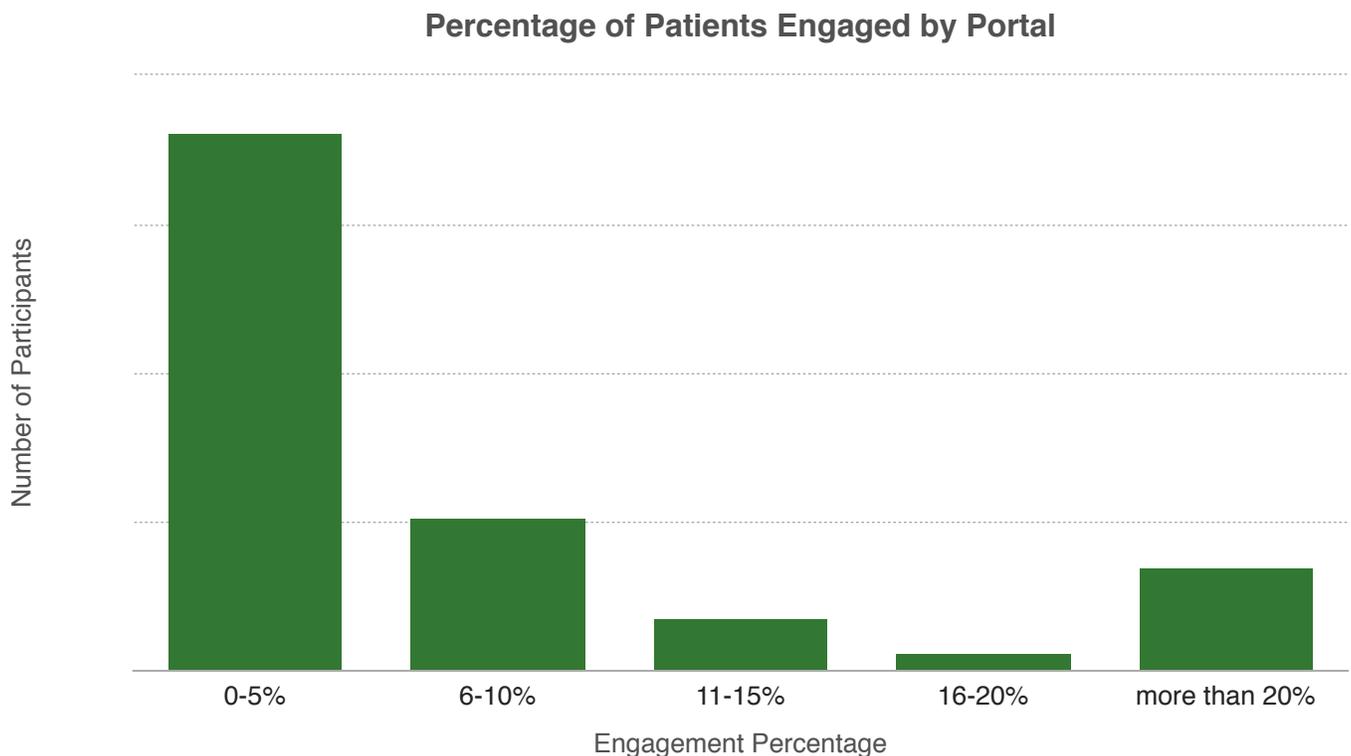


Figure 1 : Responses to question "What percentage of your patients are engaged via the patient portal?"

Profile of Success

So why are some providers dramatically exceeding the requirements while others aren't coming close to meeting them? This research gives a few clues as to what may be happening.

Hospital Size

This data says that the size of a hospital makes a difference in the rate of engagement. While one might assume that it is easier to get a good rate of engagement in a small hospital, the opposite is actually true. Larger hospitals are more likely to get above 5% patient engagement than smaller hospitals.

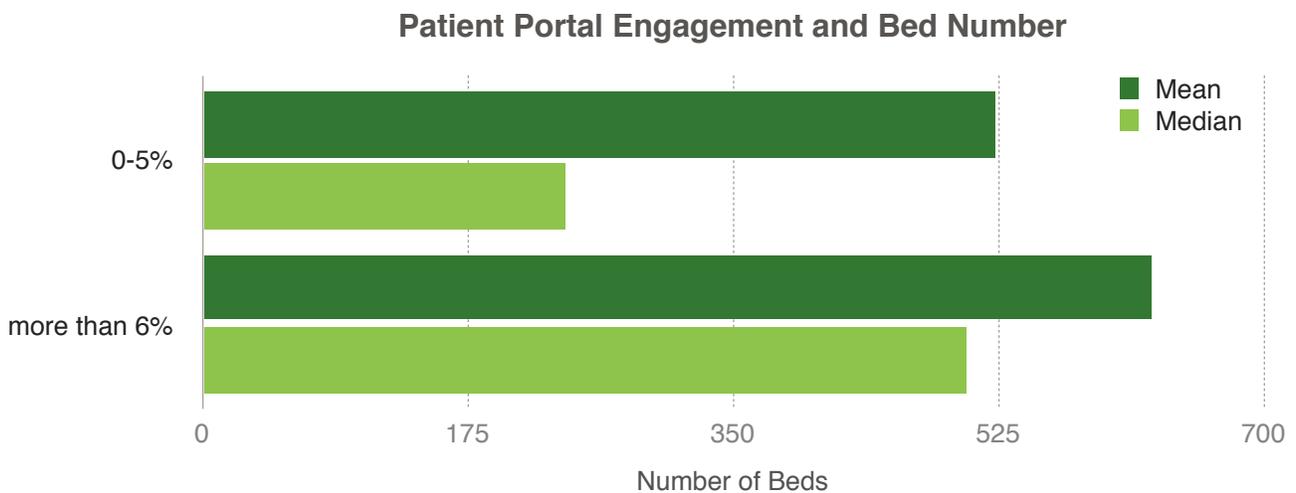


Figure 2 : Percentage of patients engaged compared with number of beds.

Mean vs Median

Figure 2 gives both the mean (a traditional average) and the median (the middle provider if we listed them in order by bed size). We use both because the wide range of bed sizes in hospitals can create misleading means.

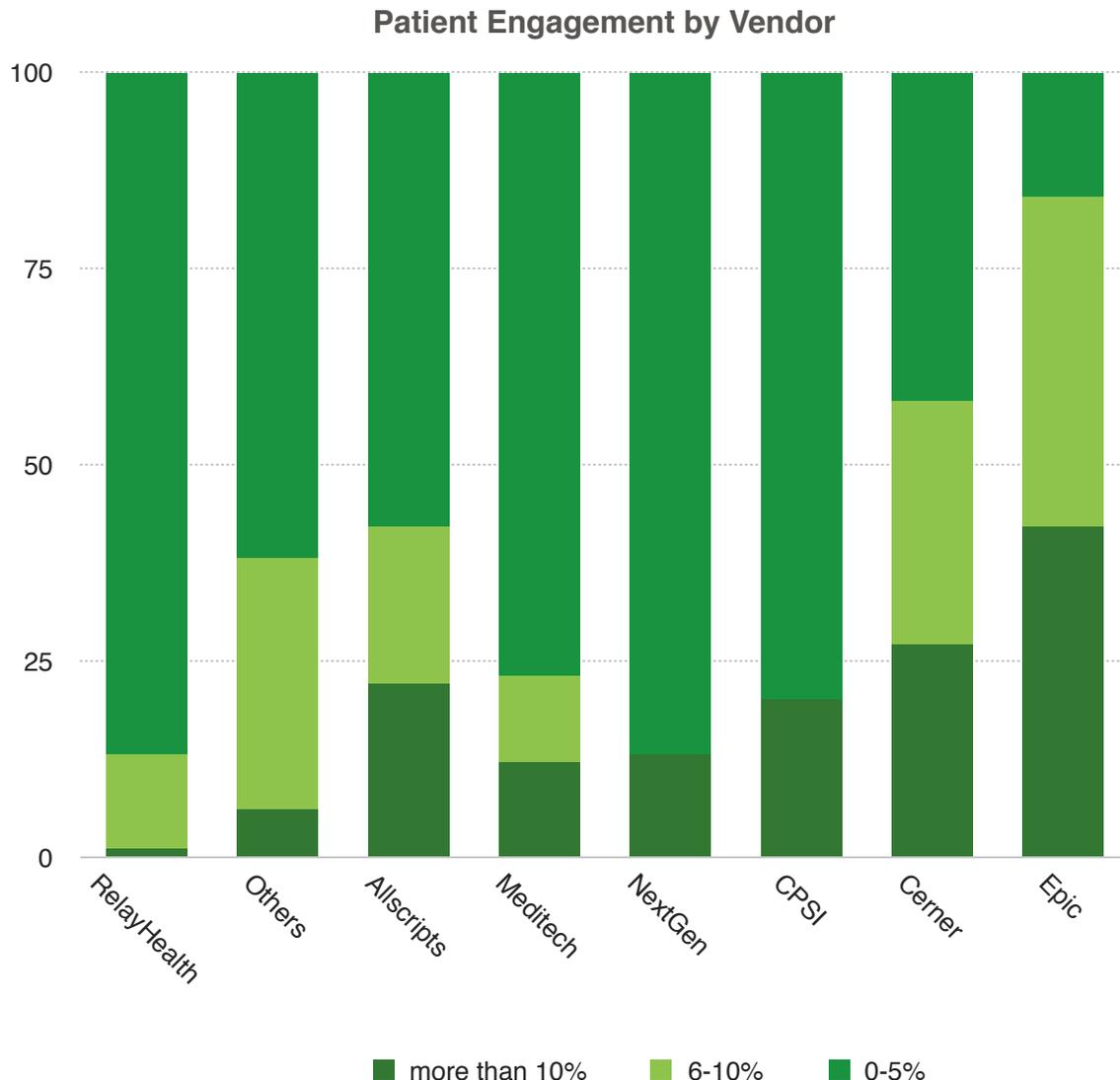
Imagine a group of five hospitals where the first four had less than 30 beds each but the last had over 2000. The mean would be over 400, but that's not really what the typical hospital in that group would look like. In that example, the median would reflect this by showing the third largest provider who would have a bed size below 30.

Vendors Lapping the Field

The patient portal vendor a healthcare organization uses certainly makes a difference as well. Some vendors are seeing much higher rates of success than others. This may be because of the size, and sophistication of hospitals these vendors target, the amount of time these vendors have been in the market, or the technical and operational prowess of the vendor. Nevertheless, there is a big difference between vendors according to the data.

Our platform pulled from the broad healthcare market itself rather than trying to guarantee that certain vendors received material representation in the data. We did it this way to try and get a better picture of the real market. The rate of success varied widely between vendors. The following table explores the patient engagement rate and how it varied between vendors. Vendors for whom we didn't get enough data were lumped into the Others category so you can still see every piece of information we found.

Figure 3



The 20%+ Club

So what makes a provider get more than 20% of its patients using a portal?

According to our study, Cerner and Epic provide the most utilized patient portals.



NOTE: Only two clients of Kryptiq participated, but both indicated they were receiving 21% or better engagement. This may simply be a statistical anomaly, but it is an impressive result nonetheless.



After looking at every provider who had that result, we noticed they share some interesting characteristics:

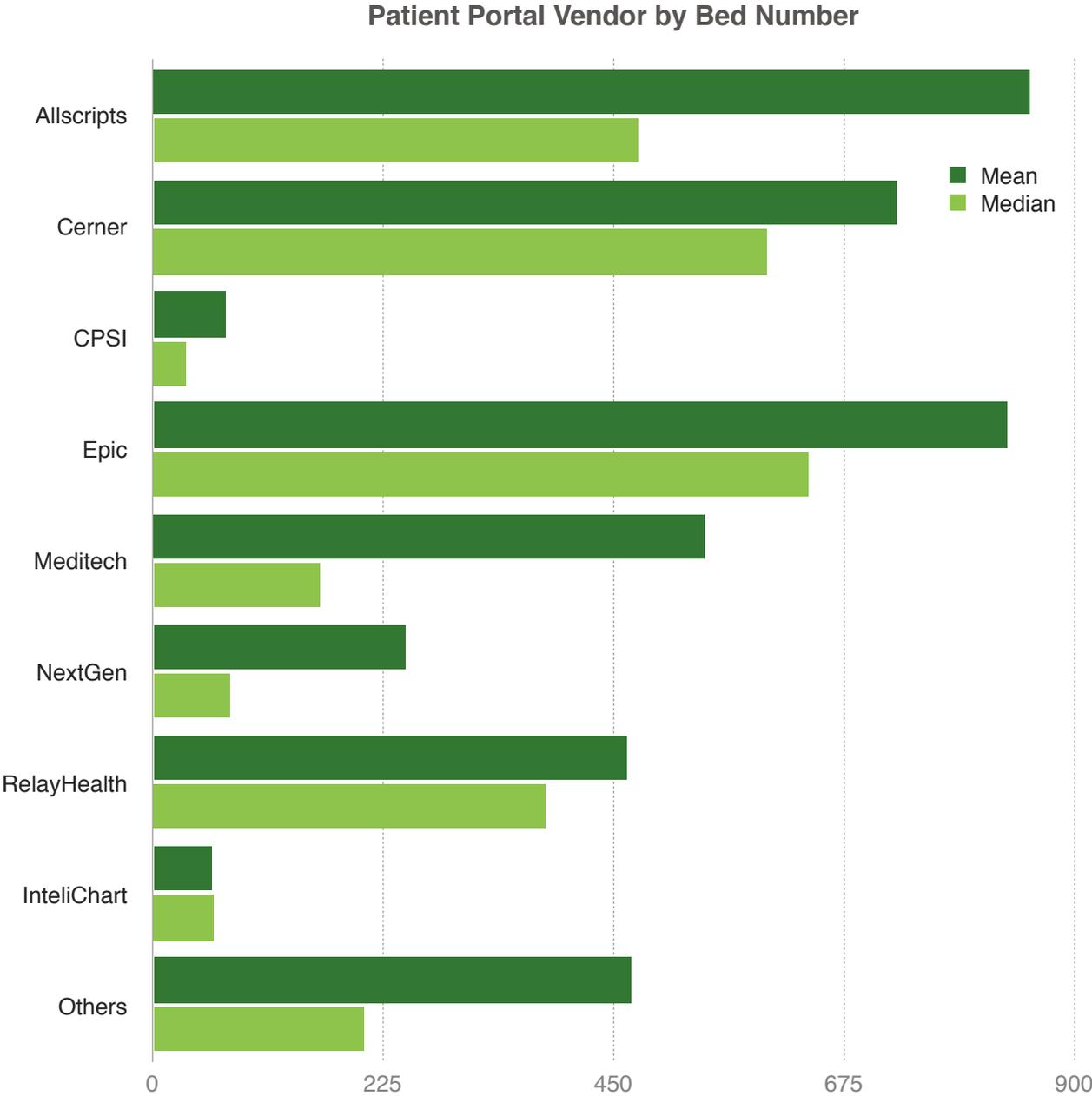
- Those with 20%+ used a wide range of patient portals.
- Almost none of the 20%+ club were located in major urban areas. They were in tier-2 cities or smaller. Only one came from a hospital near a major city – suburban Chicago.
- Some were specialty providers: a cancer institute and a children's hospital.
- The size of these hospitals took on a very wide range. Some were critical access facilities, while others were IDNs with over 1000 beds.

Characteristics of Providers

The providers analyzed clearly cater to different aspects of the market. Allscripts, Cerner, Epic, and RelayHealth cater to substantially larger entities than CPSI, Meditech, NextGen, and IntelliChart.

That makes for an Apples and Oranges type comparison between the two different groups, but it does suggest which products should be compared to each other.

Figure 4

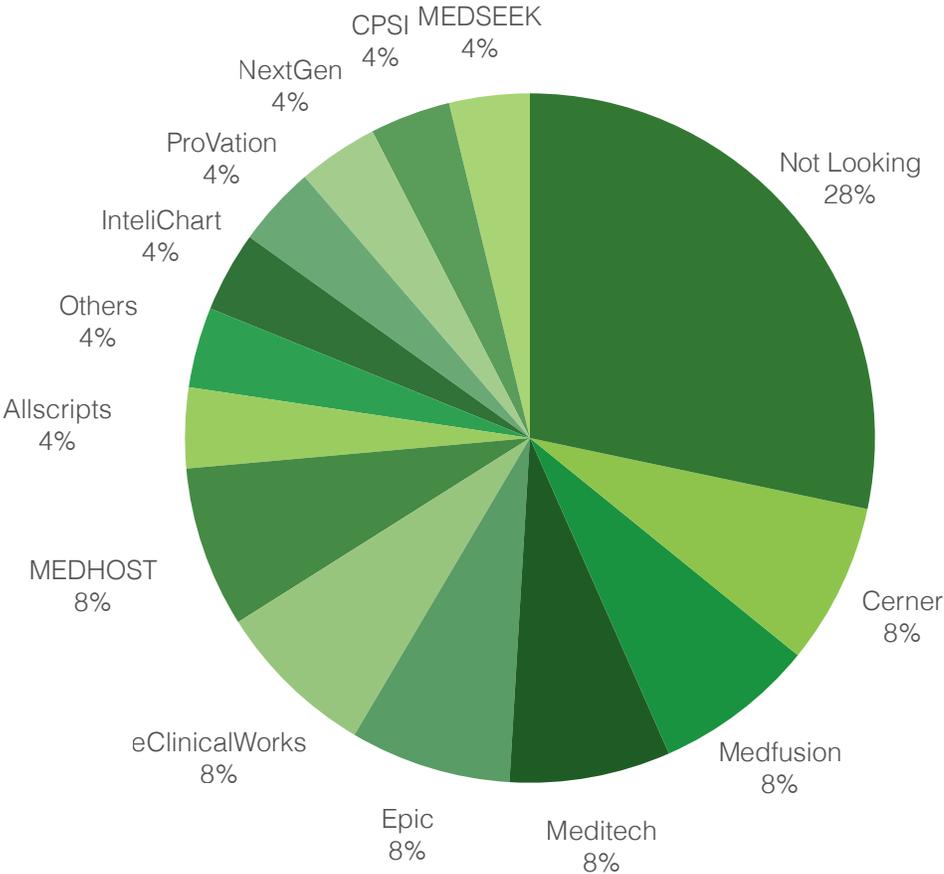


Who is Behind the Times?

Approximately 10% of all respondents indicated they are not yet using a patient portal. These respondents were then asked which vendors they were considering and which features are most important in making the decision.

Figure 5

Considered Patient Portal Vendors



Nearly one third of respondents who didn't have a vendor indicated they **weren't even looking** at prospective vendors yet; however, others had future plans to select and deploy a portal and gave names of vendors they were looking at.

Who's Not Looking?

The fact that certain providers aren't even looking at portals is surprising and somewhat concerning. These organizations cited varying reasons including:

- Cost
- Their organizations not being ready
- Prioritizing other initiatives such as trying to attain the first stage of meaningful use

So who are they?

- Small to mid-sized providers. They typically were stand alone community hospitals, with none being large organizations.
- Small areas. None of these providers were located in major urban areas. Rather, they were in suburban settings.
- They are located across the United States, from New York to Washington State and down south to Tennessee.

What They Want

Respondents that did not yet have a patient portals provider were also asked which features were most critical. These features focused on ease of use and cost, though using a vendor they were already working with for another service was clearly a plus.



Figure 6

Product Gaps

A large number of respondents who already had a patient portal were asked what features patient portals were still missing. Over 100 decision makers made suggestions of features that simply aren't provided yet.

Breaking State Laws

Some states require that sensitive information related to minors (abortion, pregnancy, etc.) be withheld from their guardians, yet many patient portals simply can't handle this. This error could lead to the violation of numerous state laws or lack of engagement with minors and their guardians. Since minors receive a large amount of medical attention, this is a serious flaw that needs to be addressed immediately in lacking systems.

In the mean time, portals with this flaw will struggle to get much business in states that have this type of legislation.

Other Missing Features

Most of the missing features noted by decision makers were not as dire as breaking state laws, though. Since patient portals are pretty new, it is intuitive that some features will be missing. With over 100 comments made, we clustered repeat suggestions into the following categories to describe these missing functions:

- Functionality for specialists
- Integration with EHRs and other systems
- Appointment scheduling
- Streamlined patient enrollment
- Bill pay
- Easy-to-use for patients
- Ability to modify data
- Quality back-end reporting
- Better marketing and training for providers – how-to videos in the portal

What's Missing by Vendor?

This section quickly covers the single most important feature that is missing for each patient portal vendor.



Cerner users seemed particularly frustrated by the lack of tools for specialists. Radiology in particular seemed to suffer in working with Cerner.



Several CPSI users were unhappy with the interface and ease of use of the system.



Multiple Epic users mentioned a need for improved communication with Epic personnel and needing more training on the Epic portal.



InteliChart and Allscripts have a lot of clients just getting started with their portals, therefore they indicated they haven't had enough time with these systems to point out material deficiencies.

What Does the Market Look Like?

Our market-based approach is unbiased, so we don't guarantee a certain number of responses for any specific vendor. Rather, we want to show what the marketplace looks like. Here is the use by vendor:

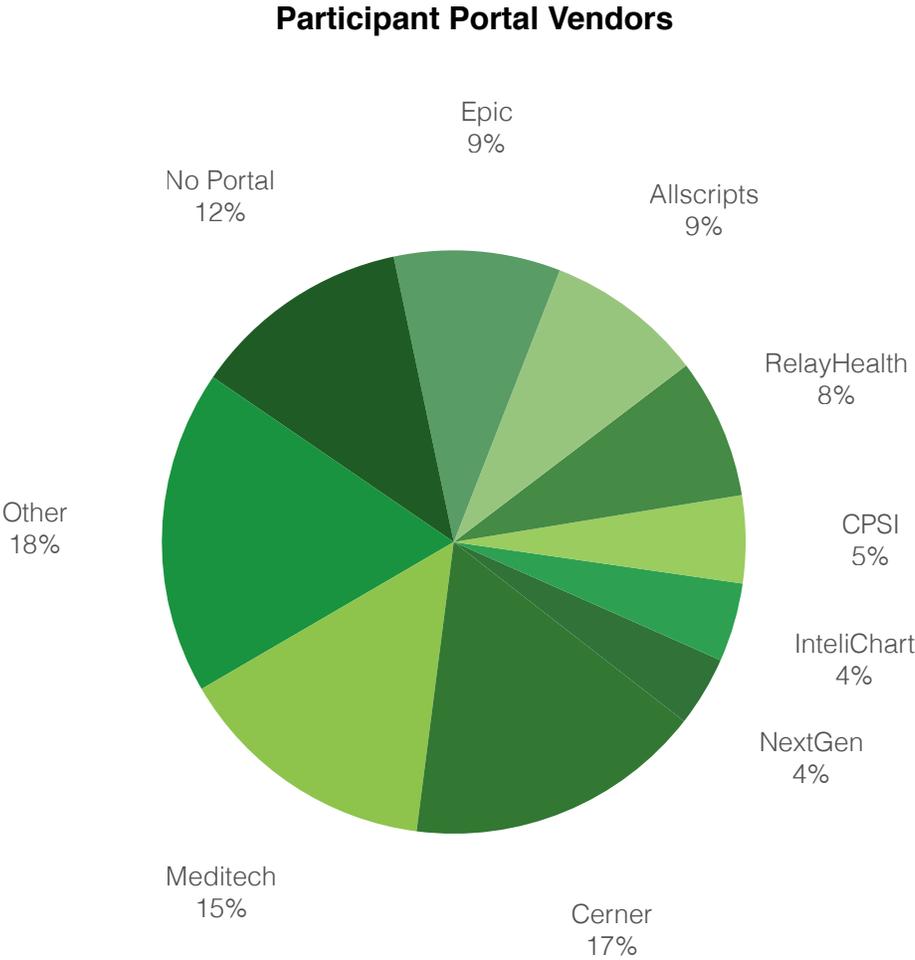


Figure 7 : Others totaling to 18% included ChartAccess, Compulink, eClinicalWorks, latric, InteHealth, Kryptiq, Medfusion, MEDHOST, MEDSEEK, MobileMD, MyAspirus, and MyKeyCare/InstantPHR

Takeaways

Based on this research, healthcare organizations and vendors should take note of the following:

- Meeting the 10% engagement threshold set forth by Meaningful Use Stage 2 is absolutely possible.
- Larger hospitals are far more likely to succeed at this requirement than smaller providers.
- Patient portals are, relative to most other healthcare IT solutions, rather new so all product lines evaluated have flaws of some kind. However, users of certain patient portals are getting better results than others.
- As noted earlier in this report there are many reasons for this, and there is a definite relationship between the overall size of the organization and the success it has engaging patients.
- Patient portals tend to lack quite a few features that providers, and patients, need. These include:
 - Functionality for specialists
 - Integration with EHRs and other systems
 - Appointment scheduling
 - Streamlined patient enrollment
 - Bill pay
 - General ease of use for patients
 - Ability to modify data
 - Quality back-end reporting
 - Better marketing and training for providers – ideally how-to videos in the system itself

In addition, some respondents brought up a serious flaw in many patient portal systems: managing privacy for minors. The laws of certain states prohibit medical professionals from sharing certain health information (pregnancy is a prime example) with guardians of minors. Creating a method in the patient portal where parents can see some but not all data is a difficult challenge vendors should highly prioritize. Providers should be wary of this problem before rolling out portal access to minors. While this is no small requirement, the vendor that figures this out in an elegant manner will enjoy a marketable advantage in the space.

Appendix A

Doing It Differently

Here at ReactionData, we've built an extraordinary system by doing things a bit differently from the rest of the market. These differences explain why we did this report.

The Flawed Traditional Approach

Research firms that put out reports that rank healthcare technology vendors reach out to vendors and ask for their lists of clients. They then measure these firms based upon how many clients of each vendor are reached up to a predefined number. This process usually takes six months and sometimes even longer than that.

Since these reports take so long to release, the research is quite dated by the time it becomes public. Also, they choose what they think the market looks like by making sure vendors get enough clients represented. This means there is a lack of accurate information about the market as a whole.

The ReactionData Solution

ReactionData uses its global ecosystem to poll entire regions and countries to get critical data. Our proprietary system enables us to get very fast responses from large populations and ensures that the research is extremely robust and incredibly timely. Knowing what's happening now in the market and within a customer base is far superior than knowing what happened half a year (or more) in the past.

We don't produce reports to make money and that's why you'll see us charging either nothing. The reports we produce are our proof of concept. They exist to show that getting a lot of valuable data quickly is possible from whatever target group you need – customers, prospects, partners, you name it.

If you need incredibly fast data from hundreds (or thousands) of healthcare providers anywhere in the world, let us know.

Appendix B

A Primer on Patient Portals

The Stage 2 Meaningful Use requirement in the Affordable Care Act requires healthcare providers to do many things. However, one requirement that seemed extremely difficult at the time was to get at least 10% of patients to view, access, and interact with their healthcare information.

While personal health records (PHRs) never really took hold, patient portals held promise. But even their adoption has been relatively modest until recently. That has changed as a strong majority of participants in this study indicated their provider-facilities have adopted patient portals. Patient portals are simply online tools that fulfill this requirement in the law. The law indicates that reimbursements for Medicare and Medicaid will be tied to this requirement as well as others. This places a heavy financial incentive on providers to reach the 10% threshold outlined in the Affordable Care Act.

Appendix C

A Note on Free Response Comments

We didn't want to bother every reader with the large (over 100) number of free response comments we received. For that reason, the raw comments are not included in this report.

If you would like more information, feel free to reach out to Jeremy (jeremy.bikman@reactiondata.com) and he can facilitate sharing appropriate data with you.

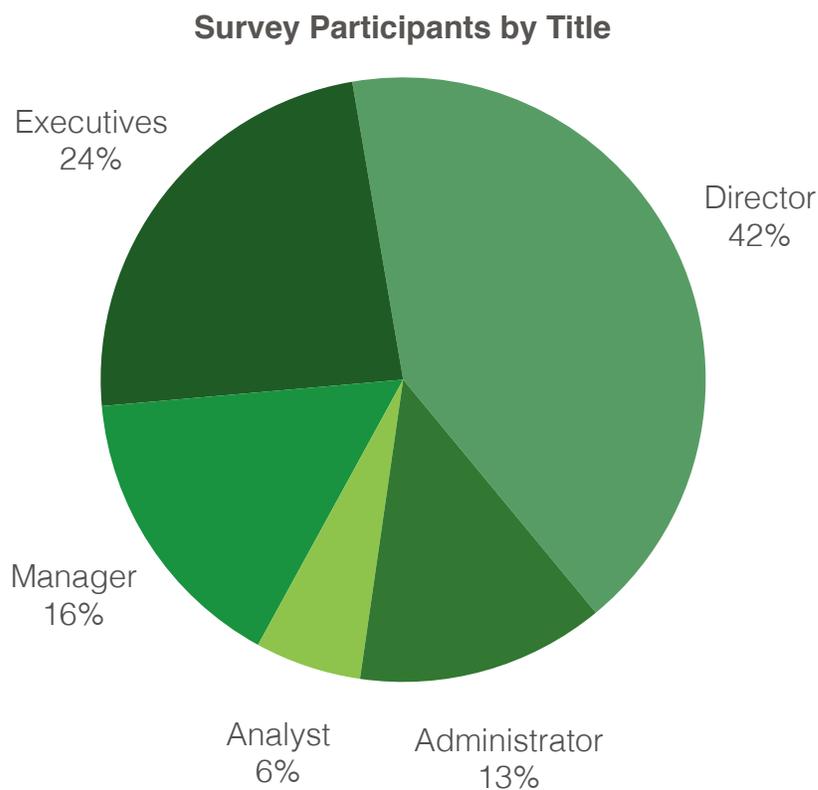
Appendix D

Survey Participants by Role

Unfortunately, many research firms spend their time getting input from people who can't make decisions. That's not the ReactionData model. Rather, we try to get feedback from decision makers and key leaders whose opinion can actually have an impact. For that reason, and in an effort to be transparent, this is a breakdown of the participants in our survey by job role.

Rest assured, the data that we collected is valuable and accurately reflects the opinions of key decision makers in healthcare.

Figure 8



Hospitals That Participated

The information provided by individual providers is anonymous and will not be shared. In addition, we want to maintain the privacy of those who individually chose to respond. That said, we felt it appropriate to list the institutions represented in this study. These institutions include:

Acadian Medical Center	Columbus Regional Health
AcuteCare Specialty Hospital	Columbus Regional Hospital
Akron General Medical Center	Cooper University Hospital
Alamance Regional Medical Center	Copley Hospital, Inc.
Alameda Health System	D.W. McMillan Memorial Hospital
Alleghany Memorial Hospital	Dayton Children's Hospital
Allegiance Sleep Health Center	Decatur Morgan Hospital - Parkway Campus
Anderson Hospital	Delano Medical Center
Anita Medical Center	Doctors Hospital at Deer Creek
AnMed Health Carolina OB/GYN	Doctors Hospital at White Rock Lake
Anson General Hospital	East Ohio Regional Hospital
Aspirus General Clinic - Antigo	Ellis Internal Medicine
Athens-Limestone Hospital	Ellis Neuroscience Care
Atlantic General Health System & Hospital	Ellwood City Hospital
Aurora St. Luke's Medical Center	Englewood Hospital & Medical Center
Bates County Memorial Hospital	Erie County Medical Center
Baxter Regional Medical Center	Excelsa Frick Hospital
Beauregard Memorial Hospital	Fairfield Memorial Hospital
Boca Raton Regional Hospital	FF Thompson Hospital
Boulder Community Foothills Hospital	Fisher-Titus Medical Center
Broadlawns Medical Center	Floyd County Memorial Hospital
Brookwood Medical Center	Frederick Memorial Hospital
Buchanan County Health Center	French Hospital Medical Center
Carroll County Memorial Hospital	Garden County Hospital
Casey County Hospital	Garrett County Memorial Hospital
Cedars-Sinai Medical Center	Genesis Health Group - Eldridge Family Practice
Centegra Hospital - Woodstock	Geneva General Hospital
CGH Medical Center	Gifford Medical Center
Charlevoix Area Hospital	Greenwood Leflore Hospital
Cheyenne Medical Center - West	Griffin Hospital
Children's Hospital of Illinois - Pediatric Urology	Halifax Hospital
Children's Hospital of Los Angeles	Hansford County Hospital
Children's Hospital of Pittsburgh	Harrison Community Hospital
Chippewa County - Montevideo Hospital	Health First
CHRISTUS Spohn Hospital - Beeville	Heartland Vascular Surgery
City of Hope Research Hospital & Cancer Treatment	Holdenville General Hospital
Clarion Hospital	Holy Cross Hospital
Coffee Regional Medical Center	Hunt Regional Center at Greenville

Huntsman Cancer Hospital
Huntsville Memorial Hospital
Jackson County Memorial Hospital
Jackson-Madison County General Hospital
Jeanes Hospital
Jersey Shore University Medical Center
Jewell County Hospital
Kalispell Regional Medical Center
Kenosha Medical Center Campus
Kershaw Health Medical Center at Camden
King's Daughters Hospital
King's Daughters Medical Center
Kiowa District Hospital
Kirby Medical Center
Klickitat Valley Hospital
Lake Charles Memorial Hospital
Lakeside Medical Center
Legacy Emanuel Hospital & Health Center - Legacy Emanuel
Children's Hospital
Legend Buttes Health Service
Lincoln County Hospital
Maimonides Medical Center
Major Hospital
Maple Grove Hospital
Mayo Clinic Health System in Waycross - Cardiology
McCullough-Hyde Memorial Hospital
Meadows Regional Medical Center
Meadville Medical Center
Medical Center of Central Georgia (MCCG)
MedStar St. Mary's Hospital
MedStar Washington Hospital Center
Memorial Hospital
Memorial Hospital at Gulfport
Memorial Medical Center
Mercy Hospital
Mercy Medical Center
Methodist Physician's Clinic - Valley
Methodist Physicians Clinic - Glenwood
Milford Family Medical Center
Montefiore
Moorpark Family Care Center
Morehead Memorial Hospital
Mount San Rafael Hospital
Mount Washington Pediatric Hospital
Munroe Regional Medical Center
Munson Medical Center

Nashville General Hospital at Meharry
Natchitoches Regional Medical Center
Nemaha Valley Community Hospital
Ness County Hospital
Newton Medical Center
North Philadelphia Health System
North Sunflower Medical Center
Northern Hospital of Surry County
Nyack Hospital
Ochsner Baptist Medical Center
Ohana Memorial's Mammography Center
Oneida Orthopedic Specialists
Orange Regional Medical Center
OSF St. Joseph Medical Center
Oswego Hospital
Ozarks Community Hospital of Gravette
P & S Surgical Hospital
Pekin Hospital
Peninsula Regional Medical Center
Perkins County Health Services
Peterson Regional Medical Center
Powell Valley Hospital
Premier Eye Care
Prevost Memorial Hospital
ProHealth Care Behavioral Medicine Center - Brookfield
Pullman Regional Hospital
Reading Hospital
Red River Regional Hospital
Reeves Memorial Medical Center
Rockdale Medical Center
Rockville General Hospital
Rusk County Memorial Hospital
Salem Memorial District Hospital
Samaritan Hospital
Samaritan Medical Center
San Juan County Hospital
San Ramon Regional Medical Center
Satanta District Hospital
Schuylkill Medical Center - East Norwegian Street
Scott County Hospital
Shriners Hospital - Salt Lake City
Shriners Hospital - Tampa
Sierra Vista Regional Medical Center
Skagit Valley Hospital
SMG Bridgewater Internal Medicine
South Bay Hospital

South County Hospital
South Nassau Communities Hospital
Southern New Hampshire Medical Center
SSM St. Clare Health Center - Fenton
St. Agnes Hospital & Agnesian HealthCare
St. Alexius Medical Center
St. Charles Parish Hospital
St. Francis Hospital
St. Francis Medical Center
St. John's Riverside Hospital - Andrus Pavilion
St. Joseph's Hospital - Highland
St. Jude Medical Center
St. Mark's Medical Center
Stamford Hospital
Stanton County Hospital
Steward Internal Medicine
Stone County Medical Center
Stonecrest Orthopedics & Sports Medicine
Sturgis Hospital
Surgical Specialty Center of Baton Rouge
Susquehanna Health System
Tallahassee Memorial Hospital

Terrebonne General Medical Center
The Guthrie Clinic
Trinity Bettendorf
Truman Medical Centers - Hospital Hill - Medical Pavilion
Union Hospital
University Hospital McDuffie
University Medical Center of El Paso
University of Mississippi Medical Center
University of New Mexico Hospitals
UPMC - Horizon
Valley Regional Hospital
Vidant Medical Center
WA Foote Memorial Hospital /Allegiance Health
Wabash County Hospital
Warren General Hospital
Wausau Surgery Center
Wayne Memorial Hospital
WellStar Cobb Medical Group
West Shore Medical Center
Willamette Valley Medical Center
Willis-Knighton Bossier Health Center
Wishard-Eskenazi Hospital