

Patient Access

Its Importance and Many Dimensions

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Children'sSM
Healthcare of Atlanta
Dedicated to All Better

The New Consumer Imperative

To be competitive in any market, health systems must create value through a formula of **accessible**, reliable, and affordable care that wins consumer preference and drives loyalty over time.

Heath Care Advisory Board: 12 Things CEOs Need to Know in 2017

A Quick Snapshot of Children's Healthcare of Atlanta

One of the largest pediatric clinical care providers in the country

- 3 hospitals
- 622 licensed beds
- 28 ambulatory locations (includes CPG, UC, Rehab/Sports, radiology, Marcus Autism Center)
- More than 80 telemedicine presenting sites around Georgia
- More than 10,000 employees
- Children's Physician Group
 - 500+ Physicians (apprx. 60% Faculty)
 - 250+ APPs
 - 58 practice groups
 - 2,000 employees (headcount)
 - 7 urgent care centers
 - predominantly all billing is PB not HB





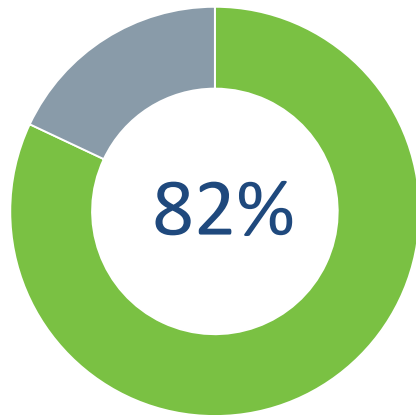




Changing Market Dynamics

Consumers Prefer New and Convenient

Consumers Willing to Try New Ways of Seeking Medical Attention or Treatment¹



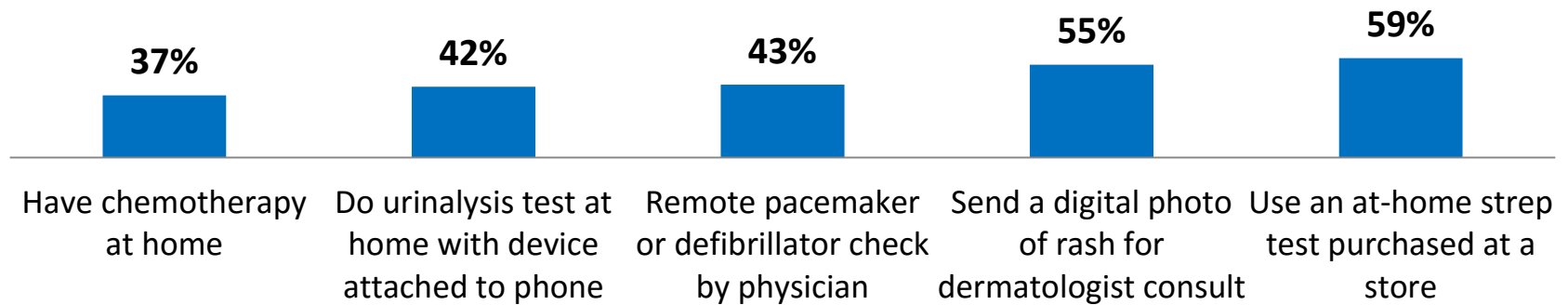
55%

Consumers with access to telemedicine have used it

11%

Of people 18-34 would switch to a physician who offered telemedicine

Percentage of consumers willing to choose more convenient options²



1) "Are you open to trying new, non-traditional ways of seeking medical attention or treatment?"
2) "How likely would you be to choose these options, if they cost less than the traditional choice?"
Percent of respondents answering "Very likely" and "Somewhat likely."

Sources: PwC, "Healthcare's new entrants: Who will be the industry's Amazon.com?" Health Research Institute, April 2014, <https://www.pwc.com/us/en/health-industries/healthcare-new-entrants/assets/pwc-hri-new-entrants.pdf>; AmericanWell, "Telehealth Index: 2015 Consumer Survey," AmericanWell.com, January 2015; http://cdn2.hubspot.net/hubfs/214366/TelehealthConsumerSurvey_eBook_NDF.pdf?submissionGuid=484469d1-8864-4efa-93c7-07e5c43fe4a5; Health Care Advisory Board interviews and analysis.

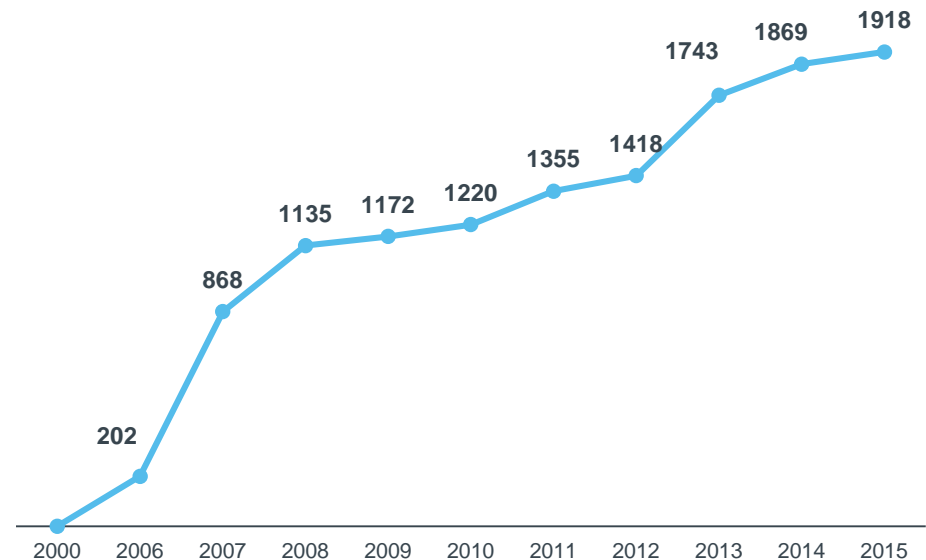
Retail Clinics Continue Growing

25% of Consumers used a retail clinic in 2015 up from 15% in 2013, and retail clinic options continue to grow

Estimated Total Number of Retail Clinics in the US

2000-2015¹

Retailer	Operational Retail Clinics ²
 minute clinic	979
  healthcare clinic	412
 TARGET	83
 Walmart Save money. Live better.	17 ³



1) As of Nov. 2015

2) As of July 2015

3) Clinics owned by Walmart; Walmart also leases retail space to providers in dozens of stores.

Source: Accenture, "Number of US Retail Health Clinics Will Surpass 2800 by 2017, Accenture Forecasts," 2015; Merchant Medicine, "The ConvUrgentCare Report," Vol. 8, No. 7, July 2015; Market Innovation Center interviews and analysis.

Note: Slide content provided by The Advisory Board Company and re-imaged to fit Children's brand

Emerging Behavior Trends



As we track consumer preferences, **new trends** emerge for organizations to better understand. Those trends point to a need to understand **Millennial behaviors.**



Understanding Millennials



Who are Millennials?



Ages 18 to 34



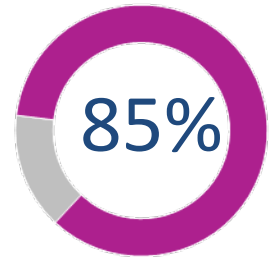
Tech-savvy, share
information online



Focused on the
present

Why are we focusing on Millennials?

All births, not just
first births, to
women **under age**
35:



What Millennial Caregivers Want By Medical Scenario

Pediatrician

- 1 Experience, education
- 2 Reputation & positive recommendations
- 3 Bedside manner with both child and parent
- 4 Extended/flexible hours
- 5 Accessibility outside of an in-person visit
- 6 Consistent service – same physician every visit
- 7 Convenient location

Urgent Care

- 1 More locations
- 2 Short wait times
- 3 Pediatric-specific care
- 4 24 hour availability
- 5 Follow up with PCP

Specialists

- 1 Immediate appointment post referral
- 2 Pediatric-specific care
- 3 “One-stop-shop”

Hospitals

- 1 “One-stop shop”
- 2 Thoughtfulness on overall experience
- 3 Pediatric-specific care

Emergency Care

- 1 Close proximity
- 2 Speed and attentiveness
- 3 Free parking

How Should a System Respond?

Dimensions of Access



Process

Communication

Scheduling & Appointment
Availability

Appointment Guarantee

Directions

Efficiency

Proximity

Neighborhood Locations

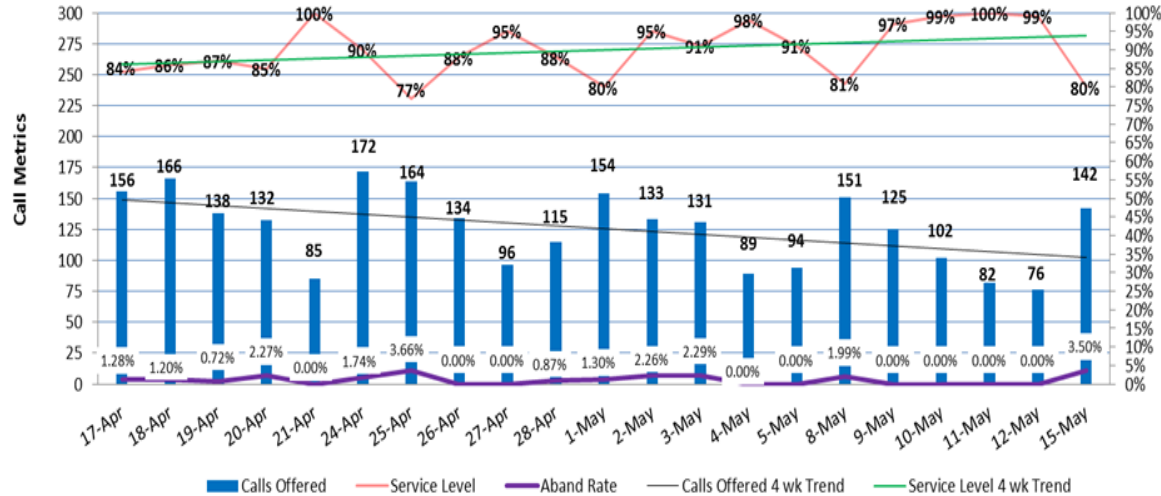
Telemedicine



PROCESS

Communication

Practice Daily Metrics



»MYchart Demo Mychart Log Out

For the patients of Children's Healthcare of Atlanta and our MYchart participating practices

Messaging Visits My Medical Record

Get Medical Advice

Use this form to send non-urgent message to the patient's healthcare team. The messaging capability is for the established healthcare team only. Messages submitted via secure message become part of the health record. All pieces of information are required to request medical advice.

If this is an urgent matter, please call your clinic. If this is a medical emergency, please call 911.

Expect a response within 2 business days.

From: Demo Mychart on behalf of Noah Mychart [3227979]

To the office of: Mychart, Provider, MD - PCP-
 Subject: Appointment Question

The following people will be able to view this message online.

☒ Myself (Demo Mychart) ☒ Mom Mychart
☒ Research Mychart ☒ John Mychart
☒ Two Test ☒ Lennon Mychart
☒ Rebecca Mychart

Enter Text Here

»MYchart Demo Mychart Log Out

For the patients of Children's Healthcare of Atlanta and our MYchart participating practices

Messaging Visits My Medical Record

Request an Appointment

Select the reason for the appointment. If the reason does not appear, select "Other" and indicate the reason below.

Expect a response within 2 business days.

From: Demo Mychart on behalf of Noah Mychart [3227979]

Want to see: Lennon, Vivian S. MD (Chamblee Primary Care Center, a service of Children's at Scottish)

Reason for visit: New Problem Visit

Preferred dates: From: 5/19/2015 To:
 Preferred times: Monday Tuesday Wednesday Thursday Friday
 Morning Afternoon

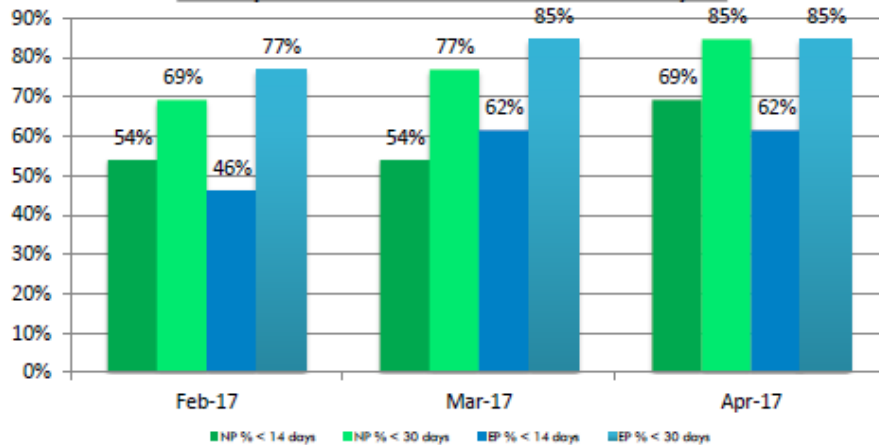
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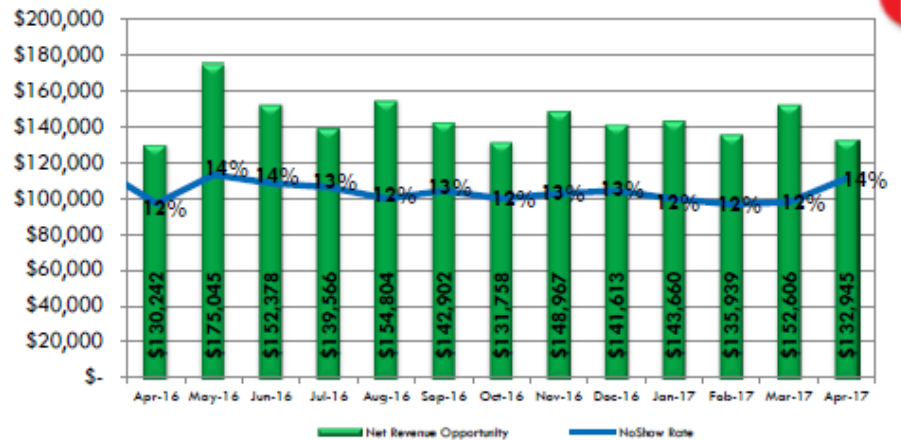


Scheduling & Appointment Availability

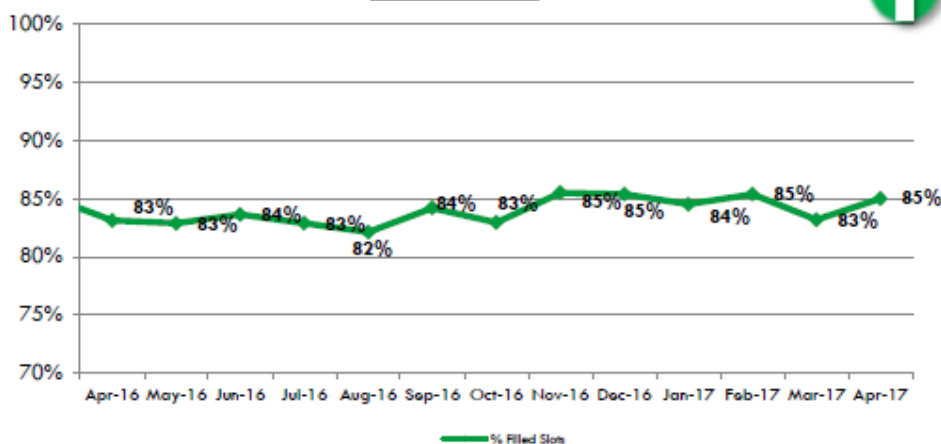
% of Specialties with TT3N <14 and < 30 Days^{5,6}



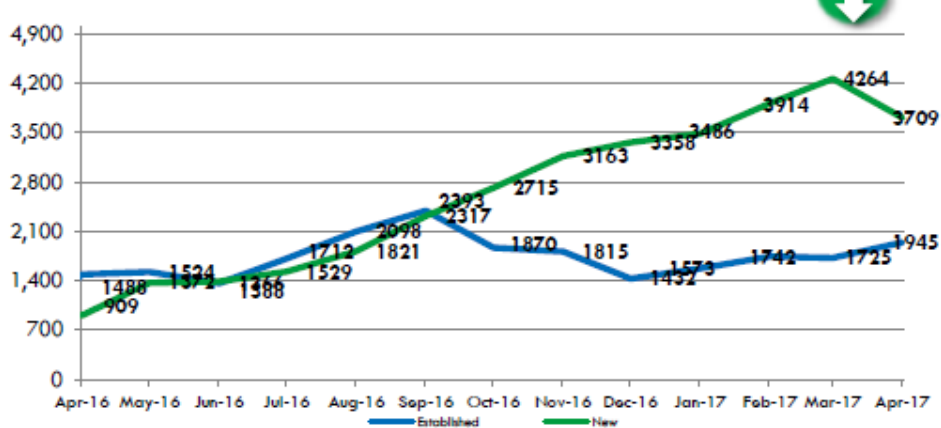
No Show Rate^{1,7,9}



Slot Utilization^{2,7,8}



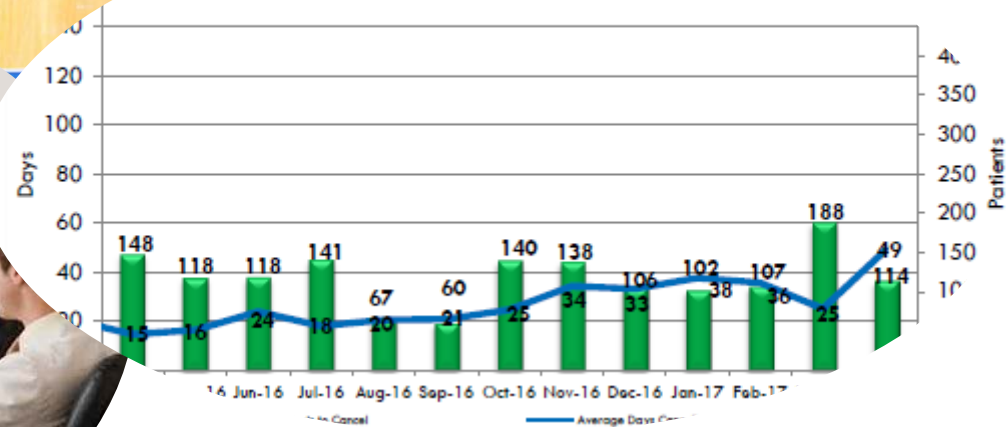
Overdue Recall^{3,4,7,9,10}



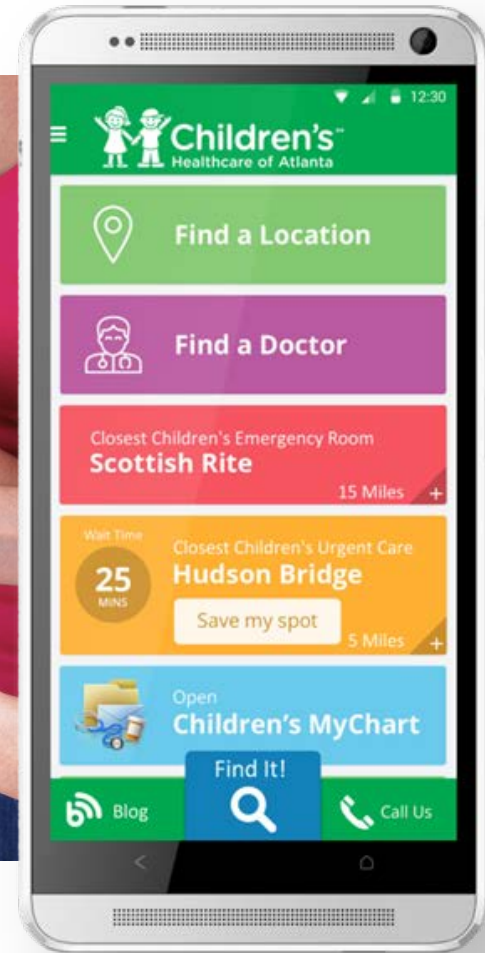
Appointment Guarantee



Schedule Disruptions⁷



Directions



Efficiency

»MYchart
 Further services of Children's Healthcare of Atlanta at Emory

Micah

Health Visits Messaging Settings

eCheck-In (Micah)

Demographics Insurance Allergies Medications Questionnaires

Street Address: 1234 test
 City: ATLANTA
 State: Georgia
 ZIP Code: 30315
 County: FULTON
 Country: United States of America

Home Phone: 678-123-4444
 Mobile Phone: 404-654-3333
 Work Phone:
 Preferred Phone: Mobile
 E-mail Address: micah.rush@choa.org

[EDIT DEMOGRAPHICS](#)

☐ This information is correct

[CONTINUE](#) [FINISH LATER](#)

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WE 4/28

	Visit Count	Visits	Registration Time (Mins)	Registration Time	Intake Time (Mins)	Intake Time	Provider Time (Mins)	Provider Time	Check-Out Time (Mins)	Check-Out Time	Check-In to Check-Out (Mins)
Department	7,084		4		27		36		8		76
Specialty	5,631		5		27		37		8		76

WE 5/5

	Visit Count	Visits	Registration Time (Mins)	Registration Time	Intake Time (Mins)	Intake Time	Provider Time (Mins)	Provider Time	Check-Out Time (Mins)	Check-Out Time	Check-In to Check-Out (Mins)
Department	7,312		4		27		36		8		76
Specialty	5,799		5		27		37		8		76

WE 5/12

	Visit Count	Visits	Registration Time (Mins)	Registration Time	Intake Time (Mins)	Intake Time	Provider Time (Mins)	Provider Time	Check-Out Time (Mins)	Check-Out Time	Check-In to Check-Out (Mins)
Department	7,084		4		27		36		8		76
Specialty	5,631		5		27		37		8		76

WE 5/19

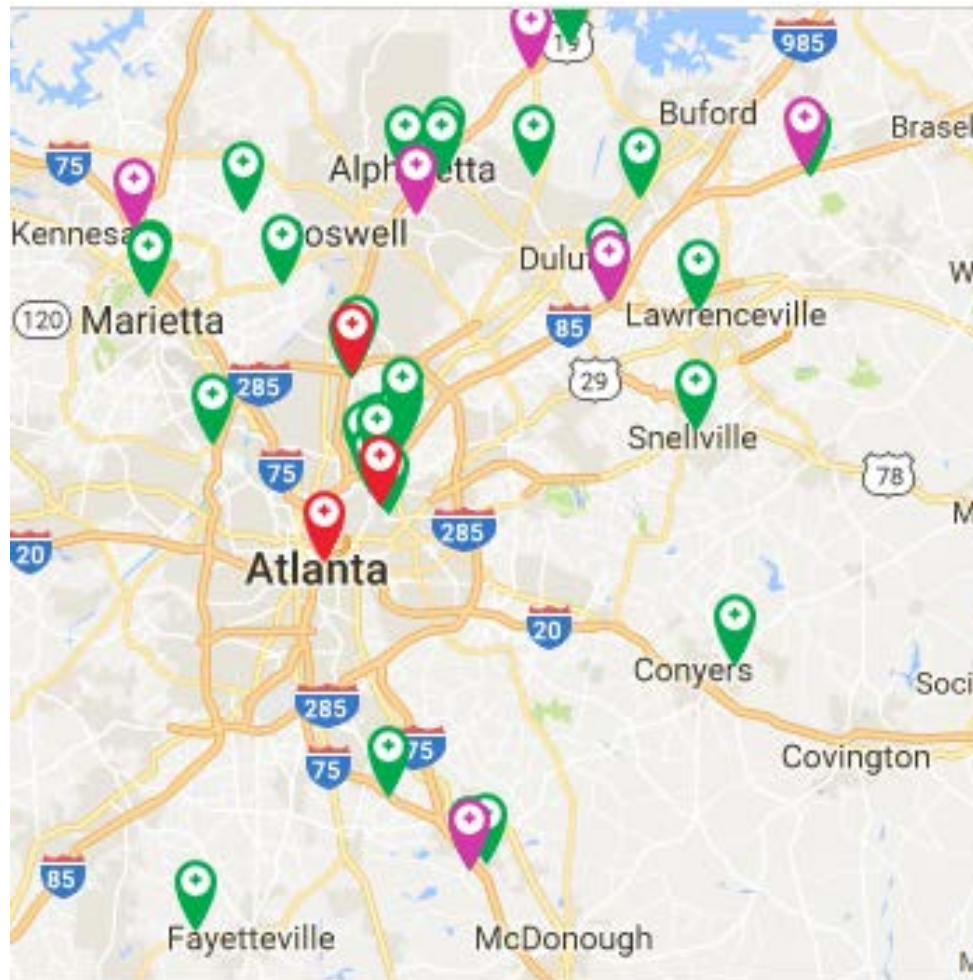
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PROXIMITY

Neighborhood Locations



-  Emergency
-  Urgent Care
-  Neighborhood



Telemedicine



Children's Response: Breaking New Ground

Center for Advanced Pediatrics



State-of-the-art
research



First building of its
kind for pediatrics in
Georgia



Saves travel time and
trips for families

Children's Healthcare of Atlanta







Outpatient Care Center (OCC)

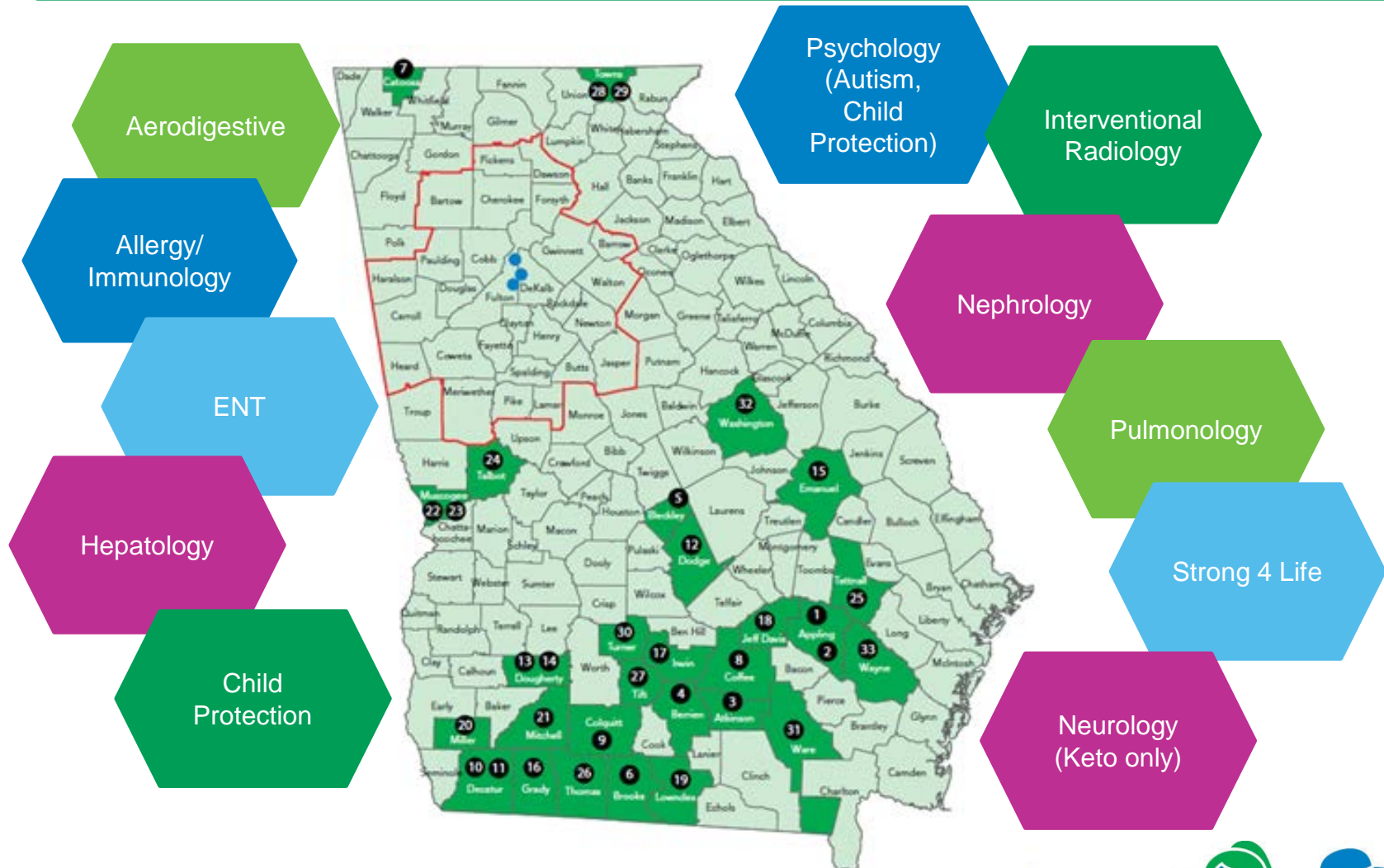




Urgent Care



Telemedicine Specialty Consults



Over 85 presenting sites throughout Georgia

Children's Healthcare of Atlanta



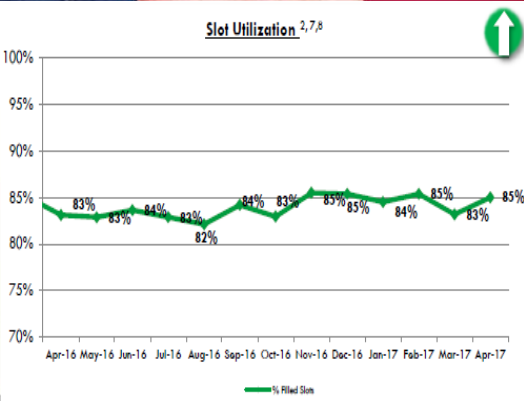
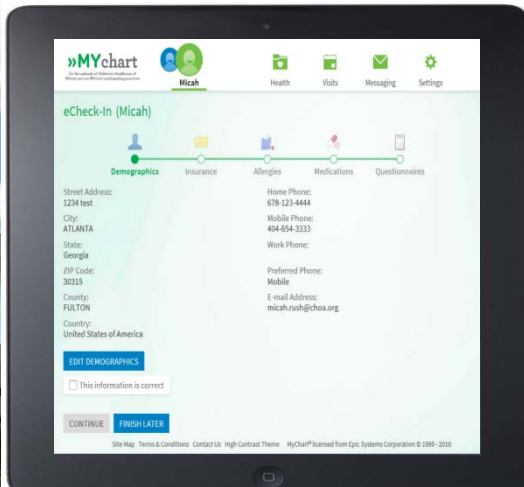
Telemedicine



2015 Statistics...Per visit:

	Median (Round Trip)	Range (Round Trip)
Miles Saved	362	72 - 504
Cost of miles saved	\$199	\$40 - \$277
Hours Saved Traveling	6	2 - 9
School days <small>*Children greater than 5 y/o and less than 19 y/o</small>	80% of our patients would have missed school to travel to Atlanta	
Work Days Missed <small>*One adult present & greater than 4 hour drive</small>	76% of our parents would have missed a full day of work to travel to Atlanta	





Questions?



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