HIMSS Analytics

2014 Telemedicine Study

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August 2014

Introduction

As healthcare organizations continue down the path of meeting Meaningful Use criteria, collaboration and coordination of care is a subject that remains a top concern. One of the ways healthcare providers, whether large hospitals, rural healthcare settings, or physician practices, have been able to increase their care coverage and extend the continuity of care within the market, is to rely on telemedicine technologies. Indeed, the growing interest and importance of telemedicine is reflected in HIMSS Analytics' new Continuity of Care Maturity Model™ (CCMM)[1].

Organizations are utilizing telemedicine technology to increase care coverage and extend the continuity of care.

Created to help optimize outcomes for health systems and patients alike, the CCMM goes beyond Stage 7 of the Electronic Medical Record Adoption Model (EMRAM)℠ by addressing the convergence of interoperability, information exchange, care coordination, patient engagement and analytics with the ultimate goal of holistic individual and population health management. In this new model, telemedicine (e.g. e-visits, e-consults, tele-monitoring) is considered part of the care plan at Stage 5. The idea being that healthcare services are not limited to face-to-face and brick and mortar based interactions, and that the consolidated patient record, coordinated care plan, and continuity of care can be delivered virtually wherever it is needed.

This study was therefore designed to establish a baseline profile of the utilization of telemedicine products and services by healthcare organizations, as well as the reasons driving their adoption. Several topics were explored in this research, including integration of telemedicine products and services with electronic health records (EHRs), primary reasons for investment and top product attributes considered by organizations. This research also looked at plans of organizations to invest in telemedicine products and services in the next 12 to 24 months.

To provide a comprehensive view of the marketplace, the findings of this report are based on data from the March 31, 2014 HIMSS Analytics® Database, as well as survey feedback from telemedicine stakeholders.

[1] For more information see Appendix A or http://www.himssanalytics.org/emram/continuity.aspx

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Methodology/Respondents

Methodological Approach 1: Web based survey
Dates of Data Collection: April 22 to May 2, 2014
Target Audience(s): C-Suite, IT professionals, clinicians, department heads
Number of Respondents: 406 (Number invited = 15,134; Response Rate = 2.7 percent)

Respondent Title	Frequency	Percent
Director/Manager	300	73.9%
Physician/Nurse	38	9.4%
C-Suite	22	5.4%
VP	16	3.9%
Administrator	11	2.7%
Other	10	2.5%
No Answer	9	2.2%
Total	**406**	**100.0%**

Organization Type	Frequency	Percent
Hospital or health system	335	82.5%
Single physician office (hospital owned)	3	0.7%
Single physician office (non-hospital owned)	16	3.9%
Multi-physician office (hospital owned)	13	3.2%
Multi-physician office (non-hospital owned)	22	5.4%
Other	17	4.2%
Total	**406**	**100.0%**

***Given the over-representation of hospitals in this study, findings have been grouped into the following two categories: "Hospital or health system", and "Physician office/Other"*

Methodological Approach 2: HIMSS Analytics® Database
Date of Database: March 31, 2014
Target Audience(s): U.S. hospitals
Number of Hospitals: 5,451

Appendix A

HIMSS Analytics Continuity of Care Maturity Model	
STAGE 7	Knowledge Driven Engagement for a Dynamic, Multi-vendor, Multi-organizational Interconnected Healthcare Delivery Model
STAGE 6	Closed Loop Care Coordination Across Care Team Members
STAGE 5	Community Wide Patient Record using Applied Information with Patient Engagement Focus
STAGE 4	Care Coordination based on Actionable Data using a Semantic Interoperable Patient Record
STAGE 3	Normalized Patient Record with Share Care Plans using Structural Interoperability
STAGE 2	Patient Centered Clinical Data using Basic System-to-System Exchange
STAGE 1	Basic Peer-to-Peer Data Exchange
STAGE 0	Limited to No E-communication

About HIMSS Analytics

HIMSS Analytics collects, analyzes and distributes essential health IT data related to products, costs, metrics, trends and purchase decisions. It delivers quality data and analytical expertise to healthcare delivery organizations, IT companies, governmental entities, financial, pharmaceutical and consulting companies. Visit www.himssanalytics.org.

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