The Tech-Enabled Provider Organization: The 2018 *OPEN MINDS* Health & Human Services Technology Survey

The 2018 *OPEN MINDS* Technology & Informatics Institute
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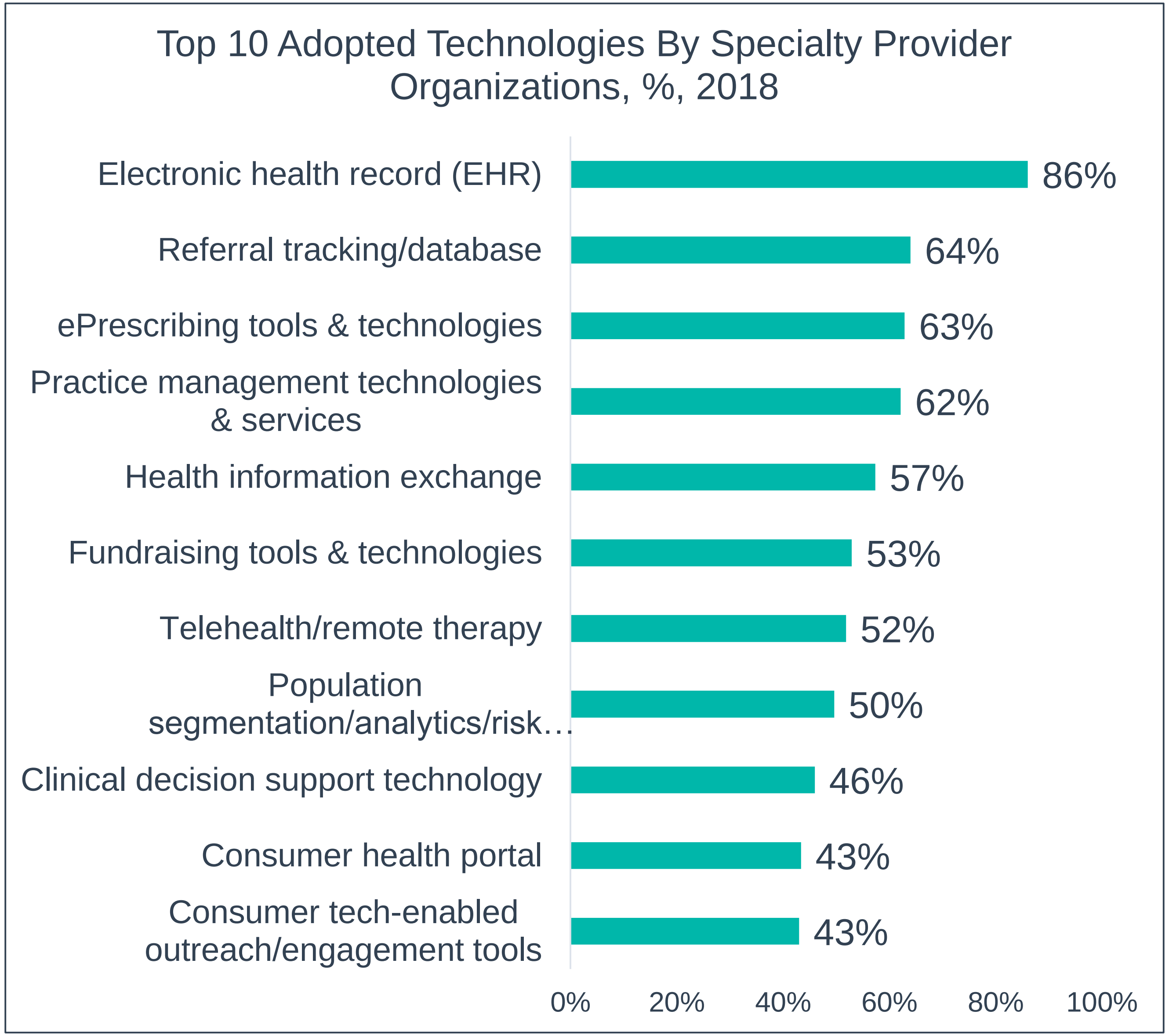
The Technologies Most Frequently Adopted By Specialty Provider Organizations, %, 2018



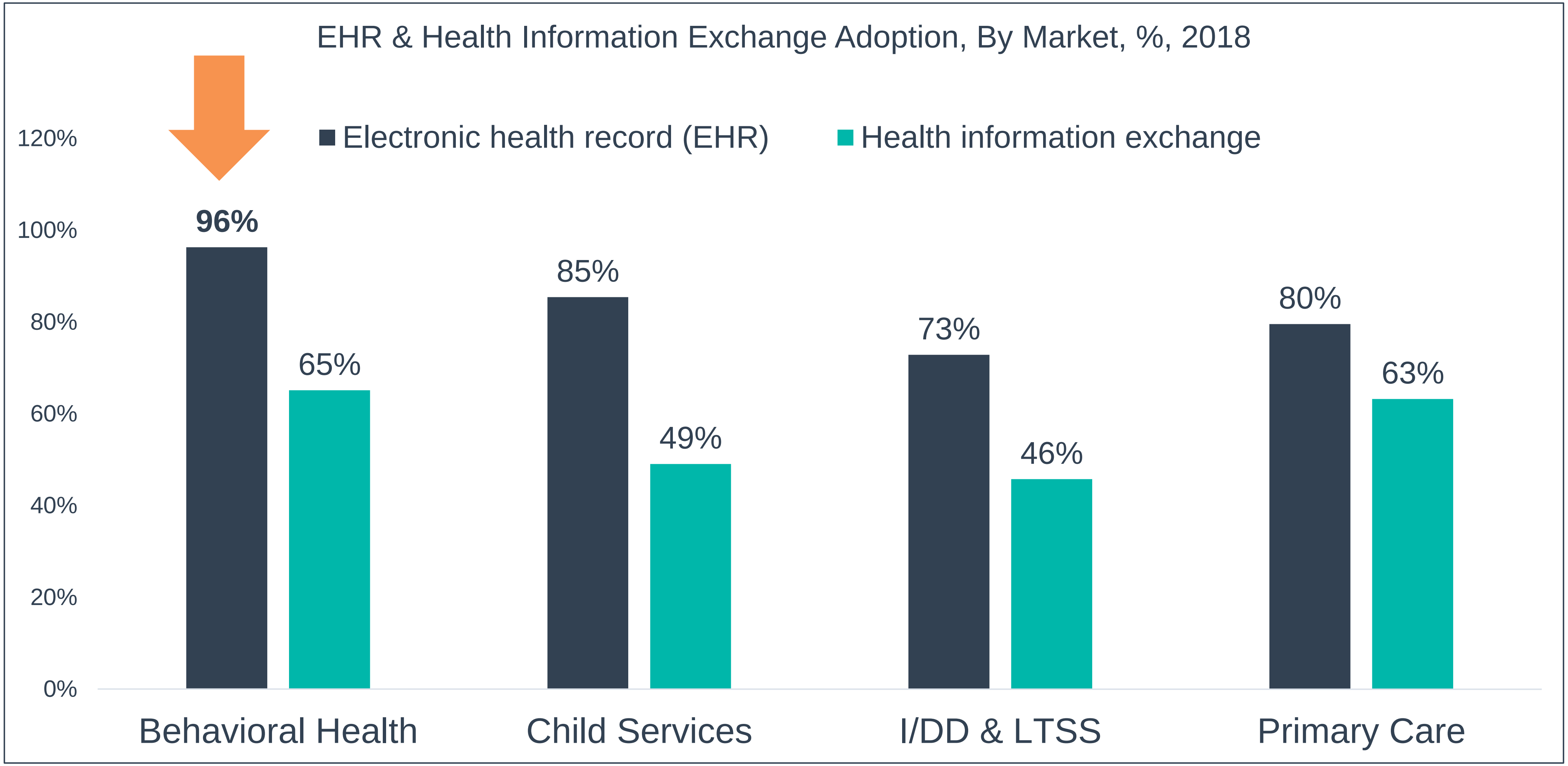
Technology Adoption By Specialty Provider Organization Type

Technology	Total, %	Child, %	Behavioral Health, %	IDD & LTSS, %	Primary Care, %
Electronic health record (EHR)	86%	85%	96%	73%	80%
Referral tracking, referral database	64%	67%	67%	49%	71%
ePrescribing tools and technologies	63%	55%	79%	36%	69%
Practice management technologies and services	62%	51%	70%	47%	76%
Health information exchange	57%	49%	65%	46%	63%
Fundraising tools and technologies	53%	67%	45%	56%	51%
Telehealth/remote therapy	52%	44%	70%	25%	53%
Population health management – segmentation, risk stratification, analytics	50%	42%	57%	37%	57%
Clinical decision support technology	46%	36%	57%	29%	53%
Consumer health portal	43%	35%	50%	24%	61%
Consumer tech-enabled outreach/engagement tools	43%	38%	44%	29%	63%
Dictation tools and services	37%	35%	46%	15%	47%
Consumer disease state/medication management technologies and services	21%	20%	14%	22%	39%
Remote monitoring (i.e. smart home, wearable monitoring)	15%	5%	13%	29%	16%
Consumer companion robots	5%	9%	1%	3%	10%

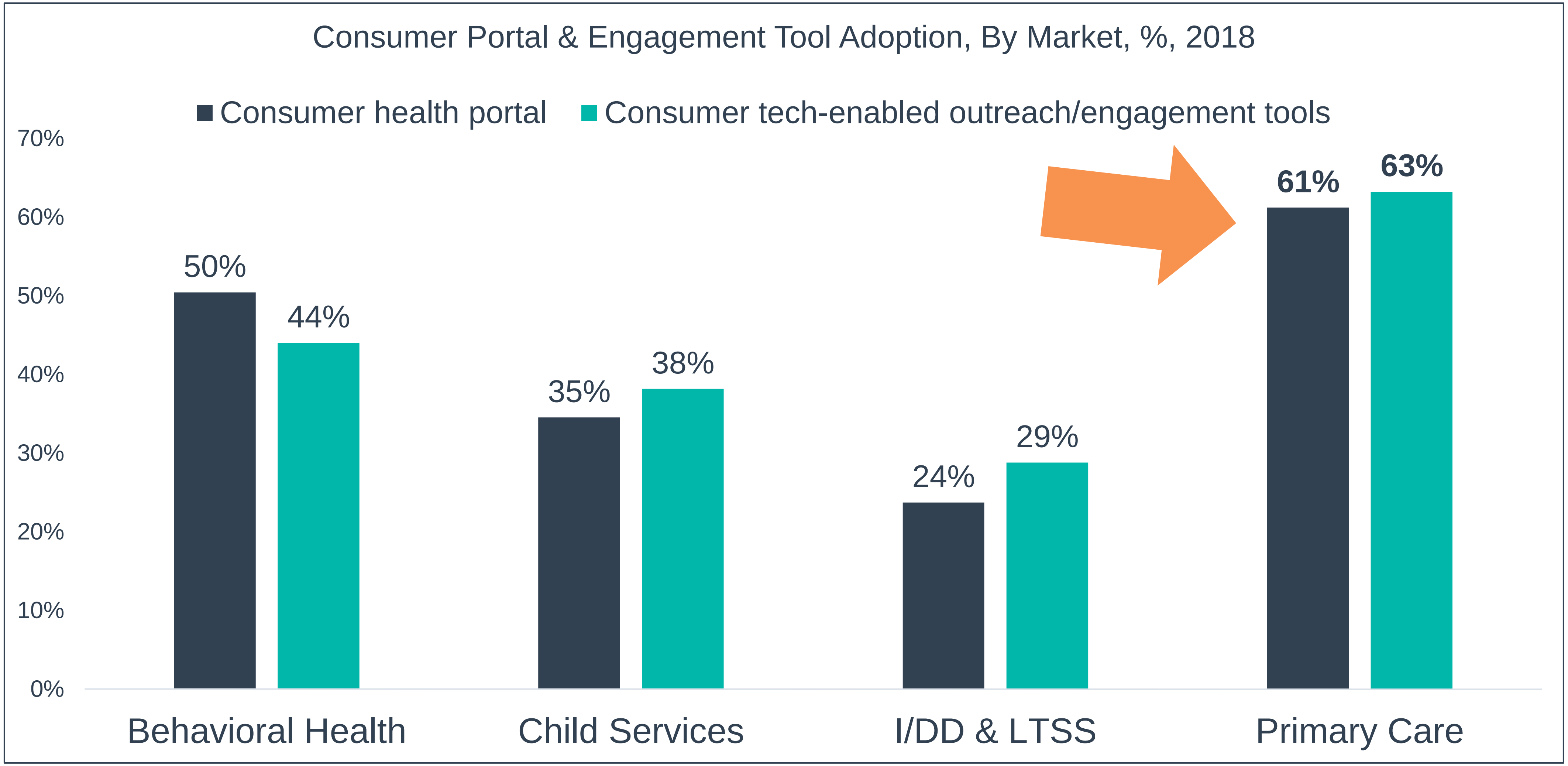
Technology Adoption By Specialty Provider Organization

Technology	Total, %	Less Than $10 Million, %	$10-$50 Million, %	More Than $50 Million, %
Electronic health record (EHR)	86%	78%	93%	91%
Referral tracking, referral database	64%	60%	65%	72%
ePrescribing tools and technologies	63%	50%	70%	80%
Practice management technologies and services	62%	60%	60%	72%
Health information exchange	57%	47%	60%	78%
Fundraising tools and technologies	53%	43%	59%	65%
Telehealth/remote therapy	52%	40%	59%	67%
Population health management – segmentation, risk stratification, analytics	50%	42%	54%	59%
Clinical decision support technology	46%	36%	51%	61%
Consumer health portal	43%	32%	48%	65%
Consumer tech-enabled outreach/engagement tools	43%	41%	40%	57%
Dictation tools and services	37%	26%	40%	61%
Consumer disease state/medication management technologies and services	21%	16%	21%	35%
Remote monitoring (i.e. smart home, wearable monitoring)	15%	12%	17%	20%
Consumer companion robots	5%	4%	3%	9%

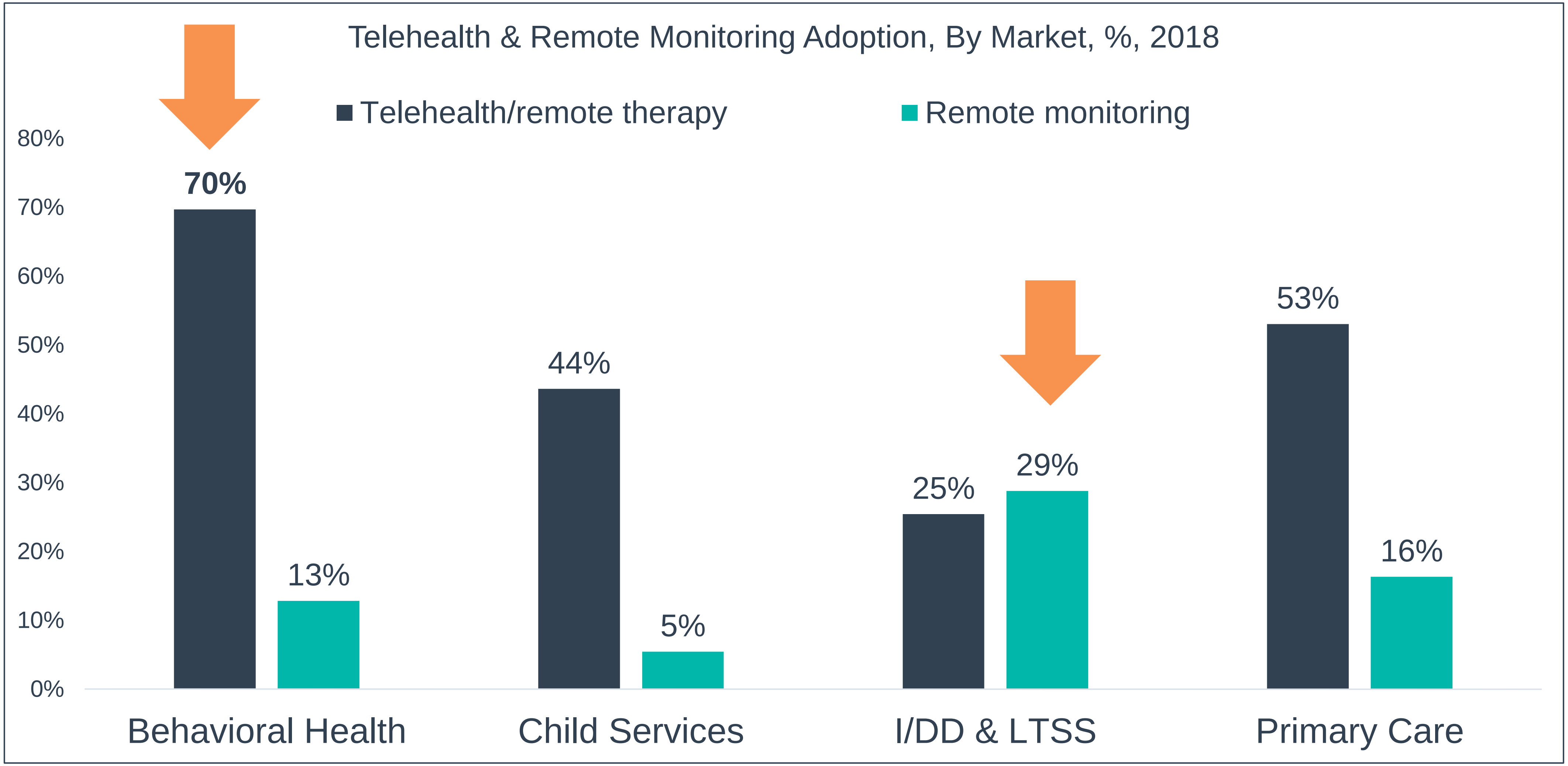
EHR & Health Information Exchange Adoption, By Market, %, 2018



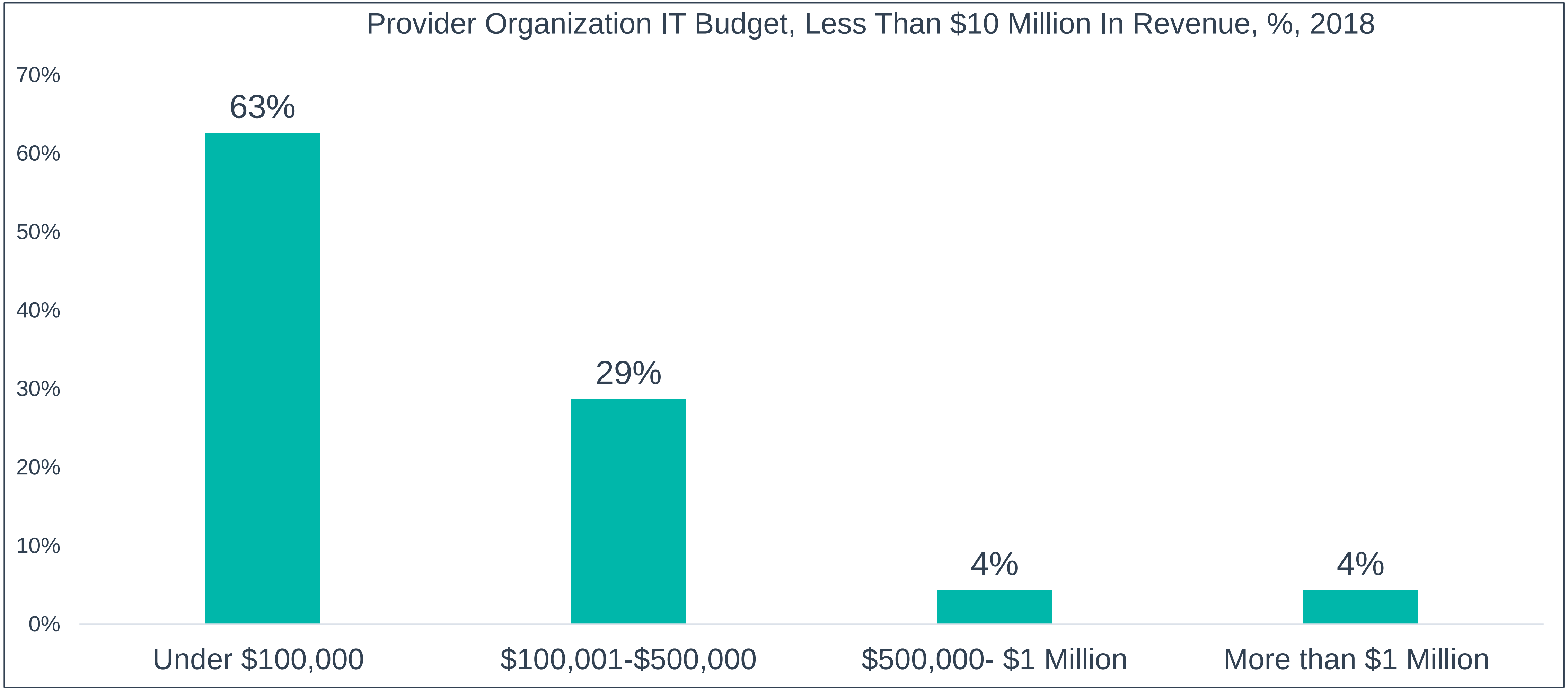
Consumer Portal & Engagement Tool Adoption, By Market, %, 2018



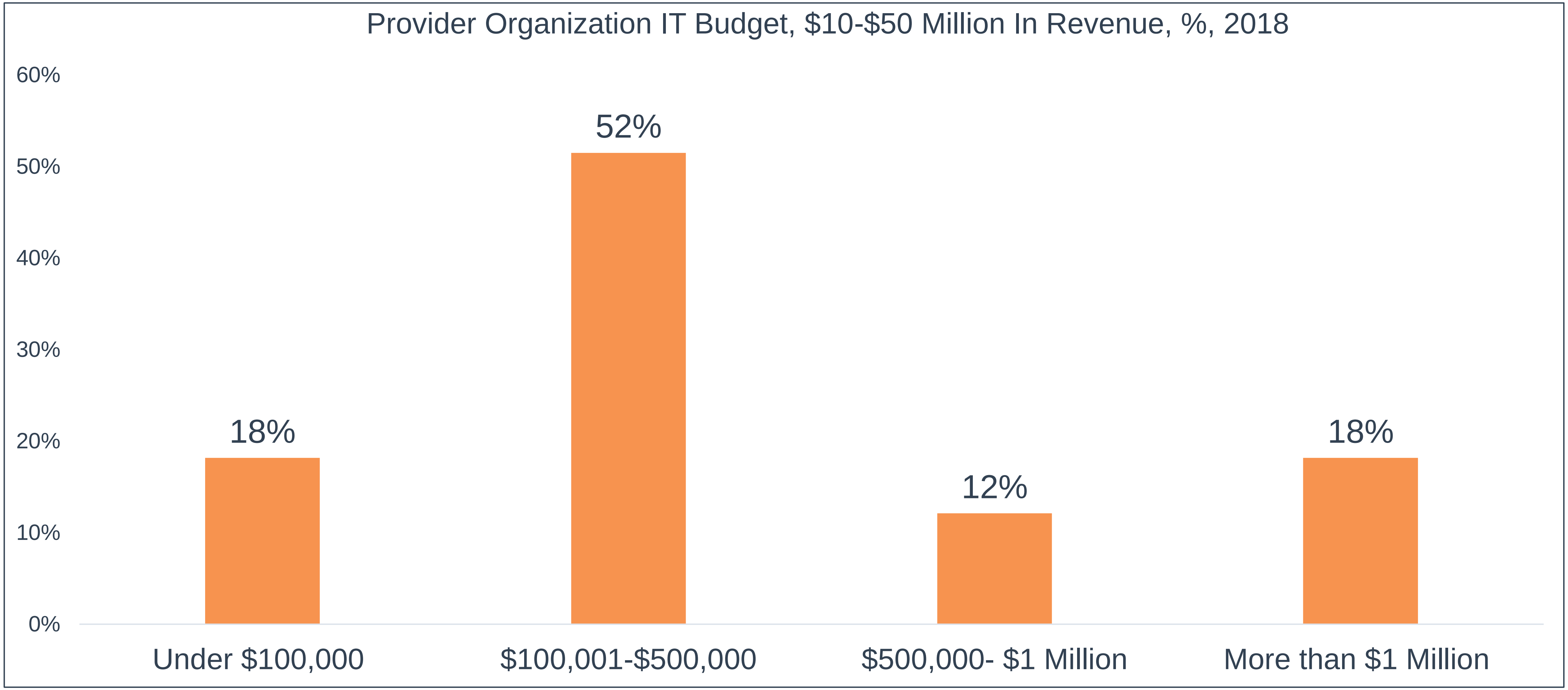
Telehealth & Remote Monitoring Adoption, By Market, %, 2018



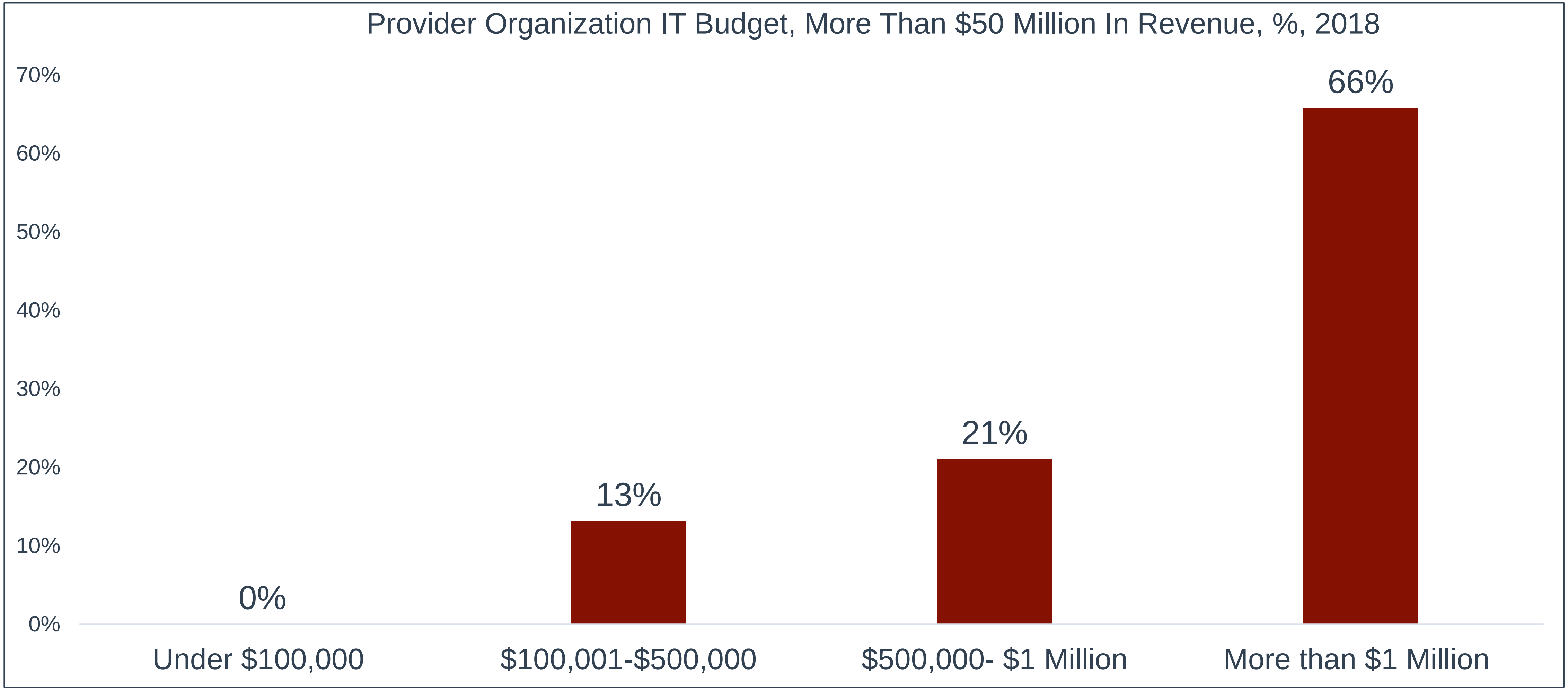
Specialty Provider Organization IT Budgets, Less Than $10 Million In Revenue, %, 2018



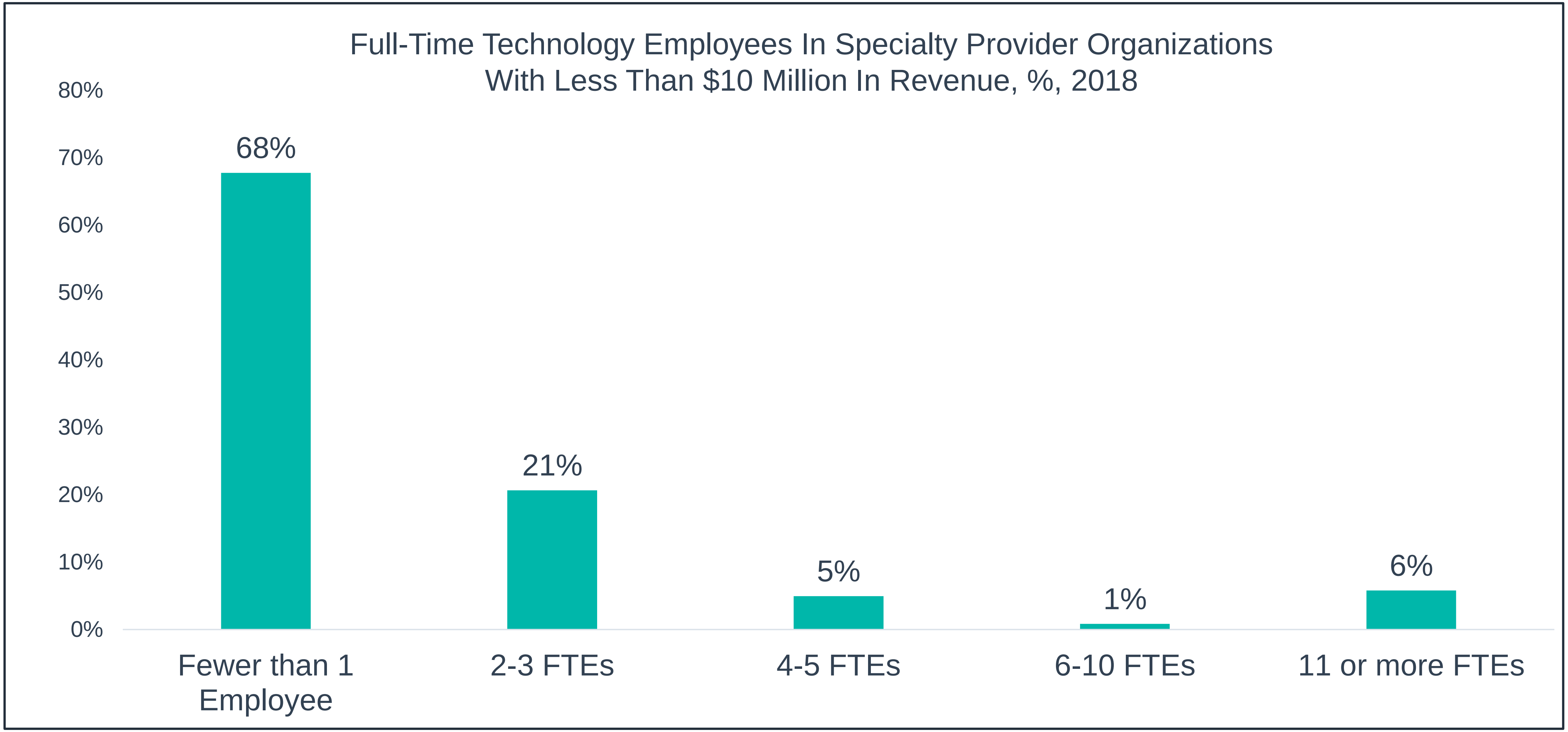
Specialty Provider Organization IT Budgets, $10-$50 Million In Revenue, %, 2018



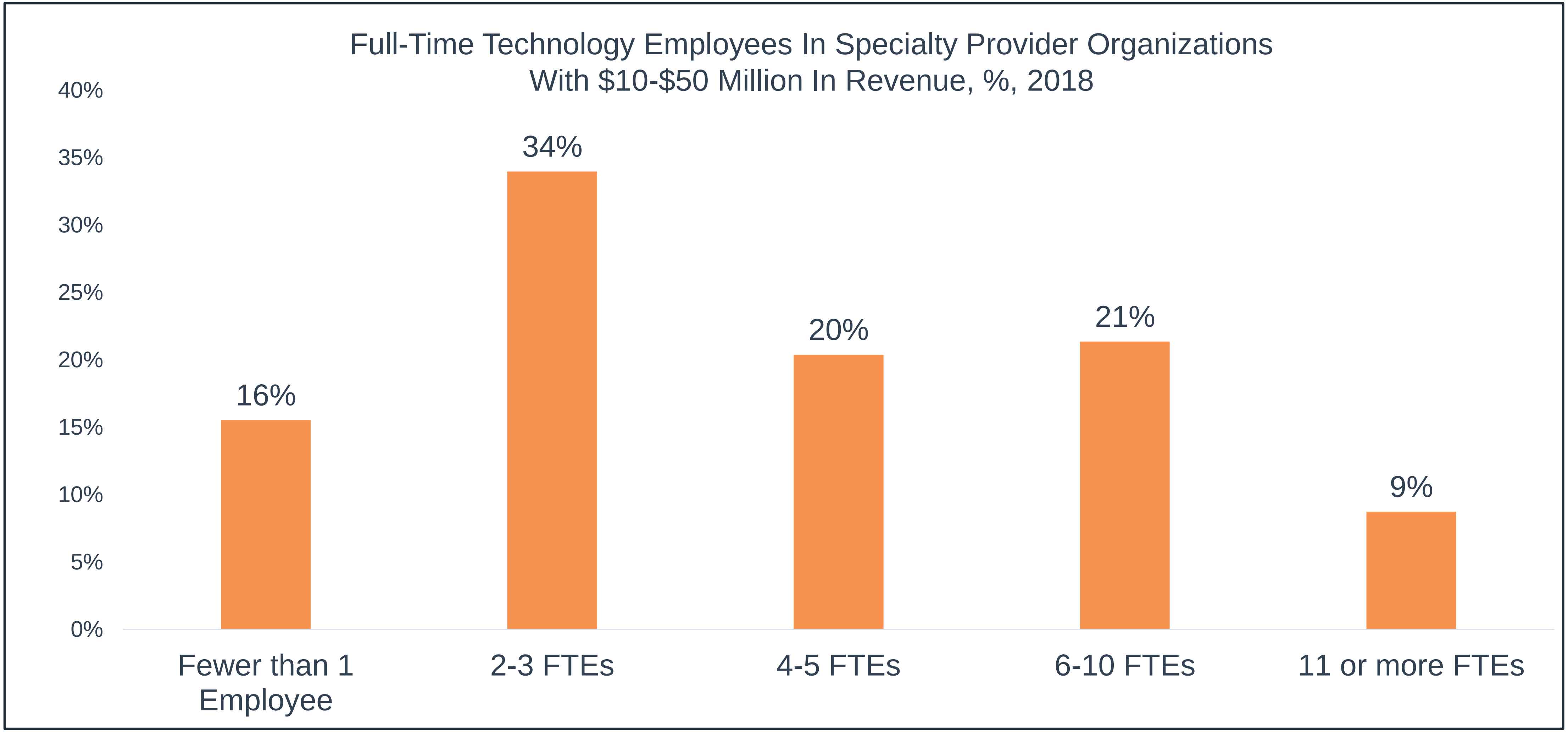
Specialty Provider Organization IT Budgets, More Than $50 Million In Revenue, %, 2018



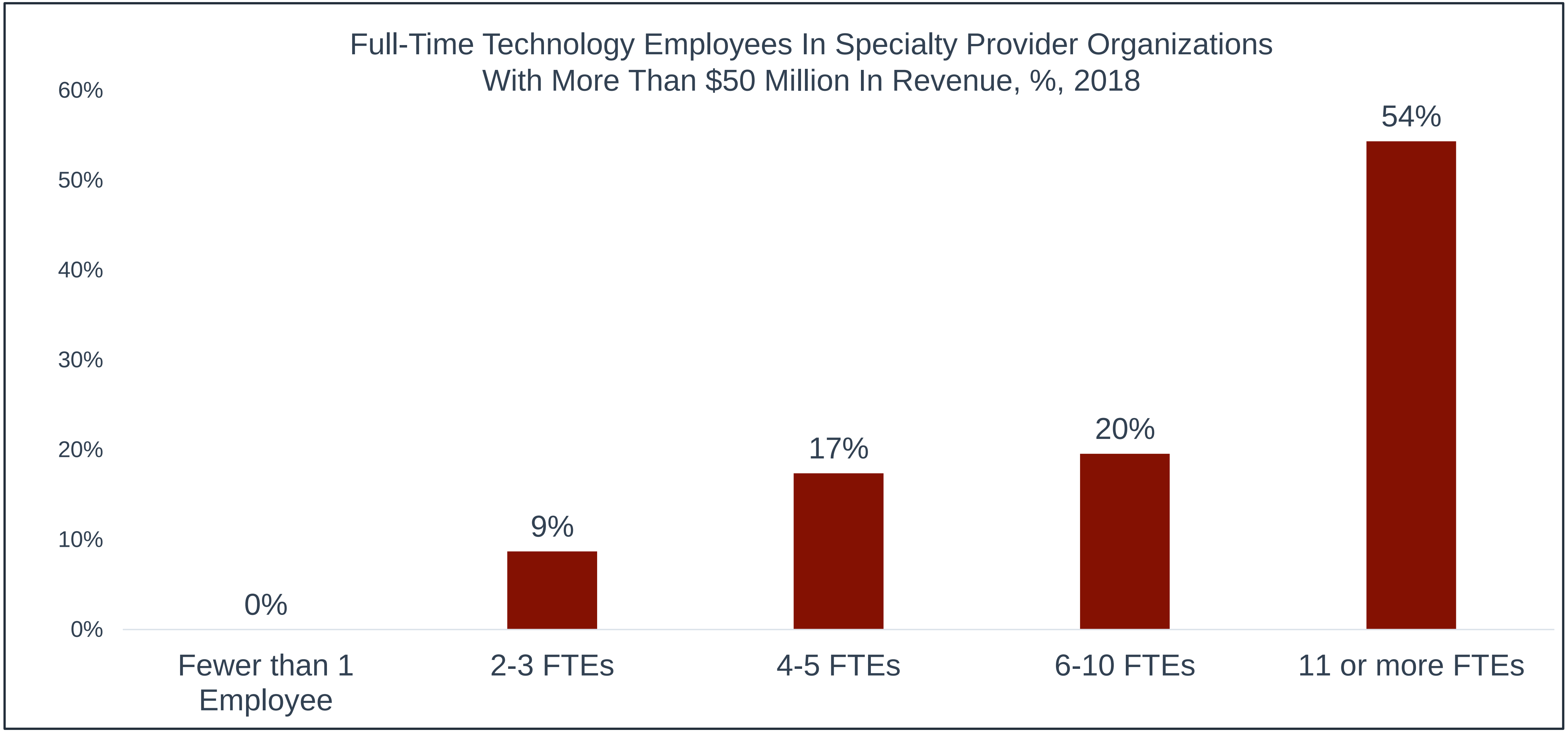
Number Of Full-Time Technology Employees In Specialty Provider Organizations With Less Than $10 Million In Revenue, %, 2018



Number Of Full-Time Technology Employees In Specialty Provider Organizations $10-$50 Million In Revenue, %, 2018



Number Of Full-Time Technology Employees In Specialty Provider Organizations With More Than $50 Million In Revenue, %, 2018



Key Takeaways

1. Technology adoption is uneven among specialty provider organization segment
   - While 86% of specialty health and human services provider organizations have an electronic health record, only 57% are part of a health information exchange (HIE) and 50% have population health management capabilities. HIE and VBR will be a key differentiator in decision to keep/replace an EHR.
   - Telehealth adoption is highest among behavioral health provider organizations at 70%. Only 53% in primary care organizations – with large growth expected there.
   - 63% of primary care organizations are much more likely to use consumer engagement tools and 29% of LTSS organizations use remote monitoring. Adoption likely to increase across all types of specialty organizations with increasing VBR.

2. Overall, U.S. health care providers spend 3.5% and 4.3% of revenue on technology budget – $350,000 to $430,000 per $10M in revenue.
   - Is that the right benchmark? This figure is 7.2% in financial services and 5.8% in business services.

3. Specialty provider organizations are not at that benchmark amount. “Under-investment” in technology is a key issue in smaller specialty provider organizations.
   - This is not true in other fields. National business survey found small and medium-sized for-profit companies often outspend larger ones. The average small company spends 6.9% of revenue on technology, while midsized companies spend 4.1%. Larger companies spent 3.2% of revenue.

4. Linking technology investment to strategy linkage is essential to success – performance, competitive advantage, and sustainability.

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results will be available online courtesy of Credible Behavioral Health

Technology Definitions

Term	Definition
Electronic health record (EHR)	A digital version of an individual's health record that are available instantly and securely to authorized users. Most EHRs are tools that can be used to store information, communicate with other systems, offer clinical decision support, billing, etc.
Referral tracking/database	Software including customer relationship manager (CRM) that allows provider organizations to track information related to incoming and outcoming consumer referrals.
ePrescribing tools and technologies	Software and equipment used to facilitate the electronic prescribing of drugs.
Practice management technologies and services	Software and technologies that assist with billing, revenue cycle management, dashboards, clinical and administrative workflows, etc.
Health information exchange	The electronic sharing of data across a defined network and geography
Fundraising tools and technologies	Customer relationship management (CRM) tools, general fundraising platforms, marketing and email tools, event management software, etc.
Telehealth/remote therapy	The use of secure video or telephonic connection to provide health care services and to store and forward imaging.
Population segmentation/risk stratification/population analytics	The use of data to divide consumers into different groups based on their health status, demographics, and other relevant characterstics.
Clinical decision support technology	Electronic tools or software that enhance decisionmaking in the clinical workflow providing prompts, documentation templates, diagnostic support, reference materials, among others.

Technology Definitions

Term	Definition
Consumer health portal	A secure online website that gives consumers access to their health information and often allows consumer to book appointments, request prescription refills, make payments, complete forms, etc.
Consumer tech-enabled outreach/engagement tools	Apps, online programs, text messaging, and other tools that assist provider organizations and clinical professionals in engaging consumers in treatment.
Dictation tools and services	Software that converts audio recordings to text
Consumer disease state/medication management technologies and services	Pill dispensers, medication alerts, clinical decision support systems, computerized physician order entry, and other software designed to assist with the medication management activities.
Remote monitoring (i.e. smart home, wearable monitoring)	Digital technologies and tools that can collect data related to health care and activities of daily living and transmit them to one secure location to be viewed by clinical professionals.
Consumer companion robots	Robots that provide assistance with daily task, act as educational tools, and can help reduce loneliness.
Concierge health care services (i.e. medical retainers)	Consumers pay a fixed fee out-of-pocket for a physician to deliver primary care services usually with increased benefits such as longer appointments, easier access, and house calls.

Definition Of IT Budget

IT budgets include hardware, software, networks, IT consultation services, outsourced projects/functionality, and information technology staff