

Thought Leadership Survey: Physician Alignment through IT



A Bold Vision Established

President Bush set forth a bold vision as part of the Administration's healthcare agenda giving all Americans access to an electronic health record in ten years. The national objective established reflects the public's growing conviction for improvements in the quality and efficiency of care.

Leading the Transformation

While the Administration encourages the development of an electronic health record (EHR) for every citizen in the country, questions surrounding who will lead this transformation persist.

Hospitals and healthcare systems have made significant investments in advanced clinical information technologies. From a technological, financial and clinical perspective, health systems are best positioned to emerge as market leaders. Helping establish electronic health record systems for their medical staffs, hospitals will realize greater physician alignment while communities will gain from the efficient exchange of health information across care settings.

Are Physicians Receptive?

Are physicians receptive to working with their local hospital to adopt electronic health records? Until recently, regulatory barriers have impeded a health system's ability to provide information technology to community physicians. New changes to Stark and anti-kick back laws have cleared the way for hospitals to help community physicians adopt electronic health records for their practices. Still the question remains, 'Are physicians ready?'

To understand physician attitudes, McKesson asked Harris Interactive, a leading, global market research organization with a specialty in healthcare, to conduct an unprecedented study assessing physician attitudes. Over 400 physicians were asked how they felt about working with hospitals in the implementation of an electronic health record. The survey reflects a national cross section of primary and specialty care physicians in a community-based practice.

Key Areas of Focus

- I. Attitude regarding IT services currently provided by their hospital
- II. Attitude regarding implementing an ambulatory electronic health record (EHR) in their practice
- III. Attitude toward working with hospitals to deploy an EHR in their practice
- IV. Attitude toward value of an EHR

The following is the top findings highlighted under each of the four key areas of focus.

Top Line Findings

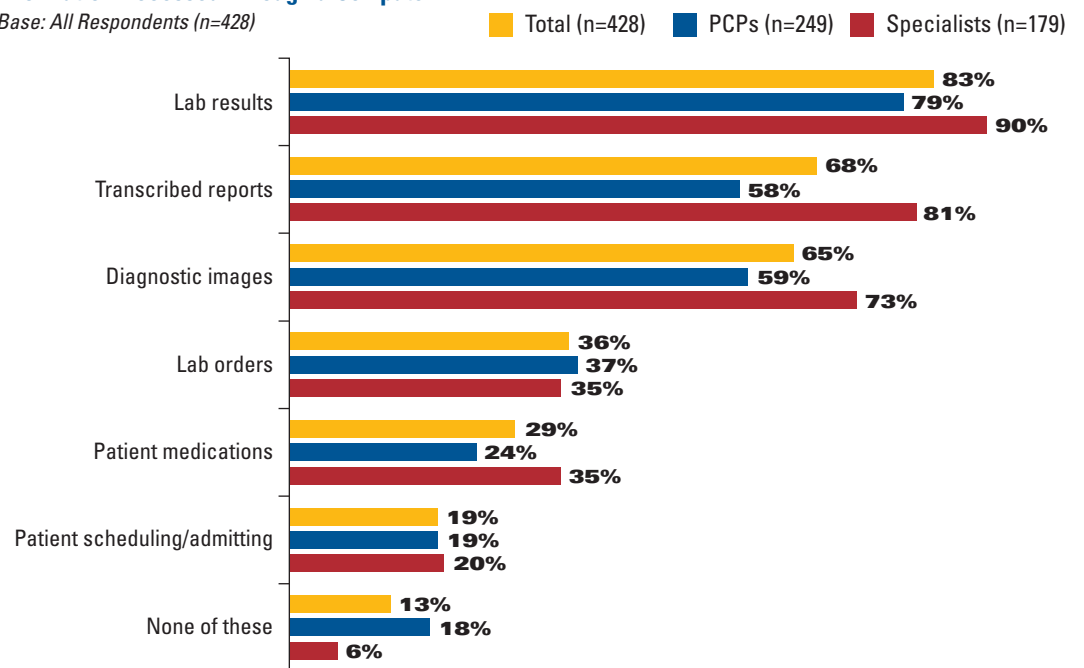
I. IT Services Currently Provided by Their Hospital

What Information Do Physicians Currently Receive From Hospitals Electronically?

Today, most physicians can electronically access a broad range of information from hospitals. Based on the chart below, physicians depend on hospitals as a primary source for timely access to important patient information. Physicians typically have computer access to lab results (83%), transcribed reports (65%), and diagnostic images (66%). Specialists are more likely to access information electronically from their hospitals than primary care physicians (PCPs). Ninety percent of specialists are able to view lab results, eighty-one percent receive transcribed reports and seventy-three percent can view diagnostic images. Specialists are also more likely to have electronic access to patient medications (35%) than PCPs (24%).

Information Accessed Through a Computer

Base: All Respondents (n=428)



Top Line Findings

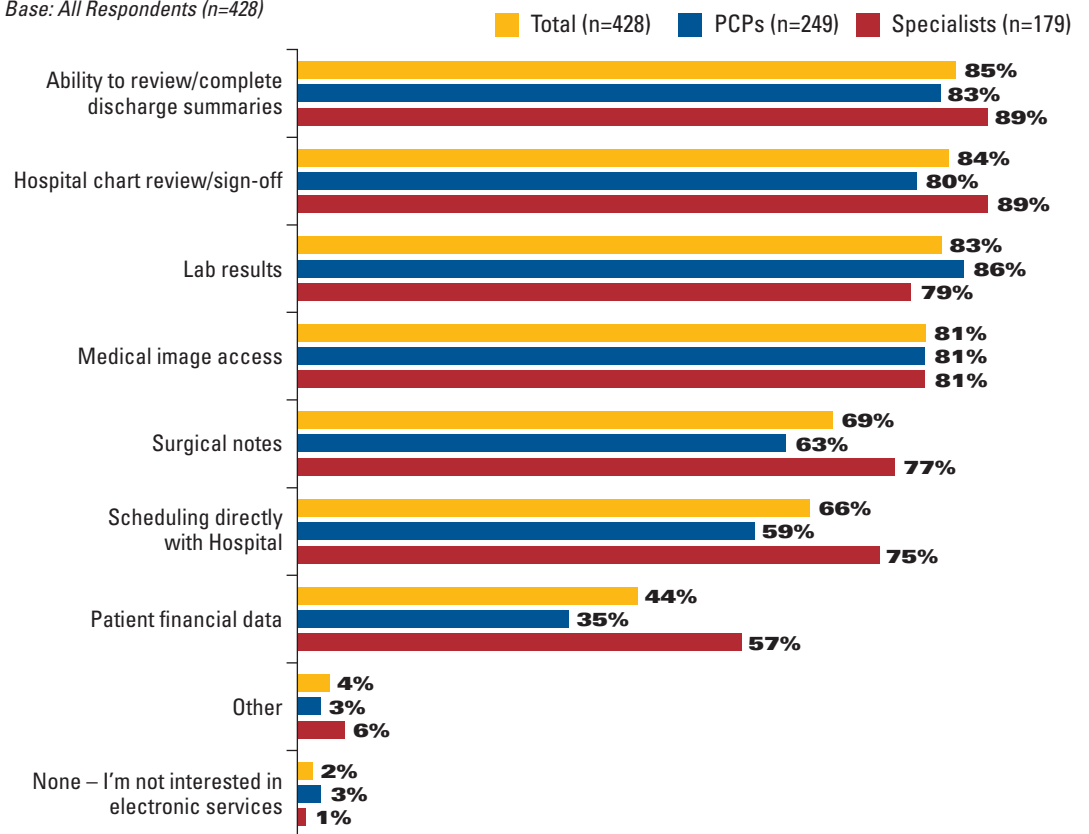
I. IT Services
Currently Provided
by Their Hospital
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What Information Do Physicians Want Hospitals To Provide Electronically?

Although hospitals are currently meeting the needs of physicians regarding access to lab results and medical images, physicians place a higher priority on having electronic access to patient discharge summaries (85%) and the ability to review and sign-off on hospital charts (89%). Interesting differences exist between the types of information specialists would like access to and information that PCPs would like. This is particularly apparent when it comes to online access to surgical notes (77% for specialist vs. 63% for PCPs), scheduling procedures directly with the hospital (75% vs. 59% respectively) and access to patient financial data (57% vs. 35% respectively).

Electronic Information Physicians Want From Hospitals for Rapid or Immediate Access

Base: All Respondents (n=428)



Top Line Findings

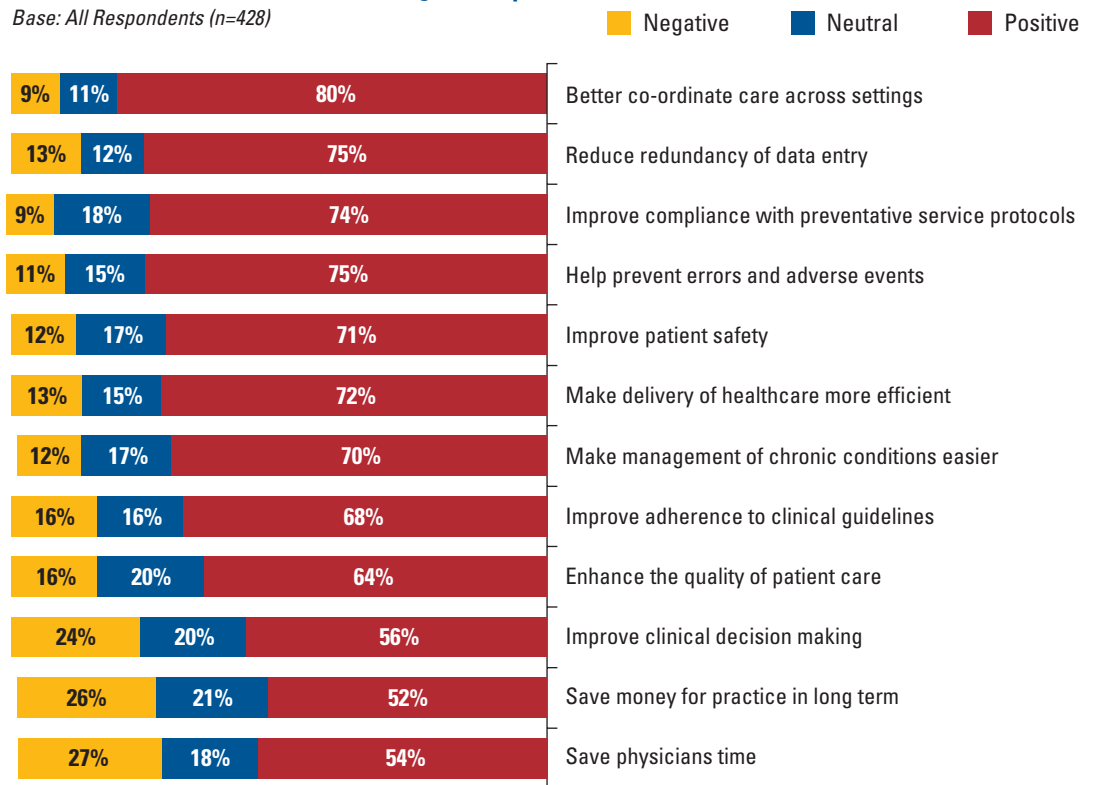
II. Implementing an Electronic Health Record (EHR) in their Practice

What Are Physicians Attitudes toward the benefits of EHRs?

Most physicians ranked care-related benefits higher than potential economic benefits as a result of purchasing and EHR. Responses indicate that physicians believe an EHR can have a positive impact on patient care while appearing to be more skeptical about the operating benefits for their practice. Overall, the highest ranked benefits to physicians were ‘coordination of patient care across settings’ (80%) and ‘reducing the redundancy of data entry’ (75%). About half (52%) believe that an EHR will save their practice money in the long run. It is noteworthy that a little more than half (56%) of physicians agree that the EHR will improve clinical decision-making.

Benefits of Information Accessed Through a Computer

Base: All Respondents (n=428)



Top Line Findings

II. Implementing an Electronic Health Record (EHR) in their Practice

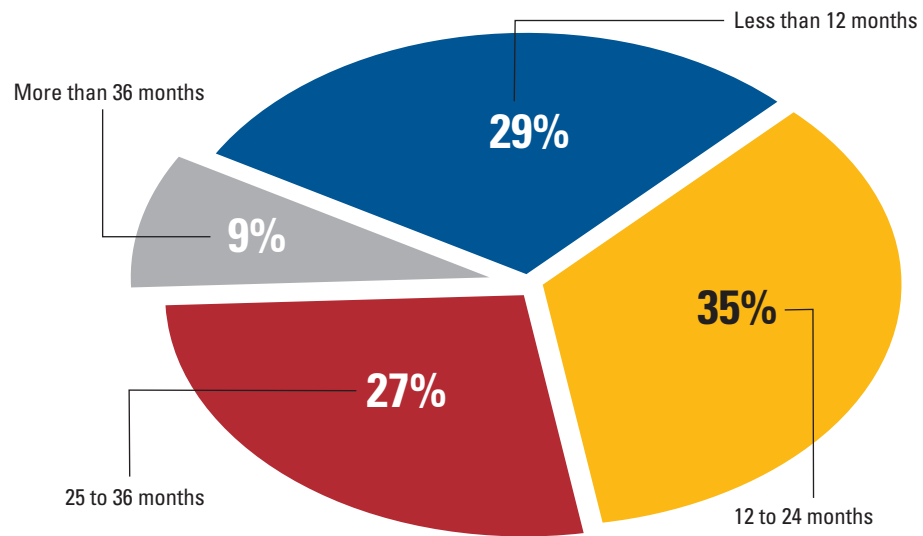
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What percentage of physicians plan to implement an EHR in the next 36 months?

Given the recent emphasis by the government and the resulting news surrounding EHR, about three quarters of physicians (74%) are starting to entertain the idea of implementing a system within their practice. Of those physicians, more than 90% are planning to implement an EHR in the next 36 months. And a majority of those physicians (64%) intend to do so within the next 2 years while another quarter (27%) plan to implement a system in 2 to 3 years.

Time Frame for Implementing EHR in their Practice

Base: Likely to implement EHR (n=318)



Top Line Findings

II. Implementing an Electronic Health Record (EHR) in their Practice

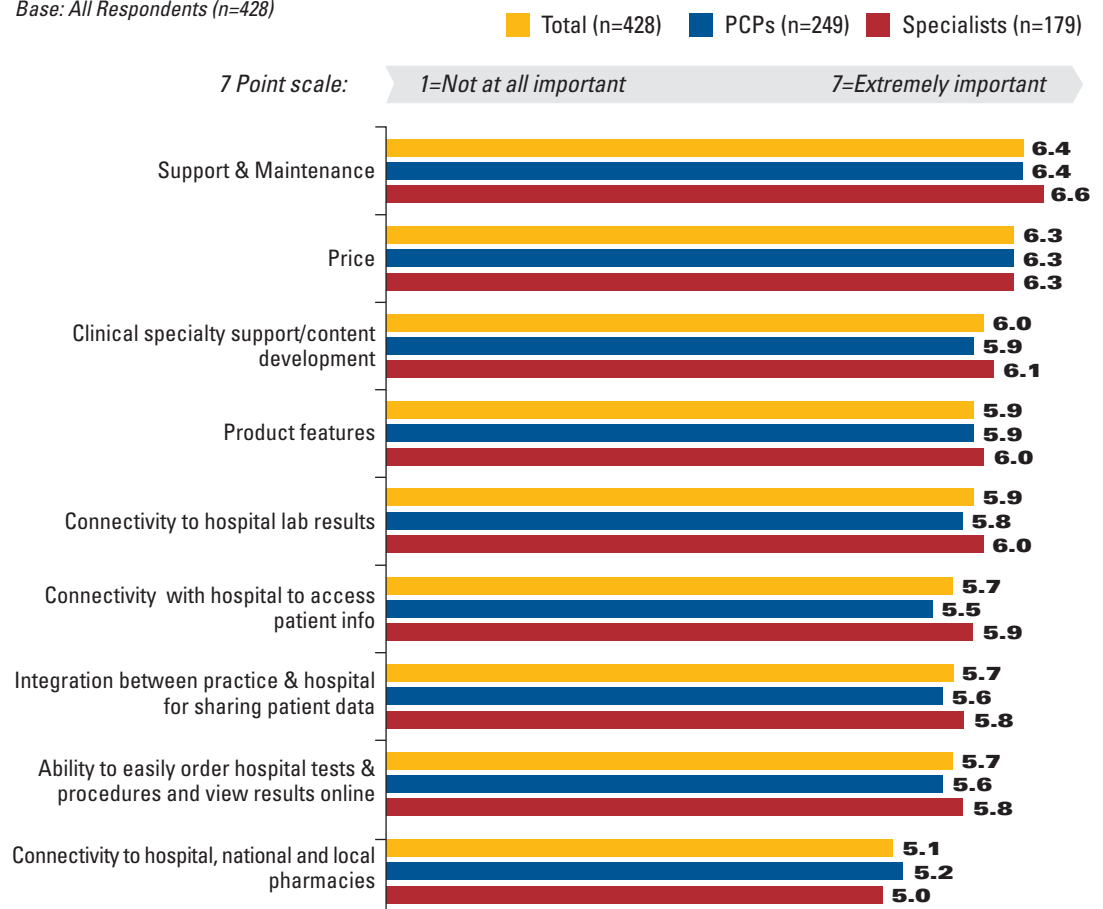
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What are Key Considerations when Purchasing an EHR?

When physicians are considering an EHR system for their practice, their number one consideration is the support and maintenance (6.4) that physicians receive for the system. This is followed closely by price (6.3). Two interesting findings emerge from the data. The first is that support and maintenance and price were ranked higher than product features (5.9). One other notable finding is that physicians consider connectivity to the hospital lab (5.9) and connectivity to hospital patient information (5.7) almost as important as product features when considering an EHR system.

Importance of Factors When Considering EHR System

Base: All Respondents (n=428)



Top Line Findings

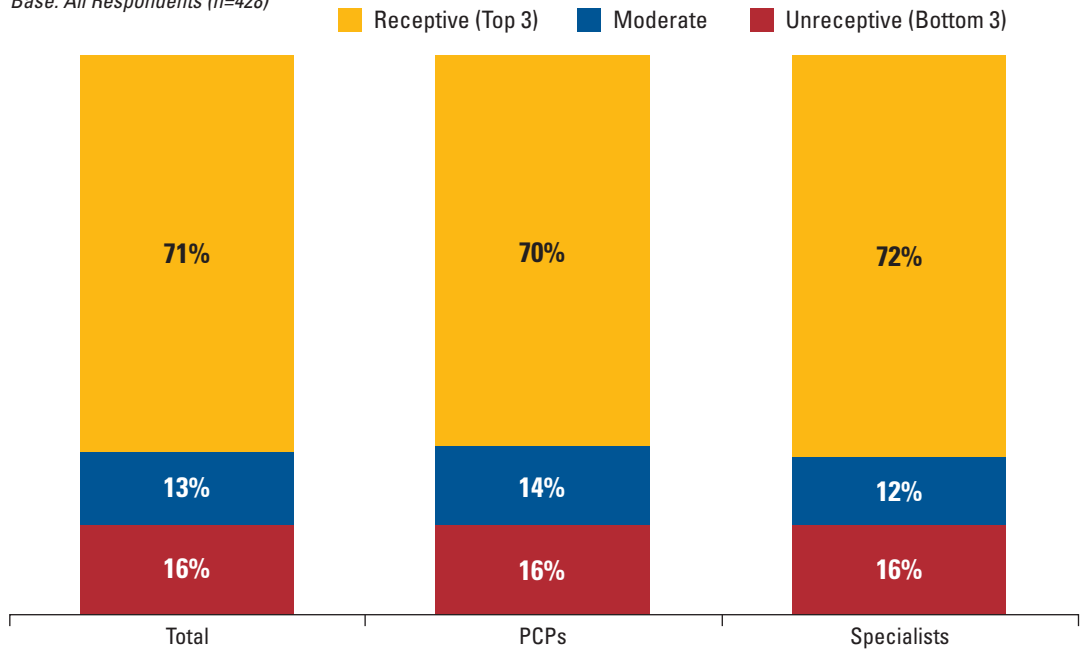
III. Working with Hospitals to Deploy an EHR in their Practice

What are Physician's Attitudes Toward Working with Their Hospitals?

More than two thirds (71%) of physicians are receptive to the idea of leveraging the hospital's information technology resources and buying power to deploy an EHR in their practice. Only a small minority (16%) of physicians was not receptive to the idea.

Receptivity to Leveraging Hospital's IT Resources for EMR System

Base: All Respondents (n=428)



Top Line Findings

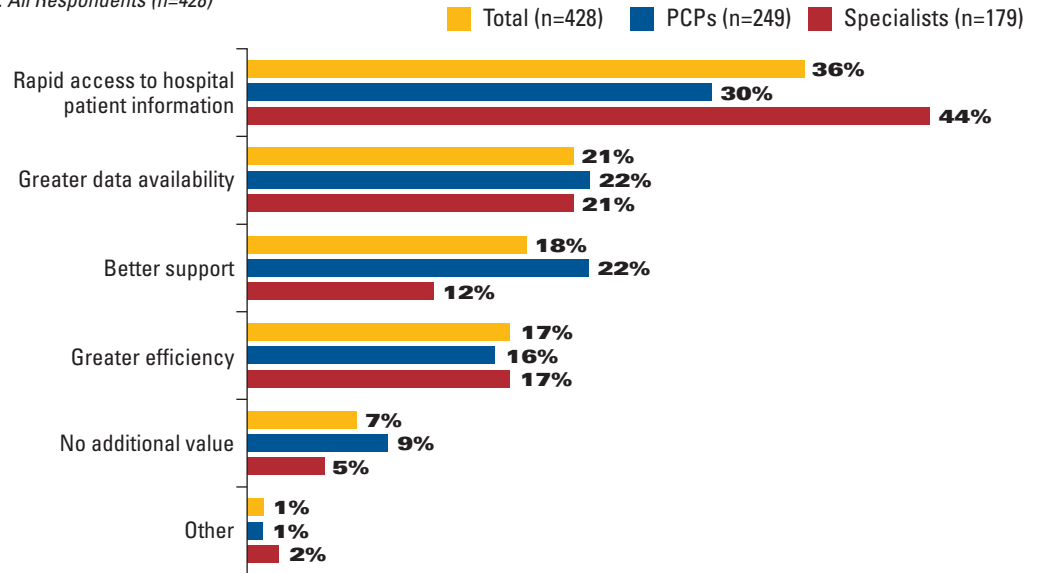
IV. Attitude about the Value of an EHR

What is the Value for a Physician of an EHR provided by a Hospital?

Physicians perceive the greatest value in an EHR provided by the hospital is more rapid access to hospital patient information. There is a gap between PCPs and specialists with close to half (44%) of specialists expecting this to be the greatest benefit while only a third (30%) of PCPs anticipated rapid access to be the greatest value. The expectations of PCPs are more diverse.

Additional Value Expected From EMR Provided by Hospital

Base: All Respondents (n=428)



Top Line Findings

IV. Attitude about the Value of an EHR

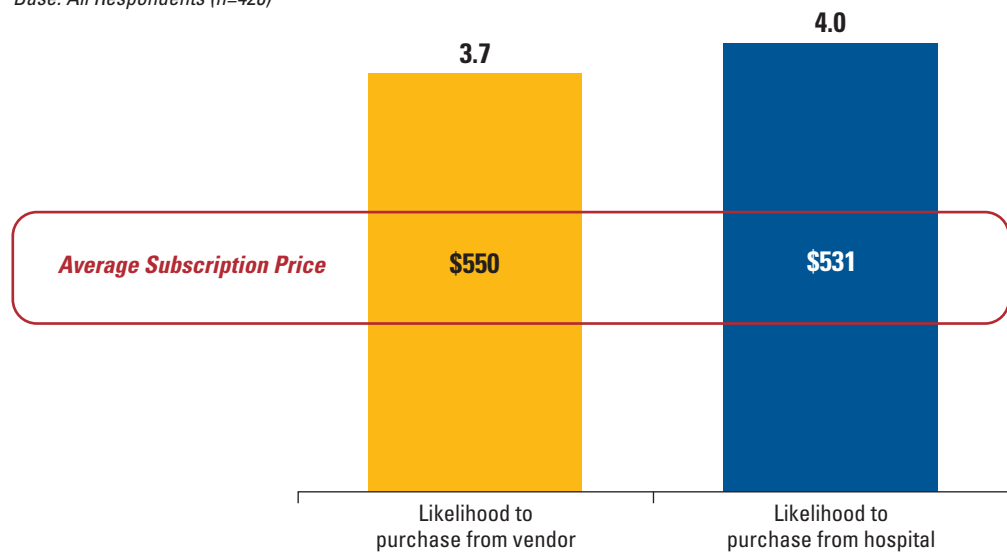
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How much value do physicians place on hospitals providing ambulatory EHR systems to community physicians?

Healthcare organizations, both hospitals and physicians, continue to struggle with acquisitions costs for EHRs. The most significant obstacle to adoption of an ambulatory EHR system is the cost. Data suggests that not only are physicians predisposed to leasing arrangements but that they are also willing to pay an equal amount to what they would pay a third party vendor. When asked what would be an acceptable subscription price paid out on a monthly basis per provider over the course of 5 years, the average monthly subscription price was slightly lower for the hospital than for a vendor.

Likelihood to Lease by Type of EMR Provider

Base: All Respondents (n=428)



Top Line Findings

IV. Attitude about the Value of an EHR

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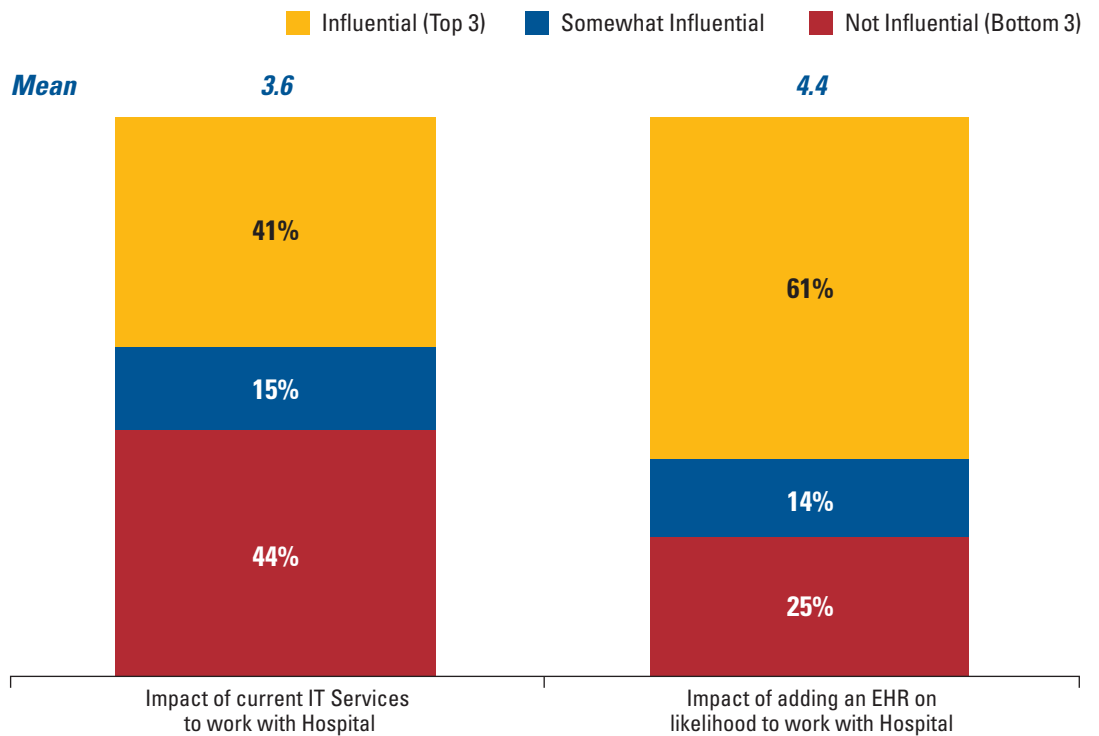
How does the Perceived Value of an EHR Impact Alignment with Hospital?

Hospitals assisting physicians with an ambulatory EHR are driving closer alignment between the hospital and the physician based on these findings. The findings suggest that the perceived value – rapid access to information, greater data availability – will have a positive impact on how physicians can more efficiently work with hospitals in the delivery of patient care.

Value of Providing Most Desired EHR Feature

Base: All Respondents (n=428)

7 Point scale; 1=Not at all, 7=Completely



Summary Highlights

The study reveals that physicians practicing in the community are looking for information technology to help them better manage patient data and improve quality of patient care. To achieve this goal, 74% are planning on purchasing an electronic health record and of those 91% plan to do so within 36 months.

In addition, over 70% of physicians indicate they are interested in working with their hospital in the acquisition of an EHR for their practice. Responses show that physicians prefer that their strategic partner be the hospital and that physicians are willing to pay a fee to their hospital in return for such technology systems.

The study indicates that the opportunity for hospitals and healthcare systems to align with their medical staffs in the adoption of an electronic health record has never been greater. The bold vision set forth by the Bush Administration will be well served as hospitals emerge as leaders in the integrated delivery of care for their communities.

Survey Methodology

The survey was conducted online within the United States between June 13 and June 28, 2006 among 428 physicians recruited from Harris Interactive's online physician panel. There were 249 primary care physicians including general practitioners/internal medicine, obstetricians and pediatricians, and 179 specialists including cardiologists, orthopedists, and general surgeons. Quota groups were stratified to reflect the US physician universe by practice size. To qualify for the survey, physicians were asked whether they had already implemented an EHR system within their practice. Those physicians that have implemented a system were disqualified from taking the survey.

Table:

249 Primary Care Physicians

179 Specialists (high referring specialty care, i.e. cardiology, orthopedics, general surgeons)

On average,

Admit to 2.5 hospitals

Age 45.7

14.8 years in practice

See 129 patients per week

84% Male, 16% Female

With pure probability samples, with 100 percent response rates, it is possible to calculate the probability that the sampling error (but not other sources of error) is not greater than some number. With a pure probability sample of 428, one could say with a ninety-five percent probability that the overall results have a sampling error of +/- 5 percentage points. However that does not take other sources of error into account. Sampling error for sub samples is higher and varies. This online survey is not based on a probability sample and therefore no theoretical sampling error can be calculated.

Note: Percentages may not add up to exactly 100% due to rounding.

These statements conform to the principles of disclosure of the National Council on Public Polls.

About McKesson

McKesson Corporation is a Fortune 16 healthcare services and information technology company. With more than 30 years of experience delivering comprehensive solutions across the continuum of care, McKesson is unmatched in our ability to help forge local health IT networks. Our unique connectivity assets enable you to bring patients, payors, retail pharmacies and other stakeholders into the connected community.

About Harris Interactive

Harris Interactive is the 12th largest and fastest-growing market research firm in the world. The company provides research-driven insights and strategic advice to help its clients make more confident decisions which lead to measurable and enduring improvements in performance. Harris Interactive is widely known for *The Harris Poll*[®], one of the longest running, independent opinion polls and for pioneering online market research methods. The company has built what could conceivably be the world's largest panel of survey respondents, the Harris Poll OnlineSM. Harris Interactive serves clients worldwide through its United States, Europe and Asia offices, its wholly-owned subsidiary Novatris in France and through a global network of independent market research firms. The service bureau, HISB, provides its market research industry clients with mixed-mode data collection, panel development services as well as syndicated and tracking research consultation. More information about Harris Interactive may be obtained at www.harrisinteractive.com.



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Ambulatory EHR 2006*

