current health

Remote Care Delivery: Perceptions, Adoption, and Trends

How to deliver excellent healthcare experiences in the home

DMS-14961

Introduction

Over the past several years, health systems have increasingly explored ways to digitally transform. COVID-19 rapidly accelerated hospitals' interest in digitization, propelling investment in solutions that meet patient demands, enable high-quality care, and support clinicians.

Remote patient care is one strategy that has proven particularly valuable to hospitals as they explore new models for delivering exceptional care at scale. Remote care includes the ability to monitor, engage, and treat patients from the safety and comfort of their own home leveraging technology like remote monitoring and video visits alongside in-person care.

Many health systems have already seen significant benefits from remote care, and growth of these programs shows no sign of slowing down. To help guide healthcare leaders in the applications and value of remote patient care—as well expectations for the future—Current Health surveyed 250 health system decision makers between December 2020 and January 2021. These are key findings from that survey.

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Key Findings

1

In the last year, health systems have successfully leveraged remote care to preserve hospital capacity while providing an overall better healthcare experience.

Organizations using remote care technologies reported key benefits of reduced hospital admissions (69%), improved patient (63%) and provider (62%) satisfaction.

2

Remote care technologies have transformed health system workflows by enabling organizations to provide earlier, preventive care at scale.

Respondents reported the most important remote care benefits for clinicians are: ability to prioritize which patients require clinical attention (67%), provide more preventive clinical care (66%), and manage a greater number of patients (60%).

3

Key barriers to remote care's adoption and success are patient and provider engagement, data and workflow integrations, and operational concerns.

More than half of all survey respondents reported patient adoption and adherence as a challenge they've faced with remote care solutions.

4

Healthcare is moving into the home within three key areas: chronic care, transitional care, and acute care.

In the next 12 months, organizations plan to increase their investment in remote care across multiple patient populations and acuity levels including for chronic care (64%), acute hospital care at home (60%), and transitional care (58%).

5

For remote care delivery to scale, organizations will need flexible, integrated solutions that can support multiple patient populations.

Atop health system leaders' wish lists for remote care technologies are: AI-driven algorithms (29%), Clinical dashboards (25%), Symptom collection / eDiary capabilities (24%).

The Move to Healthcare at Home

As the home increasingly becomes a primary site of care, healthcare leaders must be proactive about building and scaling home-based programs across patient populations.

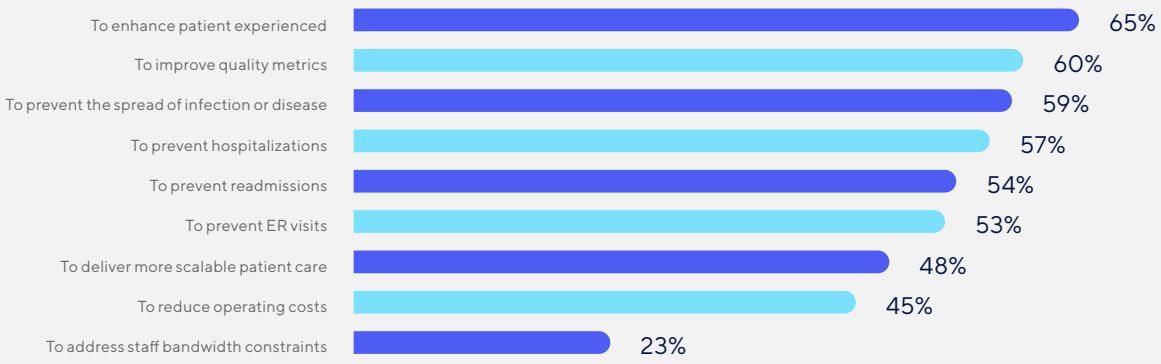
COVID-19 certainly catalyzed the transition to home-based care, but both patient and provider demand will continue driving health systems to invest in the technologies that enable this care. Survey respondents indicated patient and provider demand for care outside the home were the second and third largest drivers of their interest in remote care technologies.

With CMS's Acute Hospital Care at Home program likely to become permanent in some form, agreements with payers are unlikely to return as the major hurdles they once were.

Respondents report that in the past 12 months, their organization invested in technology that allowed them to deliver care outside of the hospital to enhance patient experience (65%), improve quality metrics (60%), prevent the spread of infection or disease (59%), and prevent hospitalizations (57%).

For patients, home-based care not only prevents risk of hospital-acquired infections and adverse events, but also allows a more comfortable experience—both of which improve outcomes. For providers, reduced hospital visits resulting from the rise in home-based care means they can focus their time and resources on the patients who need critical or physical intervention. This unlocks process efficiencies and enhances care at scale. Broadly, home-based care results in fewer hospitalizations and readmissions, reducing the overall cost of care.

In the past 12 months, what are the reasons your organization has invested in technologies that allow you to deliver care outside of the hospital:



Expectations for Remote Care Programs

As healthcare at home becomes more widely accepted by patients and providers alike, it's applications have expanded to new use cases. Among survey respondents, 64% plan to increase investment in remote chronic care, 60% plan to invest in Hospital at Home models, and 58% plan to increase remote transitional care. Enterprise solutions must offer a flexible platform that supports clinical decision making across these areas.

64%

Plan to Increase Investment in Remote Chronic Care

Chronic care management encompasses the oversight and education activities used to help patients with chronic diseases and health conditions such as diabetes, high blood pressure, systemic lupus erythematosus, and multiple sclerosis learn to understand their condition and live successfully with it. The work involves motivating patients to persist in necessary therapies and interventions and helping them to achieve an ongoing, reasonable quality of life.

60%

Plan to Increase Investment in Remote Acute Care

Acute care at home, commonly referred to as Hospital at Home, aims to provide inpatient-level care outside the hospital. Though not an entirely new model, the November 2020 CMS waiver and corresponding payment parity has spurred health systems to increase priority of these programs. By providing acute care at home, health systems aim to improve inpatient capacity while providing better overall patient outcomes at a lower cost.

58%

Plan to Increase Investment in Remote Transitional Care

Transitional care is designed for primary care doctors and specialists, as well as non-qualifying medical practitioners, to provide care to patients who have recently been discharged from clinical settings. It's a vital service that aims to eliminate gaps in patient care and readmission during critical periods. Remote care models for transitional care can reduce length of stay, improve follow-up care, and support medication adherence.

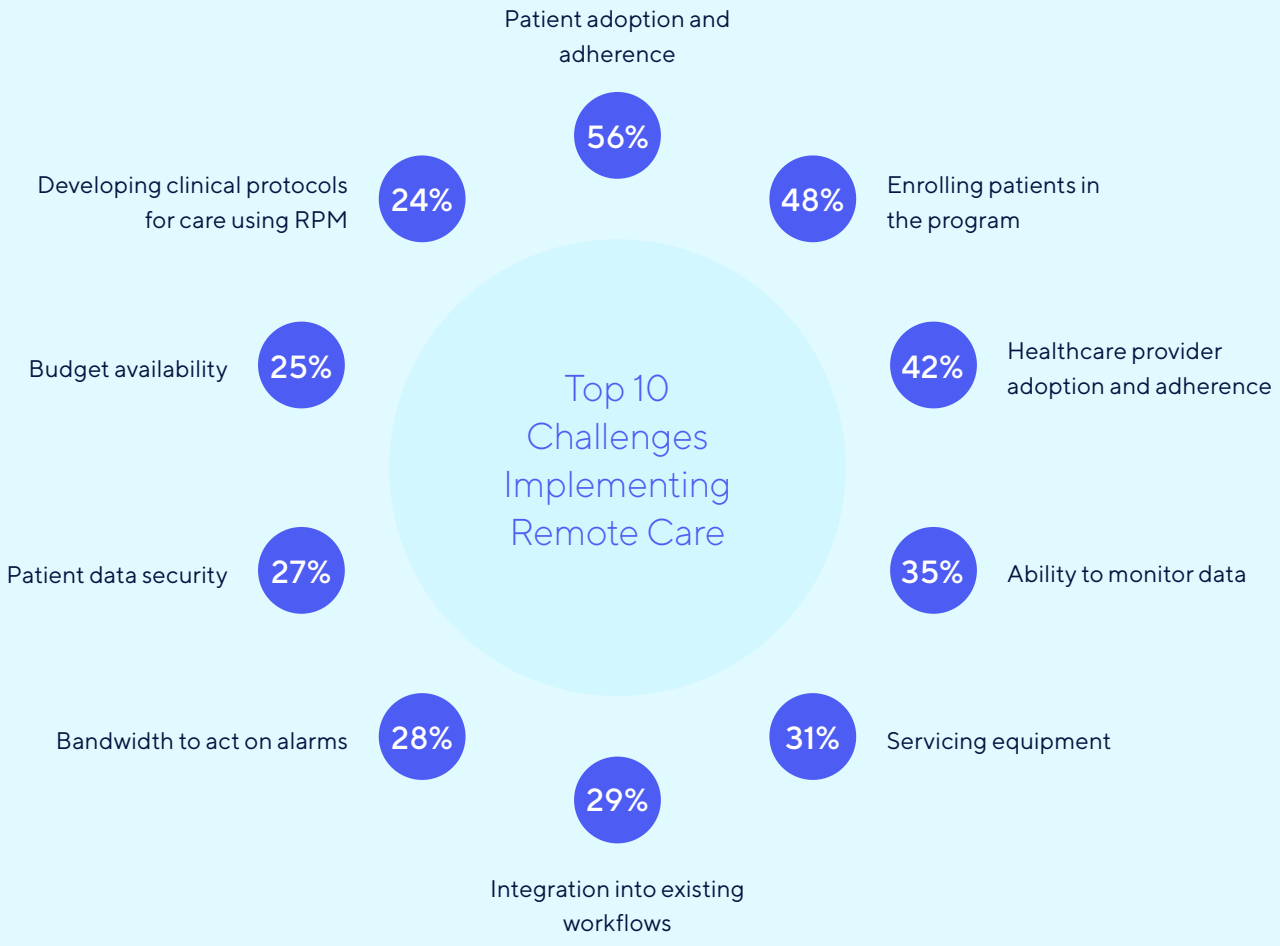
The Remaining Hurdles to Remote Care

Remote care has proven to be extremely valuable in the past 12 months, and many health systems saw historical reluctance evaporate in that time. But leaders can still expect some challenges when implementing new technology and processes for home-based programs.

The hurdles that health system leaders face in deploying home-based care can be categorized as engagement hurdles, operational hurdles, and technical and data hurdles. Engagement hurdles include provider and patient education and adoption. Operational hurdles involve the extent to which remote care pathways are supported and integrated into existing clinical workflows. Technical hurdles relate to the hardware, software, and data enabling remote care.

"When standing up a remote care program, technology was about 25% of the work. The other 75% was operational."

Dr. Brett Oliver, CMIO, Baptist Health



Technical challenges for remote care are primarily related to the monitoring and integration of remote patient monitoring (RPM) data and management of RPM devices. RPM will continue to be a foundational element of home-based care, though standalone devices will likely give way to fully integrated systems. Respondents whose organizations have not yet adopted RPM cite a lack of expertise to operationalize RPM (50%) and lack of budget to implement it (40%) as the top reasons for not yet investing.

Respondents identify several key challenges as operational hurdles, including the ability to monitor data, servicing devices and equipment, and integrating processes into existing workflows. To ease the burden of monitoring patient data and servicing equipment, health system leaders should consider outsourcing nursing triage and device management. Contracting for these time-consuming services can help protect clinicians' time. In addressing process and data integration, health system leaders should ensure alignment on priorities, effective project management, and resource allocation across teams (e.g., operations, IT, clinical).

Engagement hurdles relate to provider and patient adoption and adherence. Fifty-two percent of respondents cite patient adoption and adherence as a top challenge they face, followed by the ability to enroll patients (48%). Forty-two percent also identify healthcare provider adoption and adherence as a challenge in program adoption. Internal communication and education are critical for driving provider adoption.

" It was really important to give care teams the 'why' and to equip clinicians with scripts for presenting the home-based care plan to patients."

Dr. Brett Oliver, CMIO, Baptist Health

Lessons Learned for building successful Remote Care program

Successful and scalable remote care has dozens of moving pieces. Successful programs share a core set of attributes:

- Set enterprise success goals. What defines clinical and financial success?
- Engage clinicians from the start. Also get organizational buy-in from operations, technology, finance and quality assurance leaders.
- Have a dedicated Clinical Command Center to triage patient alarms.
- Integrate clinical data and workflows to optimize existing resources.
- Simplify the patient experience within a single, user-friendly platform.

Learn from our clients. Find out How Baptist Health and UMass Memorial Navigated Top Challenges.

" We wanted to use our Epic system as much as possible to take care of patients within the hospital at home program. So, we've spent significant time setting up integrations to use Epic for the documentation, ordering, patient movement and monitoring, and services like radiology."

Dr. Eric Alper, CQO and CCIO, UMasss Memorial

Unlocking the Potential of Remote Care

As patient expectations for remote care grow alongside providers' plans to deliver more treatment outside the hospital walls, the technologies supporting remote care must allow for scale. The solutions that help remote care programs reach their full potential combine patient-first experiences with flexible provider workflows and intelligent data insights.

70%

of health systems are using RPM and 89% of those are planning expand usage in next 12 months

Eighty-nine percent of respondents report that digital technology is "very" or "extremely" important to delivering effective, scalable care at home. But what is required of remote care technology and how might that change as remote care programs mature? RPM will certainly continue to be a mainstay of remote care programs. Among survey respondents, 70% of health systems are using RPM and 89% of those are planning expand usage in next 12 months.

Among those who already deliver some remote care, survey respondents wish their solution offered: AI-driven algorithms (29%), clinical dashboard (25%), symptom collection / eDiary capabilities (24%), and EHR integration (23%).

Why These Features Matter

Algorithms help reduce alarm burden which allows a single care provider to manage more patients at scale.

A clinical dashboard simplifies collaborative care management across a team.

Symptom collection and eDiary capabilities provide a more holistic view of the patient and their history.

EHR integration improves visibility and prevents data silos.

As care programs evolve to include broader patient populations and acuity levels, it will become increasingly important that remote care technologies not only monitor the patient and detect deterioration, but also directly facilitate care and treatment. The future of remote care technology will combine continuous patient insight and telemedicine communication with the ability to dispatch onsite intervention, labs, medicine, or therapy.

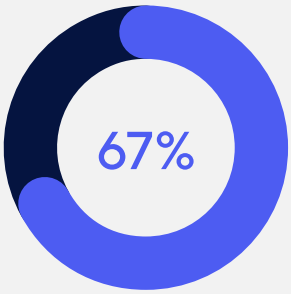
Remote Care and Healthcare's Big Challenges

Health system leaders have high hopes for remote care. Survey respondents indicated that remote care is helping them tackle some of the most significant challenges in healthcare: delivering preventive care at scale, caring for more patients with limited staff, and improving clinical outcomes.

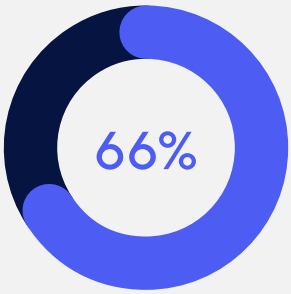
Health system leaders say that technology is driving these results by helping their providers prioritize which patients require clinical attention (67%), facilitating more preventive clinical care (66%), and allowing providers to manage a greater number of patients (60%).

These capabilities proved to be critical throughout the COVID-19 pandemic, as patient surges challenged hospital capacity and exacerbated staffing shortages. As a result of remote care, organizations have experienced a wide array of benefits, including reduced hospital readmissions (69%), improved patient satisfaction (63%), and improved provider satisfaction (62%).

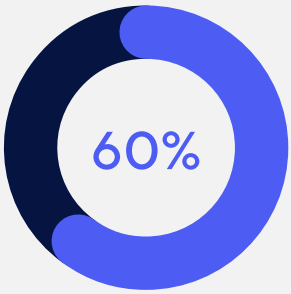
How remote care technology has helped organizations achieve these benefits (top 3)



Say it helps prioritize which patients need clinical attention



Say it allows for more preventive clinical care



Say it allows providers to manage a greater number of patients

The Future of Remote Care

Patient and provider demand for remote care has finally replaced much of the reticence that has stalled broad remote care adoption for years. With public and private payers also embracing its benefits, the shift to home-based care is sure to continue.

As increasingly more healthcare moves into the home, health systems will need a flexible, integrated remote care platform that supports clinical decision-making.

Remote care not only helps address system inefficiencies and enables better care at scale, but it also presents an opportunity to better understand disease as it presents and evolves. This could lead to breakthroughs in treatment and drug development.

81%

of respondents say they expect their organization to increase investment in remote care technologies in the next 12 months

What should your team look for in a care at home platform?

Find out in our buyer's guide.

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About Current Health

Current Health enables healthcare organizations to deliver end-to-end services in the home, expanding access to high-quality, patient-centric care at a lower cost.

Our enterprise care-at-home platform can be tailored to the needs of the individual patient, supporting the full range of clinical use cases and patient acuity levels. We provide an interoperable platform that combines state of the art technology – including continuous and non-continuous monitoring, telehealth, patient engagement tools – to provide a clear window into the patient's home and enable care teams to intervene with the right patient at the right time. To help our partners scale, we provide full inventory & logistics management, our Clinical Command Center, and third-party in-home services that support the full spectrum of care delivery at home.

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