

Right moves today. Front-runner tomorrow.

Stay on top in a value-based care world.

Key trends
defining a
new healthcare
marketplace



Know more. Do more. Reach farther.



As a care provider on the front lines of **today's** healthcare industry, no one knows better than you that the industry **is at a pivotal moment**.

Several major trends are setting the stage for a new marketplace **tomorrow**—a marketplace **focused on value** and driven by competition. Key trends include:

- Patient-centric, value-based care
- Increasing consumer engagement
- A new science of prevention

The **challenges** are big. The **opportunities** are bigger.

In this eBook, you'll find high-level **insights** into this **value-based care world** and why it's more critical than ever to deliver the **highest-value care at the lowest cost**.



"**Price** is what you pay. **Value** is what you get."

Warren Buffett

Patient-centric, value-based care.

You've seen it firsthand. Patient-centered health care is moving toward **value-based** care models, where incentives, rewards and reimbursements are for value created—as opposed to services provided. **Quality supplants quantity.**



It's a
balancing act
Reducing risk
Improving outcomes
Lowering costs

"VALUE"

Health outcomes achieved that matter to patients relative to the cost of achieving those outcomes

A **comprehensive picture of all patients** and populations is critical to focus on the right people in the right place at the right time. Operating from a comprehensive vantage point, you can **better balance** risks, outcomes and costs.

The **healthcare team is also expanding** beyond hospitals and

physicians to include wellness coaches, health monitoring services and other non-traditional members. Care extends beyond diseases to include behavioral and social factors as well. **Specialized population "ecosystems"** arise to better care for patients with shared needs.

All team members are increasingly important, because only when working collaboratively can teams deliver true patient value. Robust information and decision tools are essential to support extended care teams in providing a well-coordinated **patient experience centered on total value.**

Increasing consumer engagement.

The **second big shift** on the horizon is **engaging people more fully in their own health** and wellness.

Consumers will have more care choices, and more information about those choices, empowering them to make better decisions. **A vibrant consumer**

health and wellness marketplace will ultimately emerge.

Just as with any marketplace, healthcare consumers will have high expectations and **seek the best value:** highest quality of care plus greatest convenience at the lowest cost. Social communities will be increasingly influential.

With the help of technology, health care will also move toward an **"anywhere/anytime" model.** Patients will seamlessly connect with care team members, access virtual health tools, manage medications and more—all via numerous devices, including smart phones, tablets and **"always-on" sensor-enabled wireless devices.**

DIGITIZATION OF HEALTHCARE

84% of providers are using fully-functioning electronic health records today

62% of consumers are happy to communicate health concerns via email

39% is how much U.S. digital health venture investments rose year-over-year in 2013

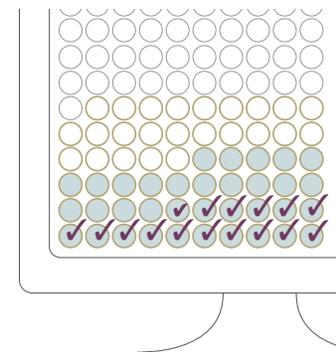
Source: Internet Trends 2014, Mary Meeker, KPCB

INTERNET AS DIAGNOSTIC TOOL

59% of U.S. adults looked online for health info within the past year

35% went online to try to "diagnose" their medical conditions

41% say a medical professional confirmed their "online diagnosis"



Source: Pew Study, Health Online 2013

New science of prevention.

Following the establishment of a consumer health and wellness market, the **third big change** in the healthcare world will be the emergence of a **new science of prevention**.

Leveraging scientific insights and state-of-the-art technologies, new products and services will be created that **target disease prevention** through highly personalized, precision treatments.

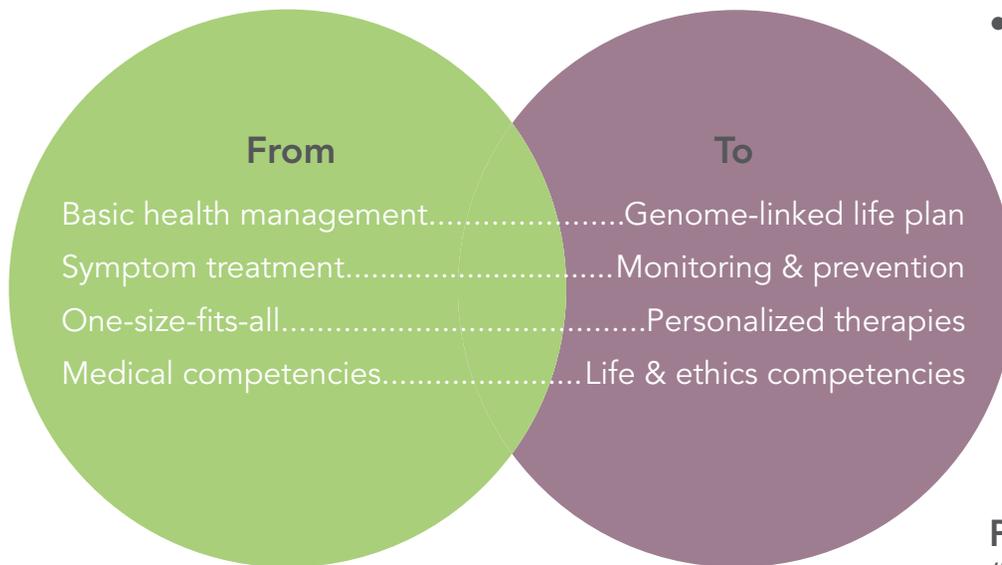
“When we debate healthcare policy, we seem to jump right to the issue of who should pay the bills, blowing past what should be the first question: Why exactly are the bills so high?”

—Steven Brill, *Time Magazine*, March 2013

A glimpse at some of the possibilities...

- **Genomic diagnostic tests** available over-the-counter will tell people if they are sick; tests will be automated and 100% accurate
- **Implantable micro-sensors** will constantly monitor a person’s health, detect early stages of disease and issue predictive alerts
- People will **take medications for diseases** years before symptoms appear
- Real-time **personal biofeedback** and personalized health apps will help people mitigate health risks

Preventing problems early and delivering individualized, “whole life” care will be the emphasis.



Allscripts EPSi for a stronger financial future.

Forward-thinking healthcare organizations are choosing Allscripts EPSi to position them for success in tomorrow's **transformed healthcare** marketplace.

Allscripts EPSi

Used by 14
of the top 18
U.S. hospitals

EPSi is the most complete, integrated budgeting, financial decision support and long-range financial planning solution **used by 14 of the top 18 U.S. hospitals** to ensure a stronger financial future in a value-based care world.

Thanks to **world-class analytics** that bring together vital clinical, financial and operational data, EPSi offers **unprecedented business value**, including the ability to:

- **Predict and manage performance**, empowering staff to make informed decisions to improve patient outcomes, reduce costs and maximize revenues
- **Accurately forecast and track** financial risk and opportunities with deep insights that enable effective action

An extremely **flexible and easy-to-use solution**, Allscripts EPSi delivers deep functionality that provides an **unbeatable foundation for value-based care** and population health initiatives.

Leading choice. Proven results.

78% of top U.S. hospitals rely on Allscripts EPSi to achieve a stronger financial future.



BEST IN KLAS

Allscripts EPSi has been named category leader in the **Decision Support – Business** segment for **8 consecutive years**



TOP BLACK BOOK™ RANKED 2014

Allscripts EPSi for **Decision Support**



Using Allscripts EPSi, Robert Wood Johnson University Hospital...

Recovered \$4.5 million in lost revenue due to underpayments.

Negotiated multiple single-case agreements resulting in incremental revenue of more than \$500,000.

Mitigated significant fees associated with consultants who had previously provided underpayment review services.

Right moves today. Front-runner tomorrow.

Two decades ago, **few could imagine a world** where people would carry phones in their pockets, send text messages and receive instant responses. Today, there are 96 cell phone service subscriptions for every 100 people on Earth.¹

We are
on the brink
of **enormous**
changes

Like other industries before it, **health care as we know it today will be unrecognizable 20 years from now.** From **value-based care** to highly-engaged consumers to a new, game-changing science of prevention, succeeding in this new landscape will require new **perspectives**, innovative **strategies** and proactive, on-the-spot **decision-making** pinpoint-aligned with ever-evolving goals.

To stay on top—to **balance it all**—you need to know more, do more and reach farther.

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