

POST ACUTE PROVIDERS

HEALTH INFORMATION TECHNOLOGY USER SURVEY RESULTS

FIRST QUARTER 2014

This survey is designed to help stakeholders of post-acute provider industry identify what strategies and solutions are developing to address the higher growth/demand for post-acute services in the challenging environment of lower fee-for-service reimbursements and impending valued-based payment models from all payers: government and commercial.

The purpose of the survey is to determine if there are more efficient ways to improve post-acute patient care and keep providers accountable for improving quality and reducing costs through effective use of health care information technology, specifically: health information exchanges (public and private), quality reporting, health analytics, workflow and care coordination, as well as patient engagement software/systems.

Black Book polled the leadership from 418 post-acute providers to ascertain the need for information platforms to support the exchange of information and provision and coordination of the most appropriate health care delivery, supplies, equipment and venue of services, as well as the operational, technological and financial road blocks, both current and projected.

TOTAL RESPONDENTS: 464 SURVEYED POST-ACUTE PROVIDERS BY RESPONDENT TITLE:

256 CHIEF EXECUTIVE OFFICER/EXECUTIVE DIRECTOR/CHIEF OPERATING OFFICER/ADMINISTRATOR (55.2%)

41 CHIEF FINANCIAL OFFICER/CONTROLLER (8.8%)

47 CHIEF INFORMATION/TECHNOLOGY OFFICER (10.1%)

30 CHIEF CLINICIAN/NURSING OFFICER/MEDICAL DIRECTOR (6.5%)

90 OTHER MANAGER/DIRECTOR/LEADER (19.4%)



CHIEF EXECUTIVE OFFICER/EXECUTIVE DIRECTOR/CHIEF OPERATING OFFICER/ADMINISTRATOR RESPONDENTS BY PROVIDER/FACILITY TYPE: 256 TOTAL

96 NURSING HOME/SKILLED NURSING FACILITY (SNF)/ LONG TERM REHABILITATION FACILITY

26 DURABLE MEDICAL EQUIPMENT (DME) DISTRIBUTORS

18 HOME HEALTH &/OR HOME INFUSION

6 HOSPICE

46 POST ACUTE PROVIDER CHAIN/CORPORATE LOCATION

37 HOSPITAL SNF & SUBACUTE

24 SHORT TERM REHABILITATION FACILITY

3 OTHER POST ACUTE PROVIDER TYPE

CHIEF EXECUTIVE OFFICER/EXECUTIVE DIRECTOR/CHIEF OPERATING OFFICER/ADMINISTRATOR RESPONDENTS BY PROVIDER/FACILITY TYPE:

37.5% NURSING HOME/SKILLED NURSING FACILITY (SNF)/ LONG TERM REHABILITATION FACILITY

10.2% DURABLE MEDICAL EQUIPMENT (DME) DISTRIBUTOR

7.0% HOME HEALTH &/OR HOME INFUSION

2.3% HOSPICE

18.0% POST ACUTE PROVIDER CHAIN/CORPORATE LOCATION

14.5% HOSPITAL SNF & SUBACUTE

9.4% SHORT TERM REHABILITATION FACILITY

1.1% OTHER POST ACUTE PROVIDER TYPE



1. WHAT DO YOU CONSIDER YOUR THREE MOST PRESSING ISSUES FACING POST-ACUTE PROVIDERS IN 2014?

RESPONDENTS	DECLINING REIMBURSEMENTS	VALUE-BASED ACCOUNTABLE POST ACUTE CARE	DENIALS	LACK OF INFORMATION TECHNOLOGY	LACK OF DATA SHARING/HIE	LACK OF CARE COORDINATION/ QUALITY REPORTING	OTHER ISSUE NOT LISTED
NURSING HOME/SKILLED							
NURSING FACILITY (SNF)/	96%	56%	87%	10%	17%	23%	13%
CORP/LONG TERM							
REHABILITATION FACILITY	(n=224)	(n=125)	(n=203)	(n=27)	(n=40)	(n=53)	(n=30)
(Total Respondents n= 234)							
HOSPITAL POST-ACUTE							
CARE/SHORT TERM	98%	61%	29%	20%	35%	54%	53%
REHABILITATION							
	(n=117)	(n=72)	(n=35)	(n=24)	(n=42)	(n=64)	(n=3)
(Total Respondents n=119)							
HOME HEALTH							
	100%	31%	91%	22%	9%	16%	28%
	(n=32)	(n=10)	(n=30)	(n=7)	(n=3)	(n=5)	(n=9)
(Total Respondents n = 32)	(11–32)	(11–10)	(11–30)	(11-7)	(11–3)	(11–3)	(11–9)
DME/OTHER POST ACUTE							
	91%	18%	94%	12%	3%	74%	3%
	/n=20\	(n-6)	(n-21)	(n-4)	(n-1)	(n-36)	/n-1\
(Total Respondents n= 33)	(n=30)	(n=6)	(n=31)	(n=4)	(n=1)	(n=26)	(n=1)
ALL POST ACUTE							
PROVIDERS	96%	51%	72%	15%	21%	35%	10%
	(n=403)	(n=213)	(n=299)	(n=62)	(n=86)	(n=148)	(n=43)
(Total Respondents n= 418)							



2. IF "DECLINING REIMBURSEMENTS" WAS INDICATED IN QUESTION 1, WHICH PAYER TYPE REIMBURSEMENT IS MORE PRESSING TO YOUR ORGANIZATION?

RESPONDENTS	GOVERNMENT PAYERS	COMMERCIAL PAYERS
NURSING HOME/SKILLED NURSING FACILITY (SNF)/ LONG TERM		
REHABILITATION FACILITY	97%	4%
	(n=226)	(n=8)
(Total Respondents n= 234)		
HOSPITAL POST-ACUTE CARE/SHORT TERM REHABILITATION		
	94%	6%
	/ 444	(0)
(Tatal Bassas dauta s. 440)	(n=111)	(n=8)
(Total Respondents n=119)		
HOME HEALTH	100%	0%
	100%	0%
	(n=32)	(n=0)
(Total Respondents n = 32)	(52)	(0)
DME/OTHER POST ACUTE		
	100%	0%
	()	(2)
(Total Respondents n= 33)	(n=33)	(n=0)
ALL POST ACUTE PROVIDERS		
	96%	4%
	(n=402)	(n=16)
(Total Respondents n= 418)		



3. IF INDICATED "DENIALS" IN QUESTION 1, WHAT ARE THE PRIMARY ROOT CAUSES OF YOUR DENIALS?

RESPONDENTS	POOR DOCUMENTATION	INCOMPLETE OR	CONSTANTLY CHANGING	OTHER
	DOCOMENTATION	INACCURATE BILLING	PAYER RULES	
NURSING HOME/SKILLED NURSING				
FACILITY (SNF)/ LONG TERM	35%	24%	38%	3%
REHABILITATION FACILITY	(=0)	()	(- 0)	(6)
(Total Respondents n= 200)	(n =70)	(n =48)	(n =76)	(n =6)
HOSPITAL POST-ACUTE CARE/SHORT				
TERM REHABILITATION & AFFILIATES	31%	5%	41%	0%
	/m 10)	(n. 0)	/m 12)	(n. 0)
(Total Respondents n= 32)	(n =10)	(n =9)	(n =13)	(n =0)
HOME HEALTH				
	70%	20%	10%	0%
	(- 24)	(n. C)	(2)	(-, 0)
(Total Respondents n = 30)	(n =21)	(n =6)	(n =3)	(n =0)
DME/OTHER POST ACUTE AFFILIATES				
, , , , , , , , , , , , , , , , , , , ,	65%	29%	3%	0%
	(00)	(0)	(4)	(0)
(Total Respondents n= 31)	(n =20)	(n =9)	(n =1)	(n =0)
ALL POST ACUTE PROVIDERS				
,	43%	27%	27%	4%
(Total Respondents n= 292)	(n =126)	(n =78)	(n =79)	(n =11)



4. IN REGARDS TO QUESTION 2, TO WHAT EXTENT IS MEDICARE ADVANTAGE AND/OR MEDICAID MANAGED CARE A GROWING PORTION OF YOUR PAYER MIX?

RESPONDENTS	SIGNIFICANT	SOMEWHAT SIGNIFICANT	NOT SIGNIFICANT	NOT APPLICABLE
NURSING HOME/SKILLED NURSING				
FACILITY (SNF)/ LONG TERM	48%	38%	13%	1%
REHABILITATION FACILITY				
	(n =106)	(n =84)	(n =30)	(n =3)
(Total Respondents n= 223)				
HOSPITAL POST-ACUTE CARE/SHORT				
TERM REHABILITATION & AFFILIATES	67%	30%	2%	1%
	(n =70)	(n =31)	(n =2)	(n =1)
(Total Respondents n= 104)				
HOME HEALTH				
	81%	15%	4%	4%
	(n =21)	(n =4)	(n =1)	(n =1)
(Total Respondents n = 26)				
DME/OTHER POST ACUTE AFFILIATES				
	71%	7%	7%	14%
	(n =20)	(n =2)	(n =2)	(n =4)
(Total Respondents n= 28)				
ALL POST ACUTE PROVIDERS				
	57%	31%	9%	3%
	(n =227)	(n =123)	(n =37)	(n =10)
(Total Respondents n= 397)				



5. IN REGARDS TO QUESTION 4, IF INDICATED "SIGNIFICANT" DO YOU FORESEE THIS MEDICARE ADVANTAGE AND/OR MEDICAID MANAGED CARE BUSINESS AS A SOURCE OF REVENUE TO MITIGATE THE DECLINING REIMBURSEMENTS BY GOVERNMENT PAYERS?

RESPONDENTS	YES	NO	NOT SURE
NURSING HOME/SKILLED NURSING			
FACILITY (SNF)/ LONG TERM	16%	14%	69%
REHABILITATION FACILITY			
	(n =17)	(n =15)	(n =72)
(Total Respondents n= 104)			
HOSPITAL POST-ACUTE CARE/SHORT			
TERM REHABILITATION & AFFILIATES	12%	11%	77%
	(n =8)	(n =7)	(n =50)
(Total Respondents n= 65)			
HOME HEALTH			
	50%	30%	20%
	(- 10)	(n. C)	(n. 4)
(Total Bospondents n. 20.)	(n =10)	(n =6)	(n =4)
(Total Respondents n = 20)			
DME/OTHER POST ACUTE AFFILIATES	F0/	F9/	00%
	5%	5%	90%
	(n =1)	(n =1)	(n =18)
(Total Respondents n= 20)	(/	(/	(10)
ALL POST ACUTE PROVIDERS			
	18%	15%	67%
	(n =39)	(n =32)	(n =144)
(Total Respondents n= 216)			

6. WHAT IS YOUR <u>ASSESSMENT</u> OF YOUR POST-ACUTE CARE ORGANIZATION'S <u>INFORMATION TECHNOLOGY & PATIENT DATA EXCHANGES</u>?

RESPONDENTS	CURRENTLY NON-EXISTENT OR EXTREMELY POOR	CURRENTLY MINIMAL OR UNDERUTILIZED	CURRENTLY MODERATE OR OCCASIONAL UTILIZATION	CURRENTLY ADVANCED OR DAILY UTILIZATION
NURSING HOME/SKILLED NURSING				
FACILITY (SNF)/ LONG TERM	79%	17%	3%	1%
REHABILITATION FACILITY				
	(n=183)	(n=39)	(n=6)	(n=3)
(Total Respondents n= 231)				
HOSPITAL POST-ACUTE CARE/SHORT			1001	•••
TERM REHABILITATION & AFFILIATES	36%	43%	12%	9%
	(n=42)	(n=49)	(n=14)	(n=10)
(Total Respondents n=115)	(11–42)	(11–49)	(11–14)	(11–10)
HOME HEALTH				
	47%	35%	18%	0%
	(n=16)	(n=12)	(n=6)	(n=0)
(Total Respondents n = 34)				
DME/OTHER POST ACUTE AFFILIATES				
	73%	23%	3%	0%
	(n=22)	(n=7)	(n=1)	(n=0)
(Total Respondents n= 30)	(11-22)	(11-7)	(11-1)	(11-0)
ALL POST ACUTE PROVIDERS				
	63%	26%	7%	3%
	(n=263)	(n=107)	(n=27)	(n=13)
(Total Respondents n= 410)				

7. WOULD AN INFORMATION TECHCNOLOGY PLATFORM FOR PATIENT DATA SHARING & COMPREHENSIVE CARE COORDINATION IMPROVE YOUR ORGANIZATION'S FINANCIAL HEALTH AND <u>YOUR ABILITY TO THRIVE UNDER ACCOUNTABLE CARE</u> & LOWER FEE-FOR-SERVICE REIMBURSEMENTS?

RESPONDENTS	YES	NO	NOT SURE
CHIEF EXECUTIVE OFFICERS			
	91%	0%	8%
	(n=234)	(n=1)	(n=21)
(Total Respondents n= 256)			
CHIEF FINANCIAL OFFICERS			
	98%	0%	2%
	(~ 40)	(-, 0)	(- 4)
	(n=40)	(n=0)	(n=1)
(Total Respondents n=41)			
CHIEF CLINICAL/MEDICAL/NURSING			
OFFICERS	80%	0%	20%
	(n. 24)	(5.0)	(n. C)
	(n=24)	(n=0)	(n=6)
(Total Respondents n = 30)			
ALL POST ACUTE PROVIDERS			
	92%	0%	8%
	(.27)	(4)	(20)
(Total Respondents n = 464)	(n=427)	(n=1)	(n=39)

8. WHAT IS THE STATUS OF YOUR POST ACUTE ORGANIZATION'S <u>CAPABILITY TO INTERNALLY DEVELOP AND IMPLEMENT STRATEGIES TO SUCCEED</u> WITH INFORMATION TECHNOLOGY SOLUTIONS, TO SUPPORT DATA EXCHANGE NEEDED FOR, BUNDLED PAYMENTS, QUALITY REPORTING AND/OR CARE COORDINATION?

RESPONDENTS	NOT CAPABLE WITH OR WITHOUT EXTERNAL SUPPORT OF CONSULTANTS &/OR TECHNOLOGY VENDORS	CAPABLE WITH EXTERNAL SUPPORT OF CONSULTANTS &/OR TECHNOLOGY VENDORS	CAPABLE WITHOUT EXTERNAL SUPPORT OF CONSULTANTS &/OR TECHNOLOGY VENDORS
STANDALONE/SINGLE UNIT PROVIDER			
	18%	65%	17%
(Total Respondents n= 266)	(n=50)	(n=172)	(n=44)
SMALL CHAIN (UP TO 5 UNITS)			
OWNED OR ASSOCIATED WITH	5%	88%	7%
CORPORATE/CHAIN OF POST-ACUTE	-11		
PROVIDERS	(n=2)	(n=36)	(n=3)
(Total Respondents n= 41)			
LARGE CHAIN (6+ UNITS)			
OWNED OR ASSOCIATED WITH	7%	67%	26%
CORPORATE/CHAIN OF POST-ACUTE			
PROVIDERS	(n=2)	(n=18)	(n=7)
(Total Respondents n= 27)			
ALL POST ACUTE PROVIDERS			
& AFFILIATES	16%	68%	16%
	(2.05)	(n. 267)	(2.53)
(Total Respondents n = 395)	(n=65)	(n=267)	(n=63)
(Total Nespondents II – 393)			



9. HAS YOUR POST ACUTE ORGANIZATION BUDGETED MONIES FOR HEALTH TECHNOLOGY PURCHASES/ IMPROVEMENTS IN 2014?

RESPONDENTS	YES	NO	NOT SURE
STANDALONE/SINGLE UNIT PROVIDER			
	8%	89%	3%
	(n=20)	(n=232)	(n=8)
(Total Respondents n= 260)			
SMALL CHAIN (UP TO 5 UNITS)			
OWNED OR ASSOCIATED WITH	78%	0%	22%
CORPORATE/CHAIN OF POST-ACUTE			
PROVIDERS	(n=28)	(n=0)	(n=8)
(Total Respondents n= 36)			
LARGE CHAIN (6+ UNITS)			
OWNED OR ASSOCIATED WITH	84%	0%	16%
CORPORATE/CHAIN OF POST-ACUTE			
PROVIDERS	(n=21)	(n=0)	(n=4)
(Total Respondents n= 25)			
ALL POST ACUTE PROVIDERS			
	21%	72 %	7%
	(n=77)	(n=264)	(n=26)
(Total Respondents n = 367)			

10. IF YOU <u>DO NOT INVEST</u> IN HEALTH CARE TECHNOLOGY, DATA EXCHANGES AND ANALYTICS/REPORTING SOFTWARE IN 2014, <u>WHAT DO YOU FORESEE</u> <u>HAPPENING</u> TO YOUR POST ACUTE ORGANIZATION <u>IN 2015</u>?

RESPONDENTS	WILL BE ACQUIRED/CONSOLIDATED BY A MORE TECHNOLOGY SUPERIOR ORGANIZATION	DEVELOP NEW PRODUCTS AND SERVICES	BANKRUPTCY, DISSOLUTION OR CLOSE/TERMINATION OF SERVICES	OTHER/NOT SURE/ NOTHING	THRIVE DESPITE THE ENVIROMENT
STANDALONE/SINGLE UNIT					
PROVIDER	54%	20%	22%	3%	1%
	(n=146)	(n=54)	(n=61)	(n=9)	(n=2)
(Total Respondents n= 272)					
SMALL CHAIN (UP TO 5 UNITS)					
OWNED OR ASSOCIATED WITH	53%	28%	18%	3%	0%
CORPORATE/CHAIN OF POST-					
ACUTE PROVIDERS	(n=21)	(n=11)	(n=7)	(n=1)	(n=0)
(Total Respondents n= 40)					
LARGE CHAIN (6+ UNITS) OWNED OR ASSOCIATED WITH CORPORATE/CHAIN OF POST-	0%	88%	12%	0%	0%
ACUTE PROVIDERS	(n=0)	(n=23)	(n=3)	(n=0)	(n=0)
(Total Respondents n= 26)					
ALL POST ACUTE PROVIDERS					
	49%	26%	21%	3%	1%
(Total Respondents n = 380)	(n=186)	(n=99)	(n=80)	(n=12)	(n=4)



11. AMONG FORWARD-THINKING PROVIDERS OF POST ACUTE PROVIDERS, WHAT DO YOU PREDICT IS THE <u>DIRECTION POST ACUTE PROVIDERS WILL</u> TAKE IN 2014 TO ADDRESS LOWER FEE-FOR-SERVICE REIMBURSEMENTS & ACCOUNTABLE CARE REFORMS?

RESPONDENTS	ATTEMPT NON-TECHNOLOGY BASED COLLABORATION BETWEEN ACUTE AND POST ACUTE PROVIDERS	PARTICIPATE IN PUBLIC & OR PRIVATE HIE	ACQUIRE CLINICAL WORKFLOW TOOLS & HEALTH DATA ANALYTICS	IMPLEMENT PATIENT ENGAGEMENT SOLUTIONS
CHIEF EXECUTIVE OFFICERS				
	28%	43%	26%	4%
	(n=66)	(n=102)	(n=61)	(n=10)
(Total Respondents n= 239)				
CFO/CIO/CMO/OTHER POST ACUTE CARE LEADERSHIP	22%	74%	3%	1%
(Total Respondents n= 72)	(n=16)	(n=53)	(n=2)	(n=1)

12. WHAT DO YOU PREDICT IS THE TECHNOLOGICAL DIRECTION POST ACUTE PROVIDERS WILL TAKE TO REMAIN/BECOME VIABLE BEYOND 2015?

RESPONDENTS	ACQUIRE TECHNOLOGY BASED COLLABORATION BETWEEN ACUTE AND POST ACUTE PROVIDERS	ENGAGE CONSULTANTS & TECHNOLOGY VENDORS TO PROVIDE STRATEGIES & SOLUTIONS	PARTICIPATE IN PUBLIC & OR PRIVATE HIE	ACQUIRE CLINICAL WORKFLOW TOOLS & HEALTH DATA ANALYTICS, AND EXECUTE INTERNALLY	IMPLEMENT PATIENT ENGAGEMENT SOLUTIONS
CHIEF EXECUTIVE OFFICERS					
	11%	43%	37%	9%	0%
(=	(n=30)	(n=117)	(n=100)	(n=25)	(n=0)
(Total Respondents n= 272)					
CFO/CIO/CMO/OTHER POST ACUTE CARE LEADERSHIP	19%	16%	61%	5%	0%
	(n=12)	(n=10)	(n=39)	(n=3)	(n=0)
(Total Respondents n= 64)					

13. ARE YOU AWARE OF ANY POST ACUTE CARE TECHNOLOGY COMPANIES/PRODUCTS IN THE MARKET THAT CAN ADDRESS THESE ISSUES?

RESPONDENTS				
	NO	YES	YES	NOT SURE
_		(ONE/A FEW)	(SEVERAL)	
NURSING HOME/SKILLED NURSING				
FACILITY (SNF)/ LONG TERM	63%	22%	6%	9%
REHABILITATION FACILITY				
	(n=124)	(n=44)	(n=11)	(n=19)
(Total Respondents n= 198)				
, , , , , , , , , , , , , , , , , , , ,				
HOSPITAL POST-ACUTE CARE/SHORT TERM REHABILITATION	30%	47%	17%	6%
TERIVI REHABILITATION	30%	4/70	1/70	0%
	(n=26)	(n=40)	(n=15)	(n=5)
(Total Respondents n=86)	(11-20)	(11-40)	(11-13)	(11-3)
HOME HEALTH/DME				
TIONE TEACHING DIVIE	88%	6%	0%	6%
	33/3	0 /0	•/3	0,0
	(n=15)	(n=1)	(n=0)	(n=1)
(Total Respondents n = 17)	, -,	,	(-,	,
DME/OTHER POST ACUTE				
	84%	5%	0%	11%
	(n=16)	(n=1)	(n=0)	(n=2)
(Total Respondents n= 19)				
ALL POST ACUTE PROVIDERS				
	78%	37%	11%	12%
	(n=196)	(n=93)	(n=28)	(n=29)
(Total Respondents n= 250)				

14. HOW MUCH OF YOUR <u>POST-ACUTE BUSINESS</u> DO YOU PREDICT <u>SHIFTING TO VALUE-BASED REIMBURSEMENT/ACCOUNTABLE CARE</u> MODELS IN THE NEXT 12-36 MONTHS?

RESPONDENTS				
	NONE (0%)	RELATIVELY SMALL (UP TO 5%)	SIGNIFICANT (BETWEEN 5% & 20%)	VERY SIGNIFICANT (OVER 20%)
NURSING HOME/SKILLED NURSING	()		, ,	(2 22)
FACILITY (SNF)/ LONG TERM	8%	69%	19%	4%
REHABILITATION FACILITY				
	(n=16)	(n=139)	(n=38)	(n=9)
(Total Respondents n= 202)				
HOSPITAL POST-ACUTE CARE/SHORT				
TERM REHABILITATION	5%	36%	36%	22%
	(n=6)	(n=40)	(n=40)	(n=24)
(Total Respondents n=110)	• •	` ,	` '	, ,
HOME HEALTH				
	0%	25%	13%	63%
	(n=0)	(n=6)	(n=3)	(n=15)
(Total Respondents n = 24)				
DME/OTHER POST ACUTE AFFILIATES				
	4%	12%	23%	62%
	(n=1)	(n=3)	(n=6)	(n=16)
(Total Respondents n= 26)	• •	, ,	, ,	, ,
ALL POST ACUTE PROVIDERS				
	6%	52%	24%	18%
	(n=27)	(n=218)	(n=101)	(n=74)
(Total Respondents n= 420)				

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