A Healthy Industry for The Health of Patients

October 20, 2008

The National Consumer Driven Healthcare Summit
Washington, D.C.
That Was Then…

- House calls mark the beginning of modern healthcare
- Life-long physician/friend
Limited access to routine and preventive care

Millions of consumers do not have an established physician relationship or insurance

Health care costs are rising at unsustainable rates

Consumers are increasingly pressed for time and are demanding convenience

These issues will worsen as the primary care physician shortage grows

**FACT:**

30% of patients do not have a medical home

*WSJ.com/ Harris Interactive 2008 Health Care Poll*
Convenient Care Clinics (CCCs) are:

- Small healthcare facilities
- Located in high-traffic retail outlets with pharmacies
- Ownership includes retailers, health systems, corporations
- Usually staffed by certified nurse practitioners or physician assistants, with local physician oversight
- Routine and preventive care only (limited scope of service)
Top Treatments at CCCs
(Source: 2008 Market Strategies International report)

1. Sore throat
2. Common Colds/Cold Symptoms
3. Flu Symptoms
4. Cough
5. Sinus Infection
6. Allergies
7. Immunizations
8. Blood Pressure Testing
What We Are Not

- Medical Home
- Emergency Room
- Urgent Care Clinic

**FACT:**
New England Health Care Institute: Approximately 25% of all ER visits were for non-urgent issues and another 25% could have been addressed by a visit to the doctor’s office. Convenient Care Clinics offer a quick, affordable alternative for patients with pressing, non-emergency medical needs.
Conveniently located
Open seven days a week, with extended weekday hours
No appointments
15-minute visits
Located next to pharmacies in retail locations

FACT:
Many families have dual-earners with busy working moms making the health care decisions for themselves and their families.
Services usually cost between $40 and $75

- Less than physician offices, urgent care clinics or ERs

- Simple and transparent pricing

- Most insurance plans accepted
FACT: 40% of patients seen at Convenient Care Clinics would have gone to ERs or urgent care clinics; 20% would have forgone care (which frequently would have resulted in a more serious illnesses).

*Health Partners, September 2008 as published in the journal Health Affairs. Survey examined five most common episodes treated in a retail clinic: sore throat, otitis media, acute sinusitis, conjunctivitis, urinary tract infection.
CCA has established Quality and Safety Standards that are more stringent than those recommended by the American Medical Association, American Academy of Family Practitioners and American Academy of Pediatrics.
Quality & Safety Standards

All Convenient Care Association Member Clinics:

1. Certified
2. Committed to ongoing monitoring of quality
3. Build relationships with traditional providers and health systems
4. Encourage patients to establish a relationship with a PCP
5. Are in compliance with OSHA, CLIA, HIPAA, ADA and CDC standards
All Convenient Care Association Member Clinics (con’t):

6. Promote good healthcare practices and disease prevention

7. Use electronic health records

8. Provide an environment conducive to quality patient care and infection control

9. Establish emergency response procedures; have relationship with local ER services

10. Empower patients to make informed choices about healthcare
Nurse Practitioners

- Board certified to diagnose, treat and prescribe
- Registered nurses with masters or post-masters level education
- Appropriate local physician oversight
- Use evidence-based protocols that adhere to established clinical practice guidelines
- Experienced in using electronic medical records
- Thoroughly credentialed
Quality: Certification

- Certification: Compliance with CCA's Quality & Safety Standards is a condition of membership
- Goal: To ensure patient safety, the delivery of high-quality care, and to improve quality services to the consumer
  - First third-party certifications are expected in the fall
  - Evaluates member compliance with Quality & Safety Standards
Rapid Growth

Rate of Growth

- January 2006
- December 2006
- May 2007
- December 2007
- December 2008
Nationwide Impact
Deloitte Health Solutions
Retail Clinics: Facts, Trends and Implications

“Retail clinics are a trend that’s here to stay. They are a disruptive innovation worthy of note to health plans, providers and policy makers because consumers have already embraced the concept. Their potential is profound; their growth untapped.”

– Paul H. Keckley, PhD, Deloitte Health Solutions
WSJ/ Harris Interactive 2008 Health-Care Poll

• U.S. adults who have used retail health clinics are very pleased with:
  Quality of care (90%)
  Cost (86%)
  Staff qualifications (88%)
  Convenience (93%)

• U.S. adults believe retail-based clinics can provide low-cost basic services to people who can not afford care and to anyone at times when PCP offices are closed
Who is using convenient care clinics?

• Patients between the ages of 18 and 44 tend to use retail clinics most frequently.

• Patients in younger and older age groups were less likely to visit retail clinics than they were to use PCPs or emergency departments.
• Only 10 simple treatments and services accounted for more than 90% of the retail clinic visits

• Only 2.3% of retail clinic patients were triaged to an emergency department or physician’s office

• As many as 60% of retail clinic patients do not have a PCP, so clearly the clinics are not disrupting physician-patient relationships

• Among patients age 65+, 73.65% of retail clinic visits were for immunizations
The University of Michigan
C.S. Mott Children’s Hospital National Poll on
Children’s Health

• 29% of parents report having a retail clinic in their community

• In communities with retail clinics, 1 out of 6 parents have used them for their children

• 1 out of 4 parents would have taken their children to the emergency room if the retail clinic was not available

• Nearly two-thirds of the parents whose children had already used a retail clinic said they were likely to use a clinic again
Increasing Access & Reducing Costs...Today!

FACT:

More than 95% of CCCs are operated by members of CCA.
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