

Reengineering Primary Care

Evolving Workforce and Workplace Models

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Agenda

Workforce: Resourcing the Primary Care Team

Workplace: Expanding Primary Care
Access Channels

PCPs Will Require the Support of Primary Care Teams...

The **primary care team** will see you now...

RN Care
Coordinators

Behavioral Health
Specialists

Community
Health Workers



Clinical
Pharmacists

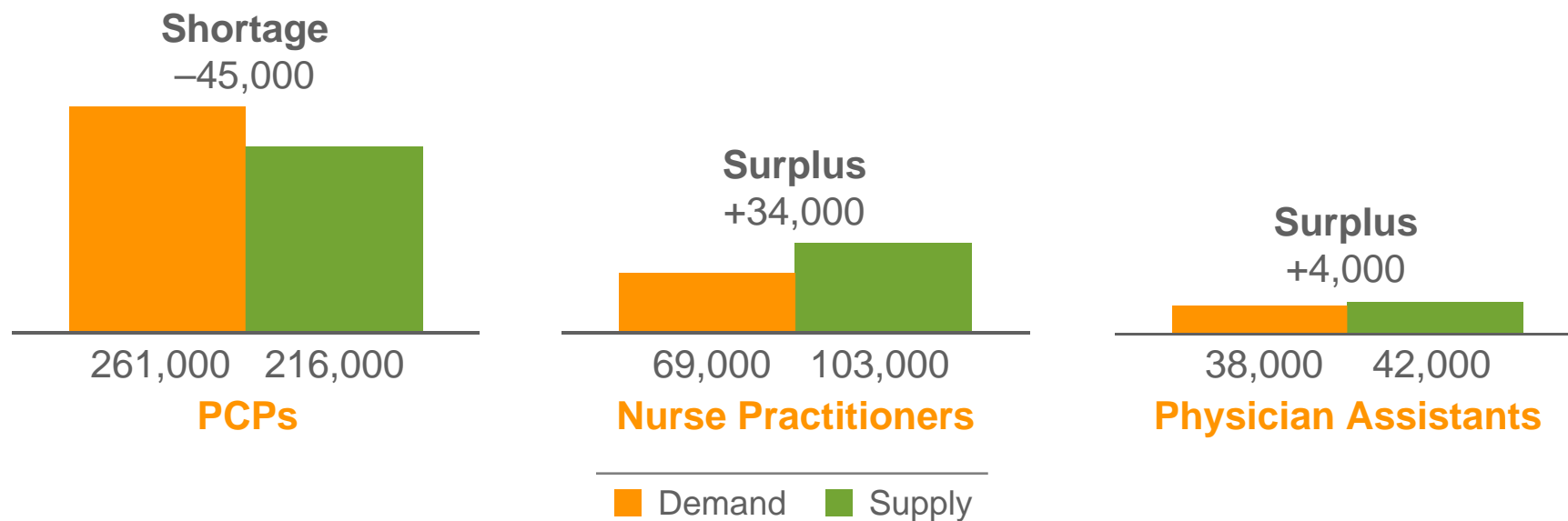
Select
Specialists

Advanced
Practitioners

...And Advanced Practitioners Will Be First-Round Draft Picks in the Move Toward Team-Based Care

Direct Primary Care Providers

US Demand and Supply Estimates, 2025
(Full-Time Equivalents)



One study estimated that advanced practitioners could deliver between 85% and 90% of primary care services.

Notes: This analysis holds the current primary care delivery model constant over time. The nurse practitioner and physician assistant estimates are for providers working in primary care clinical practice.

Sources: Auerbach DI et al. *Health Aff (Millwood)*. 2013;32:1933–1941; Everett C et al. *Health Aff (Millwood)*. 2013;32:1942–1948.

Can Medical Homes and Nurse-Led Clinics Alleviate the PCP Shortage?

Projected Demand and Surpluses/Shortages for FTE Providers, 2025

Scenario	PCPs		Nurse Practitioners		Physician Assistants	
	Demand	Surplus (Shortage)	Demand	Surplus (Shortage)	Demand	Surplus (Shortage)
Status Quo	261,000	(45,000)	69,000	34,000	38,000	4,000
Varying Prevalence of Medical Home and Nurse-Managed Health Center						
Home (15% to 45%)	251,000	(35,000)	75,000	28,000	45,000	(3,000)
Center (0.5% to 5%)	250,000	(34,000)	84,000	19,000	36,000	6,000
Home (45%); Center (5%)	240,000	(24,000)	91,000	12,000	43,000	(1,000)
Varying Medical Home Panel Size (Home 45%, Center 5%)						
Panel Increased 20%	223,000	(7,000)	84,000	19,000	39,000	3,000
Panel Decreased 20%	262,000	(46,000)	98,000	5,000	48,000	(6,000)

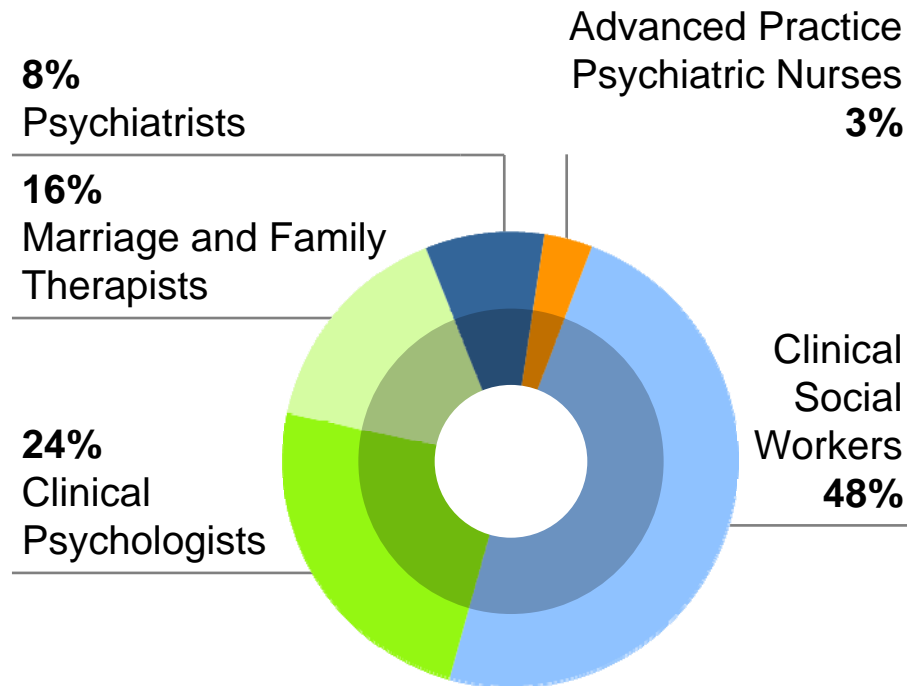
FTE = full-time equivalent.

Source: Auerbach DI et al. *Health Aff (Millwood)*. 2013;32:1933–1941.

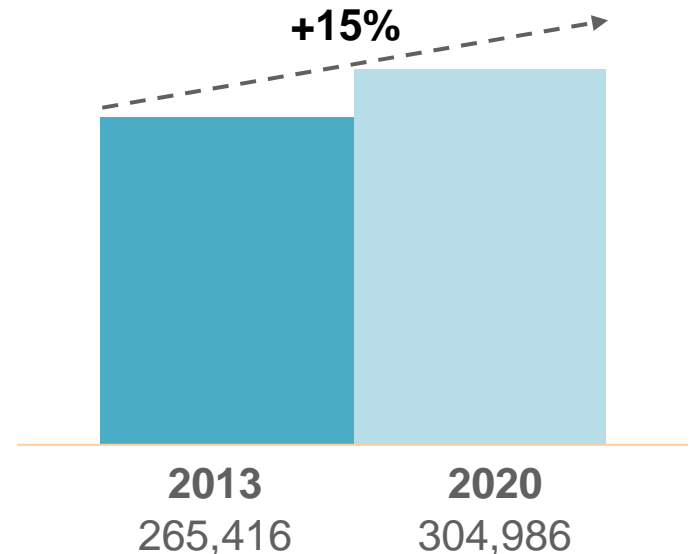
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Build Your Bench Strength: Think Behavioral Health Specialists and Clinical Pharmacists

Behavioral Health Specialists Workforce Size Estimates (Headcounts)



Pharmacists Workforce Size Estimates and Projected Growth (Headcounts)



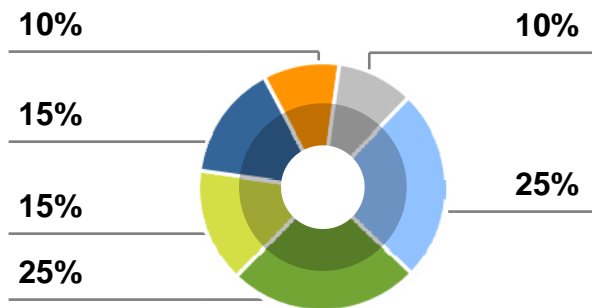
Notes: The definition of behavioral health specialists is limited to highly trained (eg, graduate degree) professionals. The behavioral health specialist workforce data are based on association membership and certification data from 2008, 2009 and 2011.

Sources: Heisler EJ and Bagalman E. *The Mental Health Workforce: A Primer*. Congressional Research Service. January 7, 2014; *Behavioral Health, United States, 2012*. Substance Abuse and Mental Health Services Administration. 2013; Knapp KK and Cultice JM. *J Am Pharm Assoc* (2003). 2007;47:463-470.

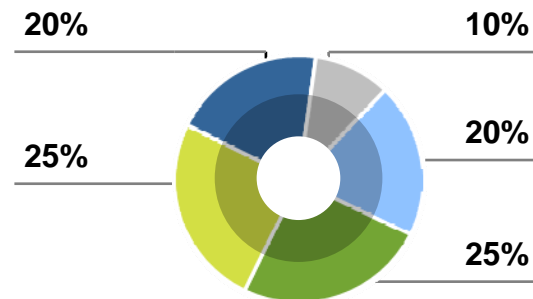
Tailor the Composition of Primary Care Teams Based Upon Population and Locally Available Resources

Spectrum Health System, Grand Rapids, MI

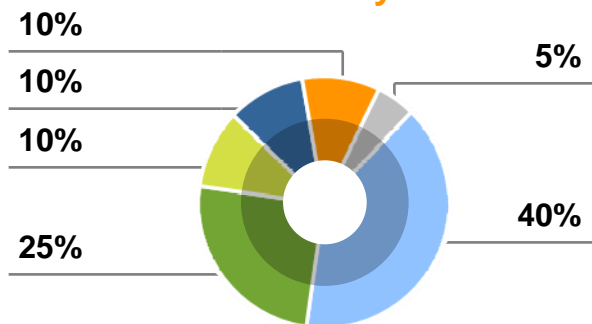
Rural Primary Care



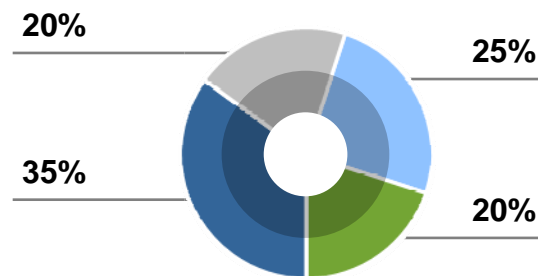
Spectrum Health Home-Based Primary Care



Urban Primary Care



Center for Integrative Medicine



APP = advanced practice provider; PharmD = doctor of pharmacy. Source: Sg2 Webinar: Rethinking the Primary Care Network—From Loss Leader to Strategic Priority. April 3, 2013.



Consider Shared Medical Appointments to Expand Access and Collaboration

Harvard Vanguard Medical Associates, Boston, MA

SITUATION

- Deployed shared medical appointments to increase capacity and access across 18 specialties

SOLUTION

- Patients in a group of 10 to 12 are seen by a physician, facilitator, scribe and RN.
- Physician talks with each patient while others observe and the scribe updates the EMR.
- Patients have opportunities to interact with others who have similar conditions.

RESULTS

- Reduced appointment wait times by 50%
- Increased practice capacity 20% to 50%
- High patient satisfaction

EMR = electronic medical record.

Source: Stempniak M. All together now: Will group appointments help relieve the doc shortage? *H&HN Daily*. April 8, 2013.

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What Solutions Reside in Your Primary Care Workforce Playbook?

● Expand the Primary Care Team

- Licensed providers
- Nonlicensed health staff
- Nontraditional support staff

Consider Alternative Primary Care Delivery Formats

- Medical homes
- Nurse-led care centers
- Shared medical appointments
- Specialist-led primary care



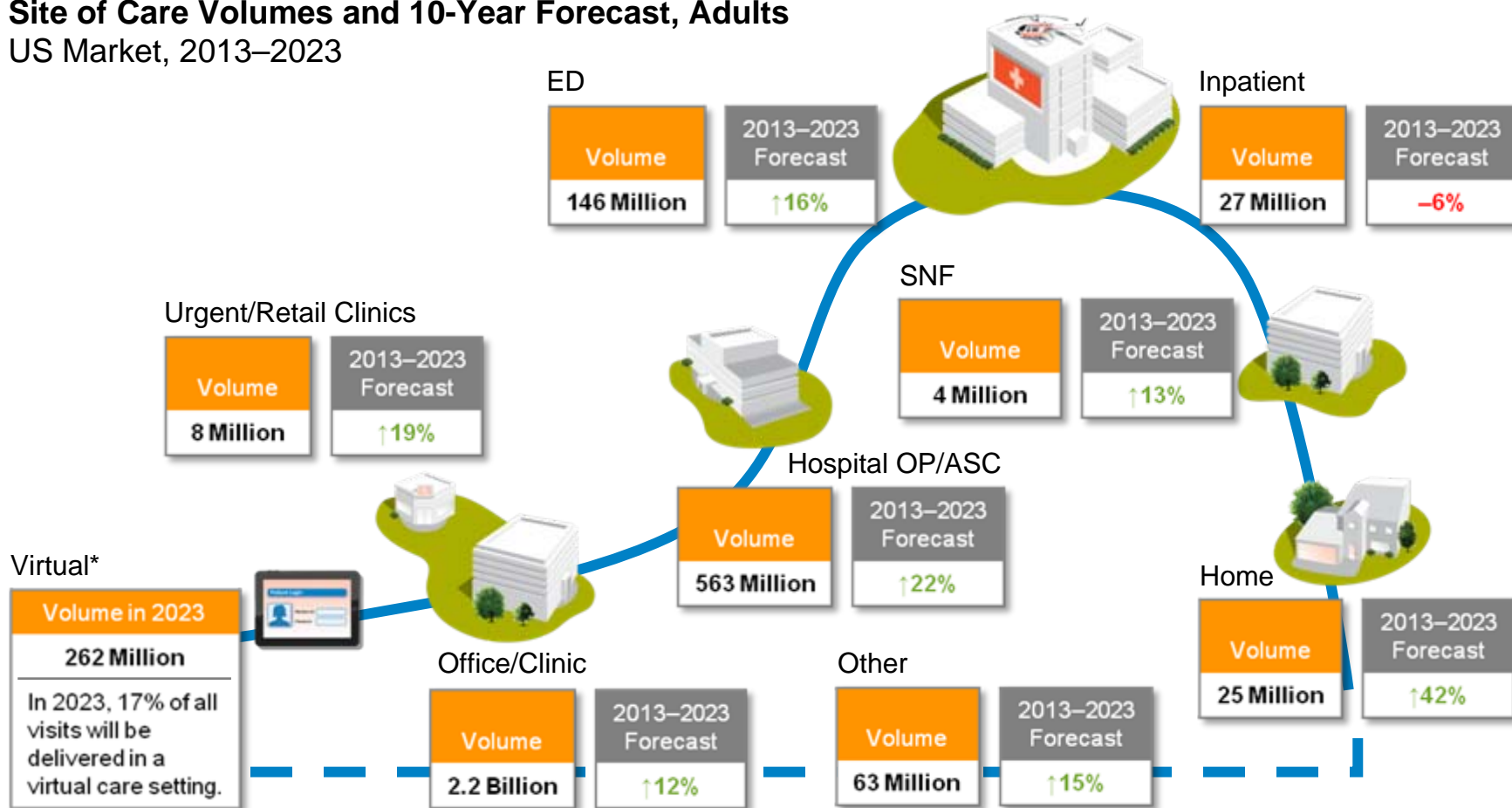
Agenda

Workforce: Resourcing the Primary
Care Team

**Workplace: Expanding Primary
Care Access Channels**

Establish Your Ideal Footprint: Site of Care Volumes and 10-Year Forecast

Site of Care Volumes and 10-Year Forecast, Adults US Market, 2013–2023



*This analysis just includes E&M visits shifting from the office/clinic site to the virtual site. The analysis excludes ages 0–17 and the obstetrics and psychiatry service lines.

ASC = ambulatory surgery center; E&M = evaluation and management; OP = outpatient; SNF = skilled nursing facility.

Sources: Impact of Change® v13.0; NIS; PharMetrics; CMS; Sg2 Analysis, 2013.

Use Retail and Urgent Care Clinics to Offer Consumers Convenient Options (and Add Capacity)

By 2020, **Walmart and pharmacy-based clinics (eg, CVS Caremark) combined** will be the largest providers of primary care services.



Know That Employer On-site Clinics Are Another Developing Channel for Primary Care Delivery...

Employer On-site Clinics

Scope of Services

Traditional

- Occupational medicine
- Workplace injury evaluation and treatment
- Wellness vaccinations
- Biometric and drug screenings
- New employee physicals

Emerging

- Primary care
- Chronic disease management
- Lifestyle and prevention programs
- Fitness programs
- Pharmacy and lab services

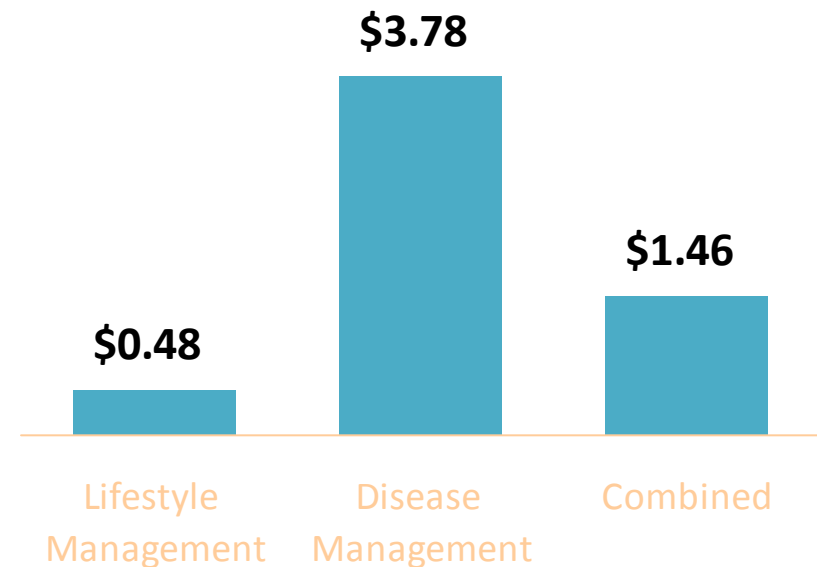
...But Does This Channel Work?

PepsiCo, Purchase, NY

WELLNESS PROGRAM COMPONENTS

- On-site wellness events
- Complex care management
- Health risk assessments
- Maternity management
- 24/7 nurse advice line
- **Lifestyle management**
- **Disease management**

Return on Investment, 2011 (Return for Each Dollar Invested)



Notes: Lifestyle management programs included weight management, nutrition management, fitness, stress management and smoking cessation. Disease management programs were offered to employees with 1 of 10 chronic conditions and focused on medication adherence and self-care knowledge and abilities. Source: Caloyeras JP et al. *Health Aff (Millwood)*. 2014;33:124-131.

Expect Virtual Visits to Become a Common and Central Component of Patient Care

Today

70% of patients are comfortable communicating with physicians via texting, email or video instead of in person. (Cisco study 2013)

Tomorrow

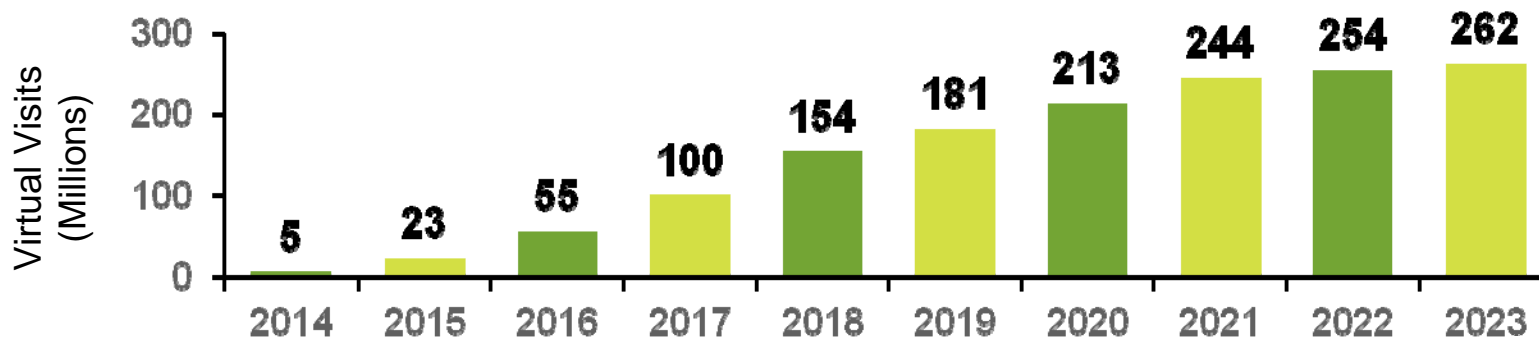
“Within 10 years, face-to-face visits will be the exception rather than the rule.”

—Eric Dishman, Intel Fellow

Sg2 forecast: By 2023, 17% of all E&M visits will occur virtually.

Sg2 Forecast, Virtual E&M Visit Volumes

US Market, 2013–2023



Note: Volumes exclude obstetrics and psychiatry.

Sources: Impact of Change® v13.0, PharMetrics; CMS; Sg2 Analysis, 2013.

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Today, Virtual Visits Offer Cost Savings and High Resolution Rates

HealthPartners, virtuwell Online Clinic, Minnesota

- Online clinic provides 24-hour online care for 40 simple conditions.
- Model combines interview algorithms, clinician phone interactions and advanced practitioner review.
- Average cost per episode is \$88 less than traditional settings.
- 94.2% of users would “Yes, Definitely” recommend the service to a friend.

Cost per Episode for Most Common virtuwell Conditions

Condition	virtuwell	Non-virtuwell	Savings
Acute sinusitis	\$87.70	\$166.60	\$78.90
Lower genitourinary infection	\$74.36	\$201.97	\$127.61
Conjunctivitis	\$61.30	\$130.30	\$69.01

Note: Savings calculations may vary due to rounding.

Source: Courneya PT et al. *Health Aff (Millwood)*. 2013;32:385–392.

The Latest in Patient Self-Management: Smart Contact Lenses

Google, Mountain View, CA

What Is It?

- Soft contact lens used to monitor glucose levels in tears
- Collects and transmits one glucose reading per second

How Does It Work?

- Includes a miniaturized glucose sensor
- Contains a hair-thin antenna to transmit data to an external device
- Pulls energy from radiofrequency waves
- Expected to take five years to reach consumers



© Google Inc.

Sources: James SD. Google contact lens to monitor diabetes holds promise, say doctors. ABC News. January 17, 2014; Mendoza M. Google contact lens could be option for diabetics. Associated Press. January 26, 2014; Sg2 Analysis, 2014.

What Solutions Reside in Your Primary Care Workplace Playbook?



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Leverage Contemporary and Emerging Access Channels

- Retail clinics
- Urgent care centers
- Employer on-site clinics
- Virtual visits

Incorporate Self-Care

- Home-based diagnostics
- Mobile health applications
- Social networks

...And Don't Forget Workflow

- Web portals
- Open access scheduling



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