

Who Will Provide Primary Care in the Future?

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Tee up Videos

Lisa Bielamowicz

<https://www.youtube.com/watch?v=x6XUm0dfDGs>

WellnessFX

<https://www.youtube.com/watch?v=K3U5aeQ3hhQ>

Scanadu

<https://www.youtube.com/watch?v=gSxNjTXfgBo>

Must

Healthcare ~~Will~~ Transform

Why Healthcare Must Transform

- **Priorities are changing:**
 - People will embrace health as a personal attribute
 - Cost to the individual will be an important driver
 - Commoditization will occur at multiple levels
 - Quality will be a given – Efficiency will be the rule
 - Individuals will own and manage all of their data
 - Trusted health information will be the new currency
 - Access will be defined through engagement

Innovations driving Healthcare Change

- Team-based care - **PCMH** (we call it PACT)
- Transactional coherent health information
- Health Management Platforms vs EMRs
- Data big and small
- Connected health
- Commoditization

Re-Envisioning Healthcare

- Health care becomes personalized according to an individual's needs and values – “*Precision Health*”
 - Still evidence-based care... but individualized for me
 - Quality for an ‘n of 1’ + safety and prevention of harm
- Control shifts from health systems to the individual
 - Individuals own the entirety of their *health information*
 - That record is agnostic to the source and inclusive of all data generated by providers and by the individual
 - *Access* is defined by whom patients choose to help:
 - Support health promotion, prevention and well being
 - Navigate complex healthcare decisions

What Does That Mean... Really



Retail Primary Care is Here

Walgreens

is a large national retail pharmacy



So is CVS and Rite Aid



Target Enters the Fray with CVS

June 15, 2015

Target and CVS Health announced today that we have signed an agreement for CVS Health to acquire Target's pharmacy and clinic businesses. CVS Health will rebrand and operate Target's pharmacies through a store-within-a-store format, and Target's clinic locations will be rebranded as CVS/Minute Clinic.



 **CVS**Health

 **minute clinic**

the medical clinic in **CVS/pharmacy**¹¹



Walmart



Walmart is the world's largest retailer



United wants to be your primary care provider

Walgreens wants to be your primary care provider

Walmart wants to be your primary care provider

Why are a large insurance company, national retail pharmacies and big box retailer all entering the same space?

- What do they want?
 - To drive front-end sales ?
- What do they bring?
 - Convenience – care when and where you want
 - Logistics and supply chain management
- What do they really want?
 - Access to health information

big data = big \$

So, now it gets interesting

Watch: Are You Ready to Compete With Walmart

Lisa Bielamowicz, MD

Chief Medical Officer

Health Care Advisory Board

<https://www.youtube.com/watch?v=x6XUm0dfDGs>

The Health Care Reality #1

Health care is an information business

- It's increasing - and increasingly complicated
- Most of which patients can't access
...or understand

Healthcare thrives on information asymmetry

The Health Care Reality #2

- Healthcare functions on **the transaction**
 - Patients come to us because they have to

Few industries remain that are based on mandatory transactions

The Health Care Reality #3

Integrated healthcare systems must configure their **informatics capability** in order to undergo true transform

The current EHR construct is not sufficient for health care delivery models of the future

Documentation vs Communication

Healthcare informatics must shift from a focus solely on documentation to one on communication and information transfer



Changing Dynamics of Healthcare

- Patients engage (us) as partners in their care
 - Focus on preventive health
 - Focus on chronic disease management
 - Focus on patient-driven outcomes
- Demand for convenient, local and timely care
- Demand for complementary/alternative care
- Demand for readily available information

Providers

Patients

And now it gets even more interesting



ZocDoc



Search Results



Dr. Alexander McCoy - MD

427 Charlette Street
New York, NY 10015



Next Availability: Sat, May 18



Dr. Farrah Begoya - MD

568 Broadway
New York, NY 10012

★★★★★ Reviews (100) >



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568 Broadway
New York, NY 10012



Next Availability: Tue, May 21



Dr. Graham Jones - MD

411 Windmore Street
New York, NY 10011



Next Availability: Tue, May 21



Dr. Lynn Kim-Burns - MD

12345 W 10th Street
New York, NY 10021



Next Availability: Tue, May 21

Book an Appointment

Wed, May 22

11:30 AM

12:00 PM

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1:00 PM

1:30 PM

2:00 PM

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3:00 PM

Professional Statement

Dr. Begoya provides comprehensive care for skin conditions to patients of all ages. She considers a strong patient-physician relationship an integral part of the success within each individual appointment. She speaks both English and Spanish and specializes in cutaneous laser surgery, general dermatology, and skin examinations. Additionally, she enjoys attending cultural events including the arts and community service involvement.

Open Table for Doctor's Visits

Self scheduling

Reviews

Guarantees



InstyMeds

The Redbox for Prescriptions



Access

Time

Distance

Choice



Labs Will Be Next

Watch: Wellness FX

<https://www.youtube.com/watch?v=K3U5aeQ3hhQ>



23andMe



Breathometer

A Word About Big Data

Companies & Industries Hospitals Are Mining Patients' Credit Card Data to Predict Who Will Get Sick



**Don't lie
to me, Susan,
I know about the
2 a.m. Papa John's
deliveries**

**Bloomberg Businessweek
Companies & Industries**

**By Shannon Pettypiece and
Jordan Robertson
July 03, 2014**

Barry Schwartz

The Paradox of Choice

WHY MORE IS LESS

*“The Internet created a massive choice problem and then started to solve it with reviews and recommendations
....too many reviews are as bad as no reviews”*

Not Who Will Provide, but What Will Healthcare of the Future Be

Healthcare is an information business

Coherent and transactional - Logistics and scale
Data big and small and it's not just in the EMR

Consumer **behavior** only drives expectations

As **information asymmetry** is reduced then

Commoditization accelerates transformation

Managing data and **information exchange** is the
new **value** proposition in healthcare

What is the role of AI ?

Watch: Scanadu

<https://www.youtube.com/watch?v=gSxNjTXfgBo>

Summary

- Healthcare is an information business
- Information asymmetry is breaking down
- Mandatory transactions are being eroded
- Commoditization is driving change
- Communication is replacing documentation
- Managing data and **information exchange** is the new **value** proposition in healthcare

Conclusion

Better Information

Better Decisions

Better Health

Questions?

