



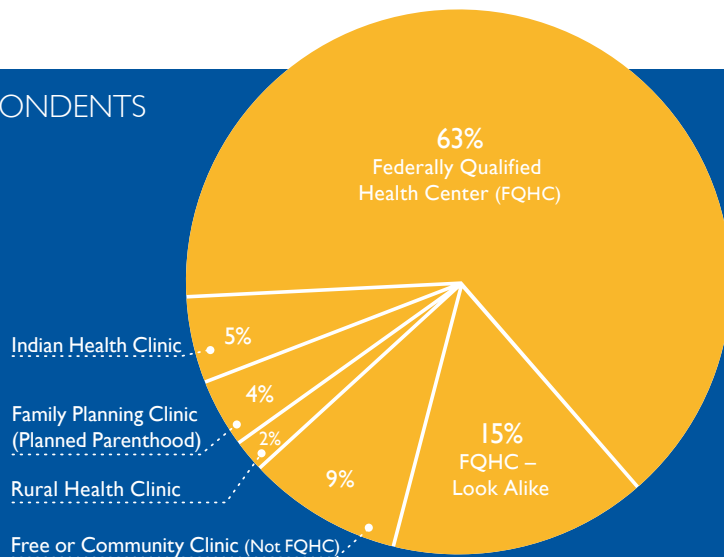
Health Information Technology (HIT) Landscape Survey

Between now and January 2014, implementation of the Affordable Care Act (ACA) will profoundly affect California's community clinics and health centers (CCHCs). Over 4 million Californians are anticipated to become newly eligible for health insurance, which will put high demands for services on CCHCs, many of which are already operating at full capacity. In this expanded healthcare marketplace, CCHCs will also face unprecedented competition with other providers to attract and retain both current and newly eligible patients.

The ability to implement and use Health Information Technology (HIT) has become increasingly critical for all health care providers within this context of Health Care Reform. To advance the HIT efforts of CCHCs, CPCA helped to launch the California Health Information and Partnership Strategies Organization (CalHIPSPO), a federally-funded nonprofit Regional Extension Center that supports adoption, implementation, and utilization of electronic health records (EHRs) for medical providers in all California counties, except Los Angeles and Orange.

CalHIPSPO has been a catalyst for the increased utilization of EHRs and other HIT tools within CCHCs over the past two years. In order to gauge the current HIT capacity and ongoing needs of California's CCHCs, CPCA conducted an HIT Landscape Survey with member and non-member CCHCs in June 2012 and received responses from 120 clinic corporations.

RESPONDENTS

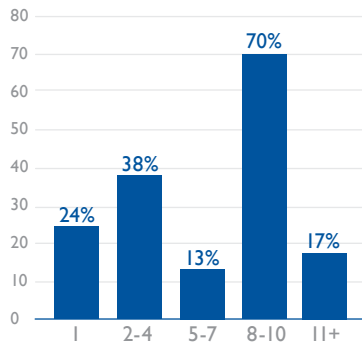


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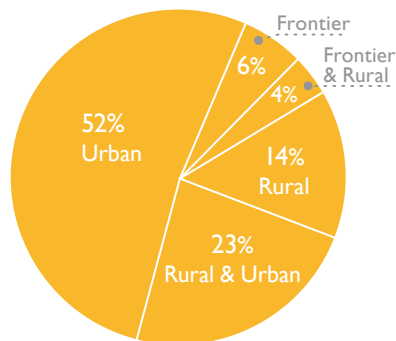
CLINIC CORPORATIONS
RESPONDED

RESPONDENT CHARACTERISTICS

Number of Sites Operated



Location of Sites



Key Findings

The HIT Landscape Survey included questions on implementation and Meaningful Use of EHRs; Patient-Centered Medical Home (PCMH) recognition; utilization of Telehealth services; and participation in Health Information Exchange (HIE) programs. Key findings from the Survey indicate that California's CCHCs are strongly committed to the Meaningful Use (MU) incentive program, earning more than \$49 million in Stage 1 payments over the past year. Since 2010, the date of CPCA's last HIT Landscape Survey, full implementation of EHRs has increased almost 20 percent, use of Telehealth services has increased almost 10 percent, and participation in some form of HIE has increased over 5 percent. All of this progress lays a strong foundation for the efforts of CCHCs to be recognized as Patient-Centered Medical Homes, with almost 50 percent of survey respondents planning to submit for PCMH recognition within the next year.

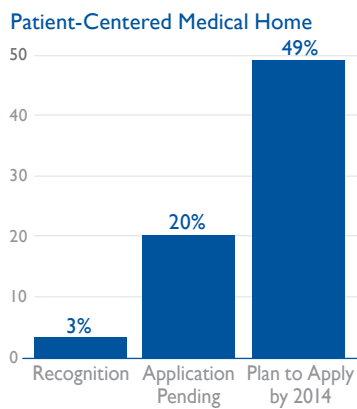
To support these efforts, CPCA has developed a comprehensive Patient-Centered Health Home (PCHH) Initiative that includes PCMH readiness assessment, practice transformation coaching, online project management and documentation tools, web-based learning modules, and a robust data analytics and reporting tool (DRVS). California currently lags behind the rest of the nation in PCMH recognition, but CPCA's PCHH Initiative, along with other federal and private foundation support, is anticipated to catapult California's CCHCs into the forefront of providing high-quality, cost-effective, patient-centered care.

\$49,278,750

STAGE I MEANINGFUL USE PAYMENTS SINCE 2011

Patient-Centered Medical Home (PCMH)

- **3%** with PCMH recognition
- **20%** PCMH application pending
- **49%** plan to apply for PCMH by 2014

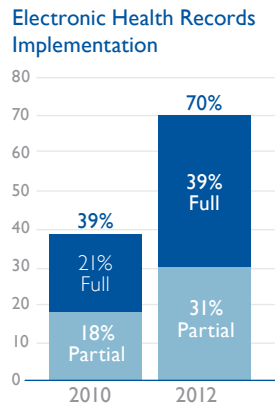


Meaningful Use and Electronic Health Records

- **\$49,278,750** in Adopt/Implement/Upgrade (AIU) payments received since 2011
- **Over 1,700** providers will report on MU Stage 1 in 2012
- **78%** anticipate having providers in the MU Program every year consecutively

EHR Implementation

- **2010:** 18% partial, 21% full (39% total)
- **2012:** 31% partial, 39% full (70% total)



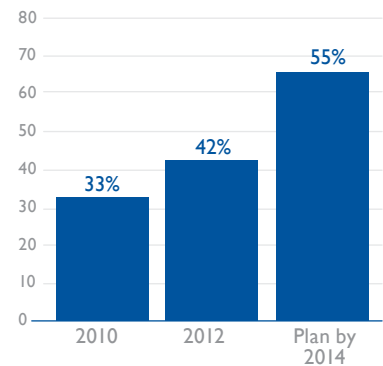
Telehealth Services

- **Top 2** applications of telehealth are interactive video (61%) and store and forward transmission (64%)
- **55%** plan to integrate telehealth in next 1-2 years
- **Top 3 barriers** to integrating telehealth: reimbursement for services, equipment costs, workforce allocation (coordination efforts)

Telehealth Provided

- **2010:** 33%
- **2012:** 42%
- **Plan by 2014:** 55%

Telehealth Services Provided



72%

PCMH RECOGNITION –
CURRENT OR ANTICIPATED
BY 2014

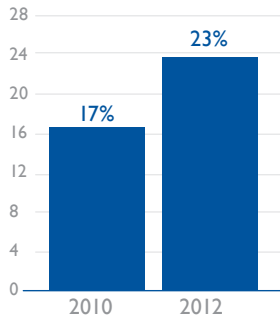
70%

EHR IMPLEMENTATION

97%

TELEHEALTH PROVIDED –
CURRENT OR ANTICIPATED
BY 2014

Participating in HIE



Health Information Exchange (HIE)

- **23%** are participating in a formal HIE compared to 17% in 2010
- **38%** can electronically exchange data internally and externally, **28%** internally only
- **Top 5** activities in the HIEs: immunization registry, ePrescribing, eReferral for specialty care, sending lab orders, patient demographics

Type of information that organizations would most like to exchange

- 65% immunization registry
- 60% receive structured lab results
- 58% send lab orders
- 58% ePrescribing
- 57% eReferral for specialty care

Type of centralized services that would be most useful to organizations

- 60% eligibility and insurance status
- 55% ePrescribing tool
- 48% patient look-up (i.e. master patient index)
- 43% EMR

Ongoing Efforts

The ultimate goal of HIT is to build a robust health care infrastructure that enhances access to and delivery of comprehensive medical services, improves the patient experience, and leads to better health outcomes. California's CCHCs are well-positioned to lead the way in HIT implementation and best practices, and CPCA will continue to support these ongoing efforts as a key component of our mission to ensure health care access for all.

CPCA
California Primary
Care Association

Health Care Access for All

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