This Year’s Update

1. How much has the dial moved on EMR nationally?
2. What are the current big themes in the Australian context?
3. Some predictions for 2019 and beyond
Summary Position
Public Hospital EMR

- NSW the leading state by deployments to date
- Expect significant movement over next year in SA, QLD, NT and VIC
- WA remains the laggard/Luddite state
- Overall we are 48% of the way through putting Integrated EMR solutions across the public sector
Developments over last 12 months

Total 6% increase in public hospitals with an integrated EMR
Summary Position
Public Hospital EMR

- Market still dominated by Cerner as key system in NSW and QLD plus major presence in VIC
- Intersystems share will go grow as NT and sites in VIC go live
- Melbourne Parkville campus will build EPIC presence but will further concentrate skilled resources
- Allscripts halted for now in SA but note win in Gippsland
Data challenges require collective input

- Significant effort required to track:
  - Deployments
  - Bed numbers
  - Closures/openings
- Local input will keep this accurate
- Needs a coordinating body

<table>
<thead>
<tr>
<th>Hospital Name</th>
<th>Bed Count</th>
<th>Health Group</th>
<th>Cerner/Slainte</th>
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<tbody>
<tr>
<td>Sunshine Hospital</td>
<td>400</td>
<td>Western Health</td>
<td>BossNet</td>
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<td>EPIC</td>
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<tr>
<td>Bendigo Hospital Campus</td>
<td>444</td>
<td>Bendigo</td>
<td>Slainte</td>
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</tbody>
</table>

Extract from original data 2017
Common Themes

1. Cost
2. Implementation Approach
3. Usability
4. Integration
Cost
Cost

It’s not the cost of the software

It’s the cost of the change

New funding takes the cost to almost half a billion dollars
Implementation Approach

Something Everywhere Vs Exemplar Model
Implementation Approach

Global Digital Exemplars: “Ivy League”

Salford Royal
NHS Foundation Trust

Warr University Teaching Hospital
NHS Foundation Trust

The Royal Liverpool and Broadgreen University Hospitals
NHS Trust

Oxford University Hospitals
NHS Foundation Trust

University Hospitals Bristol
NHS Foundation Trust

University Hospital Southampton
NHS Foundation Trust

City Hospitals
Sunderland
NHS Foundation Trust

University Hospitals
Birmingham
NHS Foundation Trust

West Suffolk
NHS Foundation Trust

Luton and Dunstable Hospital
NHS Foundation Trust

Royal Free London
NHS Foundation Trust

@DrAndrewHarper
#rsmrdh17
Implementation Approach

Either can work

It’s all about speed to value
Usability

EHR adoption is increasing, but EHR usability remains a problem for end-users trying to enter and access data efficiently.

According to a new Frost & Sullivan survey of healthcare CIOs, EHR users have often complained about the time-consuming and costly nature of entering, modifying, and accessing data in the EHR.

EHR users and hospital administrators are also concerned about the impact of the EHR on the clinical workflow.

According to the survey, problems related to searching EHRs are commonplace. The slow performance of the EHR system and a lack of consistent query results are presenting EHR users with common issues.

The Checkley Group

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Usability

Usability is in the eye of the beholder.

It is massively influenced by initial acceptance.
Integration is a Clinical Issue
Integration is a Clinical Issue

Patient-Centric OR Department-Centered
Which one are you?
Predictions

1. Private hospital groups will continue to struggle with Value For Money whilst they continue to see the equation as being about ROI
2. No major changes in strategy for the big state rollouts – pending review in SA
3. Voice Rec will not solve the doctor data entry problem in the short to medium term. In the long term Voice Rec and device integration combined will change everything
4. Integration of Departmental systems will increasingly become a clinical issue and organisations will move away from stand-alone systems for ICU, Maternity, etc
5. Focus shift to optimising EMRs and using the data
Contact me

Email:
bruce.pedersen@checkley.com.au

Website
www.checkley.com.au

Phone
1300 592 062
or
0411 146 733
Developments over last 12 months

- Big state programs moving forward in NSW and QLD
  - NSW completes EMR2 and makes significant progress on EMM
  - Metro South completes full stack across all hospitals
- Pause in SA after partial go-live at new RAH
- Several significant uplift programs in VIC
  - Peninsula Health
  - Eastern Health
  - Funding for EPIC rollout across Parkville campus
- Planning phase continues in NT
- Private groups still in planning mode
  - One large group close to a decision
  - Others still struggling with ROI
  - Meditech clinicals rolled out at Lifehouse