



Survey Report, February 2017

Patient Expectations of Medical Information Sharing & Personalized Healthcare

Research Objectives

Despite advances in the use of electronic health records (EHRs), the health industry continues to struggle with sharing health information and making patient data available across the healthcare system. One study, for example, found that only a quarter of all hospitals are able to functionally exchange (find, send, receive and use) clinical information with external providers. While much attention has focused on this issue from an industry perspective, it's unclear what patients think about it. Are they aware of the gaps that exist in medical information sharing? This was the guiding theme of our research.

The primary objectives of this survey were to:

1. Understand how important **medical information sharing**, among other factors, is to patients in order to receive a personalized care experience.
2. Understand the degree to which **patients believe medical information sharing is happening** behind the scenes of their healthcare.
3. Understand how care provider access to a patient's full health history may **influence that individual's perceptions of care quality and trust in care**.
4. Assess whether patients are using **digital health technologies to monitor their health** and whether they see value in using new technologies to engage with their care providers.

Methodology

Transcend Insights conducted an online survey among U.S. adults who have seen a doctor within the past year.

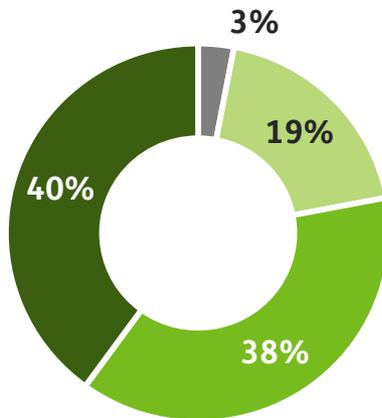
Fieldwork was conducted by Research Now between January 20 and January 26, 2017. A total of 2,597 responses to the survey were collected.

Respondents were nationally representative of U.S. Census statistics for age, gender and geographic region. Oversamples were done for patients with chronic health conditions and consumers on Medicare health plans.

Summary of Findings

Nearly all patients felt it was important for their **full medical history to travel with them** in order to receive quality care, regardless of institution or location.

Importance of Medical History that Travels with Patients



- Not at all Important
- Somewhat Important
- Extremely Important
- Very Important

72% of patients assume that their care provider(s) can easily share and access important information about their medical history, whenever or wherever they need care.

Patients identified the following as the most important to receiving a personalized care experience:*

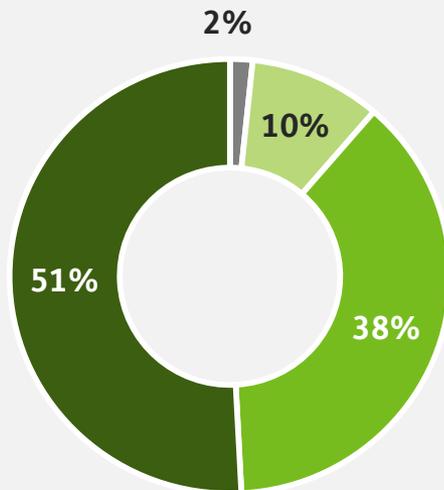
- The ability for care providers to easily share and receive important information about their medical history (**93%**)
- Access to their medical records (**92%**)
- Care that addresses mental and physical health (**90%**)

*includes both “extremely” and “somewhat important” responses

Summary of Findings

Over half of patients believe their care providers have a very good understanding of their full medical history.

Current Providers' Understanding of Medical History

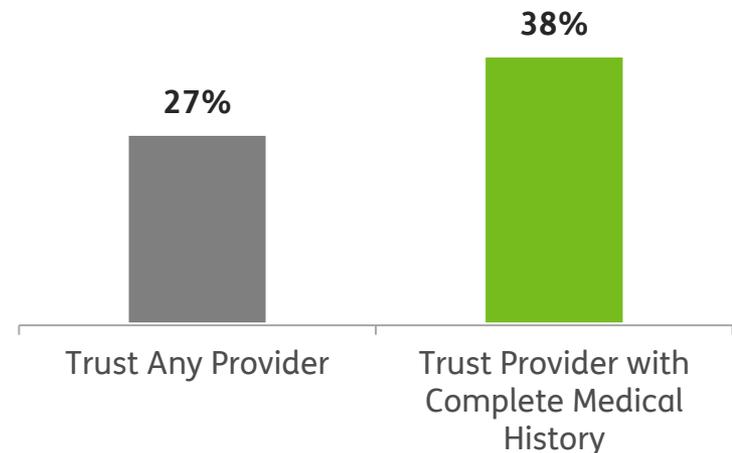


- No understanding at all
- Very little understanding
- Some understanding
- Very good understanding

51% of patients said that a care provider who is able to access their full medical history and share it with other medical professionals – regardless of location – would make them consider switching care providers for that capability alone.

Patient trust in the care they receive from a care provider **increases when that provider has access to their full medical history.**

Differences in Trust

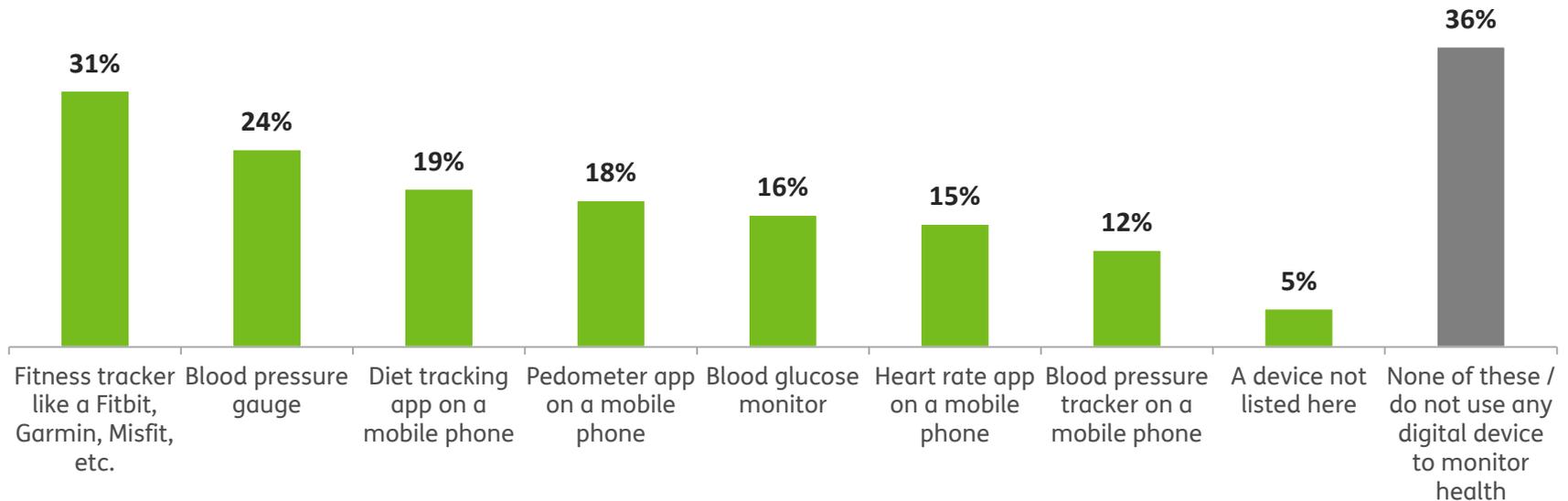


Summary of Findings

64% of patients say that they used a digital device (including mobile apps) to manage their health.

71% believe it would be helpful for their care providers to have access to this information as part of their medical history.

Use of Digital Health Devices



Discussion

Survey respondents believed that it was **important for their medical history to be complete and easily shared among care providers** — regardless of location or institution. These capabilities were consistently rated the top factors for receiving high quality or customized care.

Are patients getting what they want? It would seem so. A majority (72 percent) of respondents believed that their **care provider(s) could easily share their medical history** — whenever or wherever care was needed.

Yet, industry studies that have examined the current state of information sharing in health care suggest otherwise. One study in the Journal of the American Medical Association, for example, found that — despite attempts by primary care physicians (PCPs) to share patient medical records — only **34.8 percent of specialists received information about a patient from their referring PCP**. Information sharing between health care organizations is also reported to be a continuing challenge for the industry.

Patients place a great deal of trust in care providers, but may not know that the **technology systems care providers use present challenges to easily sharing full medical records** with all providers who might need them.