

The State of Remote Patient Monitoring and Chronic Care Management

New research reveals that healthcare C-suites are moving to implement RPM and CCM to improve patient outcomes, increase satisfaction, and build practice value.



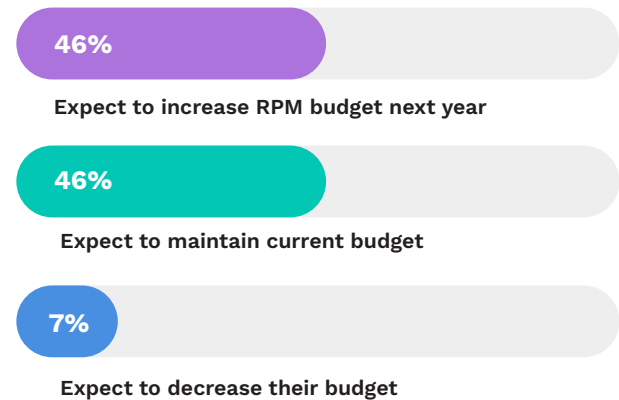
MD Revolution commissioned healthcare consultancy Sage Growth Partners to independently survey 141 C-level leaders and physicians, surgeons, nurses, and office managers. This report illustrates how RPM, CCM and underlying technologies are driving clinical and business goals and proving to be a valuable investment that delivers ROI — when operated strategically.

Key Takeaways

- Healthcare professionals participating in our survey say they implemented RPM and CCM programs to positively impact patient care and increase patient satisfaction.
- The majority of respondents expect to increase or maintain their investments in CCM and RPM in the next year.
- Patients are positive about the experience of participating in RPM and CCM programs and consider them a “concierge service.”
- Survey respondents say proven implementation processes deliver predictable and low-risk methods for starting.
- Health systems and physician practices that have already aligned with an external partner on RPM and CCM are finding the investment so worthwhile that the majority are satisfied and unlikely to switch partners.
- When choosing an RPM partner, providers look for tools to connect with patients via secure messaging, receive real-time alerts, and enhance clinical document support.
- Survey respondents also prioritize RPM and CCM programs that can be integrated with their EHR to improve quality, care decisions, and compliance needs.
- Respondents say offering both RPM and CCM together presents advantages that maintaining distinct programs cannot.

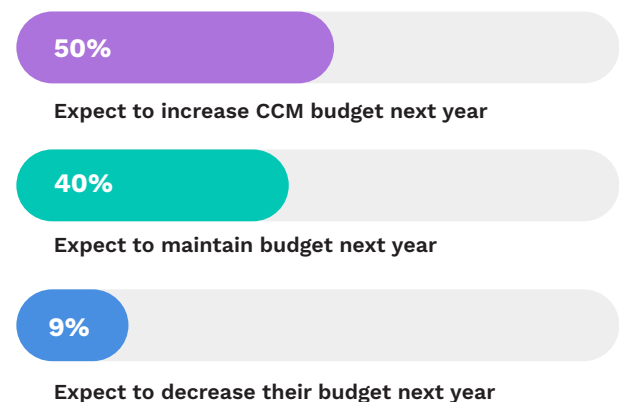
Budget Forecast: Remote Patient Monitoring

When asked whether they are anticipating changes to their organization’s RPM budget for next year, survey respondents indicate the following:



Budget Forecast: Chronic Care Management

When asked whether they are anticipating changes to their organization’s CCM budget for next year, survey respondents indicate the following:



The survey results show that the overwhelming majority of respondents expect to increase or maintain their investments into these programs in the next year, while fewer than 10% anticipate having a smaller budget in the year ahead.

Survey respondents say that among patients who are eligible for remote patient monitoring and chronic care management, 33 percent qualify for both. This research also presents evidence that patients are positive about the experience of participating in RPM and CCM programs such that they consider it to be a “concierge service” — and **none of the survey respondents indicate that either RPM or CCM programs negatively impacted their patients’ experience.**

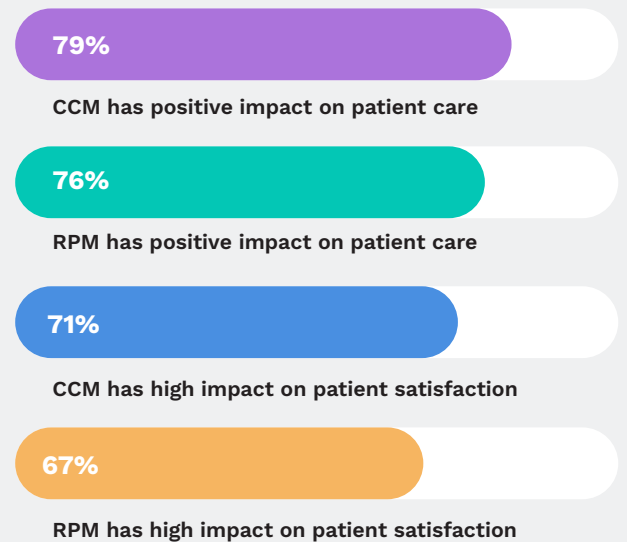
Today’s technologies and clinical services, in fact, are successful for practices largely because of proven implementation processes that make establishing the programs predictable and low risk.

Providers partnering with third parties for RPM and CCM are finding the investment so worthwhile that the majority (85%) are unlikely to switch partners.

Why Physician Practices and Hospitals are Investing in RPM and CCM

RPM and CCM Have Positive Impact on Patient Care and Satisfaction

While survey data shows that many programs have been in place for less than two years, the early results of CCM and RPM include:



Physician practices and hospitals primarily implement new CCM and RMP technologies and clinical services to improve outcomes, engagement, and satisfaction — while also reducing costs of care delivery and unnecessary and expensive readmissions.



Given the prevalence of chronic conditions, hospitals and practices deploy remote monitoring programs for populations including people living with hypertension (26%), diabetes (25%), heart conditions (20%), COPD (12%), mental health conditions (8%), surgical recovery (5%) and other reasons (8%).

Top 5 RPM Capabilities Health Systems and Practices Need

When implementing remote patient monitoring programs, survey respondents indicate that their organization looks for the ability to:

- Connect with patients via secure messaging and apps
- Receive real-time clinical analysis and alerts
- Integrate patient data into an EHR
- Provide clinical documentation support
- Document and track clinical goals

In addition to the technological capabilities physician practices and health systems are seeking in RPM and CCM, survey respondents say the reasons for offering these programs include improving continuity of care, easing the transition to value-based care, and enabling organizations to optimize reimbursement.

The next section will examine the improvements that RPM programs are already yielding, and the results organizations that have already implemented RPM and CCM are achieving to dispel common misperceptions that some survey respondents say have thus far held them back.

Remote Patient Monitoring: Reducing Costs and Unlocking Revenue Opportunities

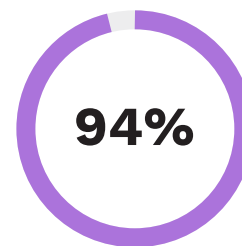
When asked whether their current remote patient monitoring program is yielding a positive return on the investment required to establish and operate RPM, nearly three-quarters of the surveyed healthcare executives say yes.

More specifically, 63% of survey respondents have earned a return by improving care plan compliance and engagement, while 58% indicate that better medication compliance has led to financial returns.

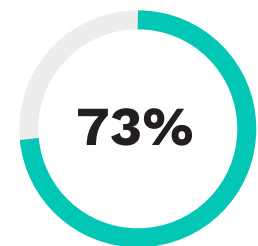
Survey respondents also say that remote patient monitoring technologies are critical to decreasing admissions, emergency department visits and hospital admissions – while simultaneously opening new reimbursement opportunities.

RPM Has Positive ROI

Almost all survey respondents say that remote patient monitoring programs are already delivering:



Improvement in patient outcomes



Yielding a return on the investment



63% of survey respondents have improved care plan compliance, increased engagement – and earned a return on their investment.

Misperceptions About Costs and Staffing

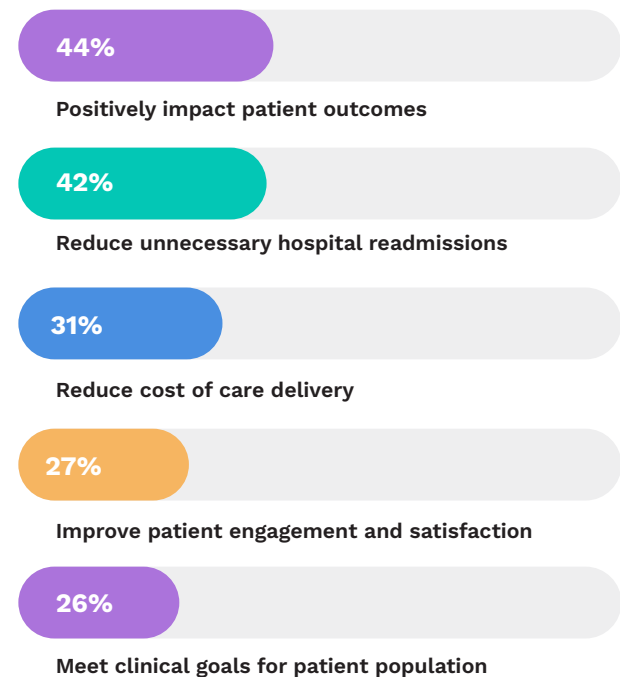
This research reveals a gap between the perceived challenges of implementing RPM and CCM programs among organizations that have not done so, and the expectations such programs are achieving for physician practices and health systems that have instituted the programs.

Physician practices that have not operated a remote patient monitoring program say that reimbursement would be too low to justify the investment, too few patients would participate, and overall the investment is just too expensive. Respondents also indicate that resistance from physicians, staff, and executive leadership, as well as the belief that RPM would not positively impact the health of patients, are inhibitors.

But survey participants that have implemented remote care management programs are countering those misperceptions by making significant improvements from a care quality perspective by deploying new digital tools and clinical services. As a result: 78% of survey respondents have already improved patient outcomes, and 60% of respondents say the staff reacted positively.

Top Reasons Providers are Implementing RPM Programs

When asked why they are deploying remote patient monitoring programs, survey respondents ranked the following:



As we will see in the next section, chronic care management programs also hold considerable promise to improve care quality, increase patient satisfaction, and deliver a return on the investments and efforts necessary to implement CCM offerings.



Chronic Care Management: Positive Impact and ROI

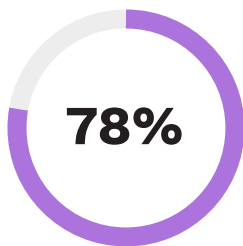
When Survey respondents representing organizations that already offer CCM services say that 39% of their patients are eligible for CCM services but just over a quarter of that population currently receive CCM services — meaning the opportunity to expand that population for improving outcomes and reducing care costs is substantial.

That opportunity will only increase as the number of Americans with one or more chronic condition is estimated to reach 170 million by 2030, up from 141 million in 2010.

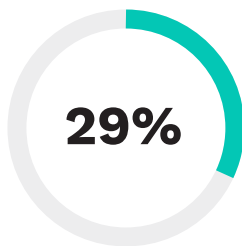
The Expanding CCM Opportunity

As the number of people experiencing chronic conditions increases, so will the ability to derive ROI from CCM programs.

170M Americans estimated to have multiple chronic conditions by 2030



Of survey respondents indicate that ROI comes from additional revenue



Increase in revenue among survey respondents that implemented CCM

The financial impact of CCM is convincing: Among the more than half of survey respondents that achieve ROI from CCM programs, 78% indicate that it comes from additional revenue, notably a 29% reimbursement increase after the program is implemented.

66% of survey respondents say their organization has earned a strong quality of care ROI from CCM programs.

Survey respondents also indicate that ROI is not necessarily always limited directly to the bottom line: Among the small (10%) number of survey respondents that are not experiencing a lot of additional reimbursement, some say the organization “still feels there is high ROI.



CCM is an extension of the medical care we deliver. It's quite valuable for some of our populations because we have people who are really sick and really difficult to engage. They're seeing multiple providers in our system and outside our system.

CEO, WESTERN MULTI-SPECIALTY MEDICAL GROUP



Top 3 Benefits of Healthcare Coaching

Survey respondents say that delivering healthcare coaching to RPM and CCM program participants as an aspect of the overall patient experience drives the following improvements:



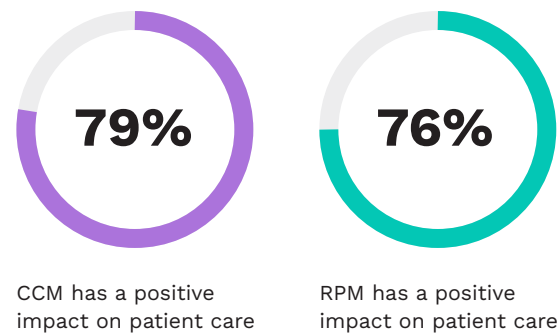
Aligned with improving outcomes, engagement, and satisfaction rates among patient populations, in the next section this research also shows that patients respond well to the remote care management programs.

The Patient Perspective: Concierge Experiences

Our research found that patients are increasingly positive about both chronic care management and remote patient monitoring programs. An executive interviewed for this market report says that patients have come to view RPM and CCM as “a concierge service,” that effectively extends the relationship between physicians and patients.

Patients Appreciate Remote Care Management Programs

When asked how CCM and RPM influenced patient care, survey respondents indicate the following:



70% of survey respondents say patient satisfaction increased as a result of participating in chronic care management programs.

In fact, 68% of survey respondents indicate a positive experience – and 0% indicate a reluctance to participate. Also at 0%: the patients who greatly decreased, decreased or even slightly decreased in satisfaction based on participation in a chronic care management program.



Patients like the option to use different venues for care depending upon the situation they're in.

CHIEF MEDICAL OFFICER,
RURAL HEALTH CENTER

The next section will outline the implementation considerations for RPM and CCM programs that achieve positive impact and earn valuable ROI.

Implementation Considerations for RPM and CCM

The foundational decision executives embarking on RPM and CCM will encounter is whether to manage the implementation in-house, work with external organizations for each program, or align with one partner that provides both RPM and CCM.



Data integration is always critical because you don't want all that information siloed.

PRESIDENT, EAST COAST COMMUNITY
HEALTH NETWORK

Integrating CCM and RPM with the practice's existing EHR is a key consideration. The benefits of EHR integration – and the disadvantages of not doing so – are substantive. Notably: 74% of survey respondents say not integrating with EHRs creates more manual work for administrative staff. Among that manual work is billing and coding, more work for physicians, and a decreased ability to coordinate care.

Top Benefits of EHR-Integration

Integrating RPM data with an EHR helps practices work toward key metrics, including:

64%

Say EHR integration improves care quality

62%

Say it enables data-driven care decisions

54%

Say it improves compliance needs

When managed in-house, in fact, survey respondents indicate that neither RPM nor CCM are yielding maximum reimbursement. As this research shows in the next section, the advantages of working with a partner that offers both RPM and CCM are becoming increasingly clear, particularly regarding the bottom line.

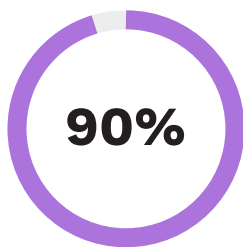


Benefits of Bundling RPM and CCM Together

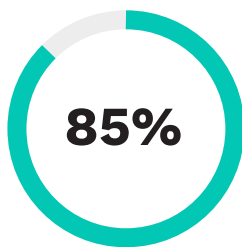
The majority of survey respondents say: **Offering both remote patient monitoring and chronic care management together presents advantages that maintaining distinct programs cannot.**

RPM and CCM: Better Together

When asked about aligning with an external partner for CCM and RPM, survey respondents say:



Of participants are satisfied



Are not likely to switch partners



Revenue is becoming a bigger part of RPM and CCM as they accelerate. Whether it's wellness visits, chronic care management codes, other e-consults, there continues to be an evolution. We provide tremendous value to patients in terms of keeping them healthy.

PRESIDENT, EAST COAST COMMUNITY HEALTH NETWORK

Yet, 30% currently work with a third-party that supports both CCM and RPM. The main benefits of working with one vendor for both CCM and RPM are time savings for administrative staff, higher patient satisfaction, and better patient outcomes.

RPM and CCM Programs Meeting Practice's Expectations

Survey respondents say that RPM and CCM implementations successfully met their expectations, including:

85%

Say the programs improve patient engagement and satisfaction

74%

Say the programs meet clinical goals for patient populations

60%

Say they reduce unnecessary hospital readmissions



We really want remote patient monitoring in a way that is beneficial for the patient and for the health system, and chronic care management to prevent complications and prolong high-quality health in our patients.

CHIEF MEDICAL OFFICER, RURAL HEALTH CENTER



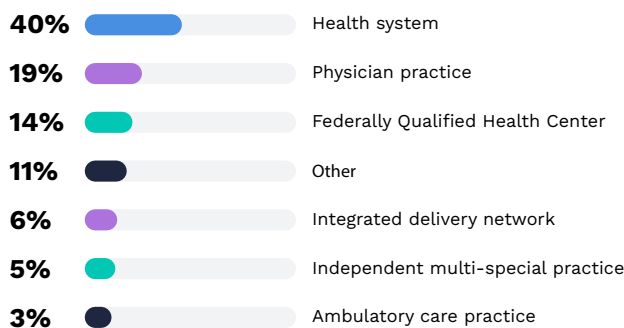
Conclusion

This research illustrates that physician practices and hospitals implementing digital tools to offer their populations remote patient monitoring and chronic care management programs — by working with a partner that delivers both — are achieving higher ROI by multiple definitions, including increasing revenue from those services, improving patient satisfaction, and positioning themselves to drive deeper engagement with more patients.

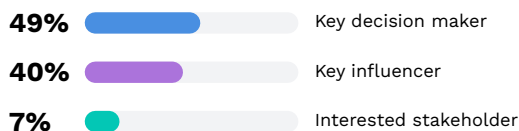
Physician practices and health systems that move to implement RPM and CCM together now will unlock new revenue opportunities and position their organization well for long-term sustainability and growth. But physician practices and health systems that do not implement RPM and CCM will likely continue struggling with lower patient satisfaction, poorer health outcomes, and missed revenue opportunities.

Research Demographics

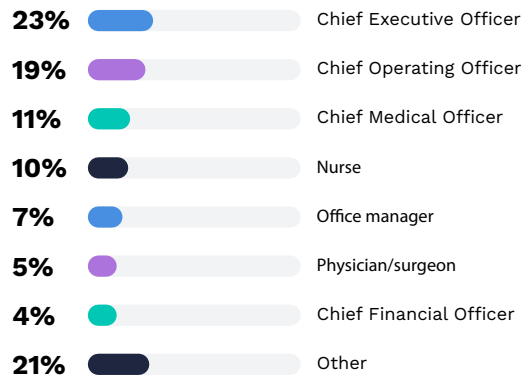
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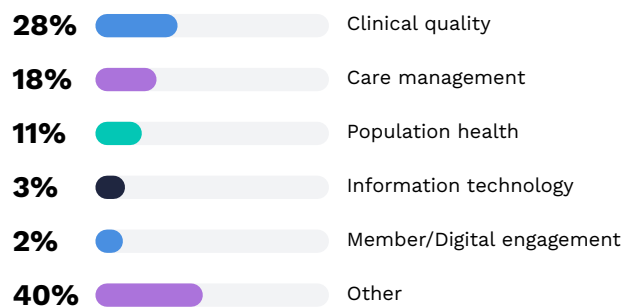
Role in Purchasing Care Management Solutions



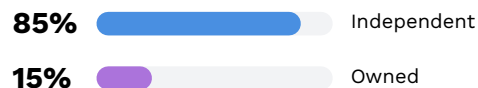
Primary Role of Survey Respondents



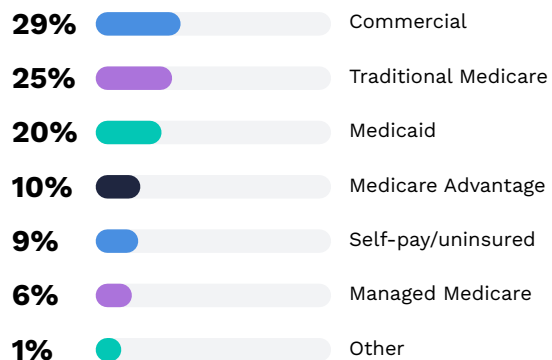
Functional Area Best Match Role



Practice employed/owned hospital or health system



Current Payer Mix



Join the Patient Care Revolution

As physician practices and hospitals approach this critical inflection point, the imperative is clear: a revolution in care delivery cannot wait. Proven, adaptable, and comprehensive remote care management solutions that emphasize healthier habits, establish routine check-ins, and activate individuals as participants within their own care journeys will lead the way. For more information visit <http://mdrevolution.com>, or connect with MD Revolution on **LinkedIn**.



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