2015 PRACTICE SURVEY: 
Practice pressures 
and e-health realities
Dear colleagues,

With Australia’s ageing population, rising patient demand and increasing funding pressure, health professionals are facing an uphill battle to provide quality patient care and maintain their practices.

Conscious of these growing issues and the need to maintain a robust healthcare system, the team at MedicalDirector is working to find useful ways to harness technology and information to support health professionals’ everyday needs.

Having good IT systems and best-of-breed clinical and practice management software can not only lead to a more efficient business, it can also lead to better patient care and more life – outside work.

MedicalDirector has been supporting health professionals and improving health outcomes for more than 20 years. Formerly known as Health Communication Network (HCN), the company has developed a suite of software programs and information to assist clinicians, practice managers and others, to do their jobs more safely, efficiently and easily.

Now, more than 64,000 health professionals use MedicalDirector products and information, spanning across the Australian health sector – including GP and specialist practices, retail and hospital pharmacy, medical information systems and pharmaceutical companies.

We want to continue developing robust, advanced systems for health professionals. To do this, we need to know the issues you’re facing and what you see working best in the future.

MedicalDirector also runs one of the longest continuous GP research panels collecting electronic records, covering over 40 million GP-patient outcomes. So, if this survey sparks other questions, we have the resources to help find answers.

We thank you for taking part in our survey and look forward to working with you to achieve the best health outcomes for your patients and strong business growth for your practices.

Dr Andrew Magennis  
Chief Medical Officer  
MedicalDirector
We want to continue developing robust, advanced systems for health professionals.
05 The increasing pressures on Australian health professionals

06 Funding changes put patients and practices at risk

08 Pressure to cut costs and increase bookings

10 Good health technology trends

12 Sharing records – ‘Snail-Mail’ still method of choice

14 Embracing change to move forward
The nature of medicine is constantly changing, with new discoveries and innovations happening daily. Over the past 20 years there has been significant evolution in the way clinicians and practices operate; from 5” by 8” index cards, to the introduction of drug interaction databases, on-site claims processing, and appointment booking at the click of a button.

Medical practices are the hub of the healthcare system, connected to patients, allied-health, hospitals and government simultaneously.

There is also increasing pressure on Australian health professionals to service more patients, maintain complex treatment plans, and to keep pace with ever-changing medical knowledge and government regulations.1

In February 2015, MedicalDirector (formerly known as HCN) surveyed 423 professionals from across the health sector including GPs, specialists, nurses, practice managers and others.

Of these respondents, just over half (55 per cent) were from capital cities, about a quarter from regional areas (26 per cent), and a fifth from rural or remote areas (19 per cent).

More than 60 per cent of respondents had more than 21 years of experience, indicating an ageing health workforce.

The aim of the survey was to identify the challenges health professionals currently face in terms of providing good patient care and sustaining their businesses, and to uncover opportunities brought about by electronic health systems.

The results have shown that while health professionals feel increasingly distressed by recent government upheaval of Medicare rebates2, they are also looking for new ways to stay ahead of the curve. Health professionals see the value in using e-health technology to its greatest potential for the benefit of both patients and their practice.

The findings, compiled in this whitepaper, also reveal meaningful differences between:

- The concerns of rural and remote practices compared with their city-based counterparts
- The perceived benefit of healthcare technology trends
- Use of, and access to electronic patient records and booking systems

From the results of MedicalDirector’s survey, it is clear health professionals are feeling pressure from many angles. This whitepaper explores how health professionals can use e-health technology to support patient consultations and improve outcomes, while strengthening business viability.

### Health sector survey respondents

<table>
<thead>
<tr>
<th>Profession</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPS (214)</td>
<td>50%</td>
</tr>
<tr>
<td>SPECIALISTS (21)</td>
<td>5%</td>
</tr>
<tr>
<td>NURSES (15)</td>
<td>4%</td>
</tr>
<tr>
<td>PRACTICE MANAGER (134)</td>
<td>32%</td>
</tr>
<tr>
<td>OTHER (39)</td>
<td>9%</td>
</tr>
</tbody>
</table>

### Survey respondents’ location

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAPITAL CITY (234)</td>
<td>55%</td>
</tr>
<tr>
<td>REGIONAL AREA (109)</td>
<td>26%</td>
</tr>
<tr>
<td>RURAL OR REMOTE (80)</td>
<td>19%</td>
</tr>
</tbody>
</table>
Funding changes put patients and practices at risk

“The biggest challenge we face is patients not presenting in a timely manner if they have to pay extra for GP services. We will get more serious acute cases presenting to emergency departments.”

NURSE, 21+ YEARS EXPERIENCE

In order to understand the challenges health professionals currently face to provide good patient care and sustain their businesses, MedicalDirector asked: “What keeps you awake at night?”

Overwhelmingly, the threat of government changes created the most concern. Almost 48 per cent of respondents are worried government changes could have a negative impact on patient outcomes.

Comments made by health professionals indicated they are concerned the most at-risk patients won’t see a doctor if the cost of consultations increases. Therefore treatment plans, which require regular appointments and aim to reduce the burden of chronic disease on the hospital system, could go by the wayside.

The concern was even more pronounced for respondents in rural or remote areas (52.5 per cent), where access to healthcare is limited and patient outcomes are generally poorer.3

Overall, having the right resources to keep up with patient demand and the ever changing medical knowledge base, kept 20 per cent of health professionals surveyed awake at night. This indicates health professionals are looking for more support, time and efficiencies, to better manage their businesses and keep learning.

Practices appear to have little problem finding patients, as only six per cent are worried about having enough to sustain their practice.

Positively, less than five per cent are worried about potential legal action against themselves or their practice, despite the fact that malpractice claims against GPs in Australia appear to be rising.4

WHAT’S KEEPING HEALTH PROFESSIONALS AWAKE AT NIGHT?

- I am worried government changes could have a negative impact on patient outcomes 48%
- I am worried I don’t have the right resources to keep up with patient demand 5%
- I am worried I am not able to keep abreast of the ever changing medical knowledge base 10%
- I am worried I don’t have enough patients to sustain my practice 6%
- I am worried about potential legal action against me or my practice 10%
- Other 21%
Pressure to cut costs and increase bookings

With increasing media and government scrutiny on fees for health services – it is not surprising that many health professionals are lying awake at night concerned for their patients and practices.

MedicalDirector asked: “What impact does speculation about potential changes to Medicare or proposed co-payments have on your practice?”

More than 38 per cent of health professionals said their practices are under pressure to cut costs or increase bookings, while 14 per cent said they have already seen a drop in patient bookings.

Pressure to cut costs and increase bookings is more pronounced in regional, rural and remote areas – where 43 per cent feel under pressure, compared with just 34 per cent in cities.

Moreover, less experienced health professionals are more likely to feel the pressure than their veteran counterparts. Almost 60 per cent of respondents with one to five years’ experience feel under pressure to cut costs and increase bookings, compared with just 32 per cent of those who recorded more than 21 years’ in the job.

Despite feeling pressure to increase bookings and cut costs, only 17 per cent of respondents use an online appointment booking system. About 65 per cent of those using an online booking system are based in cities, 27 per cent in regional areas and just eight per cent are in rural and remote areas.

Online appointment booking systems are a relatively new way for patients to interact with medical practices – offering 24-hour convenience and peace of mind.

While more than 10 per cent of respondents said they are planning to implement an online booking system within a year, the remaining 70 per cent could be missing a significant opportunity to increase bookings.
Automated reminder systems are another aspect of e-health technology that may be under-utilised. Only 28 per cent of respondents indicated they use an automated reminder system to notify patients of upcoming appointments. However, of those who do – 70 per cent found it reduced the number of no shows and/or late patients. It also means practices may be paying more for postage than they need to, if they used electronic methods of contacting patients, such as SMS.

“I am worried that in order to keep financially viable, I would have to prioritise patients that can pay higher fees. I’d rather close my practice than get that low.”

RURAL GP, 11-20 YEARS EXPERIENCE
Australia is a country that is known for its early adoption of technology. Of those who participated in this survey, 94 per cent use practice management or clinical software.

Interestingly, 42 per cent of respondents noted they still preferred to send records via post and fax, despite more than 70 per cent thinking that sharing records electronically had the potential to either streamline work or accelerate the referral process for patients.

This shows a disconnect between the belief in the potential benefits of e-health, and the reality of its use in Australian medical practices.

When asked, “which technology trend do you think could have the most opportunity to benefit health professionals and/or improve patient outcomes,” respondents were fairly evenly split.

More than a quarter of those surveyed thought health related phone or tablet apps were the way of the future. With the increasing popularity of health and fitness apps for smart phones, allowing people to record everything from their exercise habits to their menstrual cycle, there could be ample opportunities to improve health outcomes.

Telemedicine (also known as telehealth), which enables clinicians to see and diagnose patients remotely, was selected by more than 20 per cent of respondents.

This indicates a strong interest in technology that can improve rural and remote health outcomes. Health professionals are clearly ready to use teleconsultations in the appropriate circumstances, where it is clinically sound.

Online appointment booking systems were identified as a key opportunity by 17 per cent of respondents, and the Personally Controlled Electronic Health Record (PCEHR) system also recorded 17 per cent.

Practice innovations such as check-in kiosks in medical practices were selected by about 10 per cent of respondents. Of those that selected this option, more than 60 per cent were from capital cities, indicating higher patient volume and the need to reduce waiting times.

While wearable technology is receiving a lot of hype at the moment, health professionals are yet to see how these devices will help those in most clinical need, with fewer than 10 per cent identifying them as a significant opportunity. Given the cost involved, people who own wearable technology such as smartwatches and fitness trackers are likely to be the “wealthy well”, while people suffering from chronic disease are more likely to have a lower socio-economic status.

HEALTH-RELATED APPS HAVE THE MOST POTENTIAL BENEFIT

<table>
<thead>
<tr>
<th>Technology Trend</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health-related phone/tablet apps</td>
<td>26%</td>
</tr>
<tr>
<td>Wearable health and fitness tracking</td>
<td>17%</td>
</tr>
<tr>
<td>technology i.e. Fitbit</td>
<td></td>
</tr>
<tr>
<td>Online appointment booking services</td>
<td>9%</td>
</tr>
<tr>
<td>for patients</td>
<td></td>
</tr>
<tr>
<td>Telemedicine</td>
<td>21%</td>
</tr>
<tr>
<td>Check-in kiosks and other practice</td>
<td>17%</td>
</tr>
<tr>
<td>innovations</td>
<td></td>
</tr>
<tr>
<td>Personally-controlled e-health records</td>
<td>10%</td>
</tr>
</tbody>
</table>
When it comes to sharing patient records it seems old habits die-hard. MedicalDirector asked: “Do you share patient records electronically to/from other practitioners,” and more than 42 per cent of respondents preferred to send records via paper methods – post and fax.

However, a combined 74 per cent thought sharing records electronically has the potential to streamline work or accelerate the referral process.

Only 17 per cent of respondents thought the risks to patient privacy outweighed the benefits when it came to sharing patient records electronically. Another nine per cent were unsure, but some raised issues about lack of system compatibility or fear of computer hackers accessing electronic data.

These comments show that more needs to be done to make secure messaging work across technology providers.

It seems rural and remote practices are ahead of their city counterparts when it comes to sharing records electronically. Almost half of the city-based health professionals prefer to send records via post or fax (46 per cent) while only a third of those in a rural or remote areas use ‘snail-mail’.

Rural and remote practices are also most likely to use the PCEHR – at 16 per cent compared with 12 per cent of city-based and nine per cent of regional respondents.

With Australia Post’s plans to significantly increase postal prices, the high costs of using traditional mail methods may encourage more practices to take up electronic sharing as a cost-effective way to communicate with other health professionals.

Sharing records – ‘snail-mail’ still method of choice

“It’s very difficult because we don’t all share the same electronic sharing medium.”

PRACTICE MANAGER, 11-20 YEARS EXPERIENCE

“It’s very difficult because we don’t all share the same electronic sharing medium.”

PRACTICE MANAGER, 11-20 YEARS EXPERIENCE

“Not sure about putting patient records ‘out there’. Privacy issues.”

GP, 21+ YEARS EXPERIENCE

SHARING RECORDS ELECTRONICALLY COULD IMPROVE PATIENT CARE

I think the benefits of sharing patient records electronically don’t outweigh the risks to patients’ privacy

I think sharing patient records through a secure electronic system would streamline my work and reduce administration time

I think sharing records electronically has the potential to accelerate the referral process for patients and possibly improve patient care

Other
Dr Paul Ryan, GP, Manly NSW

Dr Paul Ryan says electronic health records have the biggest opportunity to benefit health professionals and were the most important advance during his medical career.

“When you keep good records, you know what’s happening and they’re easily transferable. We can now keep much better records than we used to.

“It’s all about the narrative. You don’t really know what’s happening [with a patient] unless you’ve got the full story of that person. You can get the gist of things more easily with computer-based records.”

Dr Ryan uses his clinical software to send patient records where possible.

“I use MD Exchange when I can. A lot of practices haven’t installed it but it’s a really good way of sending information.” He also uses the PCEHR. “I occasionally upload details. I’ve never actually found anything useful on it. Great idea though.”
It is clear from the findings that health professionals are looking for ways to improve patient care while sustaining viable businesses. Overall their comments show they feel under pressure from government, patients and even themselves, to deliver more with less.

The goal of this survey and subsequent whitepaper was not just to outline the challenges health professionals face, but also uncover some opportunities that may be missed in the race to meet competing demands.

Electronic health systems have already revolutionised the way health professionals work, and there is potential to create even more efficient practices with the introduction of online bookings, automatic reminders and even using smart phone technology to assist with clinical consultations.

A move to e-health can assist practices to meet the challenges they are facing. However, there is more to be done in terms of training and development to make full use of its potential.

“I work in a practice where we have doctors who are not computer literate and my biggest challenge for this year is to teach them. I would love to be completely paperless by the end of 2015.”

PRACTICE MANAGER, 21+ YEARS EXPERIENCE

“The biggest challenge and opportunity will be to embrace the changes we are seeing in technology today and keep updating our skills.”

PRACTICE MANAGER, 6-10 YEARS EXPERIENCE

footnotes


Practice Manager, Melbourne Vic

A Melbourne practice manager says it’s not enough to only have e-health records. In order for practices to be more efficient – all systems need to talk to each other.

“What would really help me is a system that communicates to everything. There are a lot of practitioners out there who want to send things electronically but we don’t have the same system. We need technology that works together and talks to the hospital system as well.”

However, she says despite its challenges, e-health is the way forward.

“That’s the way of the future, you’ve got to get on board. I want that challenge – there’s no use being left behind. You’ve got to get on board and deal with it.”