



# Why is Digital Essential for the Third Wave of Healthcare Delivery?

## [Spoiler Alert: Because it's consumer-centric]

**David Wattling**

Health IT Industry Leader and Agitator for Transformation and HIM&CC Associate Editor

I recently spoke at HIMSS on the subject of digital as the critical enabler for the third wave of healthcare.

First let me start by unpacking the key words...

**Digital.** Sure digital is a disruptive force, as it has been for so many industries, but it is not the end. And may I remind the reader that it has been around for a while with the promise of revolutionising healthcare. What it seems to me is new is that digital is reaching the consumer and connecting them with their healthcare services and providers.

**Enabler.** Or catalyst, you pick the word you like. The key is that something new makes things hitherto impossible, possible. Think of what digital did for retail (Amazon), travel (AirBnB), transportation (Uber). All these examples \*simply\* deployed digital solutions to disrupt traditional business models. A digital-first approach if you will. So...why not healthcare?

**Third Wave.** Here we have multiple definitions.

- 1) Steve Case, cofounder of AOL, describes this as a healthcare system that can't just be a reengineered version of the present. Hospitals and medical facilities need to fully embrace the internet age to help better coordinate care, improve patient outcomes and cut costs. Tracking your vitals will one day be as routine as brushing your teeth, making patients more informed and more empowered than ever before.

*...76% of Canadians say digital health can make accessing healthcare services easier and more convenient.*

Through connected devices, doctors can monitor you at home, seeing everything from your vitals to your medicine intake to your hydration levels. This will cut back on disease mismanagement, which currently accounts for more than 30 percent of healthcare spending.

- 2) Triple Tree defines it based on initiatives made by payers and providers to interact with the consumer and help them better navigate the system. They project that the third wave will take place in response to the growing number of consumers who have to be financially conscious about their healthcare decisions. As value-based or risk-based reimbursement models evolve, advanced solutions that support provider decision making, improve care coordination, and facilitate consumer engagement will become increasingly relevant to providers.
- 3) I like both of these and simplify it as follows:
  - a. Wave 1 was hospital centric – as these were expensive places where acute care was provided and they needed to be run as efficiently as possible.
  - b. Wave 2 was (is) provider-centric – as we shifted services to primary care as a gateway to the acute system, and accordingly a way to manage the burden on this most expensive form of care delivery.
  - c. Wave 3 is (will be) consumer-centric – where self-management, choice and digital tools will put patients and consumers in control and organise their health (not just care) services around the whole person.

Importantly what the third wave is not is what is commonly referred to as consumer health. This is the facilitation of consumer engagement and self-care using digital tools and information. While certainly an essential component

– and one that is yet to be proven at scale – consumer health in and of itself does not solve the complex challenges of organising health services with the consumer at the centre.

**So why do we need to push towards this third wave and why now?**

In his 2015 report, Dr. Mark Britnell, KPMG's Global Healthcare Leader noted that engaged patients will consume **8-21%** fewer healthcare resources. Wow!

Closer to home, in 2017 Canada Health Infoway reported that **76%** of Canadians say digital health can make accessing healthcare services easier and more convenient. And further that **80%** of us would use digital tools, if available, to view information and access services. A TELUS survey found that **58%** of older Canadians agree that digital technology would help them better connect with their healthcare provider, but only **20%** currently use it.

So, let me get this straight... If we had a system that was bursting at the seams, one that was threatening to bankrupt the public service with the escalating costs of chronic disease management, rising drug costs and an aging population, wouldn't we want to find ways to reduce demand? If we are to believe Dr. Britnell then surely we have stumbled across one potential solution. And based on our own surveys there is strong consumer demand and willingness to use said solutions.

**But aren't we already doing this?**

You may rightfully ask, aren't we already giving engagement tools to Canadians? We have patient portals available from our doctor's offices, we can get our lab results electronically in some provinces, we can manage our chronic conditions remotely in our homes, and in certain regions we have a personal health record that amasses information about our health from a variety of sources, including data we capture ourselves.

The answer is of course yes, albeit not widespread and available uniformly across the country. But while this is an important element, it is not the entire reflection of a consumer-centric health system.

Such a system must truly put the consumer at the centre where health services and providers revolve around said consumer. And while just about every health service provider and system says that they are “patient-centric”, they are saying that within the context of the services they provide, not the whole person. Health is a complex beast and Canada’s health system out of necessity is organised in silos. But in so doing we see myriad breaks in the health services chain. These are most acute for people with chronic conditions, where they constantly bounce between acute and primary care, where they are taking a cocktail of drugs, and for the most part are responsible for orchestrating the service providers themselves.

In order for our health system to be truly consumer-centric there are some core characteristics that must be evident:

- 1) A true continuity of care, where the care protocol is contiguous,

allowing the consumer to manage their care journey in one place, and the providers to play their part in that continuous journey, seamlessly.

- 2) An electronic health records for providers where they can see the totality of the care provided for an individual, and information that the individual has chosen to share with their provider team.
- 3) A consumer controlled health record that provides a single, authenticated, trusted and coordinated source of health and wellness information.
- 4) Consumer tools that enable choice, appointment booking, access to virtual services, a holistic medication record, etc. etc
- 5) Incentives for care providers that are squarely aligned around the health outcomes for the consumer.

Most importantly, and perhaps something we gloss over, is that the health system must shift its culture from one of viewing us as patients to one where we are treated as customers. I understand that there are aspects of being a customer that do not apply in our primarily publicly funded health system, however there are

many dynamics that must be put front and centre.

We do pay for our health system, and given information and choices I believe we would choose wisely. We would, for the most part, choose more convenient service delivery modes, for example a secure message or a video consultation with a provider over an in-person visit, or at home monitoring of a chronic condition over constant clinic appointments. We would welcome not having to repeat information with each interaction. We would embrace a safer system where all relevant information about our conditions, family history, allergies, drugs, etc. is available to our circle of care providers.

This behaviour would not necessarily be because we are conscious of the cost of our health system, but because it is convenient and fits better in our busy lives. And in the end it is better for all stakeholders.

I believe that if Canadians had the tools and health services were organised around us a whole person, we will, for the most part, act responsibly. And that is our best hope of simultaneously improving our health, individually and as a nation, and sustaining our treasured health system.

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#### Toronto

Mark J. Fecenko  
National Leader  
416.367.6711  
mfecenko@blg.com

#### Calgary

Jason Howg  
403.232.9415  
jhowg@blg.com

#### Montréal

Patrice Martin  
514.954.2546  
pmartin@blg.com

#### Ottawa

Marc Jolicoeur  
613.787.3515  
mjolicoeur@blg.com

#### Vancouver

Bradley J. Freedman  
604.640.4129  
bfreedman@blg.com

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