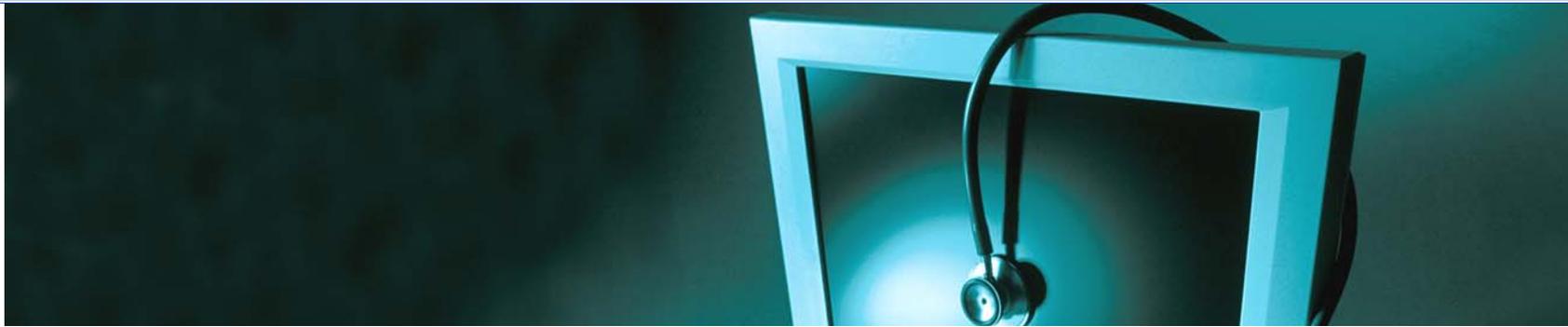


Moving Toward Interoperability— *Technologies for Accessible, Affordable Healthcare* Market Drivers and Societal Issues



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Gartner[®]

Viewpoint: Healthcare Shifts to Optimizing Performance in the Post-Paper Era

“The *First* Stuff”

Implement infrastructure

Implement business & financial systems

Implement clinical systems

Achieve nursing use

Achieve physician use

Implement basic patient safety decision support

“The *Right* Stuff”

Leverage people, process and technology

Achieve systemness, standardization and predictability

Achieve care process agility

Transform the enterprise

Transform medicine

The Challenges for IT in Healthcare

■ Inform Clinical Practice

- Incentivize EHR adoption
- Reduce risk of EHR investment
- Promote EHR diffusion in rural and underserved areas

■ Interconnect Clinicians

- Foster regional collaborations
- Develop a national health information network
- Coordinate federal health information systems

■ Personalize Care

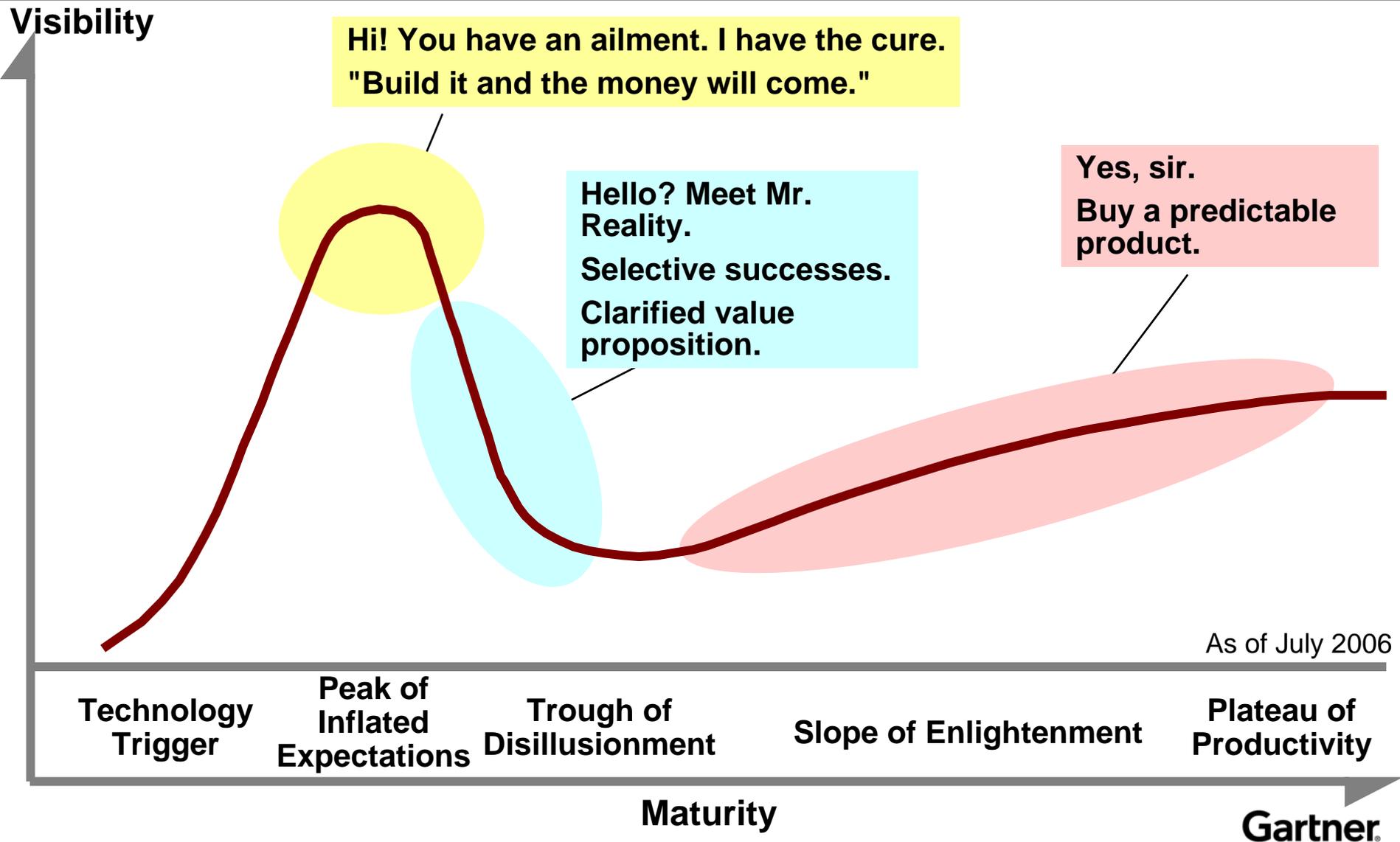
- Encourage use of PHRs
- Enhance informed consumer choice
- Promote use of “telehealth” systems

■ Improve Population Health

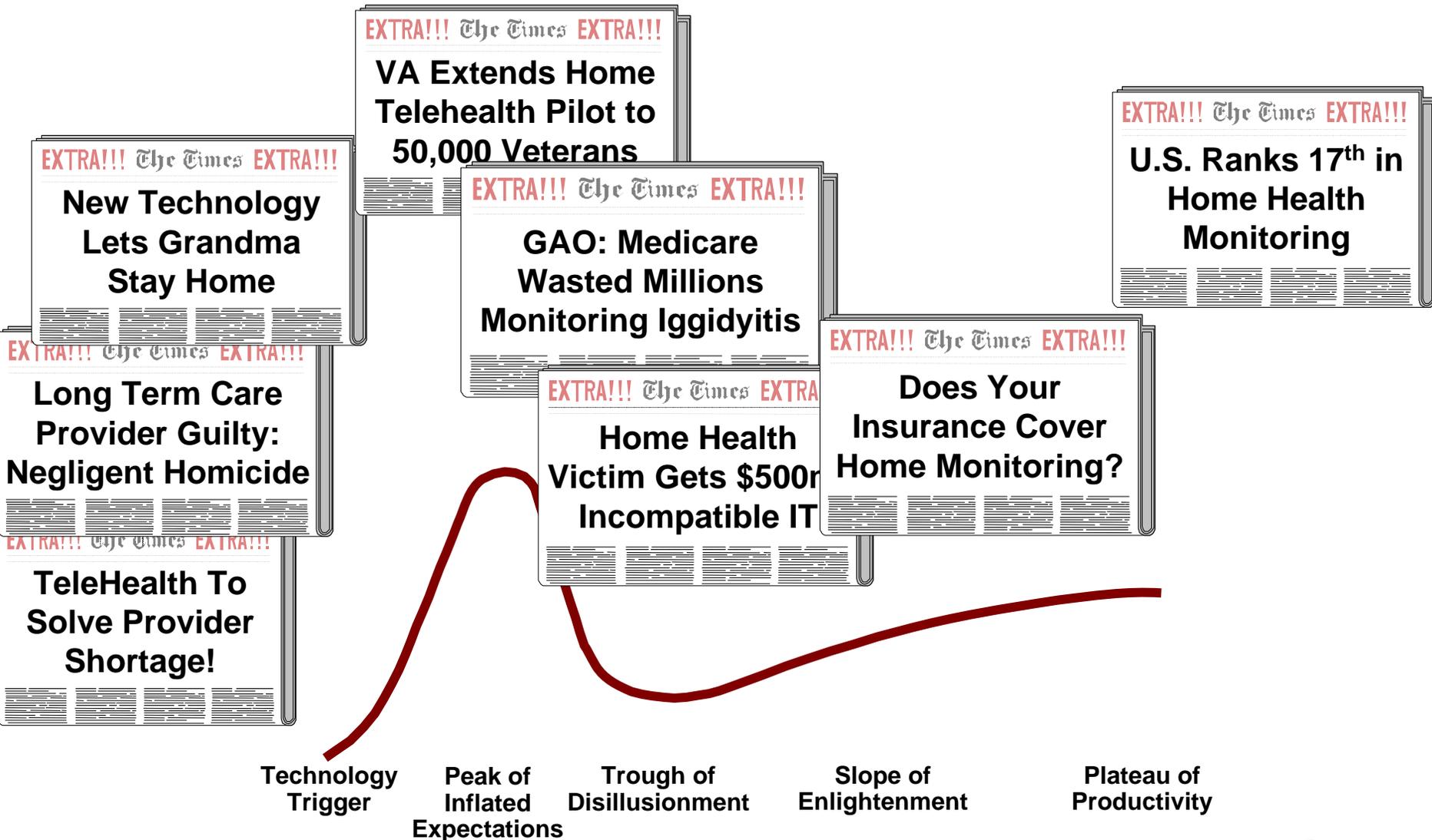
- Unify public health surveillance architectures
- Streamline quality and health status monitoring
- Accelerate research and dissemination of evidence

The Gartner Hype Cycle

Riding the News Media Roller Coaster



Following the Hype Cycle in the News



Continua

Visibility



As of July 2006

Technology
Trigger

Peak of
Inflated
Expectations

Trough of
Disillusionment

Slope of Enlightenment

Plateau of
Productivity

Maturity

Recommendations for the Home Health Monitoring Market

- ✓ This is a win-win-win: cost, quality, patient satisfaction
Run with it!
- ✓ In the U.S., start with the few providers that benefit from cost savings
- ✓ Technical interoperability is a big challenge: BlueTooth is a great example of how not to do it
- ✓ Business interoperability is a bigger challenge:
 - ✓ who looks at all the data and how
 - ✓ where are the protocols and evidence for care management
- ✓ Interoperability extends to the electronic health record
- ✓ Learn to enjoy the hype cycle