

A graphic of an owl's face, looking forward, framed by two blue diagonal bars that create a stylized arrow shape pointing to the right.

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Canada's Healthcare IT Dilemma

Accenture survey reports that most Canadian physicians believe healthcare IT is key to effective patient care, but they trail global peers in healthcare IT adoption.

Seventy-six percent of Canadian doctors use electronic medical records (EMRs) in their own practices or in the clinic or hospital compared to 91 percent globally. This according to the eight-country *Accenture Doctors Survey* of 3,700 physicians in Australia, Canada, England, France, Germany, Singapore, Spain and the United States.¹ In fact, Canada ranked lowest in EMR use among all countries surveyed.

Key terms were described as follows in the *Accenture Doctors Survey*:

Healthcare IT

An umbrella term for the exchange of health information in an electronic environment, including health information exchange, electronic medical record and electronic health record.

Health information exchange (HIE)

The mobilization of healthcare information electronically across organizations within a region, community or hospital system.

Electronic Medical Record (EMR)

A computerized medical record created in an organization that delivers care, such as a hospital or doctor's office, usually part of a local standalone health information system that allows storage, retrieval and modification of records.

Trailing the healthcare IT trends

While Canada has invested in healthcare IT in recent years from electronic repositories for lab and diagnostic imaging information to EMRs, the Accenture survey revealed that Canadian physicians also fall below percentages (or totals) in key areas of healthcare IT and healthcare information exchange (HIE) functionalities that have important implications for patients, such as:

- **Electronic patient notes.**

Globally, most physicians (66 percent) report that they routinely enter electronic patient notes—an increase of 14 percent over the previous year. Yet among Canadian physicians, only 44 percent electronically enter patient notes routinely during or after consultations. While this response was a 22 percent increase over last year, Canadian physicians are the least likely to enter electronic patient notes of all eight countries surveyed.

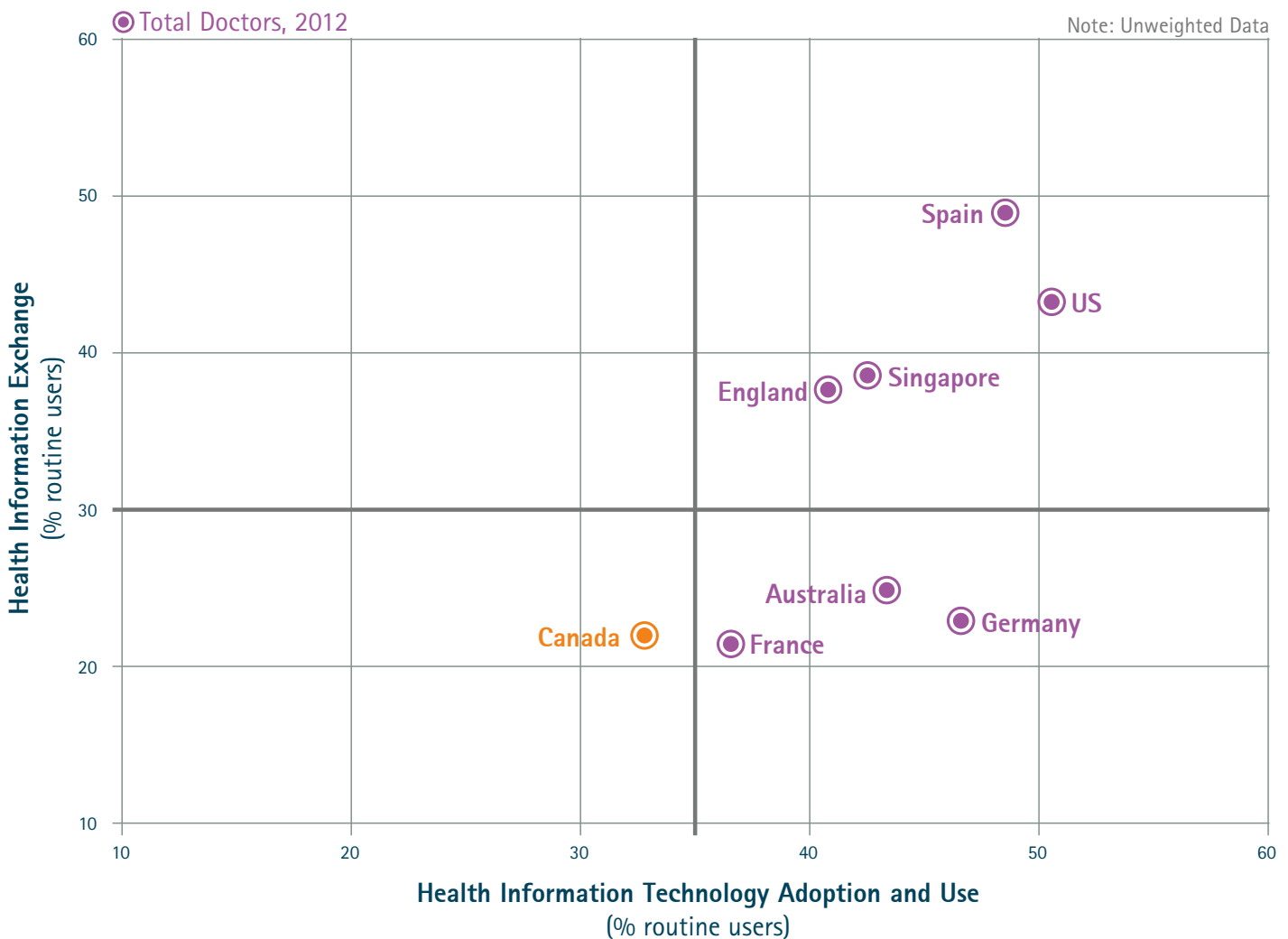
- **E-prescriptions.**

While the number of physicians across all countries surveyed who routinely send e-Prescriptions to pharmacies increased by 17 percent since last year, Canada saw no change with only 8 percent of physicians reporting that they routinely e-Prescribe—this compared to a global total of 21 percent. This leaves a large gap in benefits for both clinicians and patients.

- **Patient interactions with other health organizations.**

Only 12 percent of Canadian physicians report that they are electronically notified of their patients' interactions with other health organizations such as hospital admissions. Not only is this an 8 percent decline in Canada from the previous year, it is a marked difference from the global total of 20 percent—which increased by 11 percent over the prior year.

FIGURE 1: CONNECTED HEALTH MATURITY INDEX: TOTAL DOCTORS, 2012



When there's a will, there's a way

The study illustrates a gap between Canada and other countries in important areas of healthcare IT adoption.

However, it shows something different in respect to physician beliefs around the value of these same technologies.

In fact, Canada's implementation lag does not appear to be due to Canadian physicians' beliefs around the overall value of EMRs. The majority of Canadian doctors (63 percent) feel that the quality of patient care throughout the healthcare system has improved due to the use of EMRs.

Interestingly, eight out of ten physicians in Canada report that EMRs and HIE have a positive impact enabling reduction in medical errors—a higher percentage than six of the other countries surveyed. Such trends in physician attitudes may be a positive indication that Canada is on the road to catching up with global peers in healthcare IT.

As Denis Protti, Professor Emeritus, University of Victoria, notes, "We may be trailing, but we are getting closer. The Accenture survey results add credence to the recent Infoway and Commonwealth Fund findings that Canada is making progress, though we still have a ways to go to catch up to the global EMR leaders."

Connecting with patients

Making electronic services available to patients is an opportunity area to drive momentum in healthcare IT—and deliver healthcare more efficiently in Canada. Consider these Accenture survey findings:

- **Just 28 percent** of Canadian physicians allow their patients to communicate with them via secure email—the most widely available electronic service—compared to 42 percent globally.
- **Only 16 percent** of doctors in Canada enable patients to request prescription refills electronically while 33 percent of global counterparts do.
- **Just 10 percent** of Canadian doctors offer patients electronic reminders for preventative or follow-up care, compared to 28 percent globally.
- **Only 5 percent** of Canadian doctors facilitate patient downloads of EMR summaries, compared to 14 percent globally.

These statistics reflect the fact that Canadian provinces have focused their healthcare IT investments on infrastructure and interoperability, which do not have an obvious impact on everyday patient experiences. What patients care about are convenience and self-service—from accessing health information and getting prescriptions to scheduling appointments.

As the digital revolution has made consumer-centered electronic services the norm in industries such as financial services and retail, these patient concerns may soon become patient demands. The combination of physician buy-in and patient expectation are forces to watch in shaping the future of healthcare IT in Canada. Yet even as physician adoption of EMR increases, Canada's provinces will have to address the islands of healthcare information that remain unconnected to make the most of current and future healthcare IT investments.

Methodology

On behalf of Accenture, Harris Interactive conducted an online survey of 3,700 physicians across eight countries: Australia, Canada, England, France, Germany, Singapore, Spain and the United States. The survey included 500 doctors per country (200 from Singapore) and assessed physicians' adoption, utilization and attitudes toward healthcare IT. The research was conducted between November 2012 and December 2012. The analysis provided comparisons by country, sector, age and use. The margin of error for the eight study countries in total is +/- 1.5 percent.

**For more information,
please contact:**

Debra Sandomirsky

Accenture Canada Health Practice Lead
debra.e.sandomirsky@accenture.com
+1 416 641 5536

Sanjay Cherian

Accenture Canada Health Industry Lead
sanjay.cherian@accenture.com
+1 416 641 3718

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