

ePOCRATES[®]
an athenahealth[®] company

2014

EPOCRATES

MOBILE TRENDS REPORT

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2014 Mobile Trends Report Overview

The third annual Epocrates Mobile Trends Report examines the rapidly changing use of mobile technology among key segments of health care professionals, including primary care physicians, cardiologists, oncologists, psychiatrists (surveyed 2012 & 2013), and nurse practitioners & physician assistants (surveyed 2013).

2014 marks the first time Epocrates has measured mobile trends among hospital and retail pharmacists, an increasingly important stakeholder group as state-by-state prescribing privileges are granted and greater emphasis is placed on patient adherence.

While providers throughout the care continuum continue to engage with their mobile devices in the moments of care, this year we see evidence to suggest a heavy technology burden among clinicians related to the challenging adoption process of some electronic health record (EHR) systems.

Adoption of digital technology among clinicians (defined herein as physicians, nurse practitioners, and physician assistants) appears to have reached equilibrium for the time being. The percentage who utilize smartphones and tablets has declined slightly since last year, while daily time spent on computers has increased – presumably stemming from the adoption of traditional EHR systems. Pharmacists, on the other hand, demonstrate great enthusiasm for mobile tools despite a workflow that depends overwhelmingly on desktop workstations.

In 2014, 41% of clinicians qualify as “digital omnivores” defined as those who utilize the triad of tablet, smartphone, and computer routinely in a professional capacity, a far cry from the 82% projected in last year’s Mobile Trends Report and down slightly from 47% self-reported omnivores in 2013. This plateau may in fact be a precursor to another phase of dramatic innovation for the industry: 74% of clinicians surveyed expect to be digital omnivores by Q2 2015.

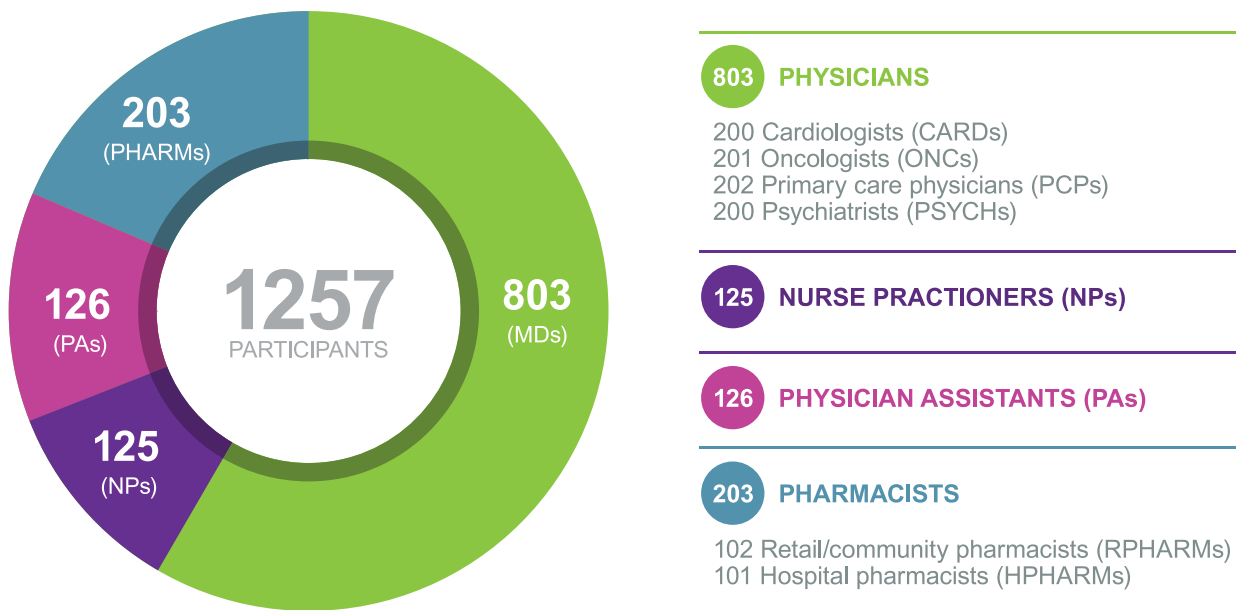
When viewed in totality, this year’s Mobile Trends data depicts a year of tremendous disruption to the digital clinical workflow. If 2012 and 2013 captured the heightened curiosity and exploration of the benefits associated with smartphones and tablet technology, 2014 data points to the focus required to roll out health care reform at the individual practitioner level.

Methodology

This report is based on a quantitative survey of 1,257 health care providers from the Epocrates market research panel, conducted in May 2014. The survey pool of clinicians was comprised of primary care physicians, cardiologists, oncologists, psychiatrists, nurse practitioners, and physician assistants. In addition, the 2014 survey included both retail and hospital pharmacists, in an effort to more fully represent the varied points of influence across today's continuum of care.

On average, clinicians saw 320 patients during a typical month, spent 93% of their time providing direct patient care, and had nearly 14 years of experience in their field. Pharmacists, on average, dispensed medication or educated 1473 patients each month, and have been in practice 16 years. All respondents are members of the Epocrates network, comprised of more than one million health care professionals, including 50 percent of U.S. physicians, who routinely use its intuitive solutions to help streamline workflow and improve patient care.

2014 SURVEY POOL

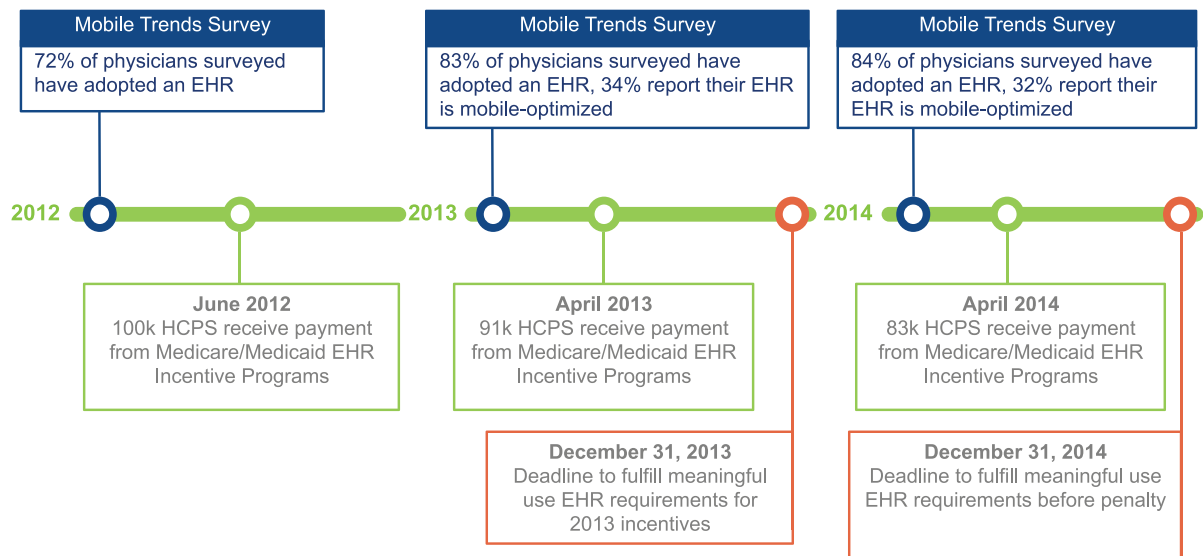


For clarity, findings refer to "clinicians" as physicians, nurse practitioners, and physician assistants. Pharmacists are treated as a separate category due to the specialized tasks related to that role and lack of historic trend data from previous Mobile Trends reports.

Amidst Historic Change In Health Care, Device Adoption Achieves Temporary Equilibrium

The drive for physicians to prove meaningful use of electronic health records by the end of 2013 in order to earn Medicare incentive payments and avoid penalties may be causing what appears to be a plateau in the number of clinicians using mobile devices, specifically tablets, during the clinical workflow.

EHR ADOPTION LEVELS OFF, WITH MOST SYSTEMS STILL NOT OPTIMIZED FOR MOBILE



While computer use has been at or near 100% since 2012, and more than three out of four respondents reported professional usage of smartphones in that same time period, the explosive adoption of tablets among clinicians gave rise to the classification of “Digital Omnivores” in 2012, those clinicians who use the trio of tablet, smartphone, and computer routinely in a professional capacity.

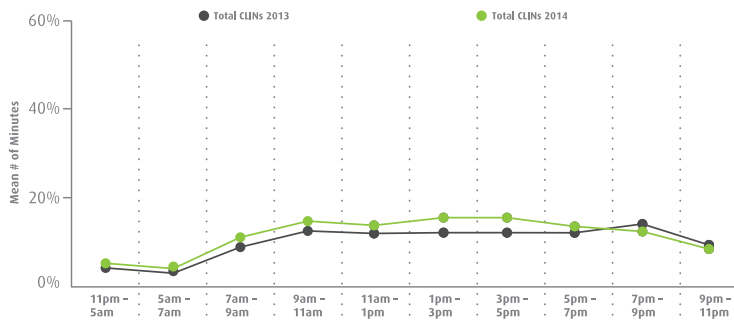
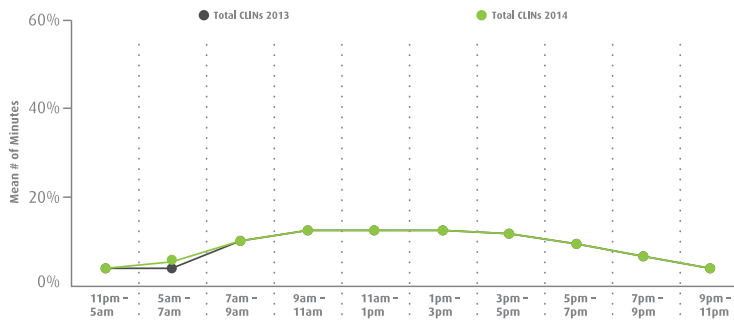
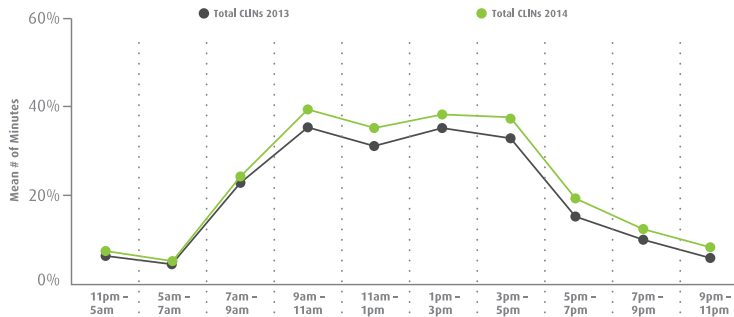
In-depth analysis of this segment reveals a consistent preference to conduct professional tasks on smartphones or tablets versus a traditional computer. In fact, digital omnivores surveyed in 2014 rely on mobile devices much more for communicating with colleagues, visiting professional resources, email and reading journal articles than their peers, who use just one or two digital platforms for their work.

Device adoption data alone does not tell a clear story, however. Though the twelve month period since the 2013 Mobile Trends survey saw slight decreases in smartphone and tablet usage in the aggregate clinician pool, an examination of how and when these digital devices are used suggests we may be witnessing the temporary effects of technological upheaval due to health care reform initiatives.

Amidst Historic Change In Health Care, Device Adoption Achieves Temporary Equilibrium

Clinicians report an uptick in time spent on computer, the predominant interface for many electronic health record systems. Time spent on tablets has also increased slightly, with EHR management ranking as the top tablet-related task, though it's important to note that only one-third of clinicians cite their EHR as being optimized for tablet or smartphone use. Smartphone minutes have remained essentially unchanged.

DAILY MINUTES PER DEVICE AMONG CLINICIANS – 2013 vs 2014



Computer Base: Total clinicians / Tablet & Smartphone Base: Clinicians who currently use a smartphone device for professional workflow in Q2

Epocrates Mobile Trends Survey 2014: Q6: Please estimate the number of minutes that you are actively using the following devices to download/process/search information (i.e. not traditional telephone capabilities) in a professional capacity during a typical working day.

Amidst Historic Change In Health Care, Device Adoption Achieves Temporary Equilibrium

Necessary IT upgrades, software training, and workflow modifications throughout a practice may also divert clinicians' time and attention away from other resources, and undermine their appetite to integrate yet another gadget into their daily routine.

Verbatim responses from survey participants provide further context for this slight pivot away from smartphones and tablets.



What do you view as your greatest needs in achieving improved patient outcomes?

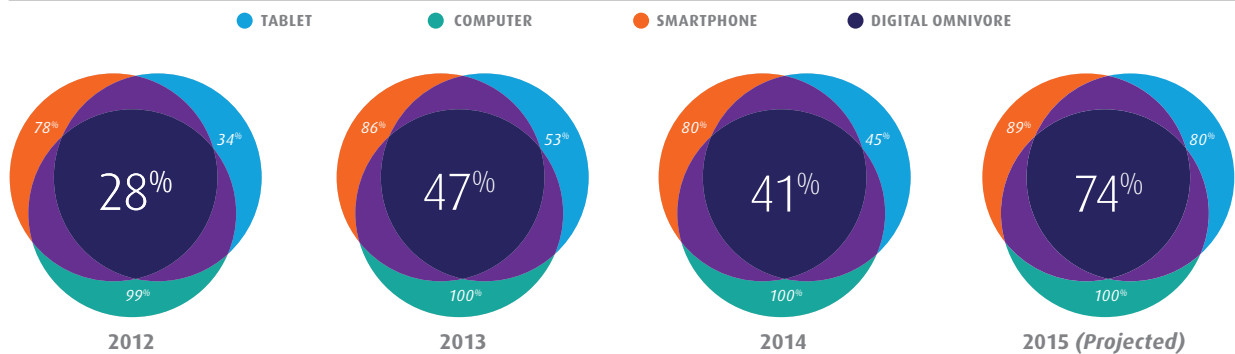
A more user-friendly and functional EHR interface as well as ability to access data over different EHRs.
– Cardiologist

An EHR and billing software that are interconnected and geared towards the user is the greatest need to improve patient outcomes.
– Primary Care Physician

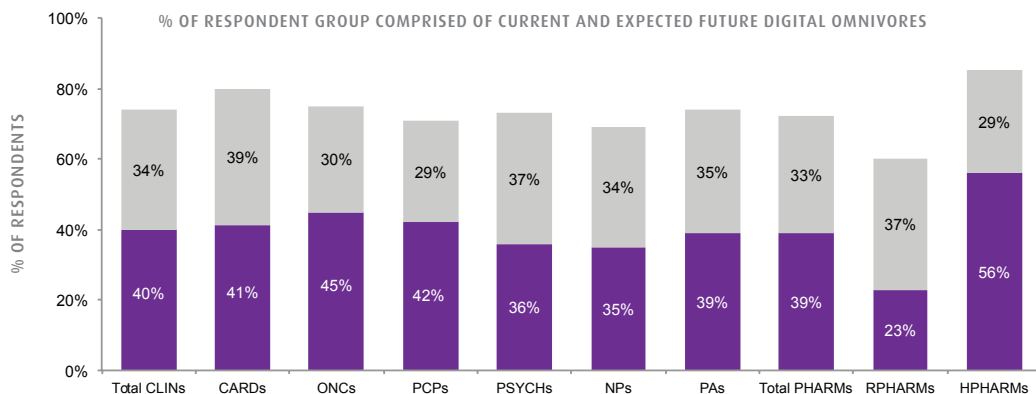
Having ease of data entry in whatever system is being used. If it's hard, people skip data entry, which results in important factors being missed.
– Physician Assistant

These growing pains may indeed be behind us soon, with 74% of clinicians expected to be utilizing all three digital platforms within the next year.

DIGITAL OMNIVORES PLATEAU... ANOTHER SURGE EXPECTED FOR 2015



DIGITAL OMNIVORES BY HEALTH CARE PROFESSIONAL SEGMENT



Task-To-Screen Trends Among Health Care Professionals



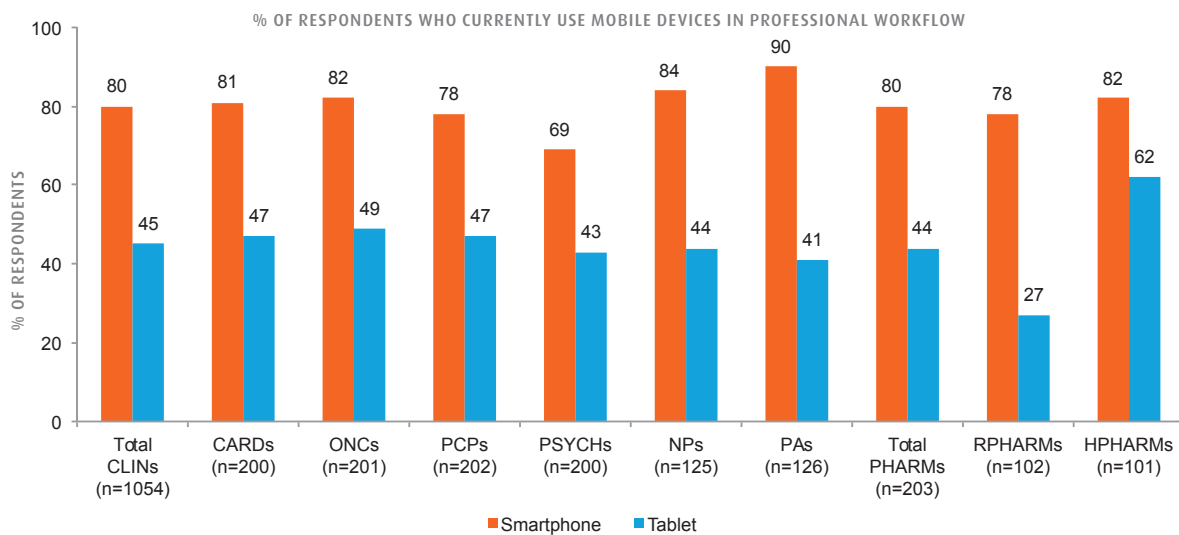
Please describe the professional tasks you most commonly conduct via your tablet, smartphone, and computer.

SEGMENT	TABLET	SMARTPHONE	COMPUTER
TOTAL CLINICIANS	53% EHR/Notes/e-Prescribing	48% Search	74% EHR/Notes/e-Prescribing
Computer users: 1257	35% Search	37% Access a Professional Resource, e.g. Epocrates or Medscape	39% Search
Smartphone users: 1002	16% Access a Professional Resource, e.g. Epocrates or Medscape	34% Communication w/Colleagues	23% Communication w/Colleagues
Tablet users: 568			
CARDIOLOGY	56% EHR/Notes/e-Prescribing	42% Search	81% EHR/Notes/e-Prescribing
Computer users: 200	24% Search	40% Communication w/Colleagues	31% Search
Smartphone users: 161	15% Communication w/Colleagues	30% Access a Professional Resource, e.g. Epocrates or Medscape	21% Communication w/Colleagues
Tablet users: 93			
PRIMARY CARE	48% EHR/Notes/e-Prescribing	49% Search	73% EHR/Notes/e-Prescribing
Computer users: 201	40% Search	39% Access a Professional Resource, e.g. Epocrates or Medscape	39% Search
Smartphone users: 164	23% Access a Professional Resource, e.g. Epocrates or Medscape	27% Communication w/Colleagues	19% Access a Professional Resource, e.g. Epocrates or Medscape
Tablet users: 98			
ONCOLOGY	58% EHR/Notes/e-Prescribing	49% Communication w/Colleagues	72% EHR/Notes/e-Prescribing
Computer users: 202	34% Search	45% Search	42% Search
Smartphone users: 158	18% Access a Professional Resource, e.g. Epocrates or Medscape	26% Access a Professional Resource, e.g. Epocrates or Medscape	28% Communication w/Colleagues
Tablet users: 95			
PSYCHIATRY	41% EHR/Notes/e-Prescribing	49% Search	73% EHR/Notes/e-Prescribing
Computer users: 200	39% Search	39% Communication w/Colleagues	43% Search
Smartphone users: 138	20% Communication w/Colleagues	31% Access a Professional Resource, e.g. Epocrates or Medscape	28% Communication w/Colleagues
Tablet users: 85			
NURSE PRACTITIONER	55% EHR/Notes/e-Prescribing	60% Search	74% EHR/Notes/e-Prescribing
Computer users: 125	36% Search	42% Access a Professional Resource, e.g. Epocrates or Medscape	40% Search
Smartphone users: 105	22% Access a Professional Resource, e.g. Epocrates or Medscape	36% Communication w/Colleagues	22% Communication w/Colleagues
Tablet users: 56			
PHYSICIAN ASSISTANT	62% EHR/Notes/e-Prescribing	54% Access a Professional Resource, e.g. Epocrates or Medscape	73% EHR/Notes/e-Prescribing
Computer users: 126	38% Search	42% Search	44% Search
Smartphone users: 113	17% Access a Professional Resource, e.g. Epocrates or Medscape	27% Communication w/Colleagues	21% Communication w/Colleagues
Tablet users: 52			
TOTAL PHARMACISTS	73% Search	82% Search	72% Search
Computer users: 203	24% EHR/Notes/e-Prescribing	17% Communication with Colleagues	49% EHR/Notes/e-Prescribing
Smartphone users: 163	19% Communication w/Colleagues	13% Access a Professional Resource, e.g. Epocrates or Medscape	18% Communication w/Colleagues
Tablet users: 90			
RETAIL PHARMS	85% Search	83% Search	73% Search
Computer users: 103	15% Access a Professional Resource, e.g. Epocrates or Medscape	16% Access a Professional Resource, e.g. Epocrates or Medscape	47% EHR/Notes/e-Prescribing
Smartphone users: 80	11% EHR/Notes/e-Prescribing	8% EHR/Notes/e-Prescribing	19% Access a Professional Resource, e.g. Epocrates or Medscape
Tablet users: 27			
HOSPITAL PHARMS	68% Search	81% Search	71% Search
Computer users: 101	30% EHR/Notes/e-Prescribing	27% Communication with Colleagues	50% EHR/Notes/e-Prescribing
Smartphone users: 83	22% Communication w/Colleagues	11% Access a Professional Resource, e.g. Epocrates or Medscape	22% Communication w/Colleagues
Tablet users: 63			

Allied Health Professionals Resoundingly Attest To The Benefits Of Mobile Technology

More than 80% of nurse practitioners, physician assistants, and pharmacists contend that mobile device usage has led to improved patient care, exceeding even the high percentage of clinicians who hold this view. In fact, a closer look at mobile device adoption and frequency of use of these devices across all HCP segments surveyed reveals that hospital pharmacists lead all respondents in tablet adoption and digital omnivore status, while physician assistants and nurse practitioners rank first and second, respectively, in terms of daily minutes spent on tablets. Easier, faster access to information and increased flexibility to work outside the office are the key drivers among allied health professionals who utilize a smartphone or tablet for professional purposes. Nearly 60% of pharmacists claim that the ACA's emphasis on technology has helped them improve patient care, whereas two-thirds of clinicians disagree.

MOBILE DEVICE UTILIZATION BY HCP SEGMENT



MOBILE ENABLES FASTER, MORE FLEXIBLE WORKFLOW

% of Respondent Group

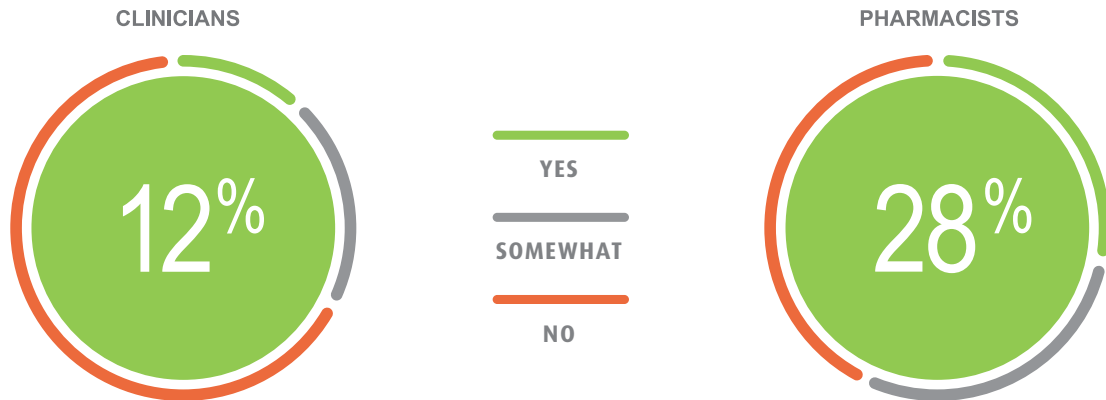
Impact on Workflow	Total CLINs	CARDs	ONCs	PCPs	PSYCHs	NPs	PAs	Total PHARMs	RPHARMs	HPHARMs
Positive (Net)	<u>73</u>	<u>72</u>	<u>67</u>	<u>69</u>	<u>72</u>	<u>80</u>	<u>83</u>	<u>82</u>	<u>85</u>	<u>79</u>
- Easier/faster access to information/data	19	19	15	22	17	24	23	29	31	27
- More mobility/can work outside office	13	10	8	14	19	12	11	16	14	19
Neutral (Net)	<u>17</u>	<u>18</u>	<u>24</u>	<u>17</u>	<u>18</u>	<u>9</u>	<u>7</u>	<u>12</u>	<u>13</u>	<u>11</u>
Negative (Net)	<u>12</u>	<u>10</u>	<u>11</u>	<u>16</u>	<u>11</u>	<u>12</u>	<u>11</u>	<u>2</u>	<u>1</u>	<u>4</u>

Allied Health Professionals Resoundingly Attest To The Benefits Of Mobile Technology



Has the Affordable Care Act's emphasis on technology helped you improve care for patients?

PHARMACISTS EMBRACE HIT REFORM AS A MEANS TO BETTER PATIENT OUTCOMES



“

“Mobile technology makes it easier to show patients, rather than explain what something looks like or how to do something.”

- Retail Pharmacist

“Whether looking up formularies to save patients money or retrieving clinical data at home or away from the hospital, mobile technology has increased time with patients by decreasing time spent looking for information.”

- Hospital Pharmacist

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CONCLUSION

With the Affordable Care Act's requirement to implement key provisions that impact clinical workflows in 2014, especially in relation to EHRs, computer usage has temporarily regained some ground. Yet clinicians as well as pharmacists clearly endorse the viability of mobile technology to provide rapid access to clinical information and the ability to communicate with a growing roster of caregivers.

In this era of easy access to and widespread proficiency with computers, smartphones, and tablets, the conversation must move beyond hardware and into the data and design that can be delivered to any health care provider's preferred screen.

As EHR use has increased due to incentives associated with the Affordable Care Act, this has fueled the increased use of computers as many EHR platforms are not mobile-optimized. We feel certain that going forward, the administrative tasks associated with EHR documentation will need to become more user-friendly to create greater efficiency in the workflow. Given self-reported intent of 74% of clinicians to adopt tablets, smartphones, and computers into their workflow by Q2 2015, the migration of tasks to mobile devices will likely continue to grow.

The outlook is favorable, and timing is everything: It's possible that electronic health record implementation, mobile device adoption and user demand for seamless, intuitive collaboration across the health care continuum may converge to create the kind of care delivery system patients and providers have been waiting for.

About Epocrates, an athenahealth service

About athenahealth, Inc.

athenahealth is a leading provider of cloud-based services for electronic health record (EHR), practice management, and care coordination. athenahealth's mission is to be caregivers' most trusted service, helping them do well doing the right thing. For more information, please visit www.athenahealth.com.

About Epocrates, Inc.

Epocrates, Inc., an athenahealth service, is recognized for developing the #1 medical application among U.S. physicians for clinical content, practice tools, and health industry engagement at the point of care. Epocrates has established a loyal network of more than one million health care professionals, including 50 percent of U.S. physicians, who routinely use its intuitive solutions to help streamline workflow and improve patient care. For more information, please visit www.epocrates.com/company.

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