CHILMARK
R E S E A R C H

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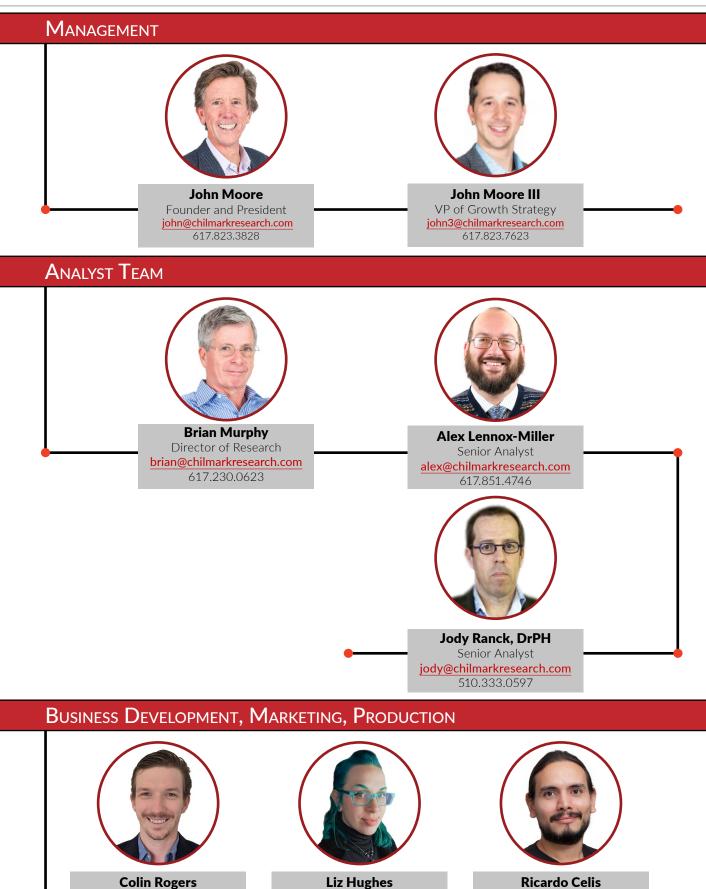## RESEARCH AGENDA
PUBLICATION UPDATE

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2020 RESEARCH REPORTS

The Path to Value for Population Health: Adopting a Value Chain Model Focus Group Report

This report is based on a web survey of healthcare executives leading PHM initiatives at their organizations and three focus group sessions with this senior healthcare organization leadership. The purpose of the survey and focus group sessions was to understand how participants derived value out of their population health management and value-based contract activities. Our results show that the path to value for PHM infrastructure investments – to support new VBC models of care – is still very much in its infancy. Using the input from these focus groups, this report introduces a new value chain model for PHM initiatives.

The Promise of Artificial Intelligence and Machine Learning in Healthcare (MSR)

This report explores opportunities, trends, and the rapidly evolving landscape for vendors, tracing the evolution from early artificial intelligence/machine learning (AI/ML) use in medical imaging to today's rich array of vendor solutions in medical imaging, business operations, clinical decision support, research and drug development, patient-facing applications, and more. The report also reviews types and applications of AI/ML, explores the substantial challenges of health data collection and use, and considers issues of bias in algorithms, ethical and governance considerations, cybersecurity, and broader implications for business.

Revenue Integrity in Healthcare: Solutions Driving Payment Performance (MTR)

Revenue cycle issues manifest in the claims process of submission, appeal, and remittance, but causes are found much earlier in clinical workflows. Rather than think of these as disparate issues, they should all be considered under a broader category of revenue integrity. The report reviews the current state of the market, the maturity of solutions, and the strengths and weaknesses of each solution type.

Vendors Profiled: 3M, Allscripts, athenahealth, Cerner, Change Healthcare, Epic, Hayes|MDAudit, Medicomp Systems, Optum, PatientMatters, RevSpring, Sift, and ZOLL.

Open APIs in Healthcare: The Future of Data Integration (MTR)

This report describes a general model for understanding the different categories of information exchange products and services (API-based and non-API-based) in the market, identifies the sources where different kinds of health-related data are most likely to be API-accessible, how APIs are already contributing to development and integration efforts across healthcare, and estimates the much larger potential of widespread adoption.

Vendors Profiled: 1upHealth, 4Medica, Allscripts, Apple, athenahealth, Availity, Blue Button 2.0, Cerner, Change Healthcare, Datica, Epic, Human API, Meditech, NextGen, NCPDP, Particle Health, The Sequoia Project, Redox, Surescripts, and Validic

Addressing Social Determinants of Health: IT Solutions to Engage Community Resources (MSR)

This report evaluates solutions making it easier for providers to incorporate community resources into care planning, identifying the strengths and weaknesses of options in the market and predicting how the market will develop in the future. Research in this report is based on interviews with executive leadership teams of solutions vendors, executives from the major EHR companies, and extensive secondary research.

Vendors discussed: aunt bertha, Cerner, Epic, HealthEC, Healthify, NowPow, Signify Health, Solera, Unite US, Xealth

2021 PLANNED RESEARCH PROJECTS*

Integration Infrastructure Market Trends Report

Lead Analyst: Brian Murphy

Released: April (View landing page, Download Preview)

Abstract

This report will focus on the software-based technologies used to support cross-application and cross-organization development and integration projects. It will focus on how these vendor's technologies help organizations and implementers source, transform, and deliver data and functionality cost effectively and efficiently.

Sample of Vendors to be Considered:

> Allscripts, Cerner, Clinical Architecture, Commure, Datica, Diameter Health, Epic, Hart, Health Catalyst, InterSystems, Lyniate, Microsoft, NextGen (Mirth), Orion Health, Redox, Verinovum, Xealth

Virtual Care Management Market Trends Report

Lead Analysts: Alex Lennox-Miller

Released: August (View landing page, Download Preview)

Current Status: Editing and Production

Abstract

Virtual care plays an essential role in solving the problems of modern healthcare. The necessary remote appointments and home care of the COVID pandemic have driven use of virtual care to new heights, but it's real promise goes far beyond these uses. When seen as part of a system of distributed healthcare, virtual care can play a vital role in the long-term care relationships that occupy most of the modern healthcare system.

Sample of Vendors to be Considered:

> AmWell, athenahealth, Bright.MD, Caregility, Cerner, Doxy.me, Epic, Gyant, Health Catalyst, Innovaccer, NeuroFlow, Persivia, Philips, Silvercloud Health, SymphonyRM, Teladoc/Livongo

AI for Operations Market Trends Report

Lead Analyst: Jody Ranck

Anticipated Release: October

Current Status: Editing

Abstract

This report will focus on AI applications that address critical operational functions of healthcare organizations including revenue cycle management, prior authorizations, conversational AI, supply chain management, claims processing, scheduling and workforce optimization.

Sample of Vendors to be Considered:

> Apervita, Change Healthcare, Codoxo, Health Catalyst, HospitalIQ, Infinitus, LeanTaas, Olive, Optum, Waystar

Calendar is subject to change in response to what we see developing in the industry throughout the year and client input regarding research needs.

Analytics for Value Based Care Market Trends Report

Lead Analyst: Brian Murphy

Anticipated Release: November

Current Status: Researching and Writing

Abstract

Current state and trajectory for offerings that support value-based care, including but not limited to network design and optimization, risk adjustment, care and coding gaps, cost and utilization management, and workflow integration. It will also discuss how data science and AI are contributing to these offerings.

Sample of Vendors to be Considered:

> 3M, Allscripts, Arcadia, athenahealth, Cerner, Clarify Health, Change Healthcare, Certilytics, Epic, Health Catalyst, HealthEC, IBM, Innovaccer, Lightbeam, Medecision, NextGen, Optum, Orion Health, SPH Analytics

Real World Evidence Future Trends - Market Scan Report

Lead Analyst: John Moore

Anticipated Release: Q4

Current Status: Researching and Writing

Abstract

This research looks at the rapidly growing interest in secondary uses of healthcare data. Termed RWD/RWE for real world data / evidence, countless health IT organizations are now pivoting to offer data (clinical and claims) and evidence to support drug development, clinical trials, efficacy, and patient safety. This market has existed for years, but clinical data availability has only recently achieved the necessary scale that can be combined with sophisticated data analytic tools to enhance the value of RWD/RWE. These are also opportunities for clinical delivery organizations to capitalize on their own data assets as well directly – such as in the case of Truveta – or through partnerships with their solution vendors. The report will look at current market solutions, use cases and what will be the keys to future success as more companies look to develop new opportunities by leveraging their existing solutions and data assets.

Sample of Vendors to be Considered:

> Aetion, Allscripts, Cerner, Clarify Health, Health Catalyst, IBM, IQVIA, Optum, Premier, TriNetX, Truveta

Robotic Process Automation (RPA) in Revenue Cycle Market Trends Report

Lead Analyst: Alex Lennox-Miller

Anticipated Release: Q4

Current Status: In Queue

Abstract

A deep look into the automation technologies emerging for use in revenue cycle, and their use in fee-for-service, value-based care, and alternative payment contracts. Includes front desk, back office, and mid-encounter automation designed to improve billing, approvals, and appeals.

Sample of Vendors to be Considered:

> Epic, Cerner, Allscripts, athenahealth, 3M, Optum, Change Healthcare, IBM, Revspring, Medicomp, Sift, ZOLL, NextGen

Customer Experience: Creating Delightful Engagement MTR

Lead Analyst: Alex Lennox-Miller

Anticipated Release: 2022Q1

Current Status: In Queue

Abstract

What are the key components of the consumer experience in healthcare? This report examines the design choice, functionalities, and enabling architectures behind consumer- and patient-facing healthcare technology. Includes mobile apps, virtual care solutions, patient engagement, network and referrals management, and other solutions targeting consumers in healthcare.

Sample of Vendors to be Considered:

> Allscripts, athenahealth, aunt bertha, Carevive, Cedar, Cerner, Change Healthcare, Epic, Epion, Experian, GetWellNetwork, Integra, Kyruus, Luma Health, Nextgen, Noona, Patient Matters, PatientPop, Phreesia, Relatient, RevSpring, Salesforce, Solution Reach, SymphonyRM, Xealth, ZocDoc

Enabling the Hospital@Home Model Market Trends Report

Lead Analyst: Alex Lennox-Miller

Anticipated Release: 2022Q2 (?)

Current Status: In Queue

Abstract

Investigates the growth of the hospital-at-home and care-at-home models, focusing on solutions that enable previously in-patient or clinic-level care and treatments in a home setting. This includes remote monitoring, care solutions, treatment technologies, and other enablers.

Sample of Vendors to be Considered:

> TBD

Payer API Adoption: Compliance or Platform (MTR)

Lead Analyst: Brian Murphy

Anticipated Release: 2022Q1

Current Status: In Queue

Abstract

While CMS's Interoperability and Patient Access final rule requires certain health plans to implement member-accessible APIs, many commercial plans will follow suit. Access to claims data will provide a way for a plan to drive member perception of value. This report will provide an update on adoption of APIs by regulated and non-regulated health plans.

Sample of Vendors to be Considered:

> TBD

REPORT TYPES EXPLAINED

Market Trends Report (MTR)

Our signature, Domain-defining report format. The result of 6-9 months of research and writing, these reports scope out our definition of solutions for the covered domain, the major market trends shaping the evolution of these solutions, and evaluates vendors on their ability to deliver on the current and coming needs of healthcare organizations.
Retail Cost: $6,000

> Finished reports are 70-120 pages.

> Examines trends influencing the changing needs of healthcare organizations, and what innovations/features future solutions should implement to remain a viable competitor.

> Includes full vendor profiles and rankings (typically 15-20 profiles). These are thorough, objective evaluations of the leading vendors in the domain

> Valuable for vendor selection process with a deep market scan of trends and future considerations, and reviews vendors' abilities to meet those future needs.

Market Scan Report (MSR)

MSRs examine an emergent, typically immature and rapidly evolving space in health IT. These reports scope the emerging market, identify the forces influencing adoption and growth of these solutions, and examine the leading vendors operating in the space. **Retail Cost: $2,750**

> Finished reports are 25-40 pages.

> Presents definition and framework for evaluating emerging products.

> Contains 6-15 vendor profiles (condensed relative to MTR profiles) and no vendor comparisons.

Multi-Vendor Sponsored Report (MVSR)

MVSRs are a collaborative, sponsored research effort to help educate the market. We scope out a specific topic that we know is lacking coverage/understanding in the industry and then reach out to vendors working in that space for sponsorship, refining the scope based on vendor feedback. In order to maintain the objectivity of the report, we require 3-5 sponsors before launching an MVSR. Examples of past MVSRs would be APIs for a Healthcare App Economy: Paths to Market Success, and The Migration to Clinician Network Management.

Cost to Public: Free

> Finished reports are 15-25 pages.

> Variable formats based on subject matter and conversations with sponsoring organizations.

> Cost to produce these reports is $75,000. Individual sponsor cost ranges from $15,000-$25,000

> Each sponsor receives a branded copy with full, unlimited distribution rights. All copies have a note in the front thanking all report sponsors, and each sponsor receives a version with just their branding (and ours) throughout the document.