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2023 DIGITAL HEALTH REVIEW

# Key Wins and Emerging Trends for 2024



# INTRODUCTION

2023 was among the toughest years on record for health care providers, forcing leaders to look at all the options for squeezing more out of every resource. With financial challenges rising – including [staffing shortages](#), [clinician burnout](#), and [shifting regulations from the Centers for Medicare & Medicaid Services \(CMS\)](#) – health systems face increasingly perilous hurdles..

Health systems must fight relentlessly for reimbursement dollars and the loyalty of once-devoted patients – for them, this is the “new normal.” To support their goals, we bring digital health vendors, programs and tools into clinical patient workflow via our Xealth Digital Care Smart on FHIR app.

Working across clinical lines in nearly 30 health systems with 12M+ digital health orders sent, Xealth has sifted through the data to see what has captured hospitals’ interest and what’s working. Here are a few findings:



### **Most Patients Enrolled: Programs Around Surgery Prep and Recovery**

1.5M patients reached



### **Most Common Programs Addressed: Women’s Health**

More than 1/2 of client health systems launched related programs



### **Most Engaged Patients: Programs Addressing Preventive Care**

69% patient engagement rate



### **Hottest Area in 2023: Chronic Disease Management**

50% increase in deployment

In 2024, this will be the year of digital transformation catch-up for many health systems. We optimistically believe providers will increase their use of digital solutions, particularly in the realm of chronic care and disease management, and maybe even start to measure the ways these digital programs, outreach and services improve patient outcomes, reduce costs and make life easier for their employees.

The return to profitability for hospitals may seem impossible for many, but many smart people are trying to figure out how to make it all work. Here are some of the challenges and opportunities that lie ahead for those leaders.

## TREND #1

# It's Time to Get Creative with Who Pays for Digital Health

The traditional healthcare financing model, which primarily relies on fee-for-service reimbursement, will continue to take its lumps.

Here are alternative payment models we'll see explored more frequently in 2024:

**Employer Programs:** More health systems are working directly with employers to leverage digital tools as part of their contracts with the employers. Scripps Health helps manage Qualcomm employees' healthcare by treating specific conditions and at-risk patient populations. A digital health integration platform further enhances this setup by surfacing relevant patient tools offered by the employer for providers, improving the quality of care and revenue capture while bypassing traditional payors. [Scripps leveraged Xealth](#) to proactively identify, educate and communicate its offerings to Qualcomm members.



**190%** increase in enrollment in Vida digital health since Xealth engagement



**16%** bump in Lyra mental health enrollment, with page views also jumping **130% and 15%** in these programs, respectively



**27%** overall patient conversion rate

**Strategic Partnerships with Technology Companies:** Collaborative efforts between healthcare providers and tech companies, involving shared investments, will address specific healthcare challenges at minimal cost to the health system.

[Banner Health's integration of SilverCloud into its Digital Therapeutics formulary via Xealth](#) for primary care practices has led to notable clinical improvements, including significant user engagement and achievement of mental health outcome goals. This success has prompted Banner to plan an expansion of the program to more providers.

**Enhanced Provider-Employer Collaboration:** A more balanced, patient-centric healthcare ecosystem continues to take shape as health systems seek to level the playing field with payors to control costs. The Froedtert & MCW health network wanted to easily invite patients in a specific eligible employee population to sign up for Omada Health's Pre-Diabetic program focusing on weight loss and greater awareness of changing glucose levels, with the goal of increasing enrollment into these programs.

[The Froedtert & MCW health network collaborates with Xealth](#) to identify and email eligible patients for a pre-diabetes program, extending personalized invitations from their providers for the Omada program. This targeted strategy results in an enrollment rate that is double the standard rate achieved by Omada independently.

## TREND #2

# Surgery, PT and Rehab, and Preventive Care Are the Top Three Digital Health Uses

For the fourth consecutive year, Xealth diligently tracked digital health use cases for its platform. There are 12 common themes we've identified across clinical and operational areas.

The table below shows the shift in Xealth usage since we began tracking, ranked by the percentage of patients associated with each area divided by the total patients reached (with some patients receiving outreach in more than one category).

	2020	2021	2022	2023
<b>Surgery</b>	15%	29%	31%	<b>41%</b>
<b>PT &amp; Rehab</b>	3%	7%	14%	<b>15%</b>
<b>Preventive Care</b>	7%	20%	17%	<b>14%</b>
<b>Women's Health</b>	2%	7%	16%	<b>13%</b>
<b>Chronic Disease Management</b>	0%	10%	10%	<b>10%</b>
<b>Family &amp; General Medicine</b>	43%	6%	2%	<b>8%</b>
<b>Virtual Care Enablement</b>	29%	43%	19%	<b>3%</b>
<b>Behavioral Health</b>	0%	1%	1%	<b>2%</b>
<b>Other*</b>	4%	4%	6%	<b>12%</b>

\*Includes Oncology, Palliative Care, Pediatrics and Innovation

Surgery, related to surgery preparation and discharge instructions and pathways, continues to grow, while activity across Family & General Medicine (general education) and Virtual Care Enablement have dropped markedly as virtual visits have decreased in popularity.

## TREND #3

# Patient Burnout Will Continue – Digital Engagement Strategy Can Help

Patient burnout is a multifaceted issue that arises from the complex nature of managing chronic illnesses, navigating healthcare systems, and dealing with the personal impacts of treatment and care.

Addressing patient burnout requires a nuanced approach tailored to individual needs and systemic challenges. The experiences of [Allina Health](#) and the [Froedtert & Medical College of Wisconsin \(MCW\)](#) health network offer insightful examples of how targeted strategies can effectively combat patient burnout.

**Personal Experiences:** Patient experiences play a crucial role in burnout vulnerability. Allina Health’s achievement of a 60% open rate on shared decision-making tools indicates that when patients are provided with engaging and relevant information, they are more prepared and confident in managing their health, positively influencing their personal healthcare journey.

**Relevant Messaging to At-Risk Patient Populations:** The Froedtert & MCW health network, with a business goal focused on preventive care, aimed to assist patients in managing their pre-diabetes, which includes measures like weight loss and reducing glucose levels. To achieve this, the organization implemented a project where they utilized Xealth to enroll patients identified as pre-diabetic in the Omada program. The results of this initiative were significant.

## The Froedtert & MCW Pre-Diabetes Initiative Highlights



Xealth sent invitations and reminders to over **500** patients



**58%** open rate and a **9.7%** click-through rate



**16%** program enrollment rate

## TREND #4

# More Holistic Reporting of Digital Health Solutions

The integration of digital health ecosystems and the growing interconnectedness of healthcare data will profoundly impact how health systems operate and the care they provide. This alignment with Value-Based Care (VBC) initiatives will continue to bring about several significant benefits:



### Improved Patient Engagement

In its quest to optimize patient engagement for the BlueStar digital therapeutic for diabetes, [Welldoc found through Xealth's integration](#) that engagement is significantly higher when the program is recommended directly by a care team. The integration into the EHR workflow allows one-click onboarding and real-time data sharing, enhancing provider-patient connections and timely health interventions. Results from several health systems reveal that patient engagement rates double when BlueStar is medically recommended, and incorporating Xealth's platform increases these rates by 2.5x compared to a direct-to-consumer approach.



### Enhanced Retention

Patients who feel understood and involved by their healthcare providers are likelier to stay with them. The Froedtert & MCW health network, seeking a standardized digital tool for at-home patient engagement, [now uses MedBridge HEP through Xealth](#). This solution enables their therapy team, including a diverse range of specialists, to prescribe tailored exercises to patients, offering them 24/7 access to the latest materials across different therapy disciplines.



### Personalized Care Delivery

Customized treatment and preventive measures improve health outcomes. [Duke Health's initiative](#) for hip and knee replacement patients involves using Xealth to send pre-op educational videos, meeting Joint Commission requirements and providing tailored patient education. The platform tracks engagement and comorbidity rates, with results showing over 60% patient engagement, saving 1,700 clinician hours and fulfilling Joint Commission standards. This approach has led to reduced readmissions and improved Press Ganey scores, attributed to the effective distribution and monitoring of educational content.

## TREND #5

# Higher Utilization of Chronic Care Services

In 2023, there was a notable increase in the use of digital health programs for monitoring chronic conditions such as diabetes, hypertension and behavioral health issues. This trend reflects an effort to more efficiently manage the time and costs associated with chronic patient care.

In 2024, health systems will respond by emphasizing digital chronic care services and can look forward to promising results. Here are pertinent success stories.

- ✓ **Comorbidities Awareness:** Duke Health recognized the need to educate hypertension patients, who often have comorbidities like chronic kidney disease or heart failure, to enhance patient satisfaction and engagement. Now, [Xealth sends a bundle of educational videos annually to these patients](#). The videos, delivered seven days before their primary care visit, cover topics like diet changes and blood pressure management.

### Duke Hypertension Initiative with Xealth



Over **135,000** patients reached



More than **80%** of patients watch **75% to 100%** of the content

- ✓ **Digital Advanced Directives:** Southern Illinois Healthcare (SIH), aiming to increase advanced directives among Medicare patients, collaborated with Xealth to automate educational outreach about Medicare Annual Wellness Visits. This initiative emphasizes the significance of these visits and the importance of having an advanced directive on file. The education, delivered via email and SMS, includes a video detailing visit expectations and has shown promising early results with a 55% click rate on SMS messages.
- ✓ **Annual Wellness Visits:** Allina, focusing on improving Medicare Annual Wellness visits education to enhance HCAHPS and HOS survey scores, partnered with Xealth for better information dissemination. This approach ensures patients recall receiving crucial information and accurately respond to surveys. Initial patient engagement is encouraging, with a nearly 20% campaign open rate, 13% click-throughs and about 10% overall interaction in the Medicare population.
- ✓ **Chronic Pain Management:** Spaulding Rehab's chronic pain management program, integrating education and mindfulness exercises, showed positive pain management results but lacked consistent delivery and utilization metrics. MGB utilized Xealth for HIPAA-compliant video distribution and tracking, enhancing its efficacy study. Engagement rates are promising, with a 53% campaign email open rate and a 28% open rate for reminder emails, while click rates average 22 percent.

## TREND #6

# Leveraging Digital Health to Close Care Gaps

Digital health can close care gaps by enhancing patient access to care, especially for those in remote or underserved areas, through telehealth services and remote monitoring. It facilitates personalized care by leveraging data analytics to tailor treatment plans based on individual patient needs and histories.

Additionally, digital health tools improve patient engagement and adherence to treatment plans through convenient and interactive platforms, ensuring continuous care and monitoring.

### Serving Neglected Patient Populations

Middle-aged women are a frequently overlooked patient population. University of Pittsburgh Medical Center (UPMC) created the Women's Midlife Health Center, focusing on peri- and menopausal care, and utilized Xealth for the automatic distribution of educational content to patients. This approach prepares patients for their appointments, allowing for more focused and efficient consultations. The campaign has shown a 40% content open rate, with nearly 20% of patients actively engaging in the program.

### Improved Preparation and POP Health Implications

Patients no-showing appointments or being unprepared can cost health systems valuable time. Allina addressed the challenge of patient preparation for colorectal screenings by using Xealth's automation to send advance messages to patients. This strategy led to an increase in scheduled and completed colonoscopies, aligning with POP health and quality goals. The approach proved effective, with a 60% open rate and 40% click-through rate on messages, resulting in patients arriving well-informed and engaging more meaningfully during appointments.

### Easing Clinical and Administrative Burden

Providing custom or vended educational content manually can drain untold care hours. Information often is omitted, plus there is virtually no way to measure impact. **Children's Wisconsin addressed the challenge** of distributing educational content by integrating their custom content management system with KidsHealth, creating a centralized workflow for care teams. This integration, along with using Artera for patient engagement, improved the consistency of provider communication, reducing alert fatigue. The solution enhanced patient and family experience, streamlined content distribution and enabled tracking of clinician and patient engagement with the educational material.





## TREND #7

# Shut Up and Give Me All Your Preventive Services

In 2024, several factors will boost the demand for preventive services, including increased patient education, technological advancements and the emergence of new behavioral health applications. This trend creates opportunities and challenges for healthcare providers who must meet these expectations and reap the benefits from the growing interest in preventive care.

Health systems proactively providing preventive services can improve patient health and ease the strain on their systems, contributing to cost containment.

- ✓ **Patient Education:** Patients who better understand the implications of their lifestyle choices and make changes can alleviate future health system burden. Duke Health, with a 39% quit smoking rate in its tobacco cessation program, [utilized Xealth to further enhance patient participation](#). The health system automated the sending of a video about smoking cessation benefits to identified tobacco users, and those expressing interest for more information are promptly contacted by the cessation team. This method has resulted in patients who say “yes” being 20% more likely to attend their first appointment.
- ✓ **Technological Advancements:** Remote patient monitoring tools offer opportunities to avoid medical complications among expecting mothers. Baystate Health implemented a more uniform digital app adoption process [by partnering with Xealth](#), starting with a Babyscripts pilot for remote pregnancy monitoring. This initiative led to over 1,000 patients enrolling in remote blood pressure monitoring, achieving an 84% engagement rate and notably reducing postpartum readmissions. Due to these positive outcomes, the program is expanding across the health system to enhance monitoring for pregnant patients before and after birth.
- ✓ **Behavioral Health Applications:** The COVID-19 pandemic taught us that behavioral healthcare needs more attention. Banner Health addressed the need by [integrating the digital solution SilverCloud into their Digital Therapeutics formulary via Xealth](#), making it accessible to primary care practices. This initiative led to substantial clinical improvements, with coached users engaging with the platform for over two hours on average, surpassing the goal of 60 minutes.



### Banner Health Surpasses Behavioral Health Goals with Xealth

	GOAL	RESULT
Average User Engagement	1 hour	2 hours
PHQ9 Improvement	50%	54%
GAD7 Improvement	50%	58%

## TREND #8

# EHRs Can't Carry the Digital Health Burden Alone

Electronic Health Records (EHRs) have been a mainstay in the healthcare industry for many years. Still, as we step into 2024, it will become more widely known that although they are excellent at a lot of things, they are not built to do everything.

The resources required for a health system to build a complete digital health platform on its own with EHR native tools are staggering. Frankly, there is no need. Better-equipped solutions are available to facilitate improved patient experiences and outcomes.

For effective chronic care management and centralized ordering and monitoring of programs, for example, a proven, unified platform is needed to promote high quality care and operational efficiencies.

Here are some key takeaways:

### ✓ **Addressing Chronic Care Patient Management**

Managing chronic care patients requires significant time and resources. In 2023, there was a notable rise in the adoption of digital health tools for monitoring patients with diabetes, hypertension and behavioral health issues.

### ✓ **Streamlining Program Ordering and Monitoring**

With Xhealth, clinicians now have a centralized system within the EHR for managing various digital health programs, ranging from maternity care to home exercise routines. This integrated approach reduces the need for clinicians to navigate multiple interfaces, thereby enhancing efficiency and patient care outcomes.

### ✓ **Efficient Distribution of Decision-Making Resources and Information**

To optimize both administrative and clinical efficiency, many healthcare providers have shifted to electronically distributing essential patient information prior to appointments. This approach not only conserves time that would otherwise be spent on manual distribution but also reduces paper and printing expenses.

## 2024: Digital Health's Year to Shine

As we step into 2024, it's clear that the challenges of 2023 have become more entrenched in the healthcare sector. However, within these challenges lies the potential for innovation and progress.

Health systems like yours count on Xealth and its track record of success to jump start stalling digital health initiatives or ones yet to be created. They understand the need for innovative solutions, but aren't always sure where to begin.

Xealth specializes in the following key areas of digital health development:

- » **Digital Health Formulary Strategy**
- » **Care Team Clinical Workflow**
- » **Digital Front Door Activation**
- » **Clinical AI Engine and Automation Capabilities**
- » **Monitoring, Notification and Data Management**
- » **Integration Management**

We appreciate your consideration of the insights and recommendations provided in this guide, and we remain committed to supporting your journey toward digital health success in 2024 and beyond.

Learn how Xealth's Digital Command Center and Centralized Integration Suite transform obstacles into opportunities for greater patient loyalty and revenue capture.

[Schedule your consultation today](#)

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