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Changes in Retail Clinic Scope of Services

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Why Retail Clinics?

Overview of Healthcare Challenges in the US

- With proposed Healthcare reform, United States is on the precipice of exponential increase in demand for health services
- Healthcare Today:
 - Number of uninsured in the United States at 45.7 million¹
 - 9% increase in 2008 U.S. healthcare expenditures, with costs expected to double by 2018 ^A
 - 95% of every \$1.00 spent in the U.S. on healthcare is for treatment and only 5% for prevention ^A
 - 27% shortage in primary care physicians forecasted by 2025 ^B
 - Overflowing Emergency Rooms, lack of Primary Care Providers and appointment availability

¹Wall Street Journal June 24, 2009

A: Centers for Medicare & Medicaid Services B: Health Affairs

Retail Clinics: A Solution to the Healthcare Crisis

- Retail Clinics can meet these needs with quality, convenient, accessible care
 - Nearly 1,200 retail clinics in the US have seen over a million of patients
 - Quality: RAND research has shown clinical quality in retail industry to be equal to or better than care in traditional settings ¹
 - Convenient: Clinics are generally open 7 days a week with extended evening hours during the week and are located in convenient locations such as pharmacies and grocery stores ²
 - Accessible: Additional RAND research shows that approximately a third of urban Americans are within a ten minute drive of a Retail Clinic

1. A. Mehrotra et. al. (2009). *Comparing Costs and Quality of Care at Retail Clinics with That of Other Medical Settings for 3 Common Illnesses*. Annals of Internal Medicine, p 321-328 (September 1, 2009, v. 151, no.5).

2. R. Rudavsky, C.E. Pollack, A. Mehrotra. *The Geographic Distribution, Ownership, Prices, and Scope of Practice at Retail Clinics*. Annals of Internal Medicine, p 315-320 (September 1, 2009, v. 151, no.5).

Retail Clinics: Current Scope of Services

- Current scope of services:
 - Acute, self-limiting conditions
 - Vaccines & preventative services
 - Screening services and health risk assessment for identification of risk, education, & referral
- Retail Clinics are positioned to address additional unmet needs: where will Retail Clinics go next?



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**Where will
retail clinics
go next?**

**Proposed
Approach to
New Service
Expansion**

**Patient Driven &
Designed to Fill
Gaps in Care**

New Services Strategy

Evolve Clinics from episodic care into a broader scope of service based on patient needs, utilizing the full potential of our Providers (NP/PAs) and partnering with local healthcare providers

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Strengthen acute and episodic care services to meet the needs of our patients



Leverage expanded services to bring patients back into the healthcare system and attract new patients

- Leverage strong consumer and payer interest in broadening scope
- Needs Assessment should be done to identify competency-levels for new services to ensure quality execution and Provider comfort level

Driving increased traffic and trial for clinics and stores

and

Heightening awareness of convenient and affordable access to care

Proposed Approach to New Services

- Introduce new services in a step-wise fashion
 - Chronic disease care
 - Health/Wellness evaluation screening and diagnosis
 - Treatment, stabilization and management
 - Counseling and education
 - All driven by patient choice and in close collaboration with the patient's primary care provider
- Engage internal and external content experts in each area to develop scope of new service designed to deliver "clinical excellence"
- Work closely with payers, employers and other organizations to provide convenient care access

New Services Strategy is Informed By Data

- Consumer needs assessment
- Marketplace assessment

<p>New Service Research Examples: Assuming you had the need, how likely would you be to consider a Retail Clinic as a healthcare option for yourself/your child for the following services/treatments?</p>	
<p>High Blood Pressure Screening, Treatment and Education – for yourself, for your child?</p>	<p>48% Self 39% Child</p>
<p>Asthma Screening, Treatment and Education (including inhaler/nebulizer treatment & training) – for yourself, for your child?</p>	<p>34% Self 33% Child</p>

Unmet, Identified Need: Management of Chronic Conditions

- Overall chronic illness prevalence is expected to increase by 42% between 2003 & 2023. The largest increases in cancer, diabetes and hypertension²
 - Chronic diseases are among the most prevalent and costly health problems, also among the most preventable
- Retail Clinics offer access points to the underserved, uninsured population that may be at higher risk
- Provide relief to overtaxed primary care system
- Drive down healthcare costs with affordable services along with increased access to preventative care

²“Remaking Primary Care: From Crisis to Opportunity”, NE Healthcare Institute, April 2009

Recent Expansion Of Services in Retail Setting

- **Vaccine Suite Expansion**
 - Travel Health, Polio, Gardasil, Pneumococcal, MMR, Varicella and Hep A
- **Point-of-Care Testing, Screenings, and Evaluations:**
 - Pink eye tests, thyroid screenings, biometric screenings, smoking cessation, allergy testing, drug screenings, heart health
- **Skin Conditions**
 - Wart removal, skin tag removal, cuts
- **Allergy Testing**
- **Nebulizer Breathing Treatments, Spirometry Testing**
- **Injection and Infusion Administration of Specialty Drugs**
 - Asthma, osteoporosis, steroids, antibiotics
- **Hypertension Identification & Diagnosis**
- **Diabetes Identification, A1c Testing**

Future Opportunities

- Continued review of new service ideas against factors surrounding:
 - Current clinical need
 - Clinical excellence
 - Patient acceptance
 - Clinician comfort level
 - Business needs
- With a focus on
 - Adhering to founding principals and standards
 - Increased monitoring and preventative services
 - Reducing costs
 - Alleviating effects of primary care provider shortages

QUESTIONS?