

Agenda



- Synsana and Andrew Ruck
 - Top level introduction to the UK Health Sector
 - Current and important strategic targets
 - Digitisation of the NHS – how far has the NHS got?
 - Patient access to services and to their data
 - Discussion
-



Andrew Ruck and Synsana



Andrew Ruck

Synsana's Managing Partner and co-founder Andrew leads programs and advising on policy for the National Health Service (NHS) and the European Commission. Andrew is also an EC accredited Business Coach an evaluator for Innovate UK and the European Commission, a past Director of the Scottish Institute of Healthcare Management and a founding Director of EHTEL. A Sloan fellow of London Business School, he started his career as an NHS national trainee.

He with Synsana, has worked with Business Finland on a number of international collaboration initiatives focussing on genomics, UK market entry for Finnish companies and a visit to UK by Minister Saarikko.

Under contract to the European Commission, Andrew recently worked on:

- [Report of the EC Working Group on mHealth assessment guidelines](#) :Leader of EU Working Group
- [European Innovation Partnership on Active and Healthy Ageing: B 3 ACTION PLAN on 'Replicating and tutoring integrated care for chronic diseases, including remote monitoring at regional levels'](#).

What we do



Our vision

Is that our clients will know Synsana has strengthened their services, through:

- greater impact on Health Care systems and clinicians, across treatment and care settings and geographies;
- better alignment with the clinical and personal needs of citizens throughout their lives.

Our purpose

Is to provide effective advisory services to:

- private companies seeking to enter European health markets with new solutions;
 - public sector organisations providing Health Care services, integrating new solutions, systems and processes, and aligned to key policy drivers.
-



Introduction to the UK Health Sector

How does the NHS in England work?

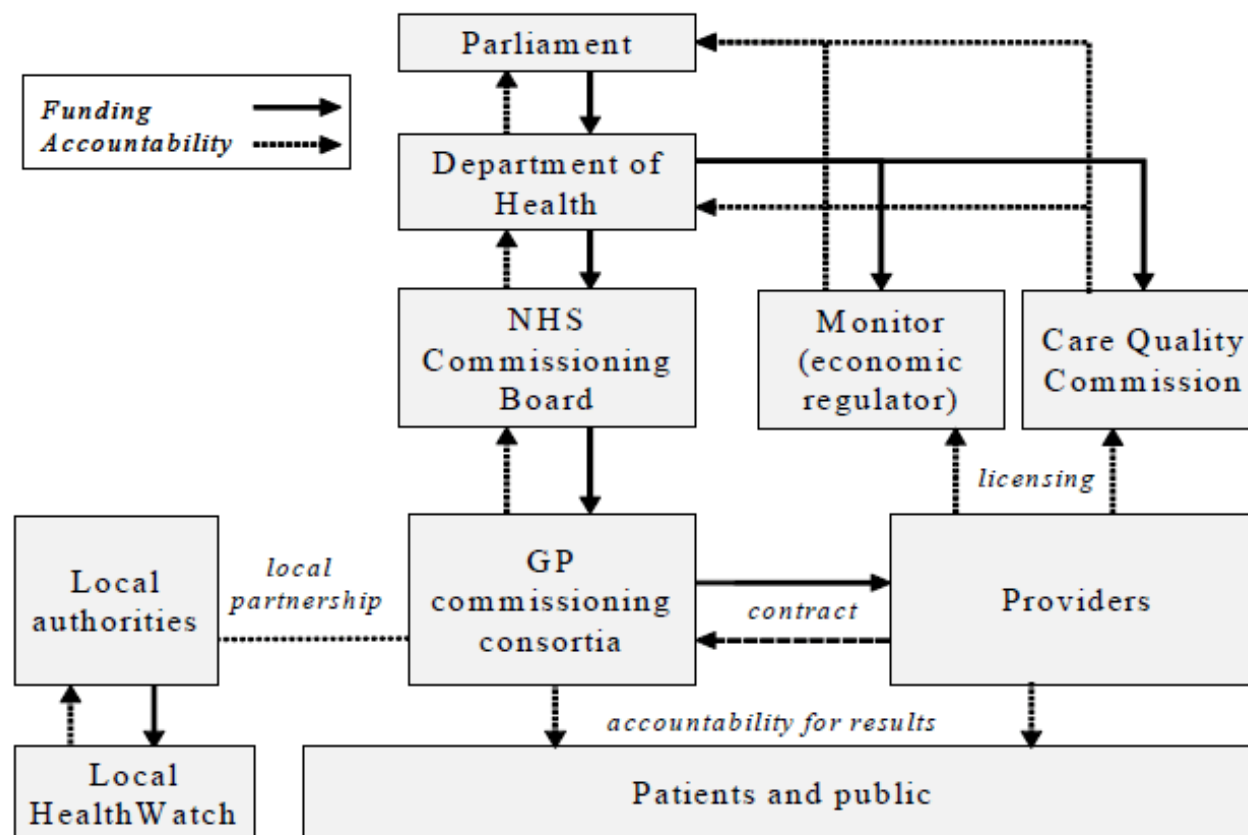


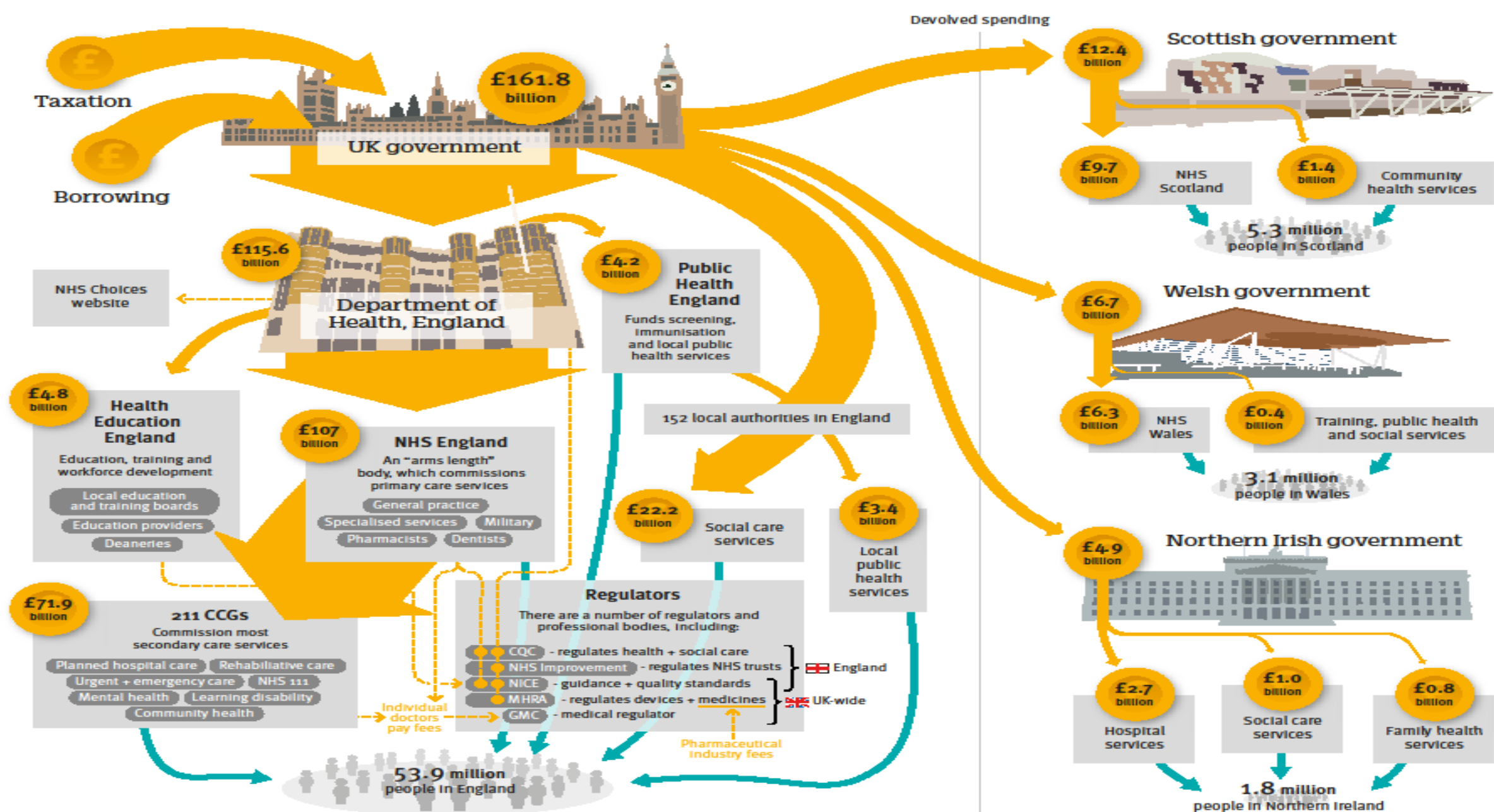
An alternative guide, care of the King's Fund

<https://www.youtube.com/watch?v=DEARD4I3xtE>



NHS in England simplified





The role of the

PRIVATE HEALTHCARE SECTOR

in the UK

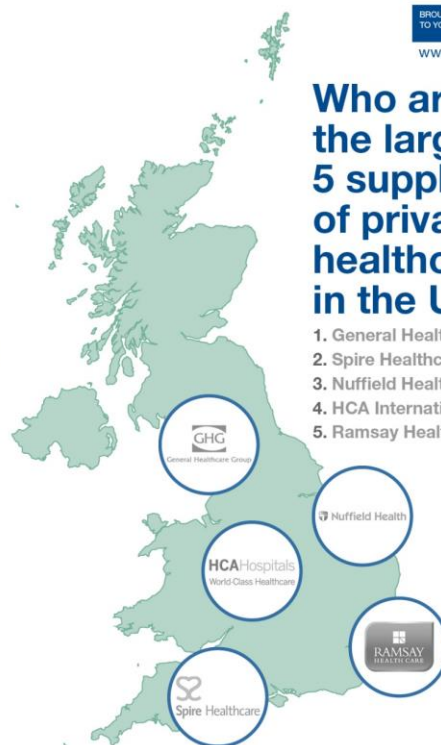
www.freepik.com



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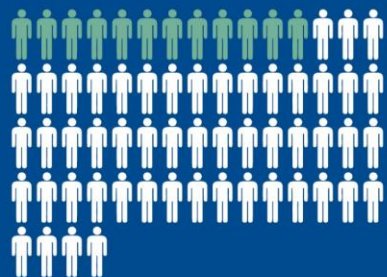
Who are the largest 5 suppliers of private healthcare in the UK?

1. General Healthcare Group
2. Spire Healthcare
3. Nuffield Health
4. HCA International
5. Ramsay Healthcare



12 million +

people in the UK are covered by private healthcare



<http://www.privatehealthadvice.co.uk/figures-facts-about-uk-private-healthcare.html>

11,200

beds are provided by private healthcare



<http://www.privatehealthadvice.co.uk/figures-facts-about-uk-private-healthcare.html>



46%

Care of the elderly and disabled

How is private healthcare money spent?

<http://www.privatehealthadvice.co.uk/figures-facts-about-uk-private-healthcare.html>



22%

Pharmaceutical products



17%

Acute hospitals sector



15%

Other

Percentage of jobs in the UK provided by the healthcare sector occupations?



7%

<http://www.privatehealthadvice.co.uk/figures-facts-about-uk-private-healthcare.html>

Percentage of those employed by the private sector?



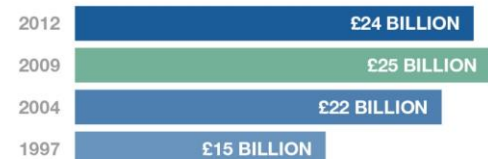
21%

What services do the private sector provide for the NHS?

Psychiatric Care

Residential Care

How much money has been spent on private healthcare per year?



(2012: <http://www.nuffieldtrust.org.uk/data-and-charts/uk-spending-public-and-private-health-care>)

Acronym Buster Quiz



- GP
 - Trust
 - CCG
 - NHS Digital
 - NICE
 - NPfIT
 - GDE
 - STP
 - ACO
-

Current and important strategic targets


Five Year Forward View

NHS CONFEDERATION


SPENDING REVIEW TIMES

NOVEMBER 2013


Protect:
all NHS spending by increasing total department budget



Increase:
the **Five Year Forward View** transformation fund



Address:
the funding gap in social care spending



1. Outline a multi-year plan across the whole of this parliament for increasing health spending by at least £8 billion a year. Met in full ✓	2. Confirm that additional funding applies to the total department budget to protect all NHS spending . Not met ✗	3. Confirm that at least £4 billion of additional funding will reach the NHS budget by 2017/18. Met in full ✓	4. Protect state-funded social services by addressing the social care funding gap in this parliament. Addressed but might not be enough ?	5. Provide certainty and support for individuals who are planning and funding their own social care. ?
6. Confirm a clear plan for retaining the Better Care Fund at current levels and clarify how it should operate in practice. BCF maintained and will grow with government funding. ✓	7. Increase the Five Year Forward View transformation fund to at least £1 billion in 2016/17 and establish a focus on transformation. ?	8. Reverse the cuts to the public health grant and protect spending on public health and prevention across this parliament. Not met ✗	9. Reaffirm commitment to increase funding for child and adult mental health in this parliament. £600m additional funding committed ✓	10. Agree to limited flexibilities to allow employers to operate outside of 1 per cent public sector pay cap . Not met ✗

www.nhsconfed.org @nhsconfed

What this means locally



Strategic Drivers

- **National Level**

- Five Year Forward View
- Everyone Counts: Planning for Patients 2014/15 to 2018/19
- Key reports around patient care, quality and safety (Francis, Winterbourne and Bubb, Berwick, Right Here; Right Now)

- **Warwickshire Level**

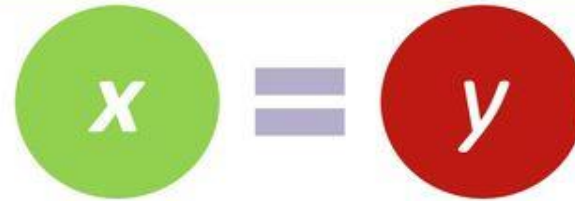
- Transformational Change: Transforming Lives
- Joint Strategic Needs Assessment
- Better Together

- **CCG Level**

- CCG local activity, financial performance and local knowledge/feedback
- CCG delivery of business as usual (assurance, financial targets) – creating the headroom to deliver change



Whole System Transformation – What and Why now?



£30 Billion funding gap by 2020



If we don't change the way care is delivered

Interoperability across care settings



A Place Based agenda moving care from over stretched hospital setting into the local communities.

Able to respond to population needs

Giving commissioners and provider the means to respond to and predict the needs of the population



10 NHS Universal Capabilities

H&SC communities must achieve NHS 10 Universal Capabilities by March 2018

1. Access across care settings
2. Access records in emergencies
3. Patients access GP record
4. GPs refer electronically
5. Discharge summaries to GPs
6. Acute-social care notifications
7. Clinicians see child protection information
8. Access end-of-life preferences
9. Electronic prescriptions
10. Patients book appointments & repeat prescriptions

True Interoperability



- Records assessments
- Transfers of care
- Orders
- Medicines Review
- Decision support
- Remote care
- Asset optimisation

Five year forward view



Commitment that by 2020 "all patient records will be digital, interoperable and real time."

Puts the citizen at the centre

All STP's empower Citizens to be the



custodian of their own Health and Social care needs. Promote Well Being and drive the Prevention agenda

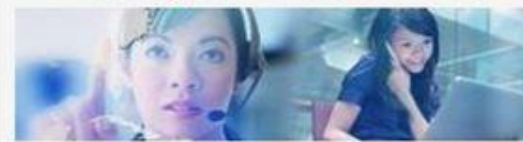
Plans & funding being put in place

STP and LDR plans submitted, including funding application by November 2016.

All enabling work streams identified, with tight timeframes for completion.



Whole System Transformation



Delivering a Person Centric Model of Care

£20B announced for NHS:
– focus on prevention



<http://theconversation.com/matt-hancocks-preventative-health-plans-will-pay-off-health-economist-106385>

Digitisation of the NHS
– how far has the NHS got?
– Where is it going?

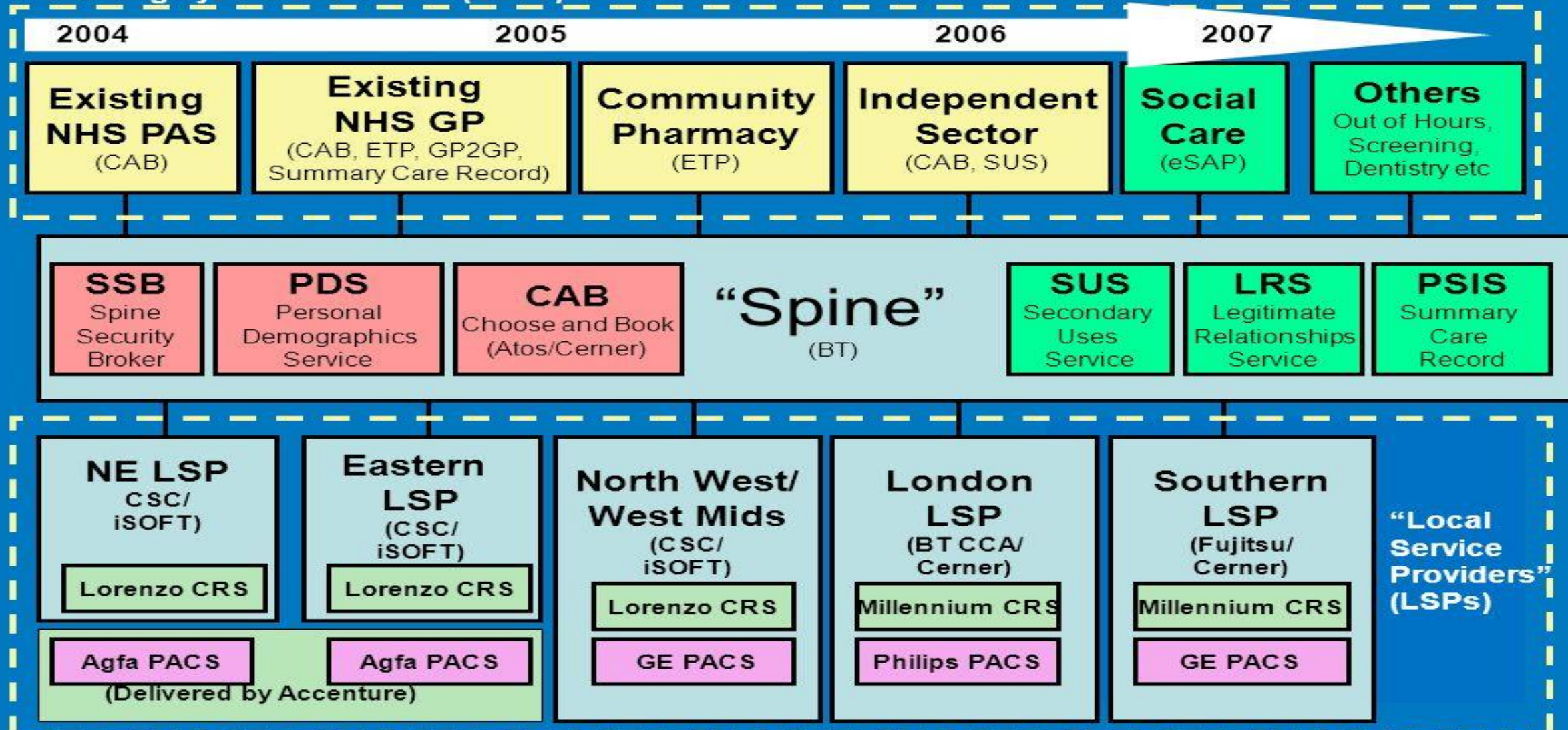
A troubled history

NPfIT: Where do ESPs fit in..



Connecting for Health

“Existing System Providers” (ESPs)



Lessons from NPfIT

(Adapted from <http://digitalhealthage.com/digital-health-lessons-npfit/>)



- The National Programme for IT (NPfIT) in the NHS was implemented in 2002 to make the NHS more technologically advanced, but after 10 years and almost £10bn the project was scrapped and labelled as the biggest IT failure ever seen, according to The Guardian.
- Some lessons learned:
 - Confidentiality is key
 - Ask the experts i/ healthcare professionals (don't only rely on outsourced suppliers)
 - Interoperability is important (three important data transferring elements of the NPfIT were sold as separate contracts, creating a situation where eight elements of the digital healthcare system were being provided by five companies over four different software systems)
 - More haste, less speed applies to healthcare
- And not all has been lost:
 - N3
 - The Spine
 - PACS

Wannacry

Impact of WannaCry cyber attack on the NHS



acute trusts
infected
(out of 236 trusts)



total trusts
infected



trusts not
infected but
reporting
disruption



trusts
attempted to
contact
WannaCry but
not locked out
of devices



Source: National Audit Office

Today

Conceptual Map (Health Systems Support Framework)



- Lot 2A – Local health and care record strategy and implementation support
 - Lot 2B – Local health and care record
 - Lot 3 – ICT infrastructure support and strategic ICT services, including Primary Care IT support and cyber security
 - Lot 4 – Informatics, analytics and digital tools to support system planning, assurance and evaluation
 - Lot 5 – Informatics, analytics and digital tools to support care co-ordination, risk stratification and decision support
 - Lot 6 – Transformation and change support
 - Lot 7 – Patient empowerment and activation
 - Lot 8 – Demand management and capacity planning support
 - Lot 9 – System Assurance Support
 - Lot 10 – Medicines optimisation
-

Funding for health innovation and digital technologies



- Historic
 - £39M for 15 Academic Health Science Networks
 - local assessment of new technologies
 - support NHS uptake
 - £35M Digital Health Technology Catalyst for innovators (£6 M for SMEs)
 - £6M Pathway Transformation Fund for NHS to integrate new technologies into everyday practices
- Matt Hancock “I’ll travel the world looking for the best technology for NHS”
 - £412M for Health Technology
<https://www.theguardian.com/society/2018/jul/20/nhs-to-receive-487m-technology-boost-matt-hancock>
 - £200M Digital Fund <http://www.nationalhealthexecutive.com/Health-Care-News/nhs-it-systems-costing-lives-hancock-unveils-200m-digital-fund-and-five-app-trials>

Global Tech and the NHS

...Consumers =
Willing to Share Health Data

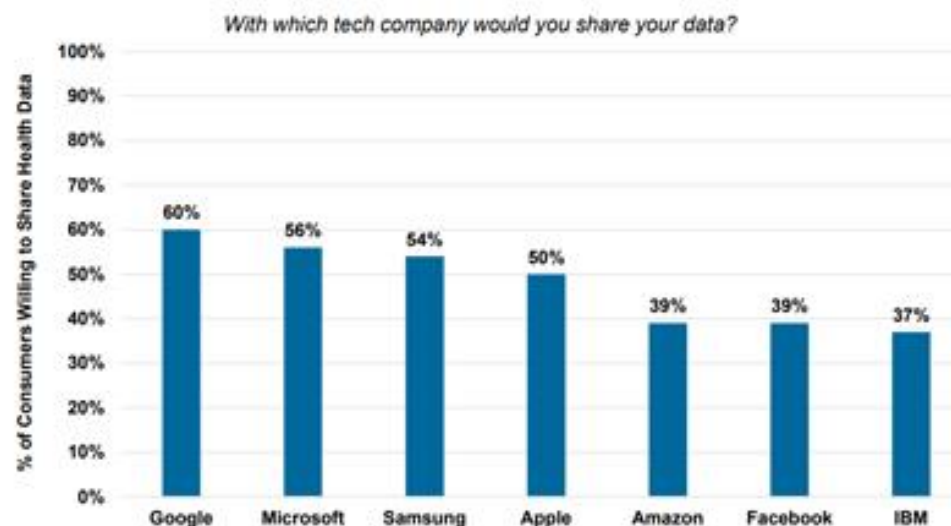
Deals announced within last 12 months

- Amazon (procurement, telehealth brand)
- Microsoft (NHS Scotland)
- Google (Deep Mind)
- Apple

Major disruptive plays

- Babylon

Leading Tech Brands Positioned Well for Digital Health, 2016



KLEINER
PERKINS

Source: Rock Health 2016 Consumer Survey
Note: Based on consumer survey with 4,010 participants, as % of respondents willing to share their health data with tech company at all.

HP INTERNET TRENDS 2017 | PAGE 295

Patient access to services and to their data

Key Obstacle



NHS data (about patients)
belongs
to the Secretary of State (Government)
– not to the patient

Conceptual Map – Patient Services (Health Systems Support Framework)



- Implementation services
 - solution sourcing, design, deployment, management and ongoing review including:
 - solution design;
 - procurement / build of the solution;
 - solution deployment (including mobilisation, launch, support and monitoring);
 - evaluation of impact and ongoing review of efficacy, outcomes and cost/benefit;
 - Identification of good practice from elsewhere including identification of technologies which empower patients to manage their own care and improve access (including
 - Telehealth;
 - Telecare;
 - Telemedicine / Teleconsultations;
 - Telecoaching;
 - Self-care apps.
- Patient portals – enabling patients to access their care record and care plans, update data and send secure messages to care providers.

Implications of the UK Healthcare Context



- Integrated Care networks are still working through their organisational governance.
- What will happen on the ground will often not match the rhetoric of high profile leadership plans.
- Combinations of partners (Consultancies, Service providers, NHS bodies, Academics, NGOs) and not necessarily including EHR vendors are driving the agenda.
- To an extent, the lead is coming from the commissioning community and at a national level.
- The move to larger population scale, placed based systems appears inevitable.
- Tackling health economy spending must involve social care.

NHS Exemplars

[Data and information](#)[Systems and services](#)[News and events](#)[About NHS Digital](#)

[NHS Digital](#) > [About NHS Digital](#) > [Our work](#) > [Transforming health and care through technology](#) > [Self Care and Prevention \(domain A\)](#) > [Personal Health Record](#)

Page contents

Personal Health Record

A Personal Health Record (PHR) is a personal digital space for health and care that enables members of the public to take greater control of their health by accessing a range of information. For example, a PHR could include:

- health records
- appointments
- prescriptions
- test results

PHRs also enable people to add information and share it with others involved in their care. For example, PHR users may choose to:

- communicate with care professionals through secure messaging
- share regular information about their condition, such as updates to disease activity scores
- capture and share images or video of symptoms or changes in their condition
- complete pre-consultation questionnaires to help care providers understand their recent history and make best use of face-to-face time.

PHRs exist across the NHS in different settings and for multiple conditions. This means, depending on who you are and where you live, you may have a PHR already.

The purpose of the NHS Digital PHR project is to encourage the adoption and development of PHRs at a local level. NHS Digital is currently exploring how it can do this most effectively, for example through the development of standards and enablers for local use.

Personal Health Records (PHRs) in England
Local healthcare providers are helping patients to see their personal health records online. Patients can use their records to:

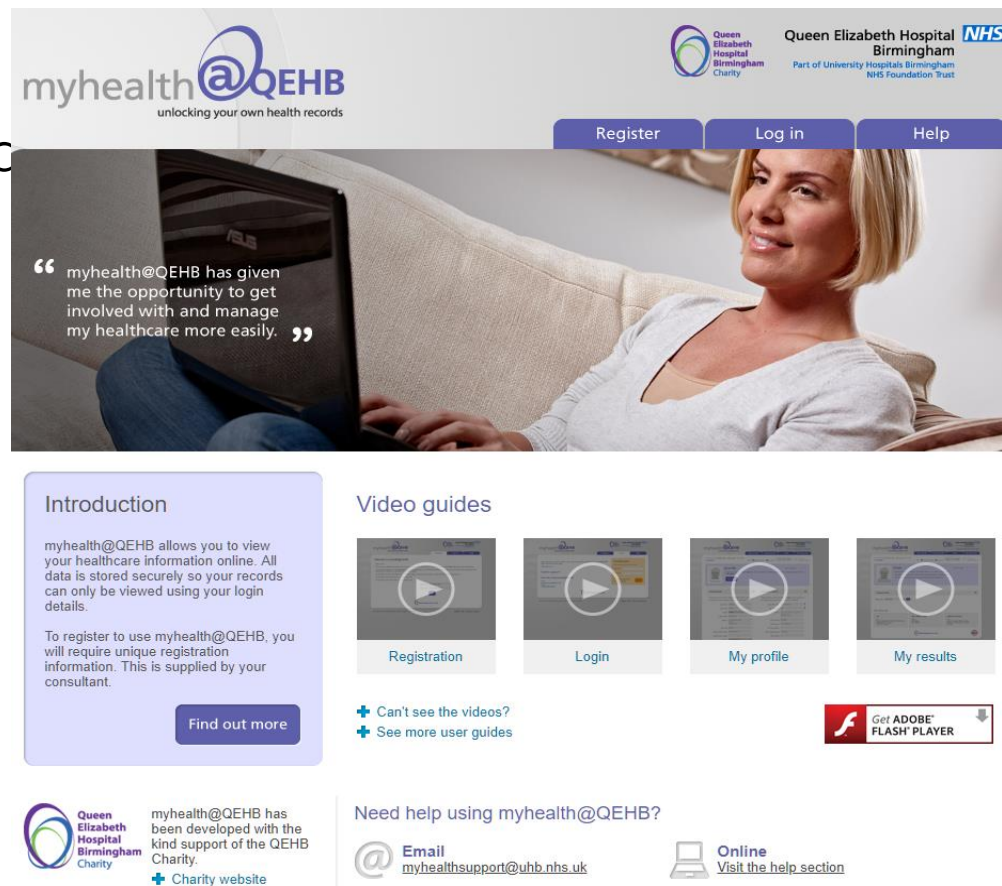
see information that healthcare staff want to share with them
find out about appointments and treatment
have more control over their health problems
bring together information from different NHS organisations they have contact with

The number of PHRs on this page will increase as more NHS organisations develop them for patients in their areas.

NHS Exemplars

- Hospital Leaders
- University Hospitals Birmingham

- <https://www.myhealth.uhb.nhs.uk>



The screenshot shows the myhealth@QEHB website. The header includes the myhealth@QEHB logo with the tagline 'unlocking your own health records', the Queen Elizabeth Hospital Birmingham Charity logo, and the NHS logo. Navigation buttons for 'Register', 'Log in', and 'Help' are present. A large image of a woman sitting on a sofa with a laptop features a quote: "myhealth@QEHB has given me the opportunity to get involved with and manage my healthcare more easily." Below this, there is an 'Introduction' section explaining the service and a 'Find out more' button. A 'Video guides' section offers links for 'Registration', 'Login', 'My profile', and 'My results'. A footer section provides contact information for the Queen Elizabeth Hospital Birmingham Charity, including an email address and a link to the charity website. It also includes a 'Need help using myhealth@QEHB?' section with an email address and a link to the online help section.

myhealth@QEHB
unlocking your own health records

Queen Elizabeth Hospital Birmingham Charity

Queen Elizabeth Hospital Birmingham
Part of University Hospitals Birmingham NHS Foundation Trust

Register Log in Help

“ myhealth@QEHB has given me the opportunity to get involved with and manage my healthcare more easily. ”

Introduction

myhealth@QEHB allows you to view your healthcare information online. All data is stored securely so your records can only be viewed using your login details.

To register to use myhealth@QEHB, you will require unique registration information. This is supplied by your consultant.

[Find out more](#)

Video guides

Registration Login My profile My results

+ Can't see the videos?
+ See more user guides

Get ADOBE FLASH PLAYER

Queen Elizabeth Hospital Birmingham Charity

myhealth@QEHB has been developed with the kind support of the QEHB Charity.

+ Charity website

Need help using myhealth@QEHB?


@ Email
myhealthsupport@uhb.nhs.uk

Online
Visit the help section

NHS Exemplars


- Hospital Leaders
- University Hospitals Southampton
<https://mymedicalrecord.uhs.nhs.uk/About.as>

Nominations and awards



EHI Awards 2016


* WINNER * Best use of IT to support clinical treatment and care



HSJ Awards 2016

* WINNER * Using Technology to Improve Efficiency
* Improving Care with Technology

In partnership with



de Poel
health+care
Temporary, Workforce | Permanent Solutions

Next steps for patients

Please speak to your clinician at the hospital if you would like to sign up for My medical record.

Next steps for clinicians

If you are interested in using the My medical record service within your speciality / hospital, please contact our team at mymedicalrecord@uhs.nhs.uk

Help
About MyMR
Privacy Policy
Our hospitals
Contact us
Research

University Hospital Southampton NHS Foundation Trust
Tremona Road
Southampton
Hampshire
SO16 6YD
Telephone: 023 8077 7222

NHS Exemplars

- NHS Digital Apps Library



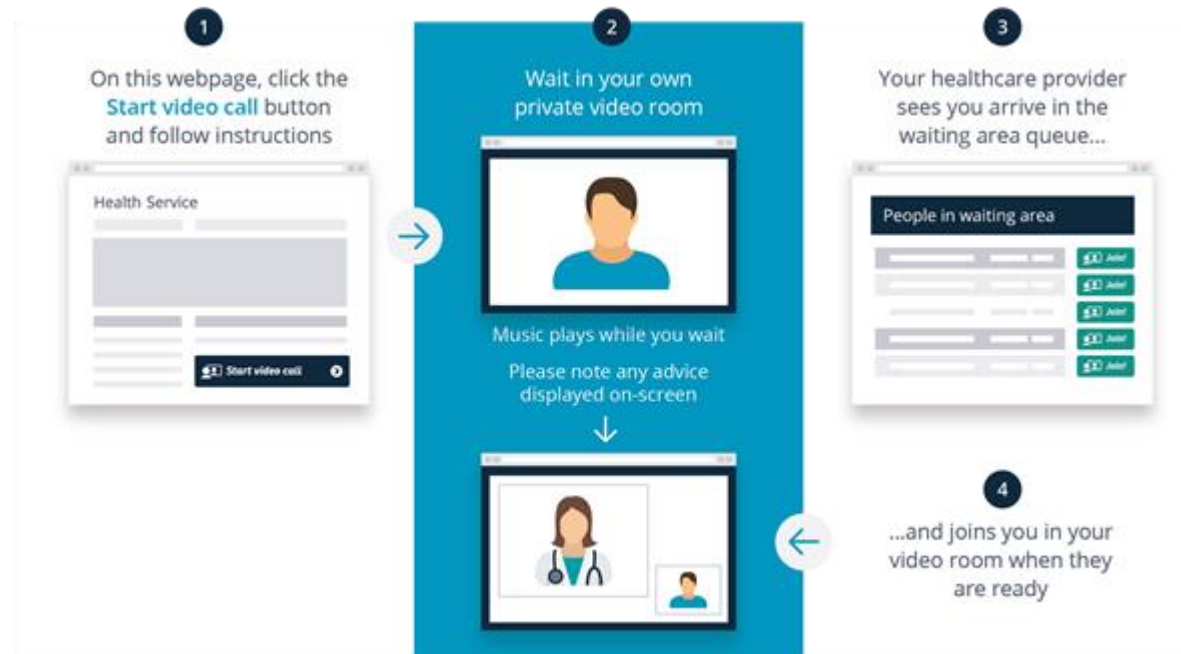
NHS Exemplars

- NHS 24



NHS Exemplars

- Attend Anywhere



NHS Exemplars

- NHS Inform



NHS inform

Health information you can trust

Looking for information on **medical conditions**, answers to common **health questions**, how to find **local health services** and **much more**.

Visit Scotland's National Health Information Service at:

www.nhsinform.co.uk

or call **0800 22 44 88** (8am - 10pm)



facebook.com/nhsinform



@nhsinform

NHS Exemplars

- Breathing Space

Mission Statement

Breathing Space is a free, confidential phone and web based service for people in Scotland experiencing low mood, depression or anxiety.

We are here in times of difficulty to provide a safe and supportive space by listening, offering advice and information.

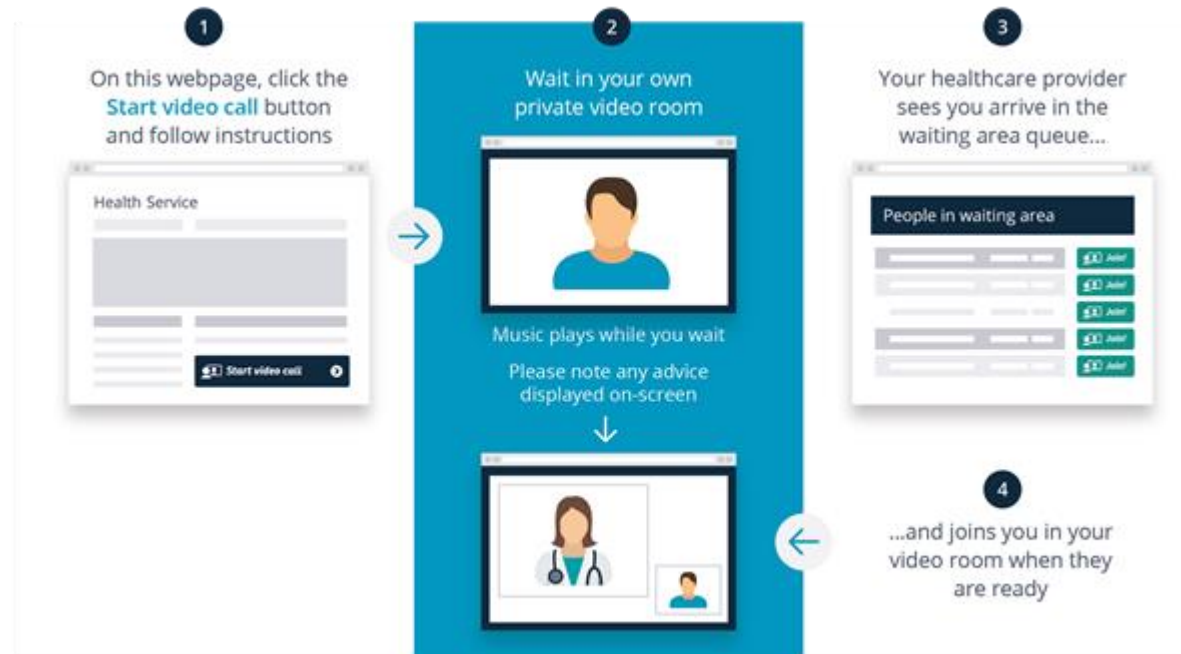
It is our belief and hope that by empowering people they will have the resources to recover.

Breathing Space is a COSCA (Counselling and Psychotherapy in Scotland) recognised counselling skills organisation.



NHS Exemplars

- Attend Anywhere



NHS Exemplars

- My Diabetes My Way



Industry responses



systmonline
PATIENT ONLINE SERVICE

Appointments

Medication

Records

Account

Mr Jonathan I
NHS Number:
Date of birth:

North Leeds Medical Practice
355 Harrogate Road, Leeds, West Yorkshire, LS17 6PZ
Usual GP: Dr Marcus Julier

Appointments: 01132680066
General: 0113 2680066
General: 01132490598

Note: Grey links represent features which have been disabled by North Leeds Medical Practice

Your Appointments

Book Appointment
Future Appointments
Past Appointments

Your Records

Patient Record
Summary Patient Record
Childhood Vaccinations
View Test Results
Record Audit
Questionnaires
Manage Sharing Rules
Sharing Requests
Consent to Share Settings

Your Medication

Request Medication
Outstanding Prescription Requests
Change Pharmacy

Your Account

View Alternate Patient/Practice
Messages (0 Unread)
Change Contact Details
Change Password
Manage Online Services
Manage Account Users
Link Account
Reset Account
Account Information
Online Usage Audit

EMIS / TPP share a Message
Interface Gateway – both provide
patient access through GP's

See also

<https://healthcaregateway.co.uk/our-work/case-studies/>

Babylon

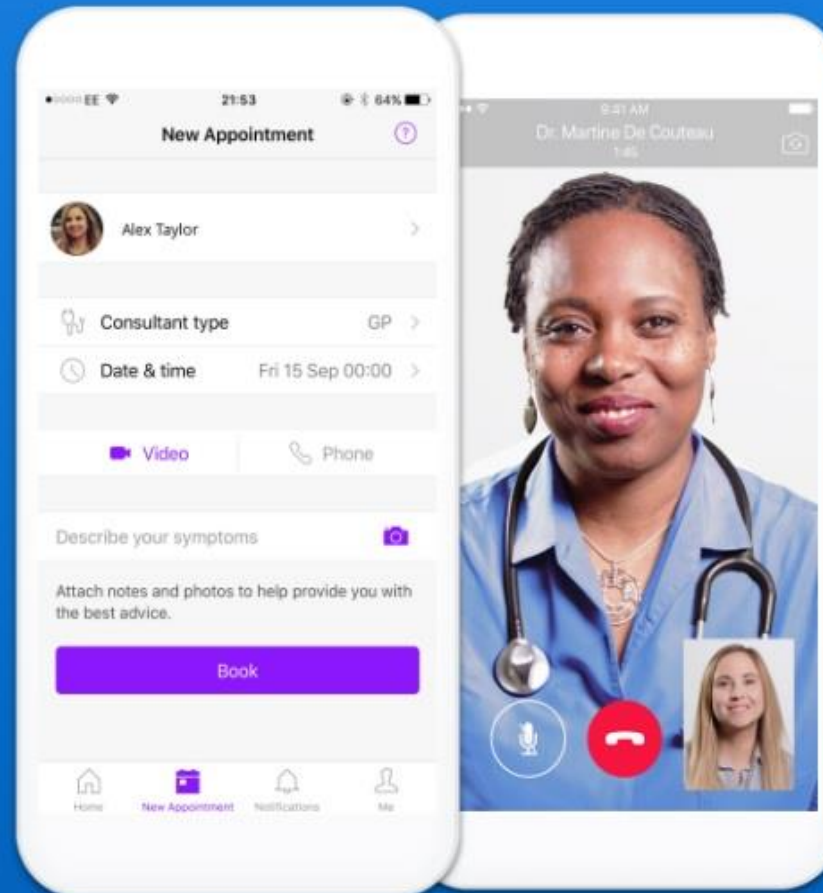


Book an appointment in seconds

You can make an appointment at anytime of day or night, directly from your mobile.

See a doctor in minutes

Doctors are available 24/7 and most of the time you'll be able to get a video consultation on your phone within 2 hours.



Cash Burn PKB

Set up 2008 –
3 major rounds of funding
44 shareholders
Burning approx. £3m over last 3
yrs

Investing for growth?

PATIENTS KNOW BEST LIMITED REGISTERED NUMBER: 06517382			
BALANCE SHEET AS AT 31 DECEMBER 2016			
	Note	2016 £	As restated 2015 £
FIXED ASSETS			
Tangible assets	4	49,788	36,364
		<u>49,788</u>	<u>36,364</u>
CURRENT ASSETS			
Debtors: amounts falling due within one year	5	576,182	328,574
Cash at bank and in hand		1,847,033	4,111,009
		<u>2,423,215</u>	<u>4,439,583</u>
Creditors: amounts falling due within one year	6	(334,541)	(600,398)
NET CURRENT ASSETS		<u>2,088,674</u>	<u>3,839,185</u>
TOTAL ASSETS LESS CURRENT LIABILITIES		<u>2,138,462</u>	<u>3,875,549</u>
NET ASSETS		<u>2,138,462</u>	<u>3,875,549</u>
CAPITAL AND RESERVES			
Called up share capital	7	679	679
Share premium account		5,699,048	5,699,048
Profit and loss account		(3,561,265)	(1,824,178)
		<u>2,138,462</u>	<u>3,875,549</u>

Discussion

Discussion Points: Unresolved issues in UK



- Model for ramp up:
 - Blueprints
 - Top down (NHS Scotland);
 - Global Digital Exemplars (NHS England)
 - Bottom Up (NHS England) – new funding via STPs; 1000 staff to go at NHS Digital
 - Market Management
 - Open Standards
 - Compulsory Interoperability
 - Industry led – global tech deals & EPIC
 - Consumer
 - Life Sciences agenda & leverage of public (NHS assets)
-