Aetna’s and ActiveHealth Management’s PHR

Recent Announcements – MS HealthVault

December 12, 2008

HIMSS PHR Roundtable

David Fitzgerald – HIMSS PHR Steering Committee member
Overview

• Aetna and ActiveHealth Management PHR Overview
  • Aetna Brief History
    • Company and PHR
  • AHM History
    • Company and PHR

• PHR Overview, Highlights and Updates

• PHR product demographics: Usage

• Care Engine

• Delegation

• Aetna and Microsoft HealthVault
About Aetna

- **Aetna** is one of the nation’s leading diversified health care benefits companies, serving approximately 37.2 million.

- **Health Care Networks:**
  - More than 855,000 health care professionals
  - More than 495,000 primary care doctors and specialists
  - 4,959 hospitals
  - A network of specialist physicians, AexcelSM, based on clinical performance and cost efficiency.

- **National Presence:**

- **Aetna Companies:**
  - [ActiveHealth Management](#)
  - [Aetna Student Health](#)
  - [Goodhealth Worldwide](#)
  - [Schaller Anderson](#)
  - [Strategic Resource Company](#)

- **Operations in: US, Canada and beginning in Europe**
In 1998, Lonny Reisman, MD, a cardiologist and a consultant to clients seeking to address rising healthcare costs and improve medical outcomes, founded ActiveHealth Management.

ActiveHealth was founded by a physician with the goal of making the healthcare system work more effectively for physicians and their patients.

History of business development.

- **Health Data Management Solutions, Inc.**
  In 2000, ActiveHealth acquired Health Data Management Solutions (HDMS) to build upon the data management and analytics capability.

- **e-MEDx, Inc.**
  In 2000, acquired e-MEDx, Inc. and their subsidiary Health Cost Consultants (HCC).

- **Aetna, Inc.**
  In May of 2005, ActiveHealth was acquired by Aetna, Inc. ActiveHealth operates as a branded, standalone business.
LARGE-SCALE CLINICAL TRIAL IN A COMMERCIAL HEALTH PLAN SETTING.

- This randomized, prospective study to demonstrate the value of our CareEngine clinical decision support technology was conducted by ActiveHealth Management. The study population consisted of 39,462 members of a midwestern managed care plan age 12-64 with at least 1 medical claim in the prior year. It was published as a peer-reviewed article in The American Journal of Managed Care.
- Across the study population:
  - 46 potentially serious medical errors identified per 1,000 people – nearly 1 for every 20 members.
  - 8.4% fewer hospitalizations.
  - $8.07 per member per month saved.

Peace-of-mind is built right into the ActivePHR service

- The most valuable feature you get with ActivePHR is a patented monitoring system that constantly watches over all of the member's health information and looks for opportunities for improved care.

So many great tools to help you manage your family's health

- If you find it difficult to keep track of everybody's medical appointments and schedules,
- ActivePHR has a convenient calendar feature that can keep things organized and even send reminders.
- If you're trying to improve your health numbers, there's a handy tracker tool that logs your information and follows your progress.
- If you really want to look for ways to improve your health, you can take the health assessment.
- If you're like most people, you dread going to a new doctor because of all the forms that have to be completed. ActivePHR offers a handy new-patient intake form that you can print out and take with you, showing all your latest health and insurance information. You can also print out immunization records, which are great if your kids go to a new school or camp.
Aetna Values

- What we believe in
Aetna: Beliefs
Personal Health Records

At Aetna, we believe that PHRs:

- Are crucial to simplifying and personalizing the consumer health care experience
- Will significantly advance health care quality.
- Enable better interactions between member and physician.
- Align the member’s health care team (doctors, nurses, pharmacist) with the same set of information
- Must be safe and secure, as well as portable, to encourage member use.
  - At Aetna: “All PHR data is private, highly secured and confidential.
  - Aetna is committed to information privacy and compliance with legislation such as HIPAA and state privacy laws.
  - Aetna will **not** be selling PHR information --
    - “I applaud Aetna’s stance on NOT selling data!” Dr. Holly Miller – chairperson of HIMSS Steering Committee.
Aetna Personal Health Record (PHR): What is it?

- A secure, centralized, online repository of personal medical information including:
  - Dates and reasons for medical visits and hospital stays
  - Past and current medical conditions
  - Prescribed medications
  - Tests and procedures that have been completed
  - Treating physicians and other healthcare providers

- The PHR is automatically updated from claims data based on the patient’s use of their health plan.

- Patients may further personalize the contents of their PHR by “self-reporting” information like:
  - Family health history
  - Basic health, e.g., height, weight, allergies, blood type, vaccinations, etc.
  - Nonprescription medications taken, i.e., over-the-counter meds, vitamins, etc.
  - Medication side effects experienced
  - Immunizations due
  - Emergency contact information
  - Any other health-related information the patient may wish to track
In February 2007, Aetna launched the CareEngine® Powered PHR, a powerful, interactive personal health record

- First National Payer to use CareEngine technology.
- Members receive timely, personalized health alerts and preventive care reminders
- Provides on-line access to secure and easy-to-use medical information.
- Members can further personalize with family health history, immunization records, allergies and emergency contacts.
- Personalization leads to better interaction; PHR can push relevant info to member (e.g. preventive reminders)
- Aetna’s PHR promotes a more collaborative relationship between patients and doctors.
- Information in the PHR can be printed and shared with physicians.

Aetna CareEngine-Powered Personal Health Record Enhanced To Better Engage Members In Managing Their Health

- Aetna Helps Medicare Members.
- Aetna and Microsoft HealthVault Empower Aetna Members to Create a Portable Record of their Personal Health
Aetna’s and ActiveHealth Management’s PHR

Direct access to Simple Steps and Informed Care Decisions

Guided tour to encourage employees to self report health information

Records of physicians, medications and conditions, lab results, tests and procedures

Access to the PHR of a dependent minor child

Detailed clinical information including content reviewed by Harvard Medical School

Click for more details

### Personal Health Record

<table>
<thead>
<tr>
<th>View Personal Health Record for:</th>
<th>Elizabeth Smith - DOB: 01/31/1969</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Health Summary</strong></td>
<td></td>
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<tr>
<td><strong>Personal Information</strong></td>
<td></td>
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<tr>
<td><strong>Emergency Contact</strong></td>
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<tr>
<td><strong>Insurance</strong></td>
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<tr>
<td><strong>Health Team</strong></td>
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<td><strong>Immunizations</strong></td>
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<tr>
<td><strong>Family History</strong></td>
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<tr>
<td><strong>Medications</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Allergies</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Personal Profile**
- **Name:** Elizabeth Smith
- **Address:** 100 Healthy Lane, City, State 99365
- **Date of Birth:** 01/31/1969
- **Gender:** Female
- **Race:** White (Not Hispanic)
- **Employer:** XYZ Company
- **Phone Numbers:**
  - **Alternate:** 555-4555
  - **Preferred:** 444-5555
  - **Emergency Contact:** 777-3333

**Emergency Contact**
- **Name:** Steven Smith
- **Relationship:** Husband
- **Alternate Emergency Contact:**
  - **Name:** John Doe
  - **Relationship:** Son

**Insurance**
- **Medical:** Aetna, Inc.
  - **Phone:** 215-555-1212
- **Dental:** Aetna, Inc.
  - **Phone:** 800-555-8888

**Health Team**
- **MRG Medical Associates**
  - **Dr. Sara Doshi:** Ophthalmologist
  - **Dr. Joyce Brown:** Dermatologist
- **MRG Medical Associates**
  - **Dr. Robert Goldberg:** Endocrinologist

**Pharmacy**
- **Rite Aid Pharmacy:**
  - **Phone:** 215-555-6666

**Immunizations**
- **Hepatitis B:** Date of Immunization: 01/01/00
- **Japanese Encephalitis:** Date of Immunization: 01/01/00

**Family History**
- **Mary Jones, Mother (Age of Death: 68):**
  - **Condition:** Diabetes
- **James Jones, Father:**
  - **Condition:** Skin Cancer
- **Mary Frederick, Sister:**
  - **Condition:** Breast Cancer

**Medications**
- **Green Tea**
- **Doxycycline**
- **Dipropylene**
- **Glucophage**
- **Lisinopril**

**Allergies**
- **Food:** Peanut

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We want you to know™

Aetna®

Print and take to next office visit

Personalized messages and alerts
Aetna PHR Statistics

- Plan Sponsors deployed on the Aetna PHR. Approximate Eligible members: almost 7 million
- Members who have used the PHR.
  - 56% female users. Adoption is highest among Females in the age segment 23-40
  - 30% of PHR Users are identified as having at least one Clinically Identified condition
- Repeat users.
- For the members that have been deployed for six months or more, 5% have used the PHR at least once, 43% of these returning to the PHR more than once.
- Membership is spread across most Aetna accounts and products.
Almost 90,000 Care considerations were generated (through June 2008)

- 7% of total CCs are derived from member supplied data. 93% from claim data.
- 59% CCs issued to females
- 48% of the CCs were clinically Important or clinically Urgent
  - Urgent: Usually warrants a phone call to the doctor.
  - Important: not as time sensitive. Paper mail to the doctor.
- % of CCs generated by age:
  - 18-30: 3%
  - 30-40: 10%
  - 40-50: 22%
  - 50-65: 56%
  - 65 +: 9%
What is the Care Engine and Care Considerations?

- **Powered by ActiveHealth’s CareEngine**
  - *Personalized messaging and alerts*
  - *Personalized health* content.
  - Member entered data processed by CareEngine.
  - More *meaningful presentation of information* to members because of ActiveHealth's rationalizing claim data

- **The PHR is the Center of a Suite of Personalized Health Related Tools**
  - Integrated with Aetna’s other best-of-breed online tools: *Simple Steps To A Healthier Life®, Aetna Navigator™, Aetna InteliHealth*
  - The PHR aligns closely with medical management and consumer directed plan offerings
  - PHR supports members across the care continuum (well to chronically ill)

- **Care Engine Video:**
PHR Delegation

- Types of Delegation
- Type of Sharing
Plan-to-Plan Transfers (2009):

In accordance with AHIP guidelines, Aetna is building functionality in 2009 that will:

- Allow members to move their existing Aetna PHR data to another insurance carrier.

ANSI 275 Personal Health Record Transfer - Between Health Plans Implementation Guide (005050X274)

The Personal Health Record Transfer Between Health Plans.

The Business flows supported by this implementation.
## Announcement Summary

- On Wednesday, October 22, 2008, Aetna and Microsoft issued a joint press release.
- Aetna believes so strongly in the power of IT that they want members to have lifelong access to the health information stored in their Aetna PHR, even if they change jobs or health plans.
- This is a significant milestone in the shift to consumer-driven health care. A leading national health plan is proactively enabling members to create a personal health record that can be carried and used throughout their lives, regardless of employment or health plan affiliation.
- Aetna believes that information technology can help advance quality in the health care system, reduce waste and improve the overall health of its members.
- Aetna and Microsoft are forming a deep relationship based on a shared commitment to empowering people to become more engaged in their health and wellness through innovative software. We expect to announce more collaboration in the future.
HealthVault Interaction diagram
Aetna and MS HealthVault - Porting

Make a Copy of Your Personal Health Record

The information in your Aetna Personal Health Record belongs to you. Its purpose is to help you better manage your health. You may, however, want to save a copy in another location. For example, if your employer decides to no longer offer this benefit, or if you switch jobs or want to take health information from other websites and store it all in one place, the download feature will allow you to do this.

1. Select the name of the person whose Personal Health Record you would like to download:

   Select One

2. Select a way to download this Personal Health Record

   There are two ways to download your Personal Health Record information so you can continue to use it elsewhere.

   - Save it as an electronic PDF
     This feature will allow you to save a copy of this Aetna Personal Health Record information to your personal computer. You will have an exact copy of the information that is in this Personal Health Record as of today. Learn More

   - Transfer your Personal Health Record information to Microsoft HealthVault
     This feature will allow you to transfer a copy of your Aetna Personal Health Record information to HealthVault. Learn More

   Cancel  Continue
MS HealthVault

Sign in to HealthVault using Windows Live ID

E-mail address: 
Password: 
Forgot your password?

Sign in

Save my e-mail address and password
Save my e-mail address
Always ask for my e-mail address and password

Don’t have a Windows Live ID?
Use your Hotmail, MSN or Windows Live account to sign in. If you don’t have a Windows Live ID, you can create one for free using any e-mail address. Create a Windows Live ID.

Other ways to sign in

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Aetna’s and ActiveHealth Management’s PHR

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Welcome to Microsoft HealthVault

Be well. Connected.

Make more informed health decisions for you and your family. Store your health information in one convenient place and share it with others you trust. Explore a growing community of Web sites that can work with your information to help you take charge of your family's health.

Sign in ▶ Create a free HealthVault account ▶

Organize and manage

- Get a free account to store health data from

Share and connect

- Let family members, doctors and others see

Learn and use

- Track your exercise and monitor health

Use HealthVault to...

- Organize your health information
- Manage health conditions
- Get healthy and fit, and stay that way
- Make the most of visits to the doctor
MS HealthVault

Use this record
Common tasks
- Add, view or edit information
- Upload a file
- Share with someone else
- View and update profile
- See complete history

Most recent changes
- 06/11/08 Blood Pressure Measurement
- 06/01/08 Weight Measurement
- 06/11/08 Weight Measurement
- 07/09/08 Weight Measurement
- 07/10/08 Weight Measurement

Use this record’s health sites
You’ve authorized these sites to work with information in this record:

Healthy Circles

ActivePHR

SOUNDhealth Solutions

American Heart Association

American Stroke Association
**Platform Capabilities**

**Leverage:**
- Commonly shared technology
- Community of partners
- Packaged solutions

**HealthVault Ecosystem**

**Leverage:**
- Application directory
- HealthVault ingredient brand
- Logo programs
- Marketing toolkit
- Microsoft PR

**Microsoft Consumer Touchpoints**

**Leverage:**
- MSN
- Messenger
- Vista Gadget Gallery
- Live Search
Q: Is this a pilot? Or are you launching to all seven million members?
   Aetna is not piloting connectivity with HealthVault. The functionality will be available to all six million members beginning November 2008.

Q: How is this different from what Microsoft and Kaiser announced?
   Kaiser and Microsoft initiated a pilot with Kaiser employees to test connectivity between HealthVault and Kaiser’s My Health Manager. If successful, the program will be expanded to include Kaiser’s more than eight million members. Aetna and Microsoft are offering Aetna’s now seven million members the opportunity to share their personal health information stored in the Aetna PHR into HealthVault. Aetna is not in a pilot we are now in production.

Q: Will Aetna offer members connectivity to Google Health as well?
   Aetna is open to working with other partners besides Microsoft who share our view that health information technology can empower consumers to be more engaged and informed in making health care decisions for themselves and their families.

Q: How will Microsoft and Aetna encourage consumers to use HealthVault?
   We strongly believe that members will be attracted to HealthVault because it offers many new ways for consumers to manage their health. We will continue to communicate how HealthVault security solutions will keep patient data private, while offering the convenience of online access.

Q: How many Aetna members do you expect to adopt HealthVault and in what timeframe?
   Aetna is making the connectivity to HealthVault available to all members who currently have access to the PHR – which is approximately 7 million people.

Q: Does this mean data can flow both ways between a HealthVault and Aetna PHR?
   Members can transfer information from the Aetna PHR into HealthVault now. In 2009, members will be able to import personal health information from HealthVault into their Aetna PHR as well.

Q: When can Aetna customers begin transferring information to HealthVault?
   Aetna members can log in to their Aetna PHR and securely transfer saved information to a HealthVault account now, where it can be viewed and stored, accessed and shared, as directed by the member, with providers, plans or a variety of Web applications.
Q: Why would an Aetna member want to store their health data in two places?

By creating a HealthVault account, Aetna members can build a complete truly portable health profile that includes information from the Aetna PHR and share that information with a wide range of providers and Web applications connected to HealthVault. This information will be accessible to members regardless if they change jobs or health plans.

Q: How does a member’s information move from Aetna to HealthVault?

The technical integration created by Aetna and HealthVault allows the individual to export a snapshot of their health information from Aetna’s CareEngine PHR system to their HealthVault account. Upon a member’s request, such health information and accompanying data shall be sent via Aetna’s PHR in a HL7 Continuity of Care Document (CCD) format, and shall contain all requested medical information about the member.

Q: What kind of health information will be stored and shared?

Some examples of the types of information individuals can store in a record include the following:

- Fitness-related activities such as aerobic sessions
- Measurements such as blood glucose and blood pressure
- Discharge summaries from hospitalizations
- Vaccination records
- Lab results
- Medications
- Health history

Q: Are your companies promoting the use of specific health applications?

Members will have access to all HealthVault applications and devices. We will not be promoting specific uses at the outset but may consider this after members are signed up and using HealthVault with the Aetna PHR.

Q: How is Microsoft working with partners to ensure third-party applications and devices adhere to security and privacy standards?

Our privacy policies are well-defined and available for any customer to see. We have designed our policies with consumers in mind, and have incorporated the input of a number of consumer and patient privacy advocates. We’ve applied for TRUSTe and HON certifications, and have conducted rigorous internal and independent audits of our practices. HealthVault partners are bound to abide by our privacy commitments.
Is there or will there be a cost for the member to port their data to MS HV?
- No additional charges for members, plan sponsors, or Aetna.

Will “all” Data be ported or just pieces? If pieces which pieces?
- All data “visible” in the PHR as well as additional lab and claims data will be included on the transfer to Microsoft HealthVault. There are two data exceptions: sensitive data and some health trackers. Data from trackers will be transferable in 2009. For the PDF, all visible data will be included in the download. Care Engine-created alerts and reminders will not go directly to HealthVault, but they can be printed and will be included in the PDF download. AHIP guidelines prohibit the transmittal of manufactured data.

Will members be able to access their PHR if their employer no longer offers this benefit or if the member switches jobs?
- If the member wishes to retain PHR data, they must download the PHR as a PDF or export to HealthVault before the termination date. Downloads and transfers past the termination date are not supported at this time. If a member leaves his or her job or if the employer stops supporting the Aetna Personal Health Record, the member will no longer have access to this product. However, members can download the PHR as a PDF or transfer the information to HealthVault before termination. In 2009, Aetna plans to build in a grace period, allowing members to access PHR portability options for some time after termination.
Appendix

- HealthVault XML Interfaces
  - All access to HealthVault goes through the XML API
  - Accessible from any modern programming environment
    - Basic XML-over-HTTP interface, POST a request and receive a response
    - Cryptography requirements add complexity
  - Why not SOAP?
    - Retain more control over the envelope for performance, cross-platform simplicity
    - May create secondary interfaces over time

- HealthVault .NET SDK – Full-featured Object Model
  - Encapsulates XML functionality in a strongly-typed, object-based package for use in .NET and ASP.NET applications
  - This is “motherhood” … we try to simship .NET SDK coverage and developer samples for all features
  - All Microsoft applications are built using the .NET SDK