

Fresenius Medical Care North America

2015 Health Indicator

The Chronic Care Report

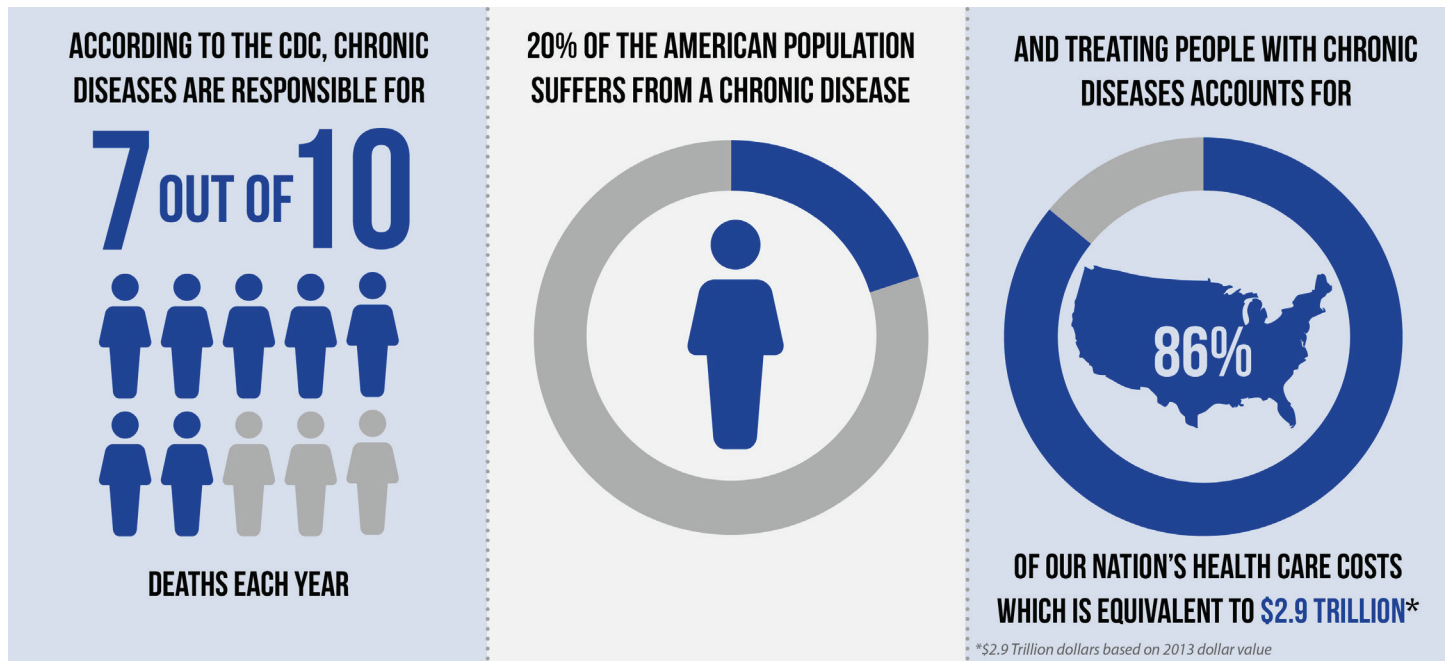
November 2015



**FRESENIUS
MEDICAL CARE**

The Impact of Chronic Disease

While only a small percentage of the American population is living with a chronic disease – a range of conditions that require continuous treatment and patient support – the impact is truly staggering.



Source: Centers for Disease Control

Survey Methodology

The Fresenius Medical Care North America 2015 Health Indicator consisted of an online survey of 288 physicians and a phone survey conducted among 1,000 general population adults.

The online survey of physicians was conducted between September 14 and September 21, 2015, among 288 physicians, distributed among cardiologists (25%) nephrologists (23%), endocrinologists (25%) and hospitalists (26%). Physician respondents were required to have at least one year of experience and work directly with patients.

The general population telephone survey was conducted between September 11 and September 17, 2015 among 1,000 general population adults 18 years of age and older living within the United States. The sample is nationally representative of the U.S. population as it relates to age, gender, region and ethnicity. A dual sampling method of landline and cell phone was used. The total sample has a margin of error of +/- 3.1% at the 95% confidence level.

The surveys were both conducted by FTI Consulting.

The U.S. Health Care System is not Designed or Equipped to Support the Unique Needs of the Chronically Ill Population

Both physicians and patients agree: there are overall concerns about the performance of the health care system in this country, especially as it relates to the chronically ill.



99%

of physicians say it is important for chronic care to be a top priority for the health care system



45%

However, less than half of physicians believe that the health care system currently makes chronic care a priority



Physicians Say...

"We face frequent lack of support and even barriers in addressing the complex and highly significant medical problems of the patients. This is compounded by the ridiculous obstacles faced by physicians in the process of getting approval from insurers for certain treatments."

"Chronic diseases take a lot of time from patient, family and provider to coordinate and arrange. Resources are limited and so decisions that may be tough have to be made sometimes without all the information."



The General Population Says...

"I was very ill last month and was unable to get into my PCP office with either my PCP or any other provider and had to go to an urgent care where the provider did not know me. This is really not a good idea when you have had an organ transplant; urgent care has no idea about one's chronic condition."

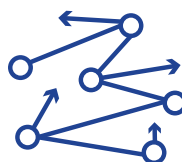
Care in the Current Health Care System is Not Coordinated

Medical professionals surveyed overwhelmingly believe that coordination with colleagues enables them to deliver better care to patients, yet they also feel that the system does not support this collaboration.



97%

of physicians agree that working with other medical professionals provides patients with better care overall



55%

consider insufficient coordination among other physicians a significant obstacle to adequate chronic care



54%

also note that working with other physicians or medical professionals complicates the process of caring for a patient



72%

say increased collaboration between hospital systems is of high priority



75%

say increased collaboration between physician specialties is of high priority.



Nearly one quarter of chronically ill patients who see multiple doctors say they do not believe their doctors communicate with each other to address all of their medical needs in the best way possible



Physicians Say...

"Care is very fragmented and my patients have complex problems overlapping many areas - we need better coordination and easier to navigate systems to allow collaboration around patient problems."

"Too many patients fall through the cracks with respect to coordination of care and insurance matters. Medical treatment is often NOT the primary problem."



The General Population Says...

"Seems at times one provider doesn't know what the other provider (or results of other testing) is. Better communication is needed."

"My husband has a metal clip in his head and his pain management doctor ordered an MRI which would cause certain death. We of course knew that he couldn't have one so he was not hurt."

Patients and Physicians Have Differing Views on Care Needs

Physicians are focused on the treatment of the medical condition, while the general population is asking for more integrated care.



90%

An overwhelming majority of physicians are focused on providing the best possible medical care



28%

Over a quarter of the general population report that their providers never discuss non-medical care with them



57%

Of physicians report that psychological care and psychosocial services are a high concern



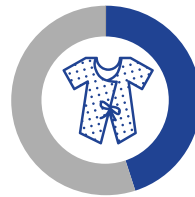
40%

16% of those with chronic conditions express a desire for psychological care, yet approximately 40% of respondents report that their health care providers never discuss this kind of treatment with them



80%

Nearly 80% of physicians believe that they often discuss medical treatments with patients



45%

However, only 45% of the general population says that their doctor often discusses medical treatments with them



Physicians Say...

"Most chronically ill patients do not receive the full amount of information needed and the social services that can be done in an office visit."



The General Population Says...

"My doctor didn't listen to anything I said and assumed to know what I wanted without consulting me."

"The doctor is not familiar with me and spends a long time going over records in front of me."

Patients Feel Their Health Care Needs are Not Being Met

40%

And 40% of physicians say that their patients lack both psychological care and psychosocial services



40%

At roughly 40%, both patients and family members agree that the health care system is not effective in helping them with psychological care or psychosocial services



55%

Over half of physicians say their patients need assistance navigating the health care system, such as coordinating between all providers and treatments



25%

One quarter of those who have a chronic disease spend at least an hour per day directly taking care of their disease



According to physicians, two-thirds of patients are taking at least 5 medications on a continuous basis



One-in-five patients are physically unable to get to treatments or appointments



Nearly half of patients say their disease has a high impact on their ability to be active



Physicians Say...

"Patients with chronic diseases like hypertension are often overlooked and uncared for. We have the most sophisticated health care system in the world and yet many patients with chronic diseases are uncared for."



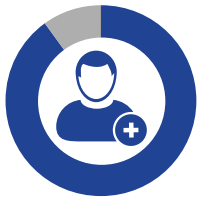
The General Population Says...

"I went to see a doctor about thyroid cancer and the biopsy came back non-cancerous and next week it swelled up to where I had a hard time breathing and I had surgery and when it came back, it was cancerous."

"The doctor does not look in-depth in a psychological sense."

Patients Want to Play an Increasing Role in Managing Their Care

The health care system needs specialized integrated networks to better meet the needs of the chronically ill



90%

of patients say they are prepared to take care of their needs arising from their disease



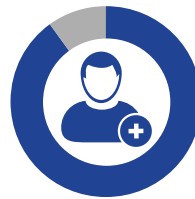
66%

Two-thirds of physicians say they would treat patients more effectively if they had more integrated care networks



86%

of the general population says that a coordinated treatment experience is important



66%

Patient non-compliance is a significant obstacle for two-thirds of physicians



Physicians Say...

"There needs to be input from a team of professionals. I try to do this in our Diabetes Center. We have our patients see a social worker, podiatrist, dietician, physical therapist (if necessary) and myself - an endocrinologist."



The General Population Says...

"I have numerous specialists that I see, but for the most part, none of them talk to each other. I have to coordinate between doctors. When I am having a physical problem, I talk to the nephrologists who I see once a week and I talk to the dialysis staff and everyone shrugs their shoulders and says that they don't know why I would be having this problem. It would be nice if they could at least direct me to a specialist I could ask about this. Instead, I have to find a new specialist to address the problem and hope that this is someone who can help me."