Patient Safety

A look at the New Normal amidst COVID-19 within our healthcare system

The link to the recording of this live webcast may be found here.
HCA Healthcare is...

- 270,000 colleagues
- 2,000 sites of care
- 21 states and two countries
- 32+ million patients
Bringing Patients Back
Leveraging Trust and Allaying Fear

NATIONAL ONLINE SURVEY RESULTS
MAY 13, 2020
Demographics

Gender:
- Male: 47%
- Female: 53%

Ethnicity:
- Hispanic: 11%
- African-American: 13%
- White: 72%

Age:
- 31% 18 - 34
- 19% 35 - 44
- 16% 45 - 54
- 18% 55 - 64
- 17% 65 +

Education:
- 28% High School or Less
- 25% Some College
- 31% College Graduate
- 16% Post Graduate

34% Are Parents

Location:
- Midwest: 21%
- Northeast: 21%
- West: 23%
- South: 34%

Urban: 38%
Suburban: 48%
Rural: 12%
45% have personally had, or someone in their household has had a change in their employment status due to the coronavirus.

Of those,

26% Lost their health insurance

15% Yes, lost their job
12% Yes, someone else in their household lost their job
15% Yes, had their salary or wages cut
10% Yes, someone else in their household had salary or wages cut
55% No, did not have a change in employment status

28% personally have, or knows someone who has been, infected with the coronavirus.

4% Yes, they have been infected
2% Yes, someone else in their household has been infected
23% Yes, someone outside of their household has been infected
72% No, does not know anyone who has been infected

* Multiple responses accepted
The virus is affecting people across the socioeconomic spectrum.

10% of those with private health insurance say they have lost their health insurance.

The percentage of people who have had a change of employment status by education level.

- High School or Less: 39%
- Some College: 43%
- College Graduate: 46%
- Postgraduate: 57%

The percentage of people who have lost their health insurance by education level.

- High School or Less: 11%
- Some College: 10%
- College Graduate: 9%
- Postgraduate: 19%
Ranked by trust on critical healthcare issues

<table>
<thead>
<tr>
<th></th>
<th>Trust A Great Deal</th>
<th>Do Not Trust Very Much</th>
<th>Do Not Trust At All</th>
<th>Unfamiliar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctors</td>
<td>60%</td>
<td>29%</td>
<td></td>
<td></td>
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<tr>
<td>Nurses</td>
<td>56%</td>
<td>34%</td>
<td></td>
<td></td>
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<tr>
<td>Hospitals</td>
<td>48%</td>
<td>38%</td>
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<tr>
<td>CDC</td>
<td>41%</td>
<td>38%</td>
<td></td>
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<tr>
<td>State &amp; Local Public Health Officials</td>
<td>30%</td>
<td>47%</td>
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<tr>
<td>Your Governor</td>
<td>29%</td>
<td>40%</td>
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<tr>
<td>Donald Trump</td>
<td>24%</td>
<td>22%</td>
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<tr>
<td>Local News Media</td>
<td>20%</td>
<td>43%</td>
<td></td>
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<tr>
<td>National News Media</td>
<td>19%</td>
<td>34%</td>
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<td></td>
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<tr>
<td>Health Insurance Companies</td>
<td>18%</td>
<td>40%</td>
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</tr>
</tbody>
</table>

INCREASE OF TRUST SINCE THE CORONAVIRUS

- Nurses: 73%
- Doctors: 71%
- Hospitals: 68%
51% rated their feelings of safety in a healthcare facility as a 5 or lower on a 10-point scale.

Women express less confidence in healthcare facility safety.

<table>
<thead>
<tr>
<th>GENDER</th>
<th>MEAN SCORE</th>
<th>AGE</th>
<th>MEAN SCORE</th>
<th>ETHNICITY</th>
<th>MEAN SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Men</td>
<td>6.0</td>
<td>18 to 34</td>
<td>5.0</td>
<td>White</td>
<td>5.4</td>
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<tr>
<td>Women</td>
<td>4.8</td>
<td>35 to 44</td>
<td>5.5</td>
<td>Black</td>
<td>5.1</td>
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<td></td>
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<td>45 to 54</td>
<td>5.6</td>
<td>Hispanic</td>
<td>5.2</td>
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<td></td>
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<td>55 to 64</td>
<td>5.3</td>
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<td></td>
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<td>65+</td>
<td>5.9</td>
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TOTAL MEAN SCORE 5.4
Regardless of how safe you feel today, what are the most important things you could hear that would make you feel more safe going to a hospital, urgent care facility or other medical facility as a patient?
The “return to normal timeframe” is pretty similar across the country, regardless of whether you’re in a hotspot state.

<table>
<thead>
<tr>
<th></th>
<th>WEST</th>
<th>MIDWEST</th>
<th>SOUTH</th>
<th>NORTHEAST</th>
<th>HOTSPOT</th>
<th>NON-HOTSPOT</th>
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<tbody>
<tr>
<td>3 Months or Less</td>
<td>24%</td>
<td>20%</td>
<td>17%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
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<tr>
<td>3-6 Months</td>
<td>32%</td>
<td>24%</td>
<td>23%</td>
<td>27%</td>
<td>27%</td>
<td>27%</td>
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<tr>
<td>6-12 Months</td>
<td>20%</td>
<td>25%</td>
<td>28%</td>
<td>26%</td>
<td>26%</td>
<td>26%</td>
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<tr>
<td>1+ Years</td>
<td>20%</td>
<td>25%</td>
<td>28%</td>
<td>20%</td>
<td>21%</td>
<td>21%</td>
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<tr>
<td>Never</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>3%</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>
There is no consensus on when people will return to healthcare facilities.

<table>
<thead>
<tr>
<th>Schedule a routine visit in your doctor’s office.</th>
<th>13%</th>
<th>23%</th>
<th>24%</th>
<th>21%</th>
<th>8%</th>
<th>9%</th>
<th>2%</th>
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<tbody>
<tr>
<td>IMMEDIATELY</td>
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<td>1-30 DAYS</td>
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<td>2-3 MONTHS</td>
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<td>4-6 MONTHS</td>
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<tr>
<td>7-11 MONTHS</td>
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<tr>
<td>A YEAR OR LONGER</td>
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<tr>
<td>NEVER AGAIN</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Schedule an elective procedure in a hospital.</th>
<th>10%</th>
<th>12%</th>
<th>17%</th>
<th>21%</th>
<th>11%</th>
<th>24%</th>
<th>5%</th>
</tr>
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<tbody>
<tr>
<td>IMMEDIATELY</td>
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<tr>
<td>1-30 DAYS</td>
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<td>2-3 MONTHS</td>
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<tr>
<td>4-6 MONTHS</td>
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<td>7-11 MONTHS</td>
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<td>A YEAR OR LONGER</td>
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<td>NEVER AGAIN</td>
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<table>
<thead>
<tr>
<th>Schedule an elective procedure in a non-hospital medical facility, like an outpatient medical center.</th>
<th>10%</th>
<th>14%</th>
<th>19%</th>
<th>20%</th>
<th>9%</th>
<th>23%</th>
<th>4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMMEDIATELY</td>
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<tr>
<td>1-30 DAYS</td>
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<td>2-3 MONTHS</td>
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<tr>
<td>4-6 MONTHS</td>
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<td>7-11 MONTHS</td>
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<td>A YEAR OR LONGER</td>
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<tr>
<td>NEVER AGAIN</td>
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</tbody>
</table>
Men are more likely to schedule an elective procedure in a hospital quickly.

Seniors and women may wait a little longer.

<table>
<thead>
<tr>
<th></th>
<th>Within 30 Days</th>
<th>2-6 Months</th>
<th>7 Months or Longer</th>
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</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Men</td>
<td>33%</td>
<td>39%</td>
<td>23%</td>
</tr>
<tr>
<td>Women</td>
<td>14%</td>
<td>36%</td>
<td>45%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ages 18 to 34</td>
<td>29%</td>
<td>29%</td>
<td>34%</td>
</tr>
<tr>
<td>Ages 35 to 44</td>
<td>36%</td>
<td>41%</td>
<td>20%</td>
</tr>
<tr>
<td>Ages 45 to 54</td>
<td>20%</td>
<td>51%</td>
<td>25%</td>
</tr>
<tr>
<td>Ages 55 to 64</td>
<td>13%</td>
<td>35%</td>
<td>48%</td>
</tr>
<tr>
<td>Ages 65+</td>
<td>9%</td>
<td>42%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Ethnicity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>White</td>
<td>20%</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Black</td>
<td>35%</td>
<td>35%</td>
<td>25%</td>
</tr>
<tr>
<td>Hispanic</td>
<td>25%</td>
<td>42%</td>
<td>30%</td>
</tr>
</tbody>
</table>
55% have delayed or skipped medical care since the Coronavirus spread in the United States.

Of those who delayed or skipped an elective procedure, reasons cited were:

- **53%** Hospital canceled or postponed procedure
- **35%** Did not feel safe going to the hospital or medical facility
- **20%** Loss of income
- **16%** Change of insurance
89% are planning to reschedule the elective procedure that was delayed or skipped. Among those planning to reschedule,

- Immediately: 5%
- 1-30 Days: 12%
- 2-3 Months: 30%
- 4-6 Months: 23%
- 7-11 Months: 8%
- A Year Or Longer: 2%
- Unsure: 21%
Of those who did not delay or skip medical care, the following were rated as potential obstacles in seeking treatment for a future elective medical procedure in a hospital.

- 42% Feeling unsafe in a hospital setting
- 18% Loss of employment or income
- 8% Change of insurance

45% did not delay or skip medical care since the coronavirus spread in the United States.
Bringing Patients Back
Leveraging Trust and Allaying Fear

NATIONAL ONLINE SURVEY RESULTS
MAY 13, 2020
# Consumer Confidence

Key findings and actions regarding consumer confidence regarding future healthcare services

## Findings

<table>
<thead>
<tr>
<th>Consumer Concern</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumers are nervous about COVID-19 exposure in healthcare facilities</td>
<td>Am I more likely to be exposed at a healthcare facility than other locations? How can I be sure my care team doesn’t have COVID-19? Can I limit my time at the hospital before, during, and after surgery?</td>
</tr>
<tr>
<td>Consumers desire emotional support at a higher level than pre-COVID</td>
<td>Will I be able to have a family member present for the surgery? If so, how will you keep them safe? Have others had this procedure done since the pandemic started? What should I expect on surgery day? Will they understand I am more scared than ever?</td>
</tr>
<tr>
<td>Consumers are prioritizing economic considerations over health needs</td>
<td>Does my pre-authorization still apply or do I have to go through that again? My income level has changed, I’m not sure I can afford to have the surgery. What’s the downside of waiting for the surgery? My surgery was considered “elective”, doesn’t that mean “optional?”</td>
</tr>
</tbody>
</table>

## Patient Concerns

<table>
<thead>
<tr>
<th>Finding</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a COVID-safe environment</td>
<td>Communicate expanded universal protections</td>
</tr>
<tr>
<td>Create emotional safety mechanisms for patients</td>
<td>Adjust operations and train staff accordingly</td>
</tr>
<tr>
<td>Establish financial counseling and navigation for patients</td>
<td>Address benefits of surgery versus risk of health considerations at an individual patient level</td>
</tr>
</tbody>
</table>

Findings are a culmination of research from internal digital and social media platforms and various external consulting firms and industry experts including McKinsey, Jarrard Press Ganey, NRC Health, Publicis Health Media, Binary Fountain, Google, and Facebook.
The New Normal of Patient Safety at HCA Healthcare

Randy Fagin, MD
Corporate VP
HCA Healthcare
Universal Protection:
A new standard that promotes patient safety & confidence across all sites of care

- **Infection Prevention**
  - Universal Masking
  - Personal Protective Equipment
  - Policies & Procedures

- **Access Control**
  - Separate Entrances
  - Screening
  - Visitation Policies

- **Distancing**
  - Social Distancing
  - Patient Cohorting

- **Patient Flow**
  - Workflow
  - Wayfinding & Signage
Infection Prevention

Universal Masking
• All patients, visitors, contractors, & colleagues
• Required in all common areas

Personal Protective Equipment
• Enhanced COVID specific policies
• Global supply chain ensuring availability

Policies & Procedures
• Removed all high-touch items (vending, coffee makers, magazines)
• Enhanced sanitation practices in all public spaces
Access Control

Separate Entrances
- Elective, Urgent, Colleagues & Contractors

Screening
- All: symptoms & exposure
- Colleagues & Contractors: temperature

Visitation
- Limited 1 screened & masked visitor / patient
- Virtual Visitation
Distancing

Common Areas
• Lobbies, Cafes, Staff Lounges
• All tables / chairs 6 feet apart

Patient Cohorting
• Dedicated Units / Areas / OR’s for COVID +
• Time-related cohorting for shared resources (ie. x-ray)
Patient Flow

Elective Pre-arrival Screening
• Symptoms & exposure
• Temperature

Telehealth
• > 2,700 sites of care in 44 markets
• > 300,000 telehealth visits in the last 60 days

Urgent Care
• Providing pre-op testing
• Web check-in & virtual visits
Addressing the Human Psyche

Deborah Reiner
SVP, Marketing & Corporate Affairs
HCA Healthcare
Emotional Aspects Behind the Data

**Anxiety and Fear** – about the virus, the economy, their children, their parents, their job, their spouses job, their vacation, life celebrations...

**Confusion** – varying advice from experts and politicians

**Responsibility** – as a parent, as a caregiver to elderly parents, as a co-worker

**Self-reliance** – increased interest in wellness and self-treatment

**Patience** – they’ve learned to wait, to slow down, to see what happens next

The “heart” is winning over the “mind”
How do we deliver safety in a way that is meaningful to consumers?

We make them feel CONFIDENT

Consumer perception research conducted in Q4 of 2019 revealed that feeling confident about the “safety and security” of a hospital or other provider setting will drive patient loyalty.

Post-COVID research confirms and magnifies that sentiment.

Source: Salt/LRW HCA Healthcare Consumer Facing Positioning Study, Q1 2020
Baseline messaging

Confidence Building

Forward.
When faced with a challenge, we see the path forward.

The human race has faced an enemy like no other these last few months, one that has made time stand still for our nation and our world. Never in our lifetimes have we faced a crisis like this one. Homes have turned into offices, social distancing has become common language. We all have been given a new way of life, a new normal. Stretched to our limits, we see the path forward.

Financial Confidence

Dear Deborah,

In one way or another, the COVID-19 pandemic has changed all of our lives. What hasn't changed is our ability to deliver safe, compassionate care as your community healthcare provider. As always, we are here to ensure you receive the care you need today, for a healthier tomorrow. As we resume services, hospitals, emergency rooms and physician offices are still one of the safest possible places to receive care. See what we're doing to keep you safe.

In addition, we are here for you as a trusted advisor on a variety of healthcare-related issues. For example, many people express difficulty in finding an easy-to-understand, single resource for health insurance options. As a result, we now...
It’s not enough just to tell them, you need to show them.
Do Different Things using technology in new ways

Virtual Patient Education

Virtual Visiting Hours
NASHVILLE, Tenn. (WTVF) — An expectant father nearly had a heart attack after delaying his trip to the doctor because he was worried about getting COVID-19.

For months, 33-year-old Zak Jablow had been suffering from chest pain. At first, he was told by a medical professional it was indigestion. But then it got worse.

“I woke up feeling like a car had parked on my chest, I had
Bridging to Our New Normal

- Build stakeholder confidence
- Ensure they understand the risk of not seeking appropriate care at the appropriate care setting
- Address their financial concerns
- Rely on partners and social media to help tell the story
- Keep smiling
The link to the recording of this live webcast may be found here.