Operational review – EMIS Health

Focussed on integrated care

Connected healthcare solutions for strategic customers in alignment with market need and NHS policy.

EMIS Health

The EMIS Health segment comprises business areas where revenues are generated from NHS organisations. This includes the primary, community and acute A&E markets as well as the Egton business.

Market shares

EMIS Health maintained its UK GP market leadership position with a market share of 57% (2018: 57%).

EMIS Health increased its community market share to 21% (2018: 20%), maintaining the number two market position.

The Group increased its market share in Acute A&E to 23% (2018: 22%) moving to market leadership.

NHS primary care frameworks

As previously announced, EMIS Health was awarded a place on the NHS GP IT Futures framework in October 2019 and shortly afterwards became the first GP clinical system supplier to be accepted onto the Digital Buying Catalogue.

The framework commenced on 1 January 2020 and replaced the previous contractual framework, GP Systems of Choice (GPSoC), to supply IT systems and services to the GP market in England. The framework will govern the provision of the majority of EMIS Group's clinical IT system-related services to GPs in England. During 2019 EMIS Health delivered the EMIS Web functionality required to meet

the initial contract obligations under GP IT Futures with further development planned during 2020.

Following the announcement in February 2019 that EMIS Health had been awarded a place on the NSS framework, the Group is investing in its team and facilities in Scotland and continues to work closely with NSS to deliver the technology to support its health and care strategy.

EMIS Health has successfully completed the upgrade to EMIS Web in Northern Ireland. It continues to support its GP customer base in Wales following NHS Wales Informatics Service's (NWIS) announcement in mid-2019 that it had cancelled the contract with one of its GP clinical software suppliers, which had been appointed to replace EMIS Health over time.

EMIS-X

The development of EMIS-X continues at pace. EMIS Group is working towards an expected first version of the platform during 2020 and the first upgraded application in 2021.

Our development activity is closely aligned with market need and NHS policy. The Group's clinical team brings a wealth of clinical insight from all major settings to ensure EMIS-X delivers innovation that makes a difference and the best end-user experience. Dovetail has contributed well in 2019 as an integrated part of our technology development activity.

Improved go-to-market strategy

During 2019, EMIS Health brought together its primary, community and acute care sales and service functions into one unit, together with Egton. The NHS market is moving towards joined-up healthcare solutions that span multiple care settings. The Group refined its go-to-market strategy during 2019 to focus on its overarching connected healthcare propositions to strategic customers, including STPs and ICSs.

The focus is to work in partnership with strategic organisations to deliver the technology solutions they need to meet the challenges of integrating care in their locality.

EMIS Health is working closely with its acute A&E and community customers to share development roadmaps with the intention of building a personalised plan for each patient to meet their needs.

It continues to work closely with customer user groups on enhancements and developments.

Streamlined support and service

EMIS Health has streamlined its support and service function with migration onto a single customer and internal platform, ServiceNow. It co-located two of its support teams during 2019 to improve joined-up working and increase efficiency.

This has seen an increase in the use of digital-first options to access support services. Digital chat is a new and additional route for end users to provide quick access to

WE DELIVER

A&E systems	GP systems	Community systems	GP hosted systems
6.3m	**163m**	**79m**	**40m**
electronic discharge messages sent to NHSD	appointments booked annually	consultations recorded	patient records

support teams via ServiceNow. In the last six months of 2019 EMIS Health saw an increasing uptake of digital-first support, with around 30% of all support issues now logged via email, portal or digital chat.

Digitisation

Egton's Lloyd George Digitisation service continued to perform well, with strong sales of its service to digitise legacy paper records, as the market continues to work towards its target to be fully digitised by 2024.

Future plans

The focus for EMIS Health for the forthcoming year is on the development of EMIS-X, working towards its first deployments in the Scottish and English GP markets. Essential developments will be delivered to the existing product suite, meeting market and contractual need until the EMIS-X platform and resulting applications are ready.

Technology allows us to think as one

Ian Bailey, RN, DN, BN (Hons)

Queen's Nurse, Clinical Design Director

"Caring for people more effectively in their own homes relieves pressure on busy hospitals. This relies on joined-up working."

Clinicians working across different teams need instant, electronic access to a shared care record – whether they are in a clinical room, the patient's home or the car. This helps them make more informed and safer decisions, have more effective conversations with their colleagues and provide patients with the best experience possible.

Read more online at **emisgroupplc.com** ⟩

Party like it's 2019

Haidar Samiei

Clinical Director, EMIS Health

"As a junior doctor, I was working in A&E on New Year's Eve 1999, armed with only a backpack full of textbooks and a pager."

Life as a junior doctor was information-poor back then: imagine replacing access to the consultant, registrar, intranet and mobile phone with a pager and some textbooks on a night shift. Now in 2019 we have decision support tools: we can streamline processes and use people with specialist skill sets to provide better, faster care.

Read more online at **emisgroupplc.com** ⟩