KaufmanHall

2018 State of Consumerism in Healthcare

Activity in Search of Strategy

Results of the Kaufman Hall Healthcare Consumerism Index

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Introduction

Within a relatively few years, the internet economy has forever changed how people shop, get information, do business, and interact. With these changes come expectations for access, convenience, and low prices like none we have ever seen before—expectations that legacy companies find extraordinarily difficult to meet. Hospitals and health systems are no exception.

Findings from Kaufman Hall's 2018 Healthcare Consumerism Survey show a wide awareness among hospitals and health systems that consumer expectations are changing and that hospitals need to focus on fulfilling those expectations. For example, 90 percent of respondents rate improving the consumer experience as a top strategic priority, and nearly two-thirds said developing digital tools was a high priority. Findings also indicate an increasing level of activities designed to meet consumer expectations, particularly in access and experience.

However, the results show that there are few truly top performers when it comes to consumerism. Initiatives generally lack a foundation of consumer insights and analytics, favor traditional over innovative approaches, and have not overcome longstanding problems with the consumer healthcare experience. The increased level of activity still has not coalesced into a consistent strategic march toward exceeding customer expectations and building consumer loyalty. For hospitals and health systems, that means loss of opportunity to grow their business based on an ability to engage consumers. It also means continued vulnerability to competitors that can provide a notably higher value equation for consumers.

Kaufman Hall's Healthcare Consumerism Index provides a lens to overall industry performance related to consumerism (Figure 1). Only eight percent of respondents are rated Tier 1 performers, and only 23 percent are rated Tier 2 performers. More than half of respondents are in Tier 3 and 17 percent are in Tier 4. The good news is that, compared with last year, a significant number of organizations have moved from Tier 4 up to Tier 3. However, the percentages in Tiers 1 and 2 are relatively flat. These results indicate that more organizations are launching new projects targeted to meet consumer expectations, but that those projects are still short of wide implementation and measurable results.

This increased activity is encouraging, but likely is not fast enough. The urgency for change is becoming even more apparent with the entrance of huge new competitors into the provider space—entrants focused on enhanced consumer access and experience, along with lower prices. For example, CVS Health and Aetna, whose combined annual revenue would be $240 billion, promise to "reinvent healthcare's front door" using interventions in stores and homes, digital tools, and advanced analytics.

As one survey respondent put it: “The traditional healthcare industry is so far behind in terms of meeting, much less anticipating, consumers’ expectations, that I fear for our ability to adapt quickly enough to remain relevant.”

The findings and analysis that follow suggest where healthcare is moving to compete in a consumer-oriented internet economy, and how it can move more effectively.

Figure 1. *Overall Performance: Kaufman Hall’s Healthcare Consumerism Index*

	Percent	Description
Tier 1	8%	Early adopters who have dedicated significant resources to being leaders in focusing on consumer needs; often have built foundational insights platforms and outlined a consumer focus roadmap early on that has evolved over the years
Tier 2	23%	Have taken a thoughtful approach to becoming more consumer-centric, piloting initiatives and identifying needs in the context of the organization’s overall strategy
Tier 3	52%	Have looked to fill a specific need, often in reaction to a change in the market or based on management/board POV, rather than in the context of an overall consumer engagement strategy
Tier 4	17%	Waiting for the market to show them what consumer-oriented strategies are needed and how to prioritize these capabilities, after which they might begin to plan for initiatives to be rolled out slowly

Source: Kaufman Hall Healthcare Consumerism Index

About the Report

The following report is based on the Kaufman Hall 2018 Healthcare Consumerism Survey and the Kaufman Hall Healthcare Consumerism Index. The annual survey is a detailed online questionnaire sent to executives at hospitals and health systems nationwide. More than 425 respondents representing about 200 organizations participated, answering questions designed to gauge strategic focus and intent toward becoming a consumer-centric organization, as well as the resources and capabilities that aid in achieving a consumer-centric organizational core.

The majority of respondents (65 percent) were from health systems, 20 percent were from stand-alone hospitals, and 13 percent were from children's hospitals. Remaining respondents were from other types of specialty hospitals.

The Kaufman Hall Healthcare Consumerism Index is based on weighted rankings of four key areas of the survey:

- **Access:** Enhancing access to care and clinicians through various means, such as retail clinics, virtual visits, online scheduling, extended hours, and patient-provider messaging
- **Consumer experience:** Addressing common problems such as long wait times, confusing billing communications, staff behavior, website problems, and poor wayfinding
- **Pricing:** Determining prices with tools such as benchmarking and analysis of service-level pricing risk, demand-elasticity, and price-volume tradeoff; and making meaningful price information available to consumers
- **The Foundation:** Developing consumer insights from multiple methods such as surveys, qualitative and quantitative research; developing analytical resources to track metrics and apply consumer insights

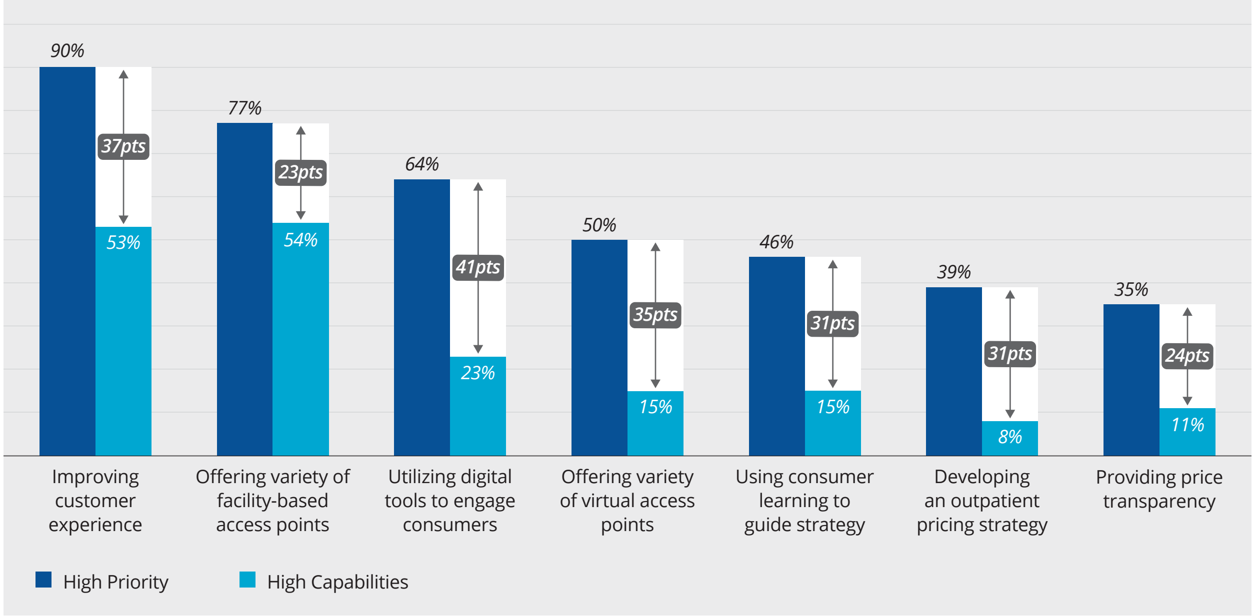
Ratings for individual organizations are not publicly available. Survey respondents can receive results for their organization upon request. Contact consumer@kaufmanhall.com for more information.

Overall Results: Consumer-Oriented Capabilities on the Rise

Last year's survey showed that consumerism was a high priority for providers, but capabilities were generally low. This year's results show that the gaps between the level of priority and capabilities are beginning to close (Figure 2).

- Ninety percent of respondents identified improving customer experience as a high priority, and more than half report that they have "well developed" or "best-in-class" capabilities in that area—compared to only 30 percent in 2017
- Seventy-seven percent identified enhancing facility access points as a high priority, and 54 percent said such capabilities were strong at their organizations, compared with just 25 percent last year
- Sixty-four percent of respondents identified using digital tools to engage consumers as a high priority for their organizations; only 23 percent said they had strong capabilities to do so, but that is still a sizable change from 14 percent in 2017
- Capabilities remained lower in other important areas, including virtual access, outpatient pricing strategy, and price transparency

Figure 2. *The Priority-Capability Gap*



Source: Kaufman Hall 2018 Healthcare Consumerism Survey

Consumer Access: Activity Increasing, but Focused on Bricks and Mortar

For two years, respondants have rated access to care as the top priority for healthcare consumers. This year's survey, however, shows that many organizations have yet to make significant strides in this area (Figure 3). Only 12 percent of organizations ranked as top-tier performers, while 18 percent were rated Tier 2 performers. Tier 3 saw a significant increase in activity, rising from 41 percent in 2017 to 60 percent in 2018. Having 70 percent in the bottom two tiers suggests there remains significant room for the industry to improve in this high-priority area.

Despite measured activity to improve access, much of the focus continues to be on relatively traditional approaches (Figure 4).

- Multi-service outpatient centers and ambulatory surgery centers were reported as widely available
- More than half of survey respondents said urgent care centers are widely available at their organizations
- Freestanding imaging sites were reported as widely available by 40 percent of respondents

Figure 3. *Index Ratings: Access*

Access	
Tier 1	12%
Tier 2	18%
Tier 3	60%
Tier 4	10%

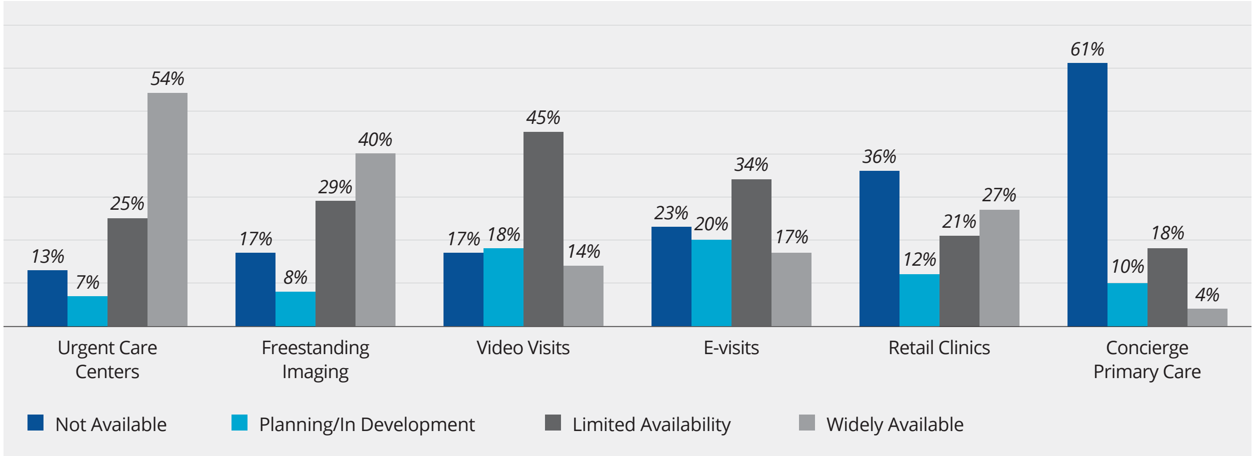
Source: Kaufman Hall Healthcare Consumerism Index

However, more innovative approaches to access are less common.

- Only 27 percent of respondents reported retail clinics as widely available
- Only 14 percent reported video visits as widely available
- Only 17 percent reported e-visits were widely available
- Only 4 percent said concierge primary care was widely available

Work is underway in all of these less traditional, largely digital, modes, but slow progress remains a vulnerability for traditional providers at a time when consumers increasingly are demanding new levels of access from healthcare providers.

Figure 4. *Availability of Consumer-Friendly Access Points*



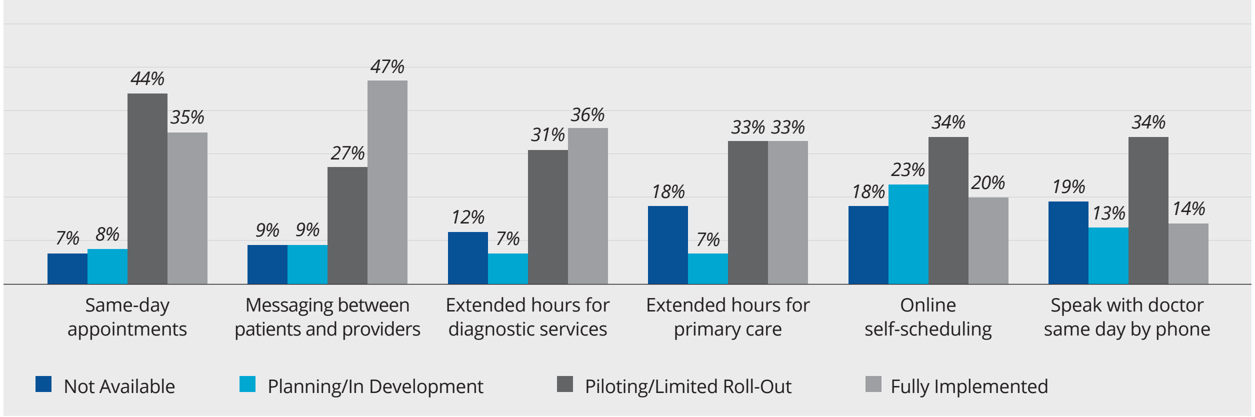
Source: Kaufman Hall 2018 Healthcare Consumerism Survey

Along with enhanced access, consumers are demanding other forms of enhanced convenience. Survey results show a significant amount of activity underway in this area (Figure 5).

- About three-quarters of respondents report full implementation or pilot tests of same-day appointment scheduling and patient-provider messaging
- About two-thirds report full implementation or pilot tests of extended hours for diagnostic and primary care clinics
- More than half report full implementation or pilot tests of online self-scheduling

These are important moves in the right direction for a majority of respondents. Providers will need to ensure that these activities result in a state-of-the-art experience that rivals what consumers experience from other industries, and that implementation is quick enough to stay ahead of non-traditional competitors focused on consumer convenience. As one respondent noted, "A lot of work is being done right now—mostly in the planning and initial implementation stages. We have a long way to go."

Figure 5. *Consumer Convenience Initiatives*



Source: Kaufman Hall 2018 Healthcare Consumerism Survey

A Look at What Consumers See

Consumers increasingly search online reviews and organizations' websites when selecting a healthcare provider. Oftentimes, these may be a person's first point of contact with a hospital or health system.

While Kaufman Hall's Healthcare Consumerism survey and index results provide valuable insights to organizational initiatives nationwide from the *provider* perspective, stepping back for an "outside-in view" from the *consumer* perspective offers helpful context.

In looking at organizations participating in this year's survey, the average rating for both Google and HCAHPS was 3.4 out of 5 stars. On average, 59 percent of reviewers said they would recommend the organizations participating in the survey.

An analysis of participants' websites examined availability of the following consumer-friendly functions:

- **Easy-to-find contact information:** Most organizations (81 percent) provided contact information on the main landing page, and the remaining 19 percent had it available within less than five clicks
- **Self scheduling:** 28 percent of organizations had self-scheduling available either on the landing page or within less than five clicks, while 34 percent had it available only through a patient portal, and 37 percent had no self scheduling available at all
- **Virtual visits:** The majority of organizations—74 percent—did not provide access to virtual visits on their website, while 5 percent had them available only through a patient portal; 21 percent had them available on the main landing page or within less than five clicks
- **Price estimators:** 21 percent of organizations had a price estimator on the landing page or within less than five clicks, while 17 percent had them available through a patient portal; 61 percent of organizations had no price estimator on their website
- **Posted wait times for emergency or urgent care and/or check-in services:** Wait times or check-in for emergency or urgent care were only available at 22 percent of organizations

These results indicate that there are significant opportunities for improvement in enhancing consumer-facing services to better connect with existing and potential new customers online.

Consumer Experience: A Work in Progress

As with consumer access, the survey results show an increase in activity, but few top performers (Figure 6). Only 7 percent of organizations rated as Tier 1 performers, while 17 percent rated as Tier 2. Tier 3 performers again rose significantly, with the number of organizations in that category jumping from 42 percent in 2017 to 66 percent this year. As the more detailed findings show, there is more work to do on healthcare's seemingly intractable challenges with the consumer experience.

Figure 6. *Index Ratings: Experience*

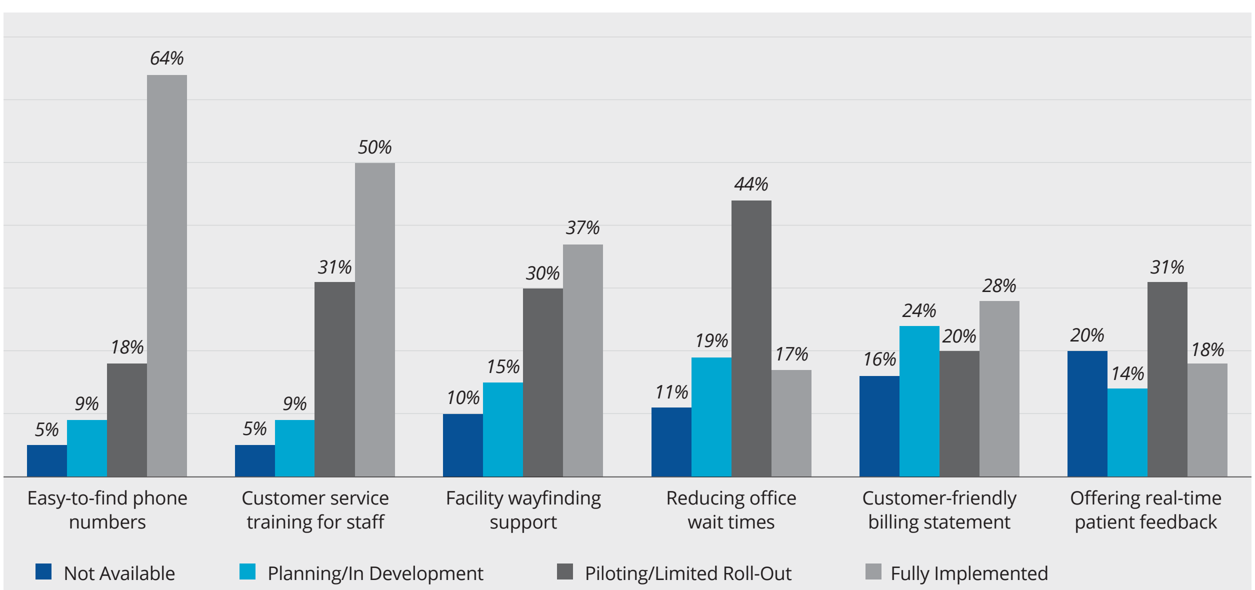
Experience	
Tier 1	7%
Tier 2	17%
Tier 3	66%
Tier 4	10%

Source: Kaufman Hall Healthcare Consumerism Index

The greatest degree of activity falls into areas in which hospitals and health systems could be seen as far behind their non-healthcare counterparts (Figure 7):

- **Offering easy-to-find phone numbers:** 64 percent fully implemented, 18 percent piloted
- **Providing customer service training for staff:** 50 percent fully implemented, 31 percent piloted
- **Improving facility wayfinding support:** 37 percent fully implemented, 30 percent piloted

Figure 7. *Organizational Progress on Customer Experience Issues*



Source: Kaufman Hall 2018 Healthcare Consumerism Survey

However, efforts are less pervasive to address other common consumer frustrations with the healthcare experience:

- **Reducing office wait times:** Just 17 percent of organizations reported having fully implemented initiatives, although 44 percent are piloting such initiatives
- **Providing customer-friendly billing statements:** Less than 50 percent of survey respondents have implemented or are piloting related initiatives

"Billing is confusing and frustrating and stressful, and it is their last interaction with us," one executive wrote. "Some choose not to come back if this does not go as expected. How can we make it easier for patients?"

Pricing Strategy: An Overlooked Opportunity

Of all the key areas related to consumerism in healthcare, pricing strategy provides the most room for improvement for the nation's hospitals and health systems (Figure 8). Only 5 percent of organizations rated in the top tier in this category for aggressively pursuing pricing strategies and price transparency, while an overwhelming 74 percent are Tier 3 and 4 performers.

Figure 8. *Index Ratings: Pricing*

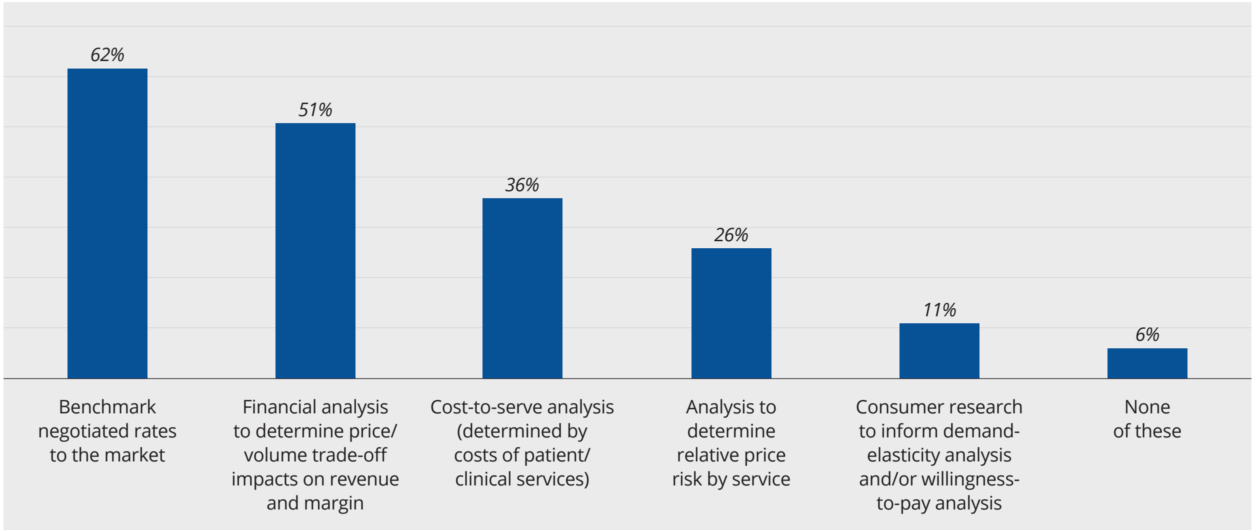
Pricing	
Tier 1	5%
Tier 2	21%
Tier 3	26%
Tier 4	48%

Source: Kaufman Hall Healthcare Consumerism Index

This category encompasses both pricing strategy and price transparency. The majority of respondents—62 percent—said they set pricing based on benchmarking of negotiated rates to the market (Figure 9), a traditional approach that does not take into account consumer price sensitivities.

The use of more sophisticated pricing methods is significantly lower. Only half use financial analysis to determine price/volume trade-off impacts on revenue and margin, and fewer still analyze cost to serve, price risk by service, or demand elasticity related to price. Six percent of respondents said they do not use any of these methods to help set pricing.

Figure 9. *Tools Used to Set Pricing of Services*

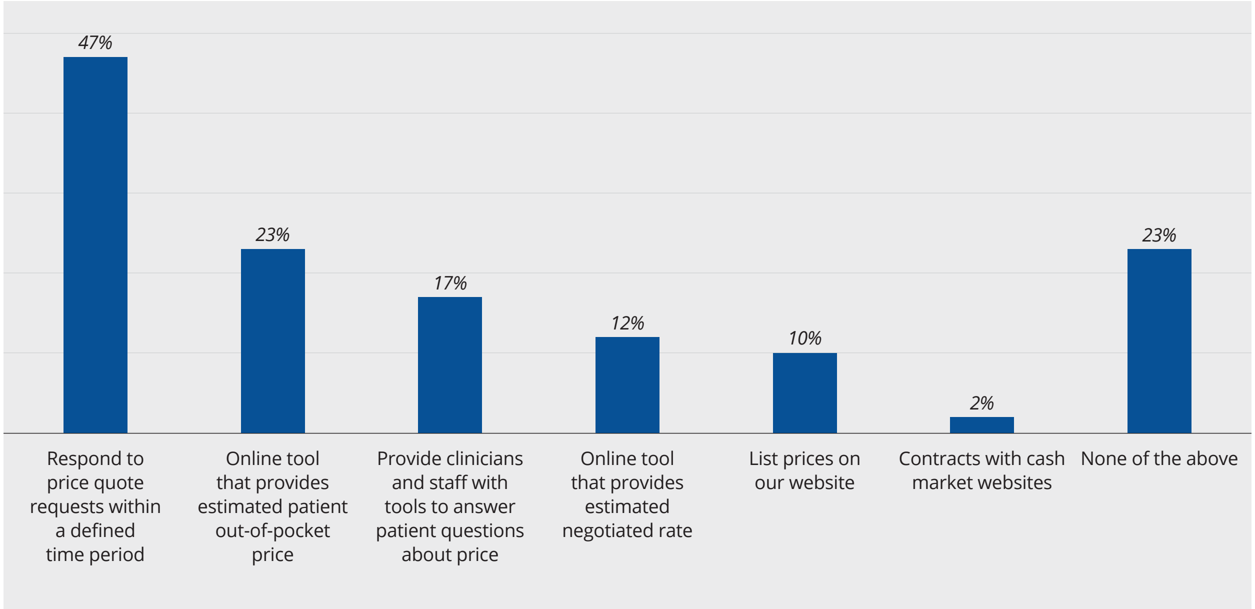


Source: Kaufman Hall 2018 Healthcare Consumerism Survey

Organizational efforts to provide price transparency for patients and families are even less consistent (Figure 10). Nearly a quarter of survey respondents said their organizations do not use any of six key methods for offering price transparency. Less than half respond to consumers' requests for price quotes within a defined time period, and only 10 percent list prices online.

Although many respondents acknowledged that healthcare pricing and lack of transparency were common points of frustration for consumers, others did not see it as a high priority. "Currently, only a very small segment of our market is price shopping," one survey respondent wrote.

Figure 10. *Price Transparency Efforts*



Source: Kaufman Hall 2018 Healthcare Consumerism Survey

Consumer Insights and Analytics: A Thin Foundation

Effective consumerism strategies are built on a foundation of consumer insights and analytics. Yet, most organizations continue to struggle in this area. Twelve percent of organizations rated as Tier 1 performers in this area, while 17 percent rated as Tier 2. Significant shifts again occurred in the bottom tiers, as more organizations are beginning to build consumer insights capabilities. Tier 3 performers increased significantly, from 18 percent in 2017 to 46 percent in 2018, while those rated as Tier 4 performers decreased from 53 percent to 25 percent over the same period.

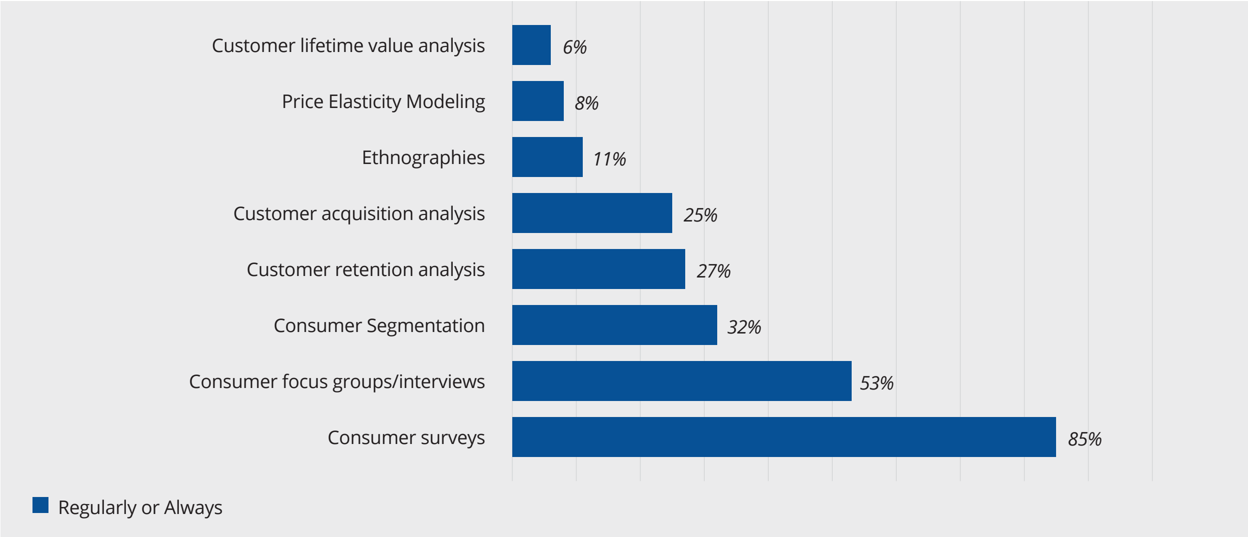
Figure 11. *Index Ratings: Foundation*

Foundation	
Tier 1	12%
Tier 2	17%
Tier 3	46%
Tier 4	25%

Source: Kaufman Hall Healthcare Consumerism Index

Surveys are the well-entrenched method for health systems to gain consumer insights, with 85 percent of respondents consistently using this approach (Figure 12). However, use drops precipitously for techniques that are common in industries outside of healthcare. For example, only 32 percent consistently use consumer segmentation, and only 8 percent use price elasticity modeling.

Figure 12. *Use of Tools for Building Consumer Insights*



Source: Kaufman Hall 2018 Healthcare Consumerism Survey

Infrastructure for collecting, analyzing, and executing on consumer insights and analysis is low to non-existent for most organizations:

- Only about a quarter of organizations said they have a fully operational data and analytics team that performs statistical modeling, or a consumer-oriented performance scorecard
- Just 15 percent have personnel trained and experienced in consumer research

Somewhat more encouraging, 27 percent of respondents said they have fully implemented tracking of brand equity or Net Promoter Score, while 45 percent have implemented these practices on a limited basis or have them in development.

These results magnify the view that organizations need to take a more comprehensive, strategic approach to consumerism. In order to develop an effective game plan for fulfilling changing consumer expectations, hospital and health system leaders need to start with a solid understanding of who their consumers are, including their healthcare needs and behaviors, how they enter provider systems, and whether they ultimately remain loyal to the organization or seek future care elsewhere.

As one executive put it: “We are assuming we know what they want, but I am not sure we do.”

Looking Forward: From Activities to Strategy

Meeting consumer expectations is a top strategic priority for most health systems, according to results of the Kaufman Hall 2018 Healthcare Consumerism Survey. Results also show an increase in activity designed to improve consumerism performance.

However, survey findings and broader industry analysis also show that these efforts need to be more strategic, more effective, and more rapidly implemented if legacy healthcare organizations are to grow and compete in an increasingly consumer-focused world.

Hospitals need to better understand their consumers in order to better meet their needs. The survey results show that most organizations have a weak infrastructure for their consumerism efforts. They rely on highly traditional tools and analysis, with few using the more sophisticated approaches that would bring a deep understanding of the needs and expectations of specific consumer segments. Such an understanding would allow organizations to select the initiatives that have the greatest effect on the greatest number of consumers, and the greatest effect on the organization’s overall performance. Organizations have a lot of work to do to transform into next-generation, consumer-centric enterprises. Deep consumer insights and analytics allow healthcare leaders to create a realistic plan to make that transformation.

Hospitals need to move more assertively toward innovative approaches. The bias toward tradition is highly apparent in the survey findings. Improving in-person access gets more attention than virtual visits. Customer service training gets more attention than real-time customer feedback. In all walks of life, consumers are interacting with the world and each other using highly intuitive, convenient, and connected technology. Healthcare will not be exempt from this trend, not only because of consumer expectations, but because of nimble start-ups and tech giants entering the provider space that show a true bias for action.

Longstanding consumer frustrations need to be resolved. The first step in a good healthcare experience is not having a bad healthcare experience. Before hospitals can delight their consumers, they have to remove longstanding areas of frustration like confusing bills, long wait times, and limited primary care hours. Survey findings show only a small percentage of organizations have resolved these problems and only a small additional percentage are piloting solutions. Organizations need a roadmap for identifying and resolving these issues, along with a willingness to make the kinds of process and technology changes that will be required.

Hospitals need to face the issue of pricing. Price is a top issue not only for consumers, but also for commercial and government payers, whose policies are pushing consumers toward lower cost, non-hospital facilities for low-intensity, routine care and services. In this environment, health systems need a clear understanding of the relationship between their prices and the perceived value of their brand. This understanding has powerful implications for consumer loyalty and hospital financial health. Yet pricing continues to be the lowest performing area for survey respondents, with nearly half ranking as Tier 4 performers.

Hospitals and health systems need a clear roadmap for consumerism. Such a roadmap is built on a foundation of data and analytics that provides a nuanced view of consumer expectations and allows organizations to prioritize their efforts over time based on the effects on patients, the impact on revenues, and the resources needed. Developing a roadmap requires a balanced assessment of the improvements needed in *access, experience,* and *pricing*, enabling it to provide a view over time that will transform many aspects of the organization.

The good news is that consumerism is widely recognized as a high priority and that the level of activity is increasing to better serve consumers. The next step is to do a better job organizing and executing those activities, and to achieve real change that benefits consumers. The urgency is real. In many respects, healthcare organizations are playing catch-up. Yet consumer expectations are not waiting. As Amazon CEO Jeff Bezos said in his 2017 letter to shareholders:

> *One thing I love about customers is that they are divinely discontent... People have a voracious appetite for a better way, and yesterday's "wow" quickly becomes today's "ordinary."... You cannot rest on your laurels in this world. Customers won't have it.*

The stakes are high. In an era of growing consumer expectations and new competitors focused on access, convenience, and low prices, a key differentiator for leading organizations will be the ability to design and activate a clear plan to transform healthcare's traditionally inconvenient interactions into a truly contemporary experience for today's—and tomorrow's—consumers.

A Framework for Consumerism Strategy

A key need that emerged from survey responses—as well as from Kaufman Hall's industry experience—is defining an organizing construct for consumerism efforts. The framework to the right has proven a useful guide as hospitals and health systems seek to prioritize and integrate their consumerism efforts to attract and retain consumers.

Access. The No. 1 driver for attracting new patients is access. Defined broadly, access includes offering a variety of convenient physical *and* virtual sites of care, as well as an array of on-demand access points for information exchange and communication, such as websites, web portals, email, and text. Health systems often default to defining access as their "ambulatory" strategy, but the ambulatory network is only part of the solution to meeting the on-demand needs of today's consumers.

Experience. If great access gets people into the system, delivering a superior experience keeps them coming back. This requires a mindset shift from providing consumer "satisfaction" to "delight." The ideal end state is an easy-to-navigate, frictionless environment. Organizations must address commonly cited consumer pain points, such as difficulty in getting an appointment, long wait times, and lack of understanding of what a visit or service will cost.

Pricing. The survey results indicate that pricing strategy remains the Achilles' heel of hospitals and health systems. While there is a need for better transparency (i.e., How much will this cost?), an even more fundamental need is: "How much *should* this cost?" Health systems often have significant volumes of "bread-and-butter" outpatient services, such as imaging, labs, and some elective surgeries—but those same services are squarely in the bull's eye of consumers, payers, and competitors. Hospitals and health systems need to move from chargemaster management to better understanding and delivering against consumer expectations.

The Foundation. Becoming a customer-centric organization starts with in-depth customer understanding and insights. This means putting in place primary building blocks such as psychographic segmentation, journey mapping, and key performance metrics (e.g., new patient growth, retention, share of spend, etc.). Establishing in-depth relationships and delivering a highly personalized experience are key to building a long-term, sustainable patient base.

Participating Organizations

Kaufman Hall would like to thank all those who participated in the 2018 Healthcare Consumerism Survey. Among those organizations participating were:

Advocate Children's Hospital
Advocate Health Care
Akron Children's Hospital
AnMed Health
Ann & Robert H. Lurie Children's Hospital of Chicago
Arkansas Children's
Atlantic Health System
AtlantiCare, a member of Geisinger
Atrium Health
Aultman Health Foundation
Aurora Health Care
Avera Health
Banner Health
Baptist Health
Baptist Health Care
BayCare Health System
Baylor Scott & White Health
Baystate Health
Beaumont Health
Berger Health System
Berkshire Health Systems
Bethesda Health
Boston Children's Hospital
Butler Health System
Care New England
Carle Health System
Catholic Health Initiatives
Central Maine Healthcare
Centura Health
CGH Medical Center
Children's Health System of Texas
Children's Healthcare of Atlanta
Children's Hospital & Medical Center Omaha
Children's Hospital Colorado
Children's Hospital of Michigan
Children's Hospital of Philadelphia
Children's Hospitals and Clinics of Minnesota
Children's of Alabama
Cincinnati Children's Hospital Medical Center
Cleveland Clinic
Community Health Network
Community Health Systems
Community Healthcare System
Confluence Health
Cook Children's
Cottage Health
Dana-Farber Cancer Institute
Dartmouth-Hitchcock Health
Davis Hospital and Medical Center
Dayton Children's Hospital
Denver Health
Detroit Medical Center
Dignity Health
Duke LifePoint Healthcare
Eastern Maine Healthcare Systems
Edward-Elmhurst Health
Emerson Hospital
Ephraim McDowell Health
Erlanger Health System
Excela Health
Fairview Health Services
Floyd Medical Center
Frederick Regional Health System
Gillette Children's Specialty Healthcare
Good Shepherd Rehabilitation Network
Greenville Health System
Grove City Medical Center
Gundersen Health System
Healdsburg District Hospital
Health Quest
Henry County Hospital
Henry Ford Health System
Highmark Health
Holyoke Medical Center
Hospital Sisters Health System
Illini Community Hospital
INTEGRIS Health
Jefferson Health
Jennie Stuart Health
John Muir Health
John R. Oishei Children's Hospital
Johns Hopkins Medicine
Kaiser Permanente Northwest
Kona Community Hospital
Lake Charles Memorial Health System
Lakeland Health
Lancaster General Health
Le Bonheur Children's Hospital
Legacy Health
Lehigh Valley Health Network
Loma Linda University Health
Lost Rivers Medical Center
Maricopa Integrated Health System
Martin Health System
Mary Lanning Healthcare
Mary Washington Healthcare
Medical University of South Carolina
Memorial Health
Memorial Hospital of Sweetwater County
Michigan Medicine
Moffitt Cancer Center
Monroe Carell Jr. Children's Hospital at Vanderbilt
Montage Health
Mount Carmel Health System
Mount Sinai Health System
Multicare Health System
Nationwide Children's Hospital
Navicent Health
Nemours Children's Health System
Newman Regional Health
Nicklaus Children's Health System
Norman Regional Health System
North Kansas City Hospital
Novant Health
Ochsner Health System
OhioHealth
Orlando Health
OSF Healthcare
Pardee Hospital
Parkview Health
PeaceHealth
Pella Regional Health Center
Penn Medicine
Peterson Health
Phoenix Children's Hospital
PIH Health
ProMedica Heath System
Providence St. Joseph Health
Regional Health
Reid Health
Renown Health
Richland Hospital
Riverside Health System
Roswell Park Comprehensive Cancer Center
RWJBarnabas Health
Saint Alphonsus Health System
Saint Francis Healthcare
Saint Joseph Health System
SCL Health
Scripps Health
Seattle Cancer Care Alliance
Seattle Children's
Sentara Healthcare
Sharp HealthCare
Shields Health Care Group
Shriners Hospitals for Children
South Georgia Medical Center
Sparrow Health System
Spartanburg Regional Healthcare System
Spectrum Health
Springhill Medical Center
St Joseph's Children's Hospital
St. Joseph Health
St. Louis Children's Hospital
St. Luke's Des Peres Hospital
St. Mary Medical Center
Stamford Health
Stanford Children's Health
Summit Health
Sunshine Community Health Center
Tampa General Hospital
Temple University Health System
Tenet Healthcare
Texas Scottish Rite Hospital for Children
ThedaCare
Tift Regional Health System
Trinity Health
Tri-State Memorial Hospital
UCLA Health
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WellStar Health System
Western Connecticut Health Network
Western Maryland Health System
Witham Health Services
Yale New Haven Health System

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