



# **Siemens Medical Solutions USA**

## ***ED Chest Pain Diagnosis Strategies***

**Summary Results - October 24, 2009**

***Confidential***

# Program Overview

- Between September 20<sup>th</sup> and October 2<sup>nd</sup>, 2009 Gatepoint Research invited 663 selected ED management to participate in a survey campaign.
- Candidates were invited via email to participate in a survey themed “Trends in ED Chest Pain Diagnosis Strategies.”
- 46% of responders held the title of CxO or President; 85% worked at or above the Director-level.
- 37 executives have participated to-date, of whom 32 were acceptable based on title criteria. Net response rate is 4.8%.
- 100% of respondents participated voluntarily; *none were engaged using telemarketing.*

# Who were the responders?

## Sampling of Organizations

Baystate Medical Center, Inc.  
Children's Hospital - Boston  
Children's Hospital - Los Angeles  
City of Hope National Medical Center  
Denver Health Center  
Doylestown Hospital  
Emerson Hospital  
Firelands Regional Medical Center  
Kent Hospital  
Loma Linda University Medical Center  
Lowell General Hospital  
New York Hospital - Queens  
Sibley Memorial Hospital  
St Luke's Hospital

## Sampling of Titles

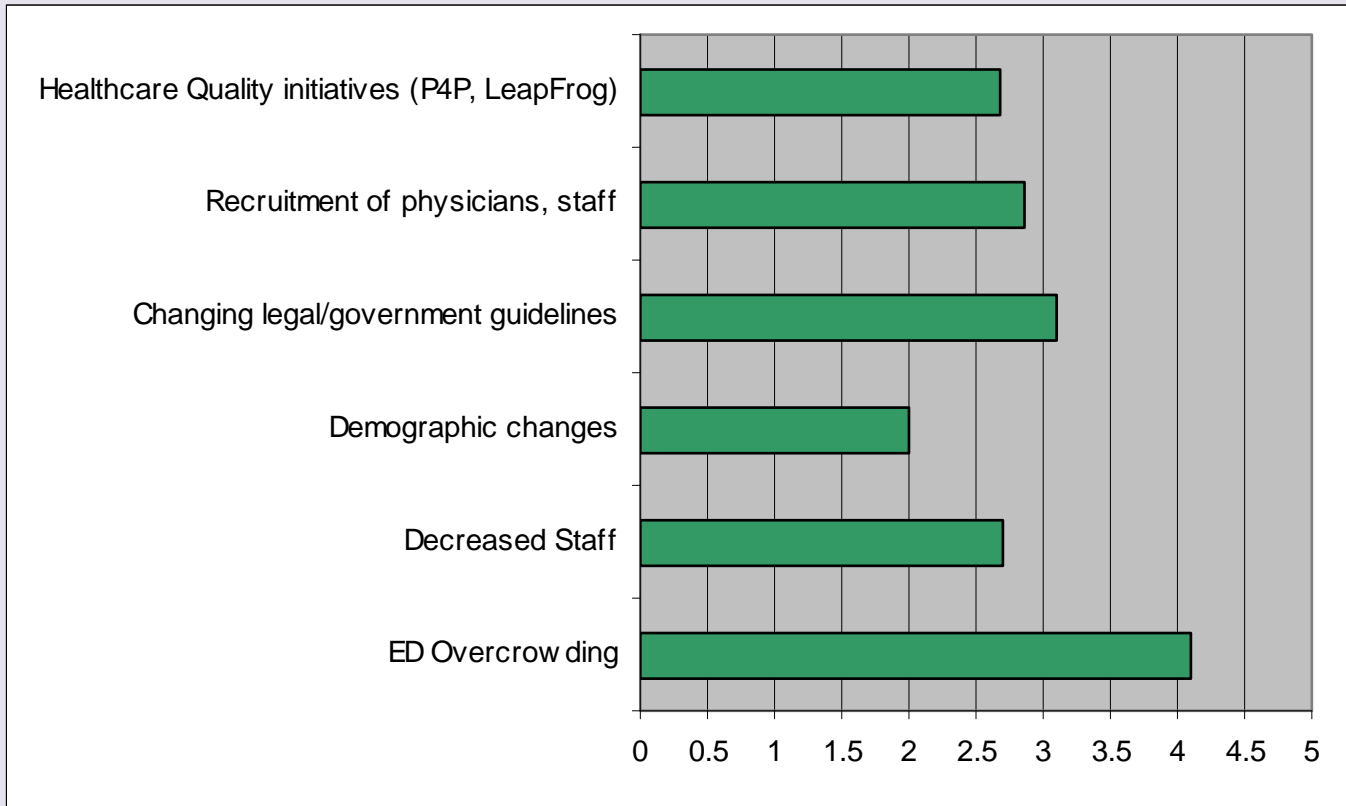
Assistant Director of the Emergency Department  
Chairman of the Department of Emergency Medicine  
Chairman of the Emergency Department  
Chairman of the Radiology Department  
Chief Financial Officer  
Chief of Cardiovascular and Interventional Radiology  
Chief, Division of Emergency Medicine  
Director of Radiology  
Director of Risk Management  
Director, Emergency Medicine Services  
Emergency Medicine Physician  
Pediatric Cardiologist  
Project Coordinator - Imaging  
Senior Radiologist

# Observations and Conclusions

## The survey results provided some notable findings

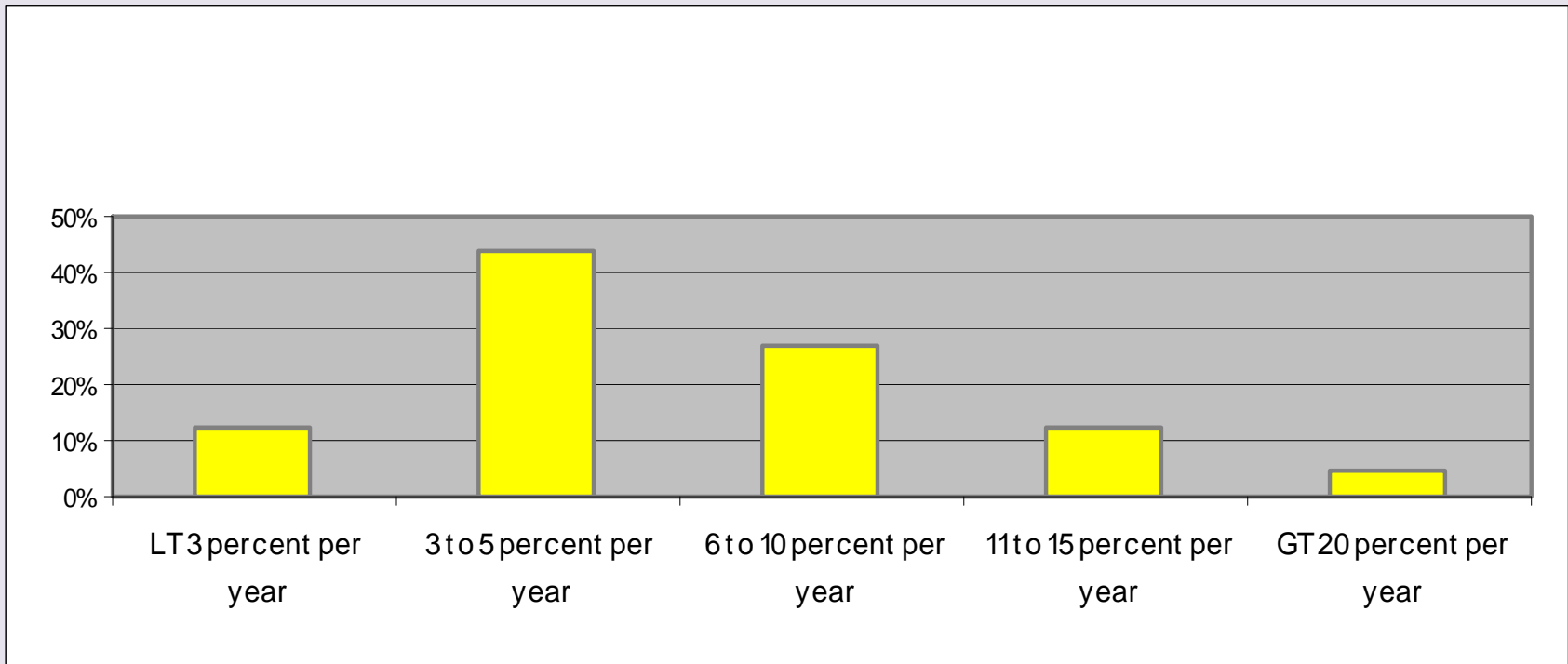
- 44% of all respondents said their ED volume was growing at an annual rate of over 6%; 16.5% said growth was at least 11%.
- Such growth helped explain why ED overcrowding was cited as the major challenge of most departments.
- Patients with chest pain were among the most common and time-consuming of all ED cases.
- Half of respondents estimated their chest pain diagnosis cost at \$3-5,000 per patient. Over a quarter estimated the cost at over \$10,000.
- While most hospitals provide multiple imaging tools, only 15% claimed to provide more advanced tools such as CT, MRI or Digital Cath Lab technologies.
- Respondents said that in order to justify new ED technology investments, the most compelling arguments were reducing ED overcrowding and achieving high utilization rates.

Rate the magnitude of the following challenges?  
(Rate 1-5, 1=minor challenge, 5=major challenge)



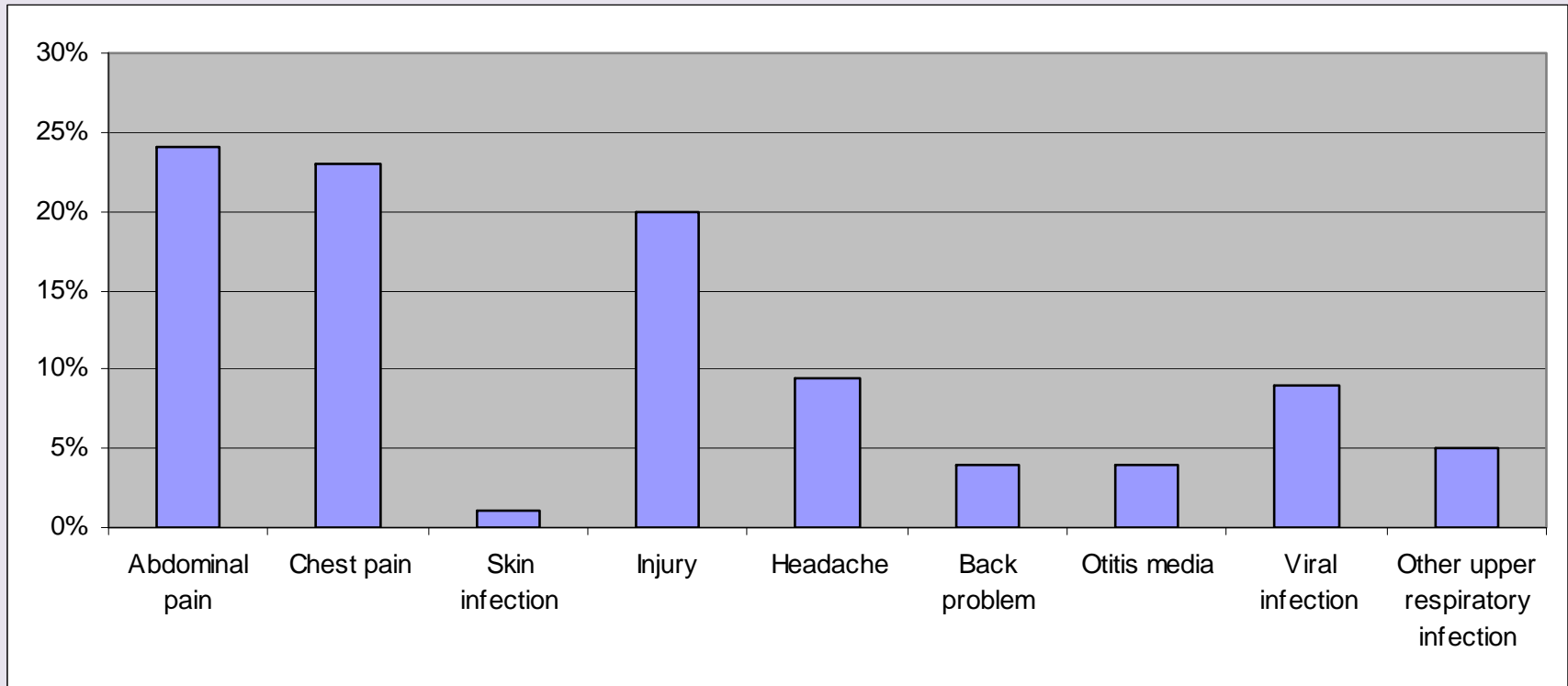
ED overcrowding emerged as the greatest challenge facing ED management.

# What has been the approx. annual growth in ED volume at your facility since 2004?



44% of respondents claimed that they were experiencing at least 6 percent annual growth in ED volumes since 2004. 16.5% reported at least 11 percent growth during that period.

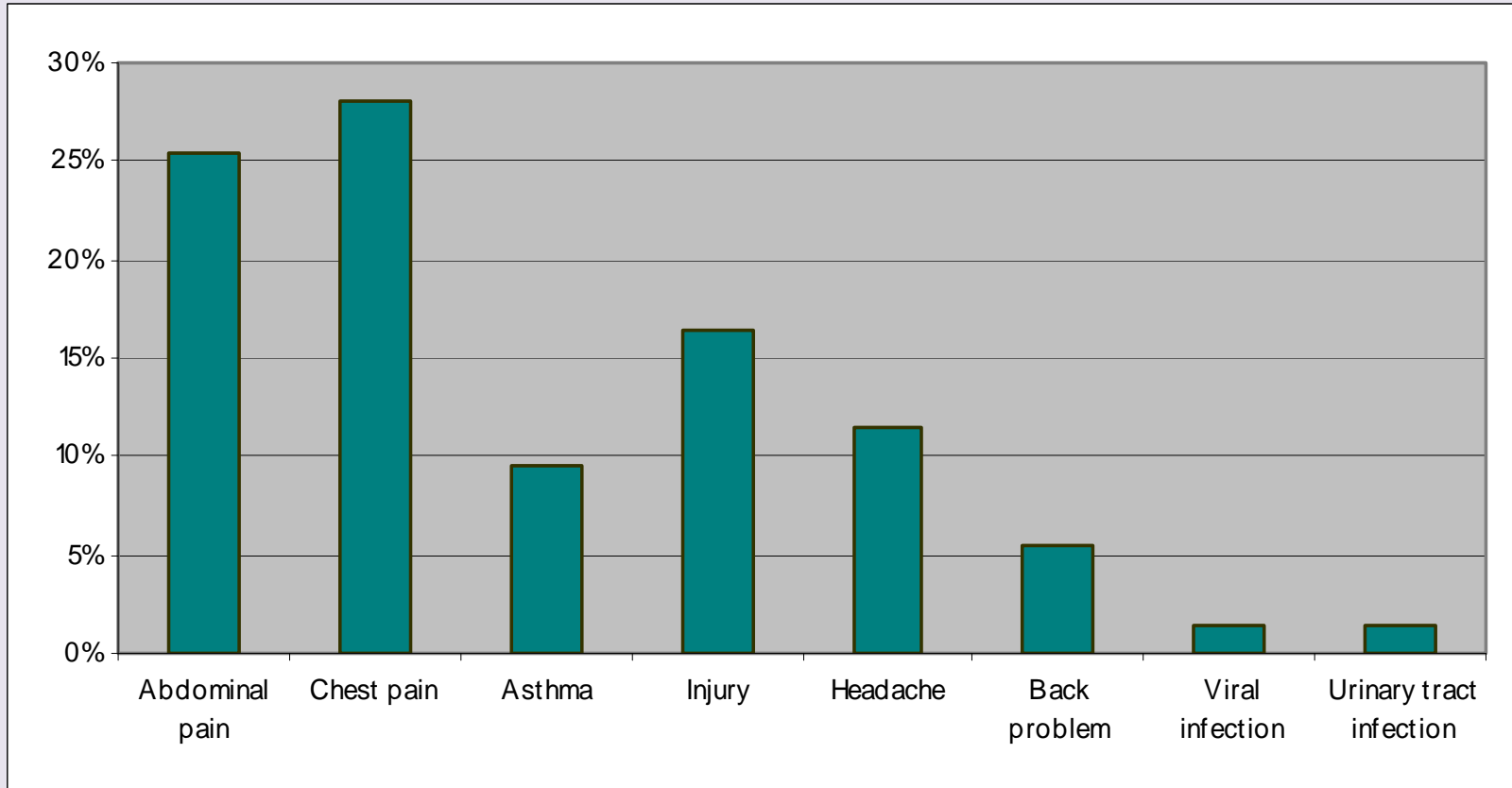
# What are the Top Three most common reasons for visits to your ED?



Chest pain accounted for 23% of all ED visits.

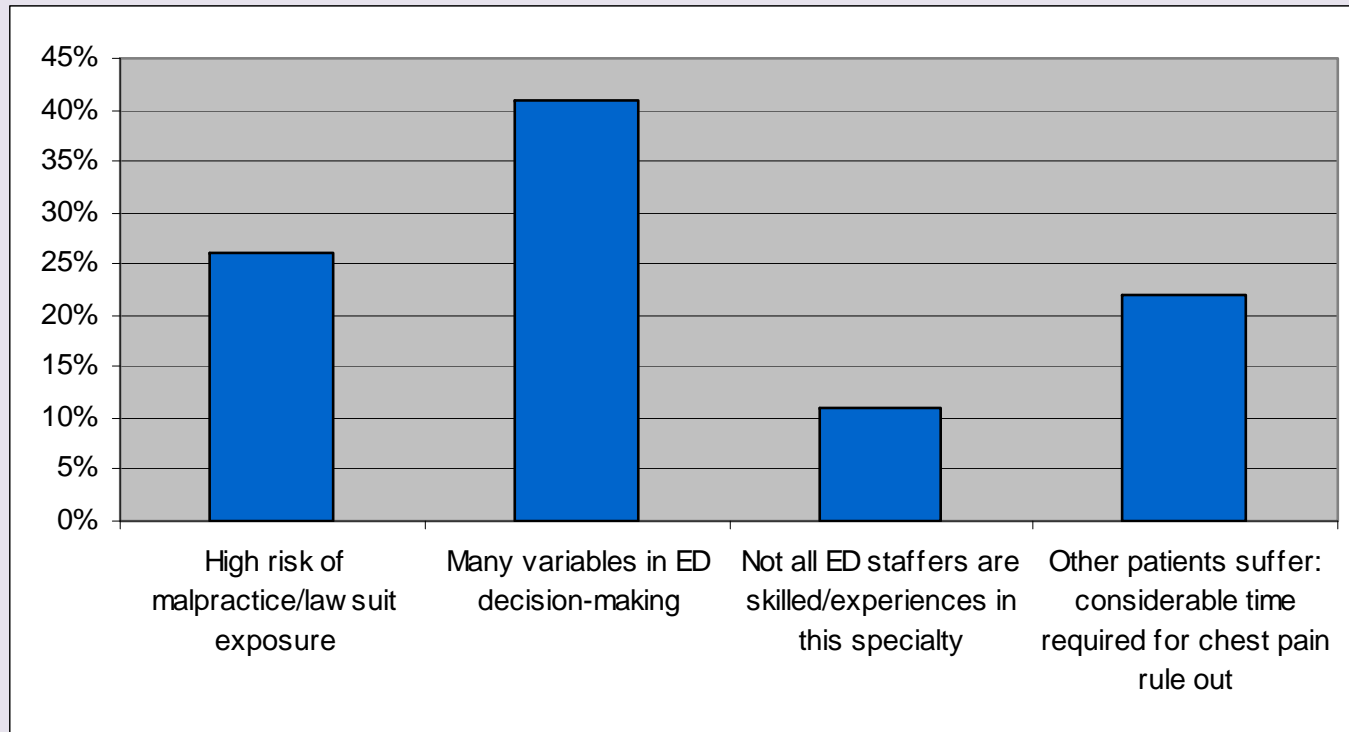


# What are the Top Three most time-consuming for the ED to encounter?



Chest pain was the most time-consuming of all ED ailments or injuries.

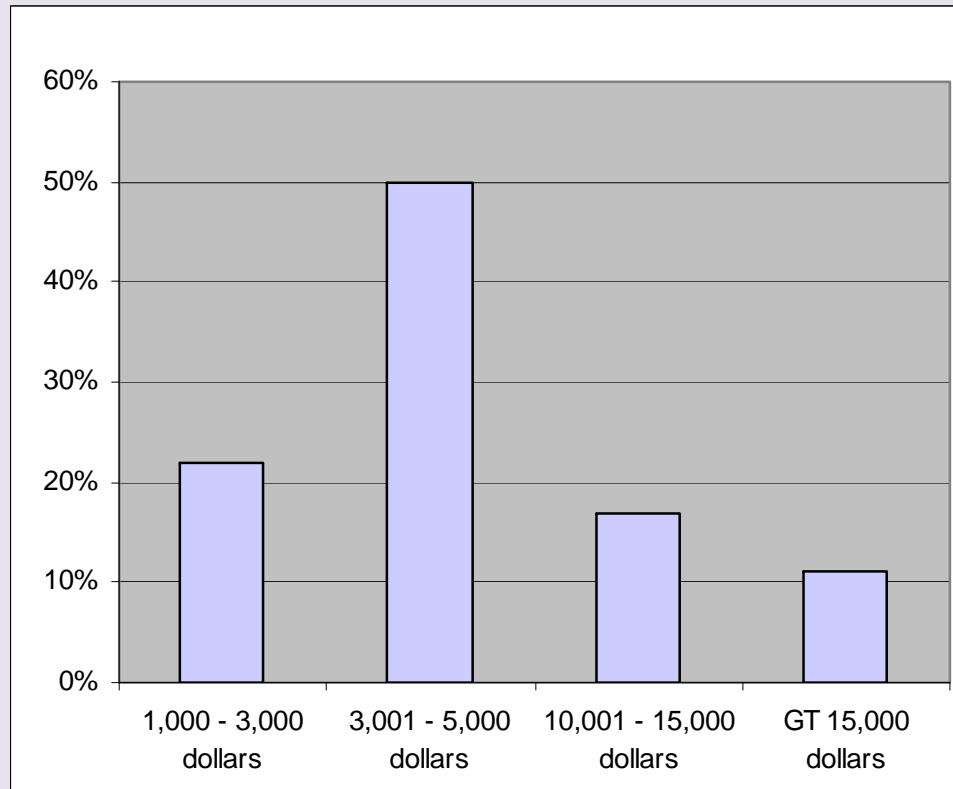
# What are the challenges to diagnosing chest pain?



The leading challenge to diagnosing chest pain in the ED were the many variables possible.



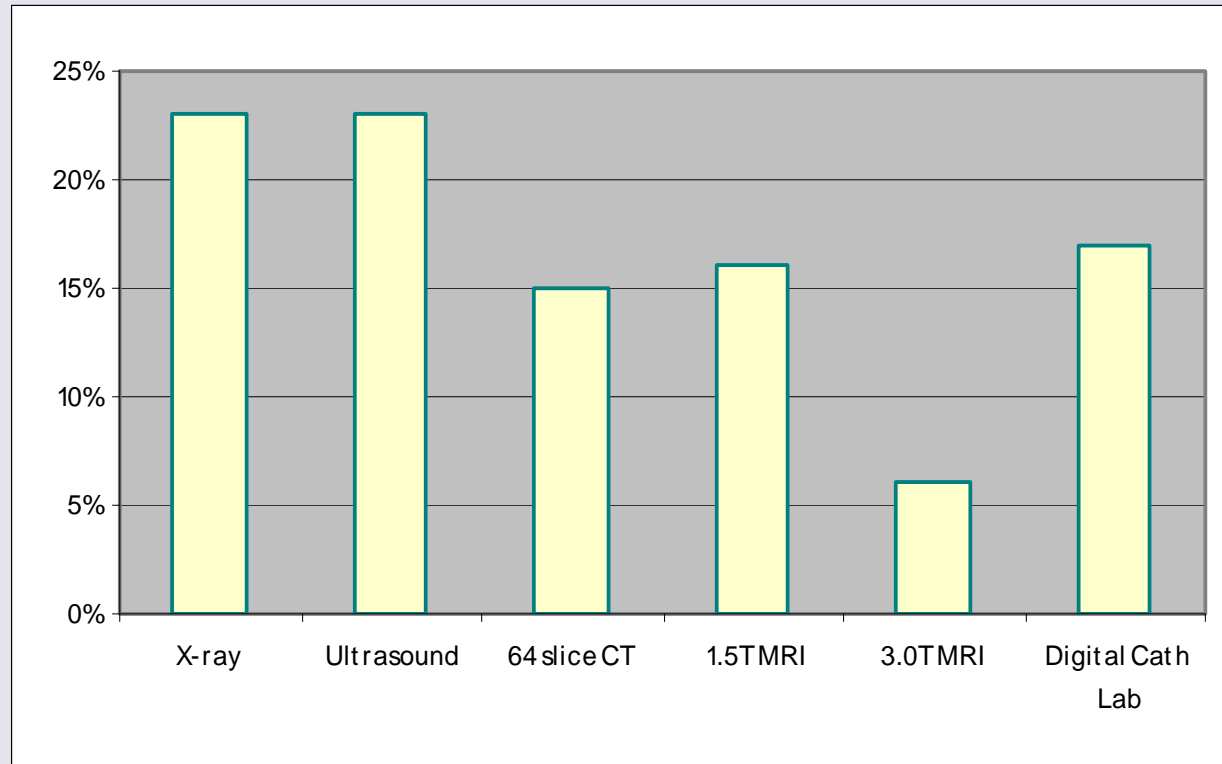
# What do you estimate is the national average for a ED's cost for chest pain diagnosis?



Half of respondents estimated chest pain diagnosis cost at \$3-5,000 per patient. Over a quarter estimated the cost at over \$10,000.

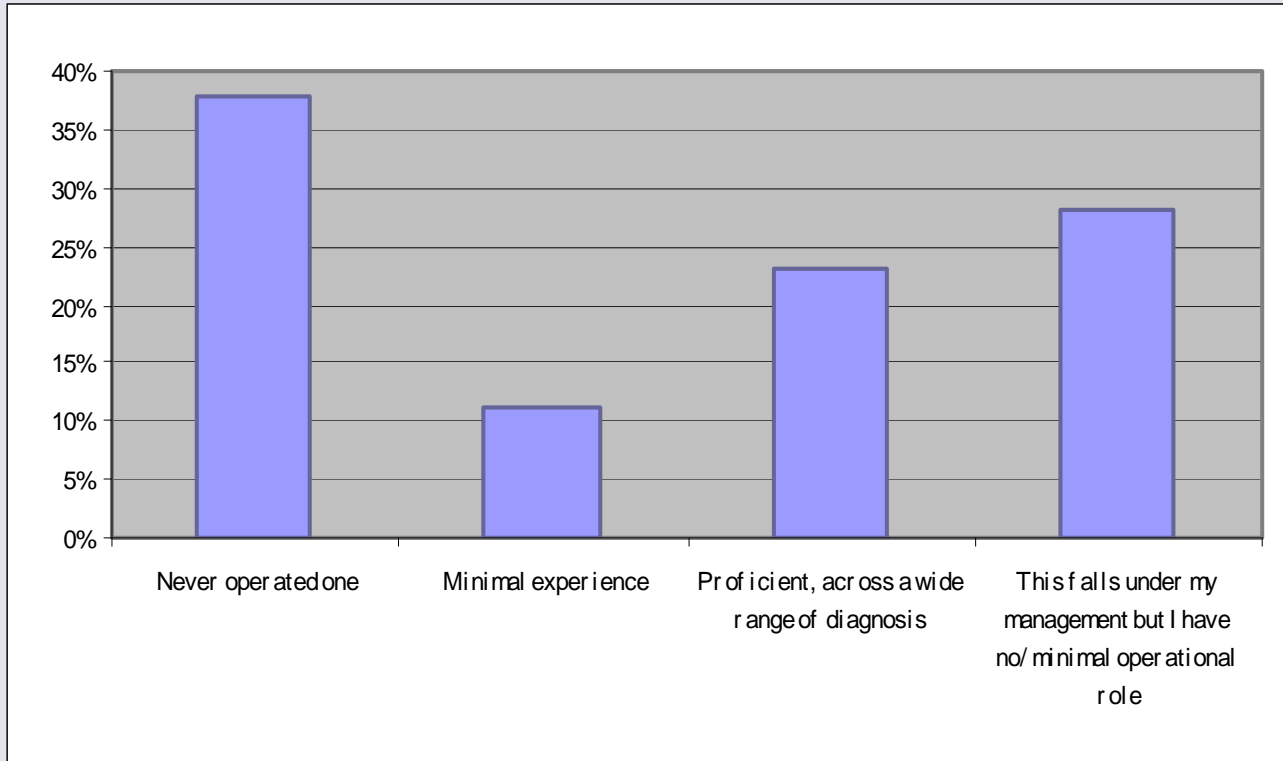


# Which of these imaging modalities does your hospital provide?



While most hospitals provide multiple imaging tools, a minority provided the most advanced technology.

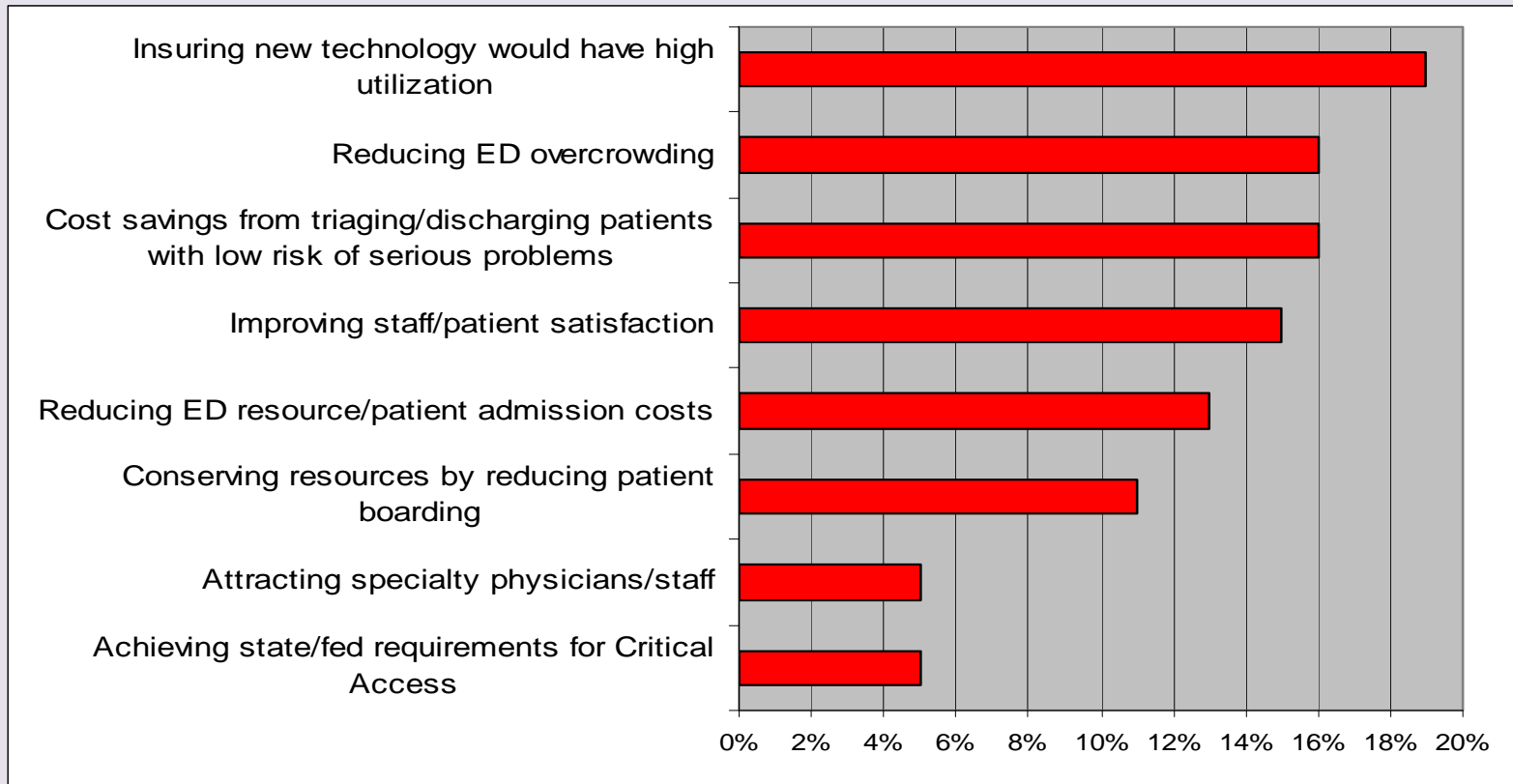
# How familiar are you with CT scanners?



Less than a quarter of respondents admitted proficiency with CT scanners.

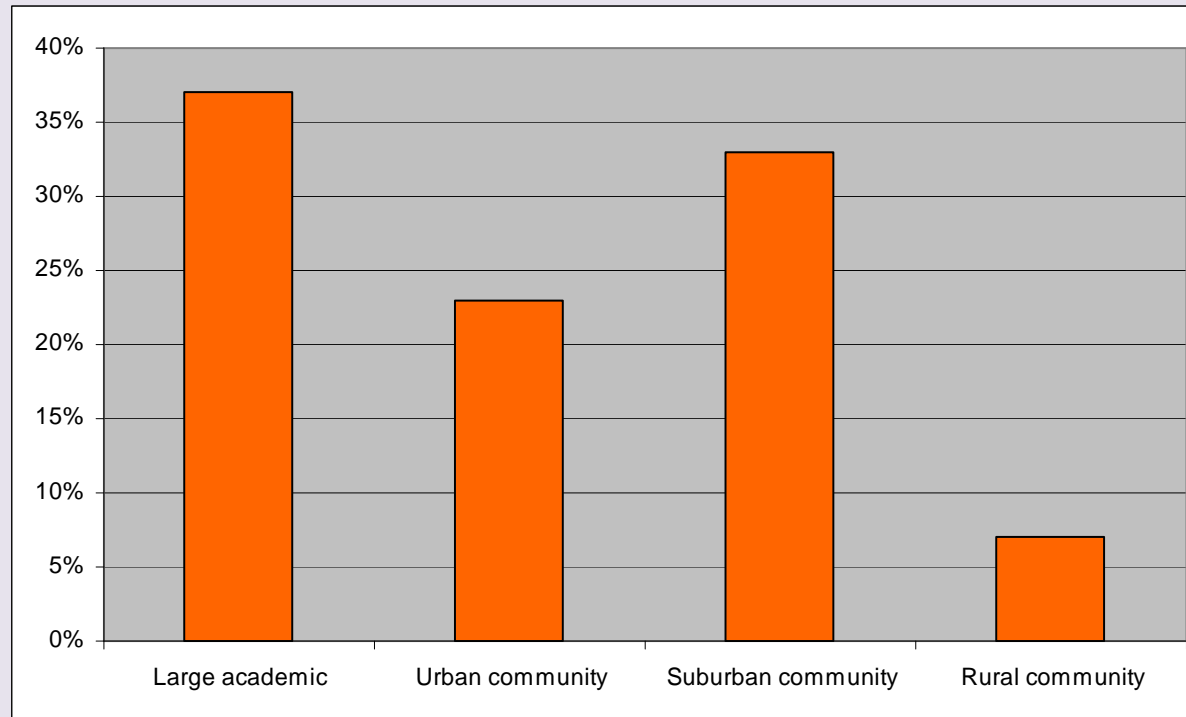


# Which of the following would best help you make the case for new ED technology?



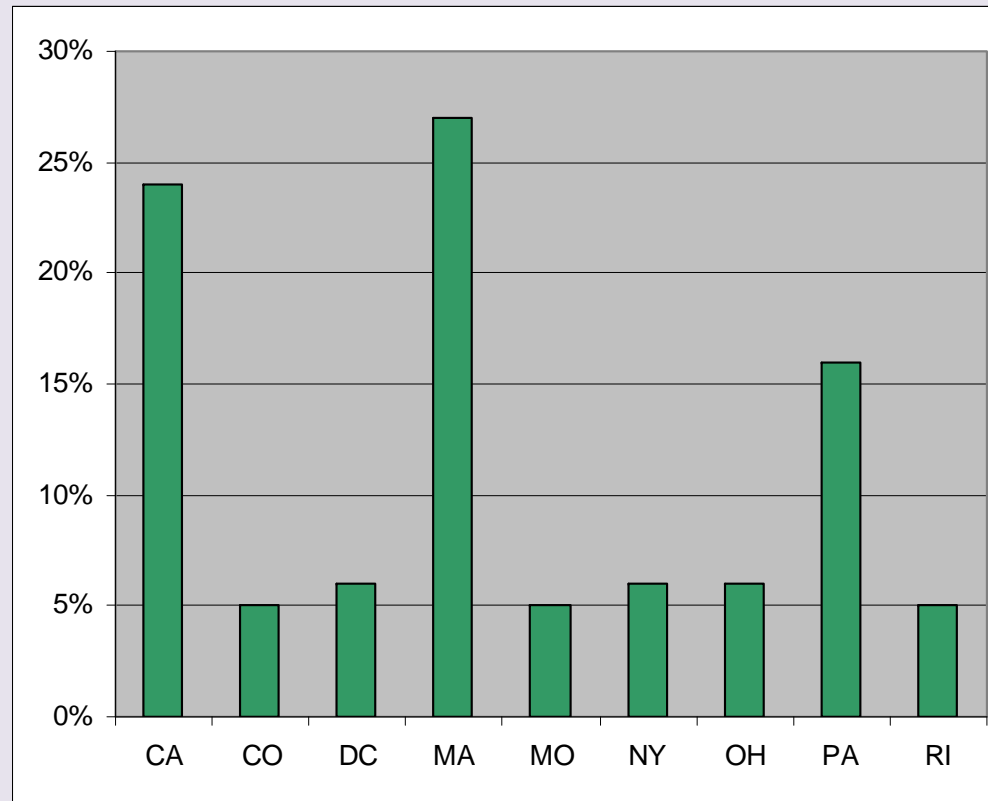
While many reasons were cited for justifying new ED technology investments, high utilization and reduced ED overcrowding were among the most common.

# Profile of Responders – By Hospital Size



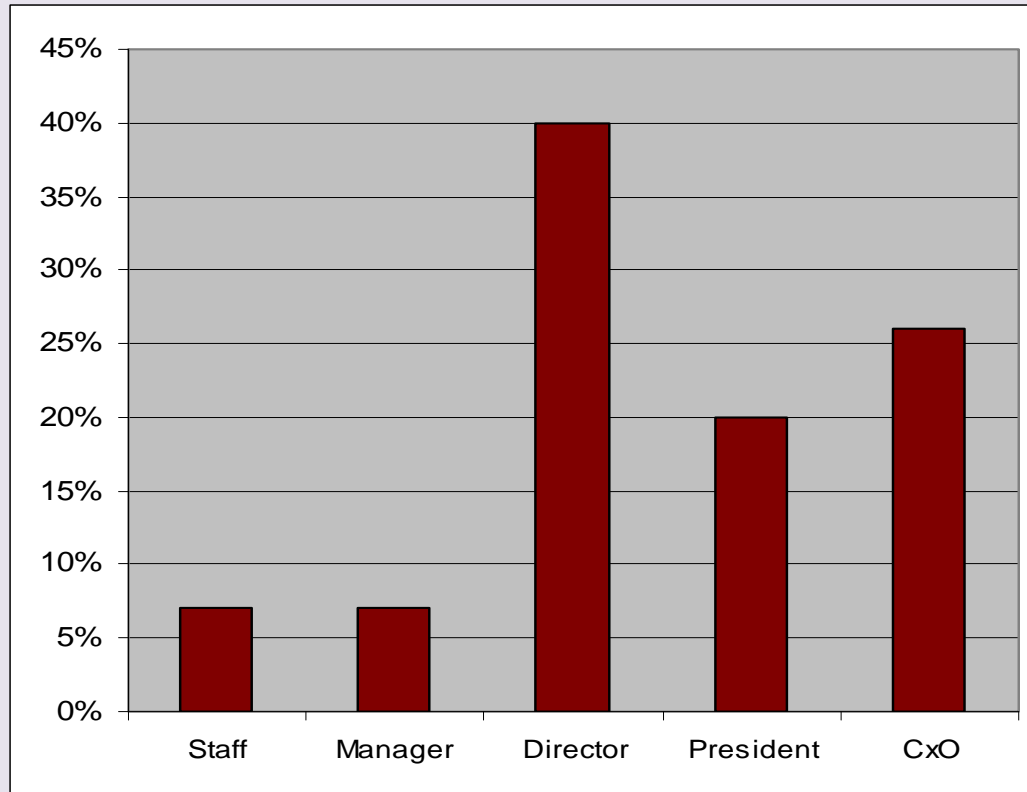
While large academic hospitals represented the source of over a third of responders, good stratification was achieved.

# Profile of Responders – By State



Half of the responders were concentrated in Massachusetts and California.

# Profile of Responders – By Job Level



46% of responders held the title of CxO or President; 85% worked at or above the Director-level.

# ⋮⋮⋮ About Siemens Medical Solutions

**Siemens Medical Solutions** is one of the world's largest suppliers to the healthcare industry. The company is a renowned medical solutions provider with core competence and innovative strength in diagnostic and therapeutic technologies as well as in knowledge engineering, including information technology and system integration. With its laboratory diagnostics acquisitions, Siemens Medical Solutions will be the first fully integrated diagnostics company, bringing together imaging and lab diagnostics, therapy, and healthcare information technology solutions, supplemented by consulting and support services. The company delivers solutions across the entire continuum of care -- from prevention and early detection, to diagnosis, therapy and care.

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