

THE DIGITAL FRONT DOOR

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Market drivers

- The NHS Long Term Plan stated that all patients will have the right to online consultations by April 2020 and video consultations by 2021. The new GP contract mandates that all PCNs and practices will provide a "core digital offering" by April 2021.
- NHSX, NHS England and NHS Improvement accelerated the roll-out of video consultation solutions through central contracts in mid-2020.
- The pandemic caused both a drop in footfall into community pharmacies and an increase in awareness of the important role that community pharmacies play in front line healthcare, causing the sector to look at digital delivery of healthcare.
- The healthcare technology market is attracting global organisations such as Amazon and Microsoft, particularly in the area of medicines management, bringing consumer trends and expectations into the healthcare sector.
- The role of community pharmacies is changing towards a hub and spoke centralised medication management model and a shift towards service provision for patients, such as the Covid-19 vaccination.

How EMIS Group can help

- EMIS offers a range of options for primary care digital healthcare delivery, including online triage, video consultations and integrated telephone consultation software, as well as enabling clinicians to access EMIS Web from any location including their home.
- Patient Access users increased from 8.4 million to 11.7 million during 2020 as more people turned to digital solutions for their healthcare requirements, such as ordering repeat prescriptions, booking in-person and remote GP appointments or pharmacy services.
- EMIS Group built on its Patient marketplace offering by releasing Patient Access for Professionals, enabling community pharmacists to provide video consultations to their customers.
- 2021 will see the launch and scaling of new services for the UK public that allow community pharmacies to offer a consumer-style experience through Patient Access Smart Pharmacy, including tracking repeat prescription orders and opting for home delivery.
- EMIS is enabling the modernisation and digitalisation of the community pharmacy sector through hub and spoke powered by Smart Pharmacy, helping to build a sustainable community pharmacy model as competition in the digital space increases.
- Patient, Pinnacle and EMIS Community Pharmacy together will develop solutions for the provision of clinical services in a pharmacy setting.

Industry insight



Dr Shaun O'Hanlon Chief Medical Officer, EMIS Group

The digital transformation of healthcare during the pandemic has been nothing short of remarkable.

The total triage approach was readily adopted by patients and clinicians when the pandemic started, leading to unprecedented use of online consultations to manage demand and provide timely responses to patients. There is now a professional consensus that healthcare will never go back to how it was – a "digital front door" will create a sustainable model that will better enable a stretched service to meet the ongoing challenge of increasing healthcare demand.

Primary care is reorganising and GP practices are collaborating as PCNs, which have been able to set up agile, flexible ways of providing healthcare from the use of online triage and consultations to creating digital care pathways to support patient self-care. The Covid-19 vaccination programme is a terrific example of how PCNs have responded to the challenge.

Covid-19 has helped unlock the potential of technology for large-scale research, demonstrating how data analytics can provide a vital and rapid insight into the health of the population.

I expect we are witnessing a paradigm shift in how the NHS embraces digital technology and data analytics in a positive way to improve UK healthcare.

Looking ahead, the next step is the Covid-19 recovery phase. We will need to see the Covid-19 induced deficits in care for long-term conditions, mental health, screening and cancer diagnosis addressed rapidly. This will require advanced risk algorithms based on a clinical data-driven approach to prioritise patients for assessment and intervention.

The global digital transformation in healthcare will be sustained and further accelerated – healthcare will never return to the way it was before 2020.