System Integrators in Digital Health (SIDH) Program
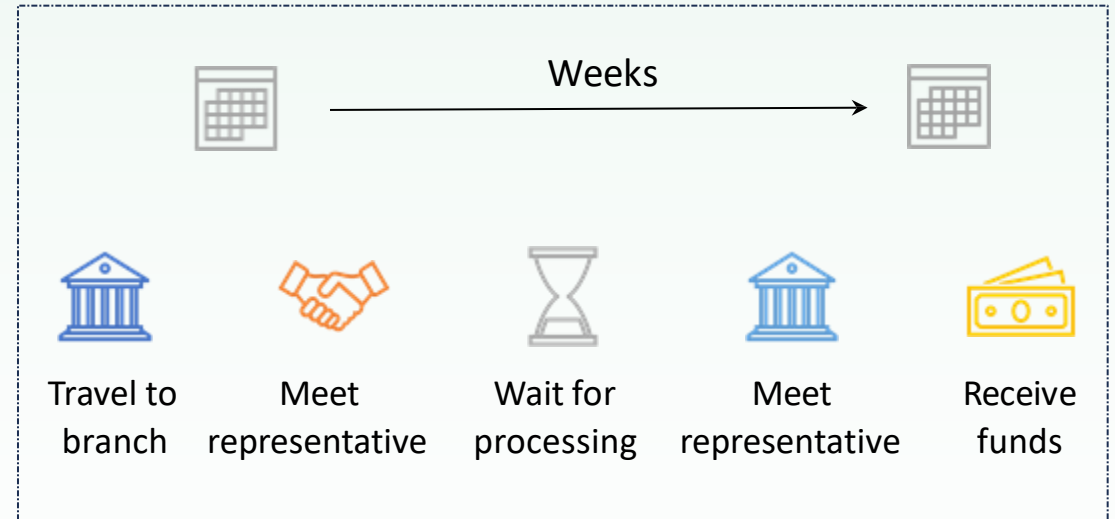
Next Big Opportunity for System Integrators in India

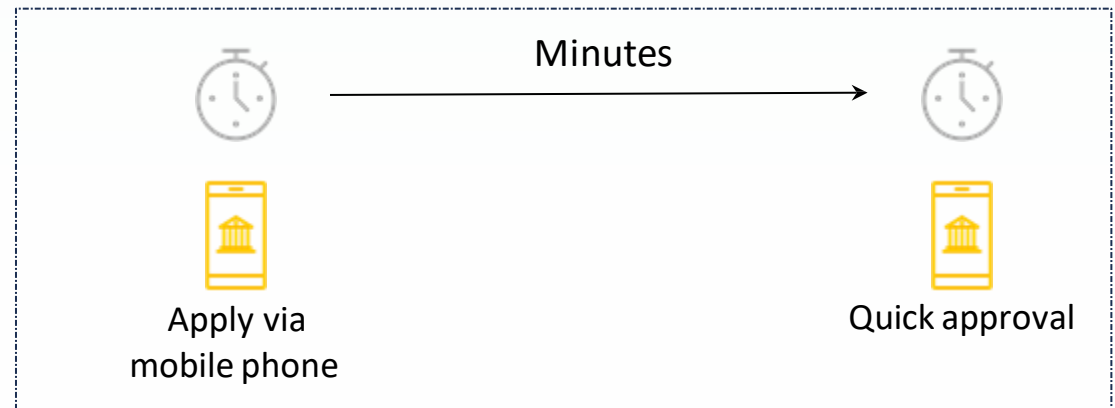# Digital Evolution: Transforming Industries & Revolutionizing Healthcare

- Digital revolution has brought about significant **transformations** in many industries - **banking, retail, communication, entertainment, travel -** fundamentally enhancing these industries

- In addition, Digital technologies have **created business opportunities for many companies supporting this transformation e.g., system integrators**

- **Healthcare industry has now started transforming** - impacting patients, doctors, health insurance - to improve healthcare outcomes.

- It is also a **BIG focus area of the Government of India and Health ministry**

- **Adoption of Digital Health is a creating a BIG business opportunity over the next 5-10 years!**

Digital Transformation in Banking Industry

BEFORE

Weeks →

| Travel to branch | Meet representative | Wait for processing | Meet representative | Receive funds |

NOW

Minutes →

Apply via mobile phone   Quick approval

Digital Health: Introduction

What is Digital Health?

Digital Health is using technology and health information (on computers, mobile devices, software apps and the internet) to enhance healthcare delivery and efficiency at all levels - patients, doctors, facilities, region/national level.

Key Digital Health applications:

Hospital Management Information System (HMIS)	**Electronic Medical Record (EMR)**
Telemedicine	**Apps and Wearables**	**Patient Portal**
Provider Portal	**Analytics**	**ABDM**

Most healthcare organizations including hospitals, labs, and pharmacies need to start using Digital tools

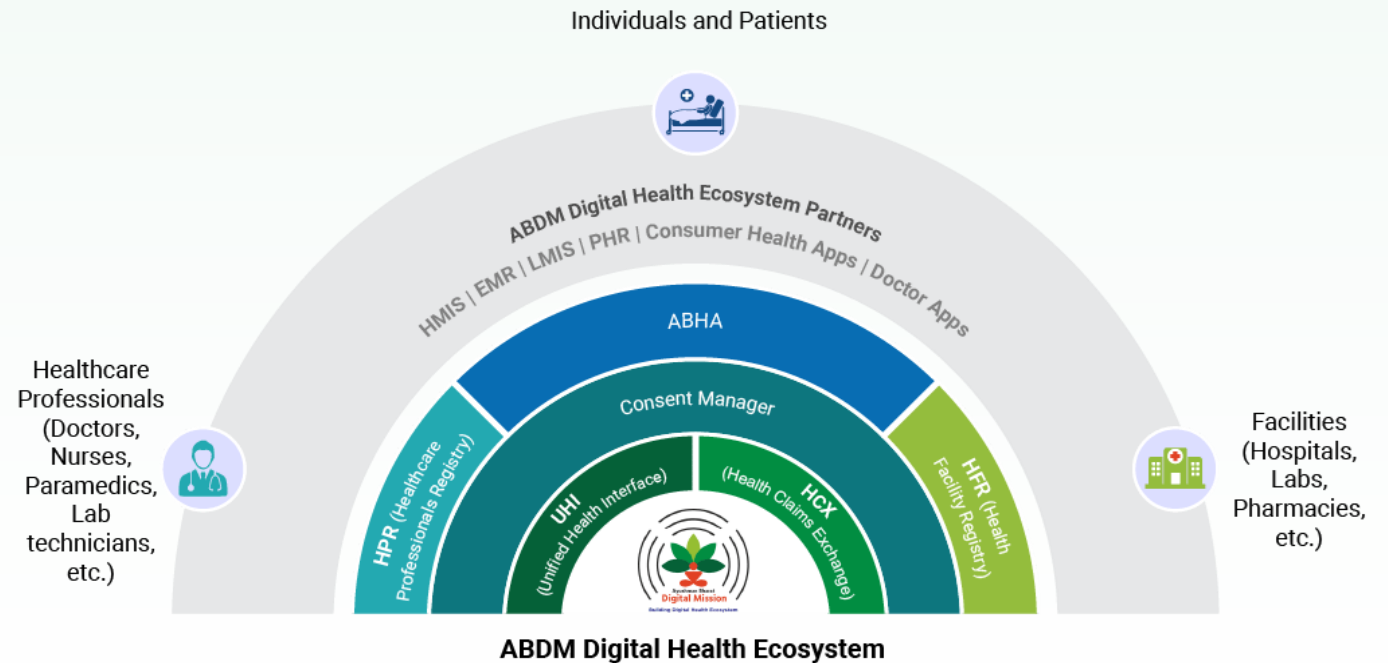But healthcare organisations don't have the technical skills to identify, implement and Digital tools

Big need and business opportunity for System Integrators to help healthcare organizations in selecting, implementing and using Digital tools... and providing other hardware and software required

Ayushman Bharat Digital Mission (ABDM): Overview

> **National Health Authority (NHA)'s ABDM program promotes digitization and transformation of Healthcare industry just like Aadhar & UPI have transformed the Financial Services industry!**
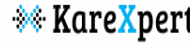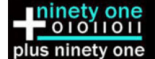
How ABDM work?

- Each **citizen has an Ayushman Bharat Health Account (ABHA)**

- **Hospitals need to register with NHA and get a Healthcare Facility Registry (HFR) ID**

- ABDM enables **exchange of patient records** (e.g., labs, discharge summary) between ABHA and HFR, **based on patient consent**

- Consumers & Patients can access their health records using an **ABDM-certified Personal Health Record (PHR) app**

- **NOTE: Actual patient data is NOT store in ABDM or by NHA** - ABDM only facilitates data exchange between parties

Individuals and Patients

ABDM Digital Health Ecosystem Partners

HMIS | EMR | LMIS | PHR | Consumer Health Apps | Doctor Apps

Healthcare Professionals (Doctors, Nurses, Paramedics, Lab technicians, etc.)

ABHA

Consent Manager

HPR (Healthcare Professionals Registry)

UHI (Unified Health Interface)

HCX (Health Claims Exchange)

HFR (Health Facility Registry)

Facilities (Hospitals, Labs, Pharmacies, etc.)

ABDM Digital Health Ecosystem

> **Hospitals need to use an ABDM-certified EMR to be able to participate in the ABDM Ecosystem**

Ayushman Bharat Digital Mission (ABDM): Strong Progress

ABDM Adoption by Citizens, Hospitals & Doctors

- **668+ million** citizens have created their **ABHA IDs**
- **334,000** Healthcare facilities registered on the **HFR portal**
- **472,000 Doctors / Healthcare providers have been registered on the HPR portal**

ABDM Adoption by EMR / HMIS companies

- **50+ HMIS** have achieved all 3 levels of ABDM integration **(M1-M3)** with several others progressing through the stages

List available on NHA Website-https://abdm.gov.in/our-partners/HMIS

ABDM Adoption by large healthcare organizations

- Large hospital chains' HMIS are ABDM-enabled e.g. **Apollo Hospitals & Narayana Health (M3) and Fortis Hospitals (M1)**

- Leading diagnostic chains have become ABDM compliant e.g. **Dr. Lal Pathlabs (M3) & Agilus Diagnostics (M3)**

ABDM Adoption by Insurance Industry

- Strong **ABDM integration push by IRDAI**

- Recognizing the value of ABDM and NHCX, **20+ insurers and TPAs** have joined the digital health movement with ABDM compliant M1 solutions

Source: ABDM Website as of 19 Sept 2024 | Acronyms: Insurance Regulatory and Development Authority of India (IRDAI), National Health Claims Exchange (NHCX), TPA (Third-party Aggregators), HMIS (Hospital Management Information System), Electronic Medical Records (EMR)

System Integrators in Digital Health (SIDH) Program

- Digital Health adoption is currently restricted to large hospitals and healthcare organisations (labs, pharmacies) in metros, leaving **untapped potential in hospitals in Tier 2 & Tier 3 cities of India**

- Most hospitals and healthcare organizations need to start using Digital tools but don't have the technical skills to identify, implement Digital tools. This creates a **big need for system integrators in healthcare market**

- **System Integrator in Digital Health (SIDH) program aims to create a network of system integrators in Tier 2 & Tier 3 cities** to support Digital Health adoption in hospitals

- **SIDH program focus on helping hospitals implement Electronic Medical Records (EMR).** NHA has already onboarded many EMR companies which will work with SIDH partners to drive the SIDH initiative

The global market for digital health is growing over 25% per annum*

In India too, digital health market is projected to grow from under Rs.4000 Cr today to over Rs.18,000 Cr by 2030*

SIDH offers a great business opportunity for small/mid-sized System integrators in India

SIDH Program: Key Market Focus

India Healthcare market is broadly split into Public Health and Private Health entities.

- **Public Health** –Central and State Governments, and other government owned hospitals & healthcare facilities

- **Private Hospitals & healthcare facilities**
  - **Very large facilities (e.g., >250 bed hospitals)**
  - **Large facilities (e.g., 100-250 bed hospitals)**
  - **Mid-sized facilities (e.g., 25-100 bed hospitals)**
  - **Small facilities (e.g., <25 bed hospitals)**

Primary FOCUS of SIDH Program* – need for System Integrators for Digital Health (SIDH) to support hospitals and healthcare organisations

* Note: Doctors clinics are excluded from SIDH focus as business opportunity may be small

SIDH Partners: Selection & Onboarding Process

- We will select SIDH partners which are **small/mid-sized organizations with background and experience in IT Systems / Computer Hardware / Software support** – selection process will be based on the credentials of the partner, their experience in IT/technology, and willingness to commit and work with EY and NHA teams

- SIDH will **partner with any EMR vendors of their choice** and support them locally – sales, business development, implementation and provide post implementation support

- SIDH Partner will **create a small team (3-4 professionals) for SIDH & EMR training**

- SIDH can **sell to any hospital of their choice** and support EMR selection and adoption incl. EMR selection, implementation support, end-user support and training.

EY team will help onboard SIDH Partner and train them in becoming successful

Selection & Onboarding	Partnership with EMR	SIDH & EMR Training	EMR Sales to Hospitals	Technical support

SIDH Partners: Operating Model

EMR Companies

Hospitals

SIDH Partner
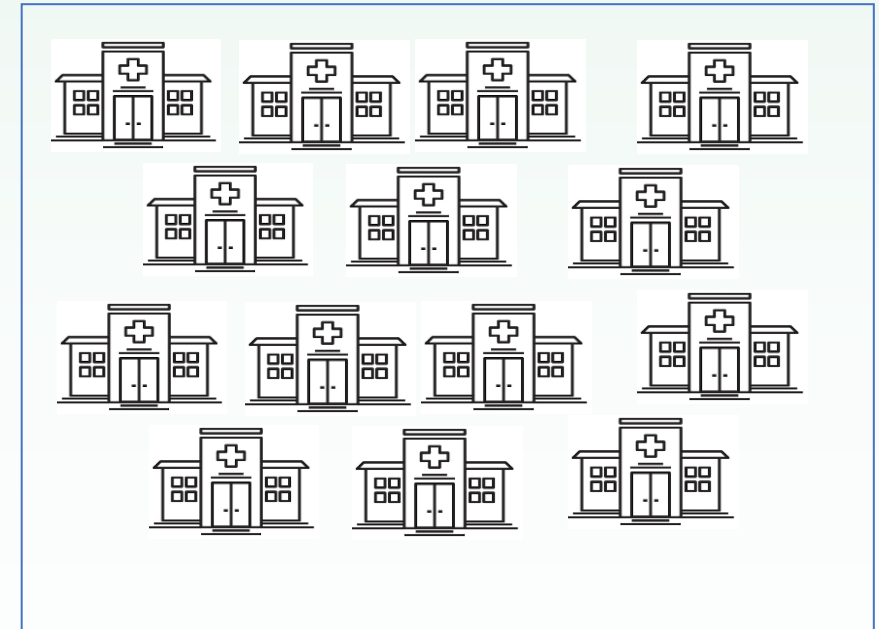
Revenues Opportunity with EMR Companies

- ❏ Sales - Commission on License revenues (one-time, ongoing)
- ❏ Implementation Support services
- ❏ Training and EMR onboarding services

Additional Revenues Opportunity from Hospitals

- ❏ Tech Services e.g., configuration, integration, tech support
- ❏ IT hardware, software, networking, Internet / Wi-Fi, other hospital needs
- ❏ Additional Services e.g., data entry of medical records

SIDH Partners: Business Support Provided

- **EMR Partnerships**: Assist in identifying suitable EMR vendors for partnership e.g., making introductions, support partnership agreements, EMR marketing material

- **Marketing Toolkit:** Provide marketing toolkit along with brochures and templates, empowering SIDH to effectively promote and market EMR solutions to small and mid-sized hospitals.

- **Sales Support:** Provide Sales support e.g., list of location hospitals and key connects, hospital qualification approach

- **Training and Capacity Building:** Provide training materials and workshops for SIDH team members - equip SIDH team with the necessary skills and knowledge to efficiently handle EMR sales and implementation.

- **Access to ABDM Roadmap:** Participate in quarterly NHA workshops - learnings from other SIDH partners, EMR updates ABDM updates etc.

- **SIDH Partner App:** New mobile app built exclusively for SIDH partners with complete information on EMRs, hospitals, sales & marketing, training!
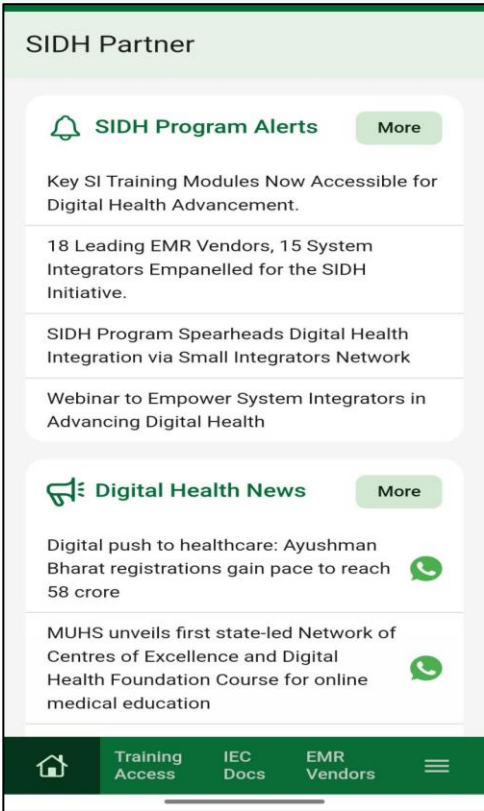
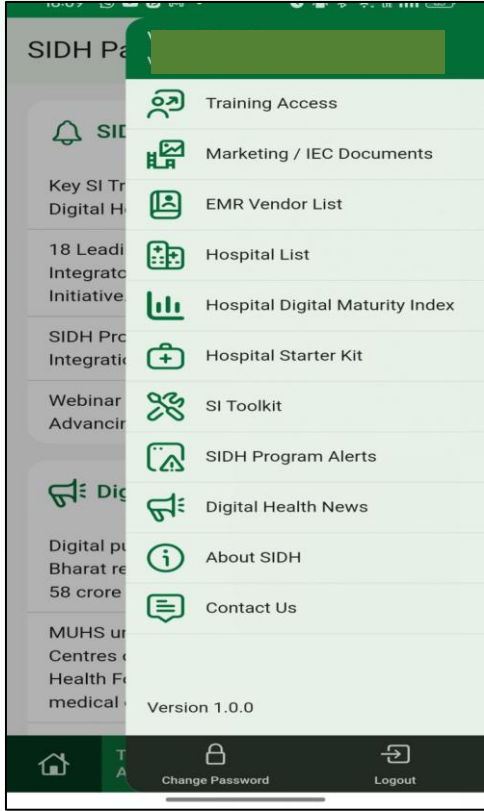# SIDH Partner App: Comprehensive SIDH Engagement Platform!

SIDH app has just been developed to offer a complete set of resources and support to SIDH Partners!
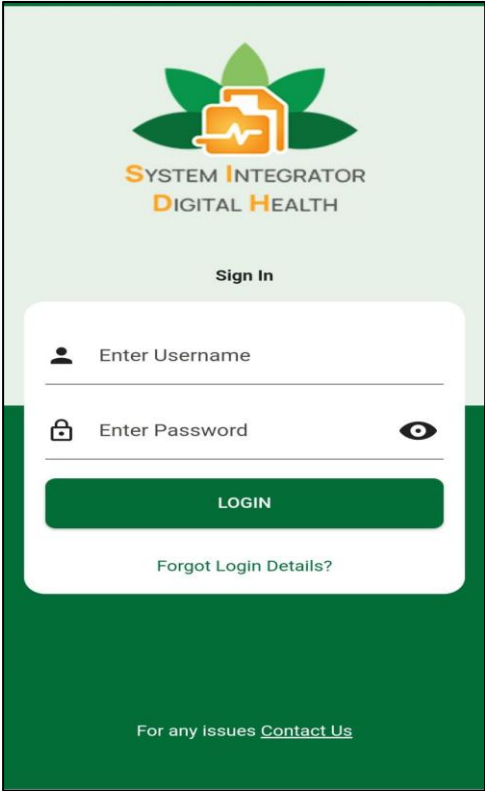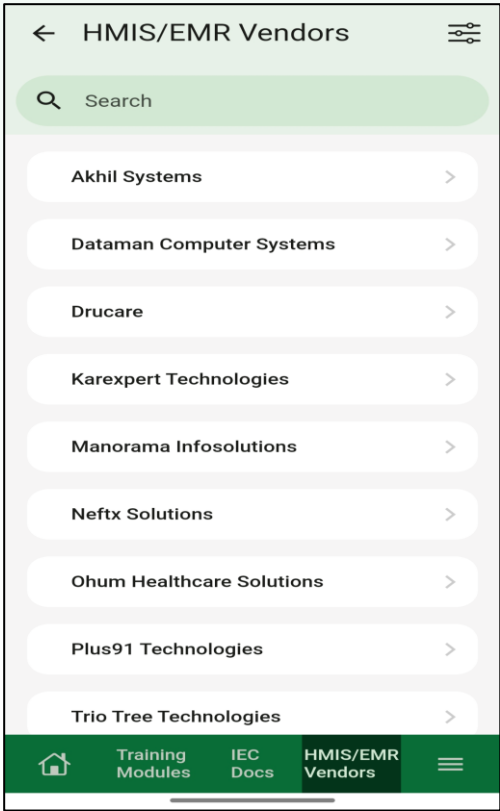

Landing Page

Home Screen

App Sections

EMR Sections

SIDH Program: Win-Win for ALL Stakeholders!

SIDH: Value to SIDH Partner

- Expand business into new healthcare market
- Build relationships with local hospitals and healthcare facilities as well as leading EMR vendors
- Access to high-quality training, onboarding and other resources by NHA and EY
- Ability to sustain and grow business beyond EMR sales & adoption

SIDH: Value to Hospitals

- Access to local system integrator who can support EMR selection & adoption
- Have onsite training for staff on EMR and related tools
- Get standards processes (e.g., ABDM registration) completed quickly
- Get additional IT support from SIDH as needed e.g., computers, printers, internet, wi-fi

SIDH: Value to EMR Vendors

- Get access to SIDH in new geographies – increase reach
- Engage with SIDH to help accelerate the EMR sales process
- Work with SIDH on local technical support e.g., internet/wifi-issues
- Ability to provide local / onsite support esp. for Level 1 issues
- Have local support for consistent EMR usage by all stakeholders

SIDH Partners: Significant Long-term Business Opportunity!

Building business in new & emerging healthcare market

Expanding business into a new healthcare market by leveraging partnerships & collaborating with NHA and healthcare experts

Partnering with EMR Companies

Partnering with EMR companies as channel partners to facilitate the adoption and implementation of EMR.

Partnering with Hospitals and Healthcare organisations

Getting support from SIDH team and NHA to establish relationships with hospitals, healthcare organisations (labs, pharmacies etc.)

Upselling Opportunities for hardware / software

Upselling and cross-selling opportunities e.g., providing hardware, networking, other IT solutions to hospitals

Offering Technical & other Services to Hospitals

Offering technical services to hospitals e.g., IT support, Internet services, data entry, data processing, reporting, data analytics

Building Long-Term Relationships

Opportunity to build long-term relationships with local hospitals, EMR companies - with long-term business opportunity

SIDH Program: Next Steps

- **Get onboard:** Understand the SIDH program and Sign a Letter of Engagement

- **SIDH Team:** Identifying SIDH team (3-4 members) who will be trained by the NHA/EY team. Preferably team should have one member with some medical/clinical background

- **SIDH Training:** SIDH team will be trained by the team on the basics of Digital Health, EMR sales, and implementation approach

- **SIDH-EMR Partnership:** SIDH team to engage with approved EMR vendors and partner with one or more of them

- **Marketing & Sales:** SIDH to initiate marketing & sales activities with hospitals in collaboration with EMR partners

Thank You

For more information: **Sonal Saxena**

Mobile: +91 73062 02551

Email: Sonal.Saxena@in.ey.com