



**Welcome  
To....**



**Telehealth  
During A Time  
Of Change**

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# WHAT IS TELEHEALTH?

Telehealth offers the ability for providers and patients to use many forms of digital connections for the care and/or management of patients health care.



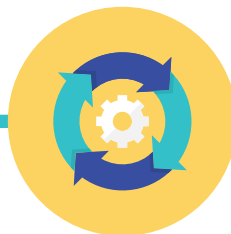
## Synchronous Interactions

Happens in live, real-time settings where the patient and provider interacts. Commonly known as video visits but \*could also be via phone.



## Asynchronous Interactions

Refers to the store-and-forward process, usually accessed through an EMR. Involves acquiring medical data, then transmitting this to a doctor or medical specialist for assessment offline.



## Remote Patient Monitoring (RPM)

Is a healthcare delivery method that uses technology to monitor patient health outside of a traditional setting.

# AN ESSENTIAL TOOL AGAINST COVID-19



Telehealth provided virtual consultations that preserved capacity and prevented unnecessary exposure

## COVID Patients

Telehealth systems keep mild and recovering COVID cases out of the hospital and monitored at home. Allows for clinical resources to care for the more severe cases.

## Non-COVID Patients

Methods allow for patients with non-COVID related illnesses to be seen without risking exposure in clinical settings.

## Clinicians

Providing virtual care protects clinicians and providers from unnecessary exposure and allows for quarantined providers to continue seeing patients



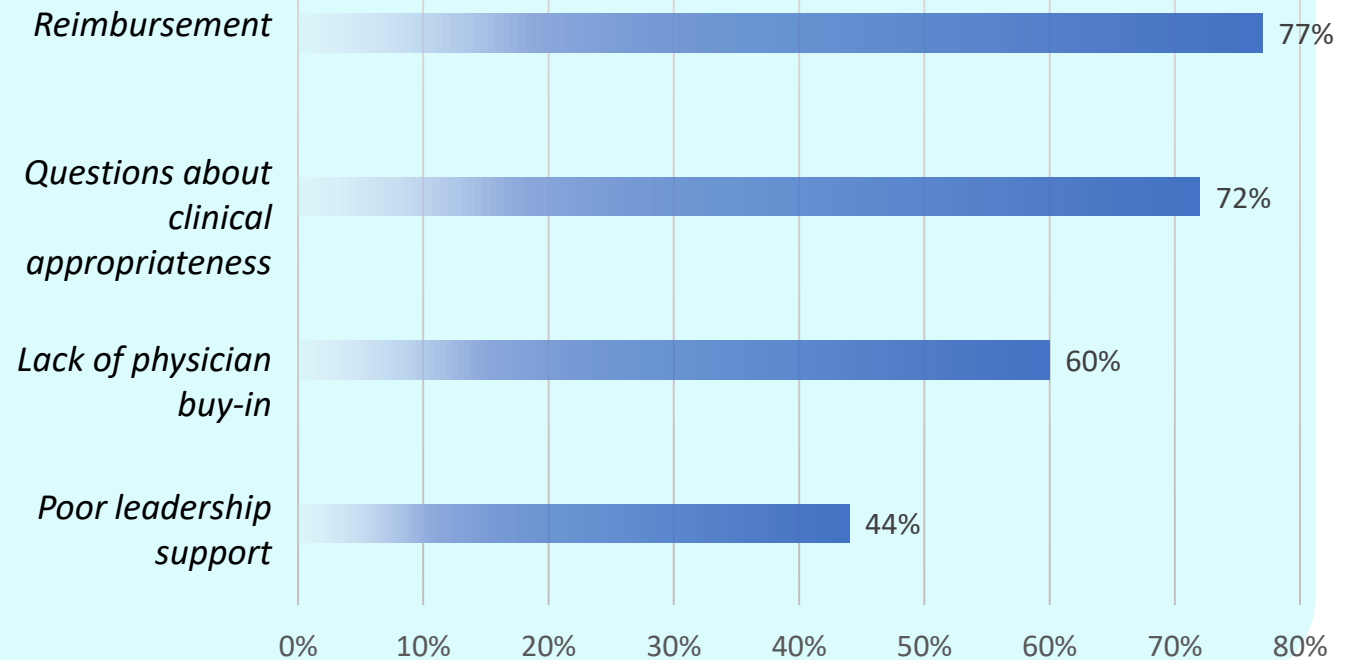
# CMS ADOPTED NEW CHANGES

Under pressure, CMS lifted restrictions on where, how, and with who patients can access virtual care

- Patients are allowed to access telehealth from their home
- Telehealth visits can be conducted using smartphones and video platforms such as Face Time.
- Audio-only visits are allowed with additional services added as eligible services
- A patient does not need to have an existing relationship with a provider prior to a telehealth visit.
- All healthcare professionals who currently bills Medicare for their services can use telehealth to deliver care.

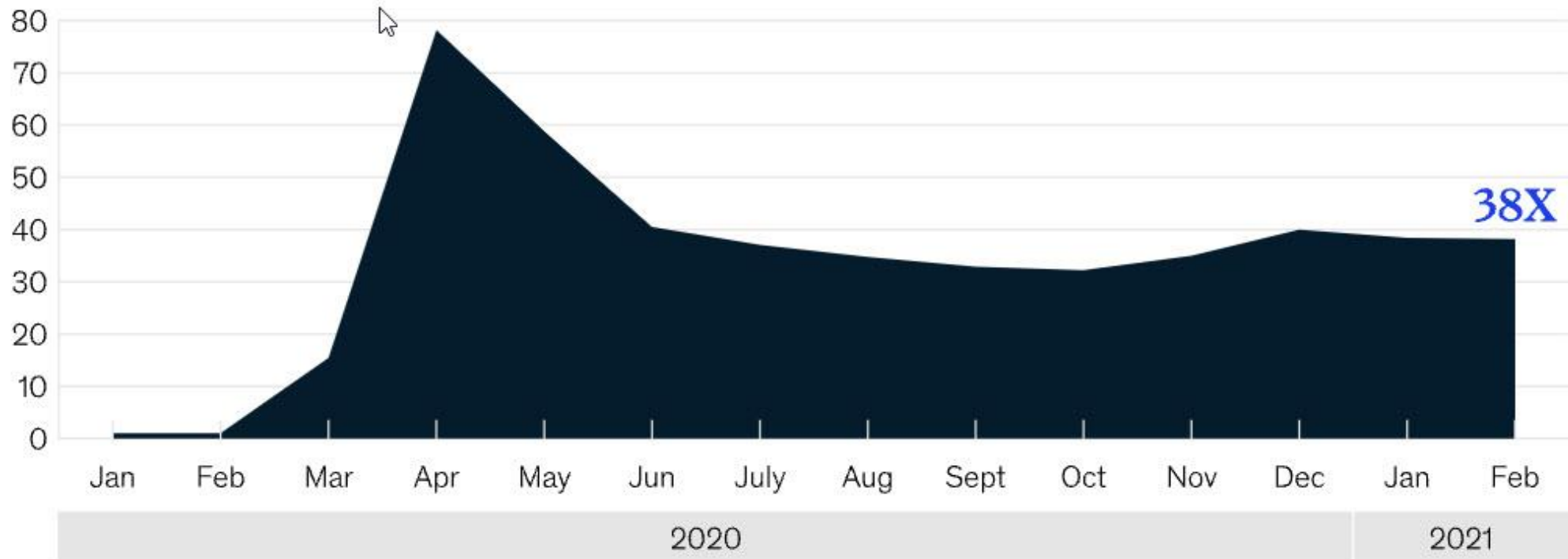
# TELEHEALTH, TRIAL BY FIRE

Percentage of physicians identifying pre-COVID roadblocks



# CONTINUED MOMENTUM

Growth in telehealth usage peaked during April 2020 but has since stabilized



# TELEHEALTH INSIGHTS



Telehealth utilization has stabilized at levels 38X higher than before the pandemic.



Similarly, consumer and provider attitudes toward telehealth have improved since the pre-COVID-19 era



Some regulatory changes that facilitated expanded use of telehealth have been made permanent



Investment in virtual care and digital health more broadly has skyrocketed



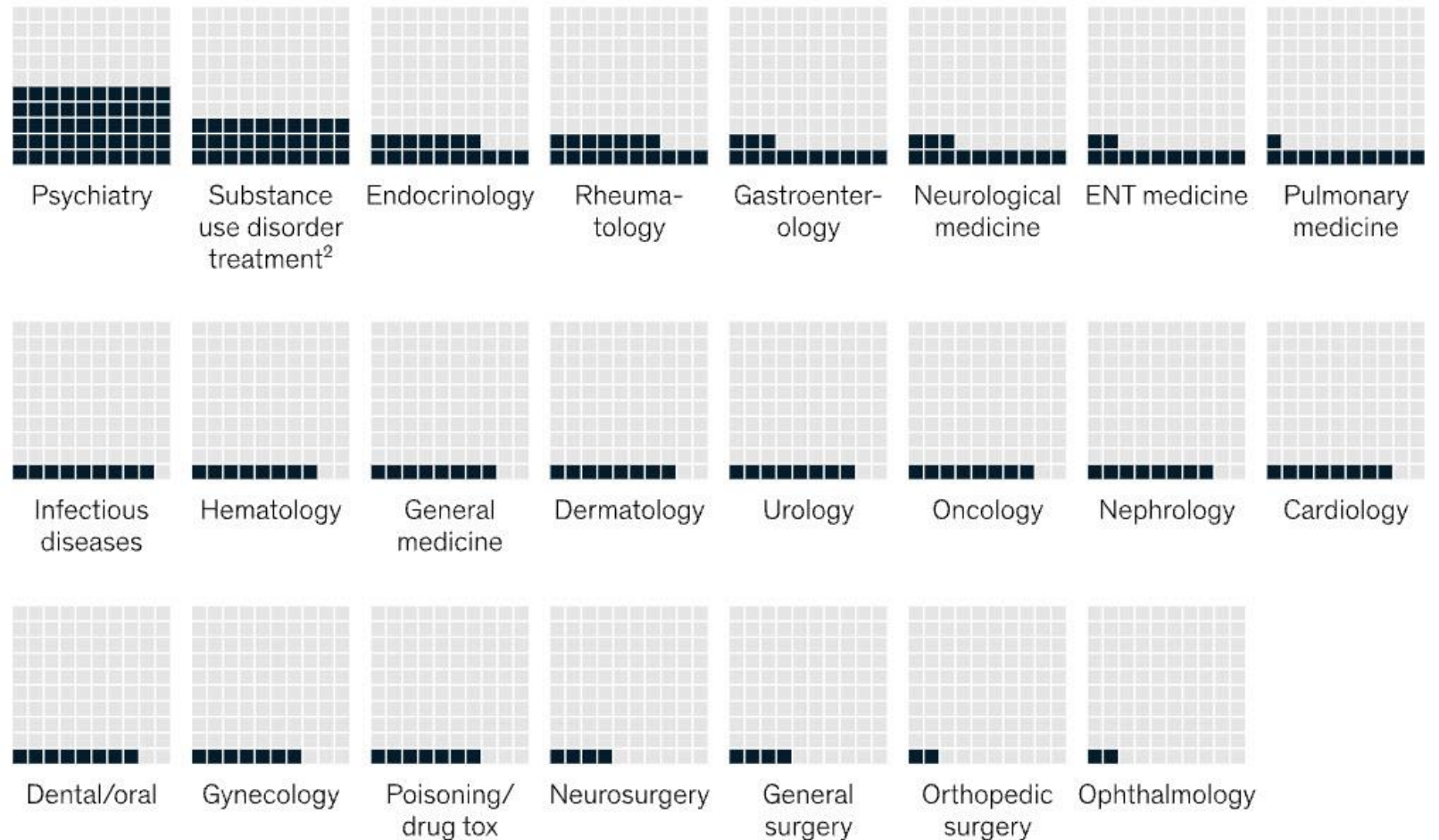
Virtual healthcare models and business models are evolving and proliferating



# UPTAKE AMONGST SPECIALISTS

Substantial variation exists in share of telehealth claims across specialities.

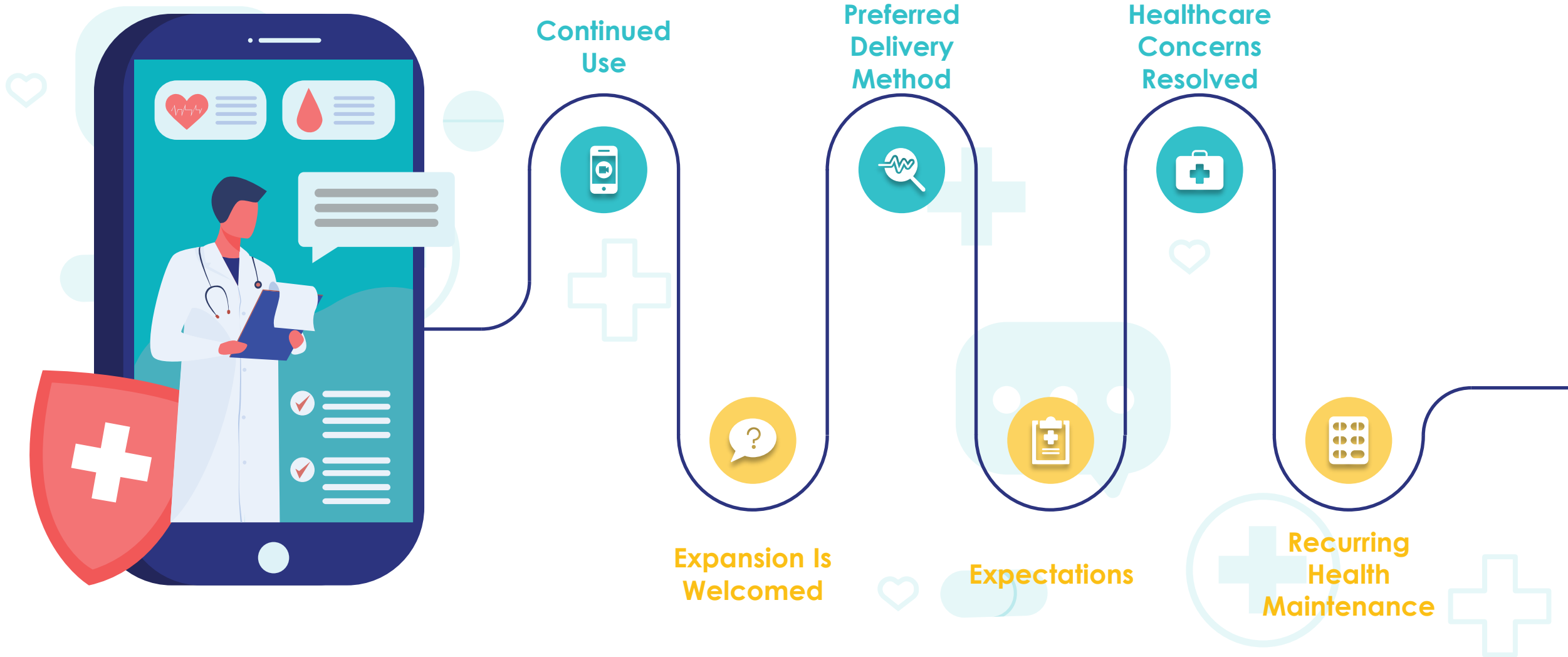
Share of telehealth of outpatient and office visit claims by specialty (February 2021<sup>1</sup>), %



We are also seeing a differential uptake of telehealth depending on specialty, with the highest penetration in psychiatry (50 percent) and substance use treatment (30 percent)



# PERCEPTIONS OF THE CONSUMER



# A BUSINESS OUTLOOK

- Health systems moved rapidly to develop telehealth capabilities during COVID. Not deploying a telehealth strategy may place organizations at a financial disadvantage
- Building a generic telehealth program will yield minimal results
- An unsure reimbursement environment is causing health systems to explore needed changes to in-person services and capacity
- If the shift towards telehealth is permanent, health systems, physicians and other clinical providers should look at modifying fixed costs
- The ability to expand key service lines beyond the restrictions of the geographic catchment area
- Improve the access to specialists, increasing efficiency and improving patient experience will provide opportunities for improved cash flow or cost savings

# CAN TELEHEALTH BE THE FUTURE?

“ Reimbursement parity is an essential key to the successful adoption of telehealth as a normal method for care delivery. ”

## The transformative downstream implications of mainstream telehealth

### Betting on Telehealth



Telehealth evolves from a nice to have into an essential strategic tool for patient engagement and retention

### Revising care standards and pathways



Telehealth evolves from a nice to have into an essential strategic tool for patient engagement and retention

### Site of care shifts



Expanding beyond follow-ups and e-consults to a comprehensive digital doorway for the right care, in the right place, at the right time.



# A POSITIVE OUTLOOK FOR TELEHEALTH

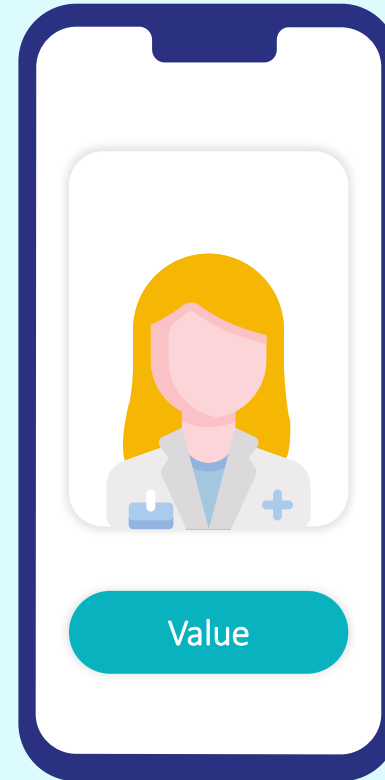
Because of what took place during the pandemic, the healthcare industry had to adapt quickly. As a result, telehealth became the norm for physicians and patients alike.



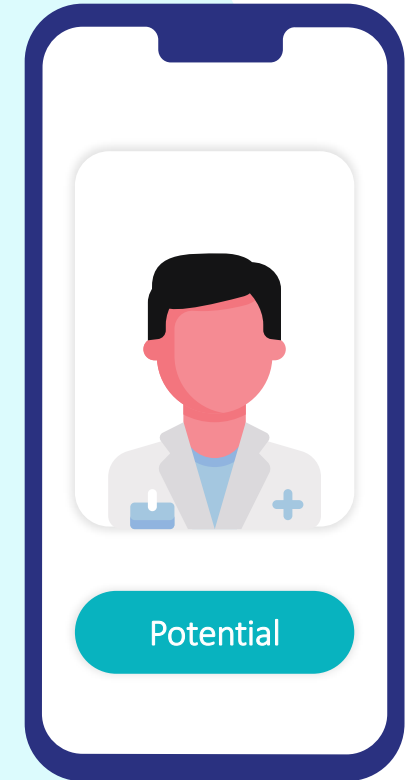
Emerging from the smoke are key developments surrounding the use of the virtual care which will ultimately shape the future of telehealth services.



Fortune Business Insight has predicted that the digital health market is expected to rise to over \$397 billion USD by 2027



New models of care from physicians and physicians groups optimizing operations improving the patient experience.



What is becoming evident now is a newfound appreciation of the strategic potential that telehealth will bring to the healthcare industry.

# UTILIZATION



What started as a solution to reduce COVID exposure has evolved into strategies for continuation of telehealth consults

Healthcare providers and insurance companies working together moving forward to broaden the availability and accessibility of telehealth..

According to HIMSS and the Trust Partners, 80% of health systems said they plan to increase their investment levels in digital health over the next five years.

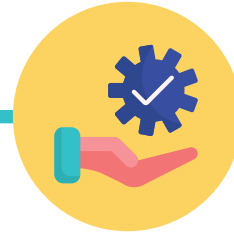
Memorial Healthcare System is expecting approximately 20% of visits to remain virtual

Some insurers are beginning to offer virtual only memberships



# CHALLENGES REMAIN

While telehealth has become mainstream during the pandemic, organizations will still need to overcome challenges.



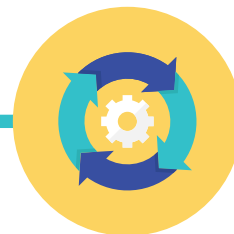
## Sufficient Internet Connection

Without broadband and easy access to the web, telehealth is nearly impossible.



## Reimbursement

There still is an outstanding issue about if payers should be required to reimburse for a telehealth appointment or service the same as they would for an in-office one.



## Organizational Culture

Gaining the buy-in of stakeholders is imperative in any new service line. While telehealth has gained in popularity, some will still have doubts for an ROI.

# UNCERTAIN REGULATORY CHANGES

Some regulatory changes that enabled greater telehealth access during COVID have been made permanent.



CMS allows coverage for a number of current CPT codes to be permanent, however:

- There remains uncertainty surrounding lifted telehealth restrictions once the health emergency expires
- The waiver has temporarily allowed all providers who can bill Medicare to provide telehealth services. The future of this change is unknown.
- It is challenging to plan too far into the future as telehealth and the lifted provisions once the public health emergency ends is not yet clear.

# WHAT'S NEXT



- Telehealth will become a standard service offered across all care settings
- Patients will choose providers, health systems, and hospitals based on telehealth access
- Medical facilities that embrace telehealth will see business and revenue growth
- Telehealth will become an efficient option for preventative care
- Access to specialists will become the norm, which will benefit hospital wait times





# HOSPITAL AND HEALTH SYSTEM PRIORITIES



Increasing capacity and service for clinical interactions



Creating a safe environment for clinicians and patients



Creating a seamless consumer experience



Enhancing capacity and efficiency of acute and specialist care



THANK  
YOU ...

