



TELEHEALTH

Taking the Pulse of the Healthcare Consumer in the New Normal

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EXECUTIVE SUMMARY

Numerous innovations over the past decade have brought disruption to healthcare delivery in America; however, none have been as impactful as the COVID-19 pandemic. In fact, this health crisis will likely go down as the greatest single disruptor to the modern U.S. healthcare industry. Within months, there have been sweeping changes in not only who can receive care, but also how consumers access and receive care. Providers, facing unprecedented operational and financial ramifications, have had to adapt to delivering medical care in a socially distanced environment.

As regulators and payors have granted broad flexibility for treating patients remotely, healthcare organizations have stepped up their telehealth capabilities to safely cope with noncritical and ongoing care needs. The rapid emergence of virtual care has been critical in the public health response to COVID-19.

HAS COVID-19 SHATTERED THE STATUS QUO?

To gain deeper insight on how COVID-19 has impacted both access to healthcare and the delivery of medical services, we partnered with OnePoll to survey a representative sample of 1,000 adult healthcare consumers across the U.S. between June 29 and 30, 2020.¹ In this report, we analyze our findings and offer proactive strategies providers can take to enhance patient access, value and experience as they continue to adapt to a new normal.

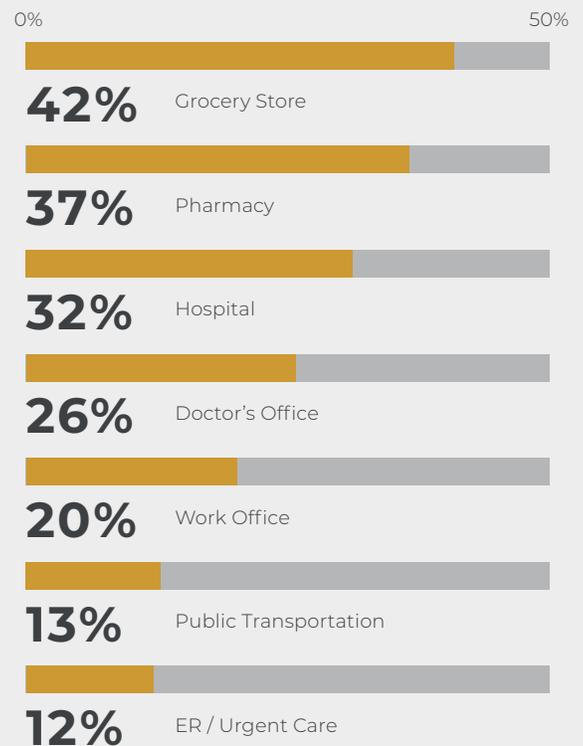


MEDICAL DISTANCING DISRUPTS CARE DELIVERY

At the onset of the COVID-19 pandemic, the CDC recommended that healthcare systems delay non-urgent and elective care visits to mitigate the spread of the virus.² As consumers began social distancing, they adjusted their healthcare use accordingly by “medical distancing.” This had the unintended consequence of patients avoiding care for non-COVID-19 urgent and emergent health needs. Other disruptions included canceling and postponing medical visits and switching to telehealth services.

Uncertainty and fear of exposure are driving a lack of patient confidence in care settings. As the pandemic is evolving, patient confidence levels seem to be changing as well. While 26% of the respondents in our survey said they currently feel comfortable visiting a doctor’s office, 43% indicated they will not feel safe entering any care setting until at least the fall.

WHAT TYPES OF FACILITIES DO CONSUMERS FEEL SAFEST ENTERING?



THE RISK OF PUTTING OFF CARE

COVID-19 has dramatically altered access to both outpatient and inpatient care. As providers have deferred elective and preventive visits, patients have largely avoided in-person medical care to minimize exposure. Our survey reveals that **68% of patients cancelled or postponed an in-person medical appointment during the pandemic.**

A Cigna study identified seven conditions – acute coronary syndromes, acute appendicitis, aortic aneurysm and dissection, gastrointestinal bleed, epilepsy and seizure, transient ischemic attack, and atrial fibrillation – that require prompt medical care. They found that the rate of hospitalizations for each of these conditions significantly decreased between February 2020 and March 2020, suggesting patients may have deferred care due to concerns over exposure to COVID-19.³

Unfortunately, patients who cancel or delay care may face negative long-term and short-term health consequences. Patients with chronic conditions who postpone elective and well-visit appointments run the risk of negatively impacting their overall progress and disease management. Patients with symptoms of acute illness run the risk of experiencing harm if they fail to seek immediate care.⁴

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“Unfortunately, patients who cancel or delay care may face negative long-term and short-term health consequences.”



of patients cancelled or postponed an in-person medical appointment during the pandemic



of patients wouldn't feel comfortable seeing a provider in-person until at least the fall





RE-CONNECTING

PATIENTS TO CARE

It is incumbent on providers to restore consumer confidence in healthcare settings. Health systems have the opportunity to leverage contactless methods like online scheduling and telehealth to establish trust and re-connect their patients to needed care.⁵ While many consumers are open to using digital communication methods, only 21% report having a conversation with their provider about what options are available to them.⁶ Researchers believe this lack of knowledge prevents patients from taking advantage of digital communication technologies.

About one of three patients in our survey said that “scheduling an appointment” was the most frustrating aspect of their telehealth appointment – clearly, there is room for improvement when it comes to the scheduling experience.



have scheduled a telehealth appointment online



prefer to schedule an in-person or telehealth visit online

Patient demand for accessing healthcare is likely to surge in many areas of the U.S. depending on COVID-19 levels. From patients seeking to reschedule elective procedures and those who have deferred care for chronic underlying conditions to patients who are experiencing an acute illness or COVID-19 symptoms, online scheduling gives patients a way to conveniently and safely re-connect to the care they need, when they need it.

TELEHEALTH: ITS TIME HAS FINALLY COME



Although the adoption of telehealth has grown steadily over the last several years, a study conducted by the American Medical Association showed that only 28% of providers were offering virtual health services as of 2019.⁷ COVID-19 has ushered in a new era of telemedicine. As infections surged in the U.S., the federal government took steps to expand the use of telemedicine⁸ and several medical associations released practice guidelines. Within weeks, there was an estimated ten-fold increase in telehealth consultations,⁹ with 97% of healthcare leaders reporting they had expanded access to these virtual services.¹⁰ No longer are remote health services viewed as a “nice-to-have” – they are now a must-have care delivery option.

As the COVID-19 health crisis persists, health systems have a unique window of opportunity to scale broader telehealth offerings and realize the following benefits:

- ✓ Minimizing care deferrals during the pandemic
- ✓ Greater efficiencies in the provision of care
- ✓ Expanding market share by creating new areas of access
- ✓ Better continuity of care for high-risk, high-cost patient populations
- ✓ Decreasing readmissions by addressing gaps in care
- ✓ Driving loyalty and trust
- ✓ Improved outcomes and patient experience



FILLING THE **PATIENT ACCESS VOID**

Meeting patient needs is fundamental to quality patient care. As the demand for telehealth continues, providers should be pivoting how they deliver care to meet consumer expectations and fill any gaps in access. Multi-channel access and engagement is critical to optimizing utilization of virtual health services. For example, email and text messages, used as an extension of a virtual visit, add value and care continuity to the encounter.

Our findings reveal that patients generally feel positive about telehealth services and will use them if they are made aware of their availability.

USE OF TELEHEALTH: ATTITUDES & INFLUENCERS



**Video was the most common type of telehealth appointment; however, a significant number used phone.*

The top 3 factors that respondents indicated would influence their decision to schedule a telehealth visit were “COVID-19-related safety concerns” (47%), “covered by insurance” (43%) and “ease of accessing quality care” (40%).

A CLOSER LOOK AT THE **DEMOGRAPHICS OF TELEHEALTH**

COVID-19 pushed all demographic groups to adopt telehealth, whether they were ready or not. As healthcare organizations continue to introduce and fine-tune virtual health options, it's essential to understand where their patient populations see value in telehealth – and where they do not – to maximize its impact and increase adoption.

GENERATIONAL OUTLOOKS ON THE TELEHEALTH EXPERIENCE

- Overall, Generation X (**53%**) has used telehealth the most, followed by 57+ (**42%**), Millennials (**39%**) and Generation Z (**13%**).
- Generation Z is most likely to negatively characterize their telehealth experience as “disorganized,” “complicated,” “frustrating,” or “confusing.”
- **95%** of Generation X and younger patients who have had a telehealth appointment are willing to schedule a telehealth visit instead of an in-person appointment.
- Overall, younger generations were more likely to schedule an appointment online and to be satisfied with the process of scheduling an appointment.
- About half of Millennial and Generation X say that knowing their provider offers telehealth services would influence their decision to use them.



GENDER OUTLOOKS ON THE TELEHEALTH EXPERIENCE

- Men use telehealth more than women (**45%** vs. **37%**).
- Men were more satisfied with their overall telehealth experience than women (**95%** vs. **88%**).
- More men than women said they were “very likely” to schedule another telehealth appointment (**68%** vs. **57%**).
- Men are more likely to use telehealth for a routine checkup (**62%** vs. **50%**) or an unexpected illness/injury (**44%** vs. **28%**).
- Men and women found different aspects of the telehealth appointment more satisfying. For example, more men were satisfied with the scheduling process (**59%** vs. **48%**) and the quality of the video/audio technology (**37%** vs. **28%**) than women, while women were more satisfied with the quality of care delivered (**32%** vs. **25%**).

WHAT DOCTORS CAN LEARN FROM THE PATIENT'S TELEHEALTH EXPERIENCE

Over 90% of patients reported they were satisfied with their overall telehealth appointment care experience. Healthcare systems and providers can build on these positive experiences to scale their digital health programs.



THE TOP 4 MOST SATISFYING ASPECTS OF THE TELEHEALTH EXPERIENCE



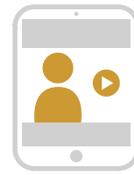
38%

Day of appointment wait time



33%

Pre-appointment communication



33%

Quality of the video/audio technology



31%

Providing health insurance information

11%

follow-up after appointment

Notably, only 11% of respondents were satisfied with the follow-up after the appointment. A simple way to enhance the overall experience is to incorporate post-appointment emails and texts.

THE TOP 6 APPOINTMENT-RELATED ACTIVITIES PATIENTS WOULD PREFER TO DO ONLINE



Schedule an appointment



Check symptoms before the visit



Find out the cost of the visit



Complete intake forms



Provide insurance information



Receive directions to prepare for the visit

Consumers today are looking for convenience, transparency and efficiency in all their transactions, including healthcare. Those providers that offer a seamless telehealth experience from scheduling to follow-up will earn a competitive advantage.



THE “NEW NORMAL” OF HEALTHCARE DELIVERY

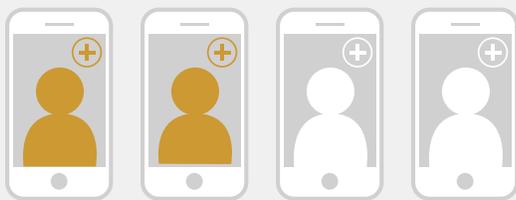
There’s been much speculation about the “New Normal” in a post-COVID world. The pandemic has thrust profound change on every aspect of life, particularly healthcare. As the health crisis evolves, so do the predictions. One thing we do know is this: many of the adjustments in healthcare are likely to be in place for at least the next 12 to 18 months, as COVID-19 concerns remain until a vaccine is widely available. During this time, consumers’ preferences for care access and delivery will continue to develop.

Innovations – like digital and telehealth solutions – designed to meet patient needs will likely become embedded into the healthcare delivery system. There are two areas of clinical care that will continue to serve as stepping stones as providers scale their virtual health offerings: behavioral health and chronic condition management. Retail healthcare is another area that will continue to thrive as it proves to be a preferred and cost-effective way to receive medical care. The looming question: Will the regulatory and payor environment continue to support virtual health as the country moves beyond COVID-19?

MEETING BEHAVIORAL AND MENTAL HEALTH NEEDS VIRTUALLY

Nearly half (45%) of adults in the U.S. reported that their mental health has been negatively impacted due to worry and stress over the COVID-19 pandemic, according to a Kaiser Family Foundation poll.¹¹ As the pandemic wears on, the mental health burden will likely increase as people face greater isolation, job losses, potential financial distress, fear of getting the virus and more uncertainty in general. Blue Cross Blue Shield data show that negative coping behaviors, such as smoking and non-medical drug use, are on the rise, which increase the risk of mental and behavioral health disorders.¹²

Behavioral health virtual care, commonly known as telemental health, has a strong evidence base¹³ and offers a critical avenue for providing and sustaining mental and behavioral health support both during and beyond COVID-19. While this specialty has used virtual visits for a while due to provider shortages, its full potential was hampered by CMS regulation.¹⁴ Since the regulatory waivers at the onset of the pandemic, telemental health has taken off. Blue Cross Blue Shield has seen virtual mental healthcare visits increase by 1.6 times since last summer.¹⁵ Over half of that growth has occurred since the onset of the pandemic. Optum Health reports that telemental health claims have drastically increased from 2% before COVID-19 to 33% since the onset.¹⁶ Forrester projects there will be 80 million behavioral health virtual visits in 2020.¹⁷



More than 1 in 4 surveyed respondents had a mental health telehealth visit since the pandemic hit

KEEPING PATIENTS WITH CHRONIC ILLNESS **SAFE WITH TELEHEALTH**

According to the CDC, people of any age with certain chronic conditions are at increased risk for severe illness from COVID-19.¹⁸ These underlying conditions include Type 2 diabetes, serious heart conditions, chronic kidney disease, obesity and COPD. Fear of contracting the virus has led some chronically ill people to put off care. Failing to get appropriate and timely routine chronic disease care can lead to worsening health, admission to the hospital, and possibly a preventable death. All these factors increase the costs of caring for this vulnerable patient population, which already cost the U.S. healthcare system an estimated \$1.1 trillion before the pandemic.¹⁹

As discussed earlier, telehealth visits for routine chronic disease care allow patients to access the care they need while reducing the risk of getting sick with COVID-19. Augmenting telehealth with other remote technologies, such as remote patient monitoring, wearable devices and digital therapeutics, enables clinicians to better manage their patients with chronic conditions. In general, these patients are already comfortable with remote monitoring tools – in a recent study, almost 90% of patients felt that remote monitoring would improve their ability to manage their conditions.²⁰



28% of respondents used a telehealth appointment to address a chronic condition issue

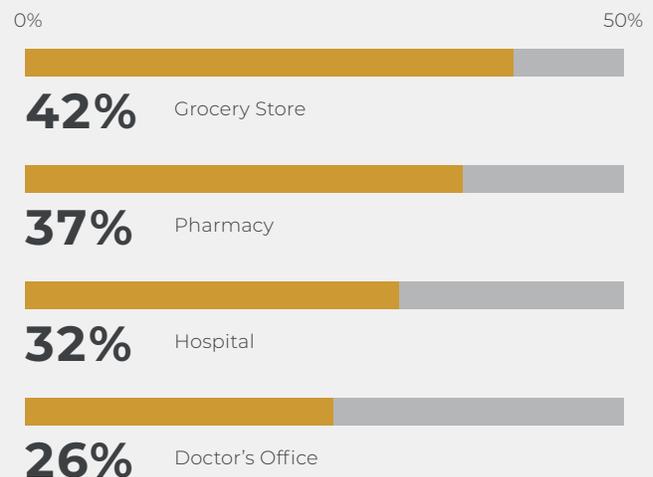


THE RISE OF RETAIL HEALTHCARE

Since their inception in 2000, retail clinics have played a growing role in the healthcare industry.²¹ With the likes of CVS, Walgreens, Target, Rite-Aid and Walmart getting into the game over the last two decades, there were 1,949 clinics by January 2019.²² Convenience, easier access to care and affordability have been the primary drivers of growth.

As with telehealth, the pandemic is paving the way for retail clinics to cement their value to the healthcare system. As our survey shows, patients feel safer entering retail environments than medical facilities, which will encourage them to obtain needed care. Retail clinics may also reduce the load on hospitals by providing basic, lower-acuity health services. They are also contributing to the COVID-19 response by providing care in underserved areas and offering drive-through testing.²³

PLACES WHERE PATIENT FEEL THE SAFEST



WILL REGULATORS AND PAYORS CONTINUE TO **SUPPORT VIRTUAL HEALTH?**

“

“I think that telehealth and the ability to charge the equivalent to what we do in the clinic space isn’t going away anytime soon...or ever.”

*Dr. Ashok Rai
CEO of Prevea Health²⁹*

INSURANCE COVERAGE IS A DECIDING FACTOR FOR PATIENTS

- When asked what would influence their decision to schedule a telehealth appointment, the second most popular reason given (43%) was that it was covered by insurance
- Before COVID-19, 28% knew their insurance company covered telehealth appointments

The CARES Act prompted a rapid adoption of telehealth by temporarily reducing or eliminating barriers to its use.²⁴ Not only did CMS expand coverage to include a much wider range of patients and conditions, Medicare and in some cases Medicaid are reimbursing at the same rates for both virtual and in-office visits.²⁵ Some commercial payors have followed suit. For example, Cigna waived customer cost-sharing for COVID-19 telehealth screening and is facilitating virtual treatment for routine medical exams.²⁶

Establishing telemedicine as a standard point of care before the pandemic was slow moving. Proponents of virtual care touted its promise to expand access to care, improve continuity of care, and reduce healthcare costs. A 2019 study determined a net cost savings of \$19-\$121 per telemedicine visit.²⁷

Now that more patients and providers are comfortable with telehealth, is it here to stay? A lot hinges on the continued support of regulators and payors. Our survey revealed that insurance coverage is a large determinant in whether patients schedule a telehealth appointment.

With payors seeing the full potential of telemedicine in real-time and the CMS top administrator calling for a permanent expansion,²⁸ the odds are very high that telehealth is here to stay.



STRATEGIES

FOR OPTIMIZING TELEHEALTH

Consider the following actions to improve patient access and care coordination, value and experience through your virtual health program. Taking these steps will enable your healthcare organization to not only scale your telehealth offerings, but also build a competitive advantage in the months to come.

- Develop a consumer-focused digital front door to give patients a seamless experience when accessing telehealth (i.e., finding a provider, scheduling an appointment, completing pre-visit forms, providing insurance information, checking symptoms)
- Integrate multi-channel scheduling access with a variety of access touchpoints, including Google, social media, health plan member portals, call centers and provider-to-specialist referrals
- Inform patients that they have telehealth services available to them with a combination of marketing and outreach strategies, such as website updates, emails, text messages and social media messaging
- Educate patients on how to use telehealth services, and verify their devices and internet services meet technical requirements prior to the scheduled visit

- Automate verifying the patient's telehealth insurance coverage before each visit
- Incorporate post-virtual visit communications to follow-up with each patient based on their individual needs (i.e., schedule a follow-up appointment, get test results, give physician referral, etc.)
- Train staff and providers on good "websites" manners to set a professional tone, reduce distractions, and improve the overall experience of the visit
- Confirm interoperability between the telehealth application and other supporting systems – such as the EHR, payment systems and online scheduling – to ensure sustainability and scalability
- Strengthen your organization's infrastructure to support the expansion of telemedicine services
- Implement strategies to scale your telehealth capabilities into new markets and populations
- Measure the value of your virtual care program by tracking clinical outcomes, access improvement, cost savings, and patient/provider satisfaction to support service expansion and advocate for expanded coverage



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