

Health.
Virtually.
Everywhere.

Telehealth: Where we are and where we're going

gpTRAC Annual Conference

Ann Mond Johnson

May 23, 2023

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About the ATA

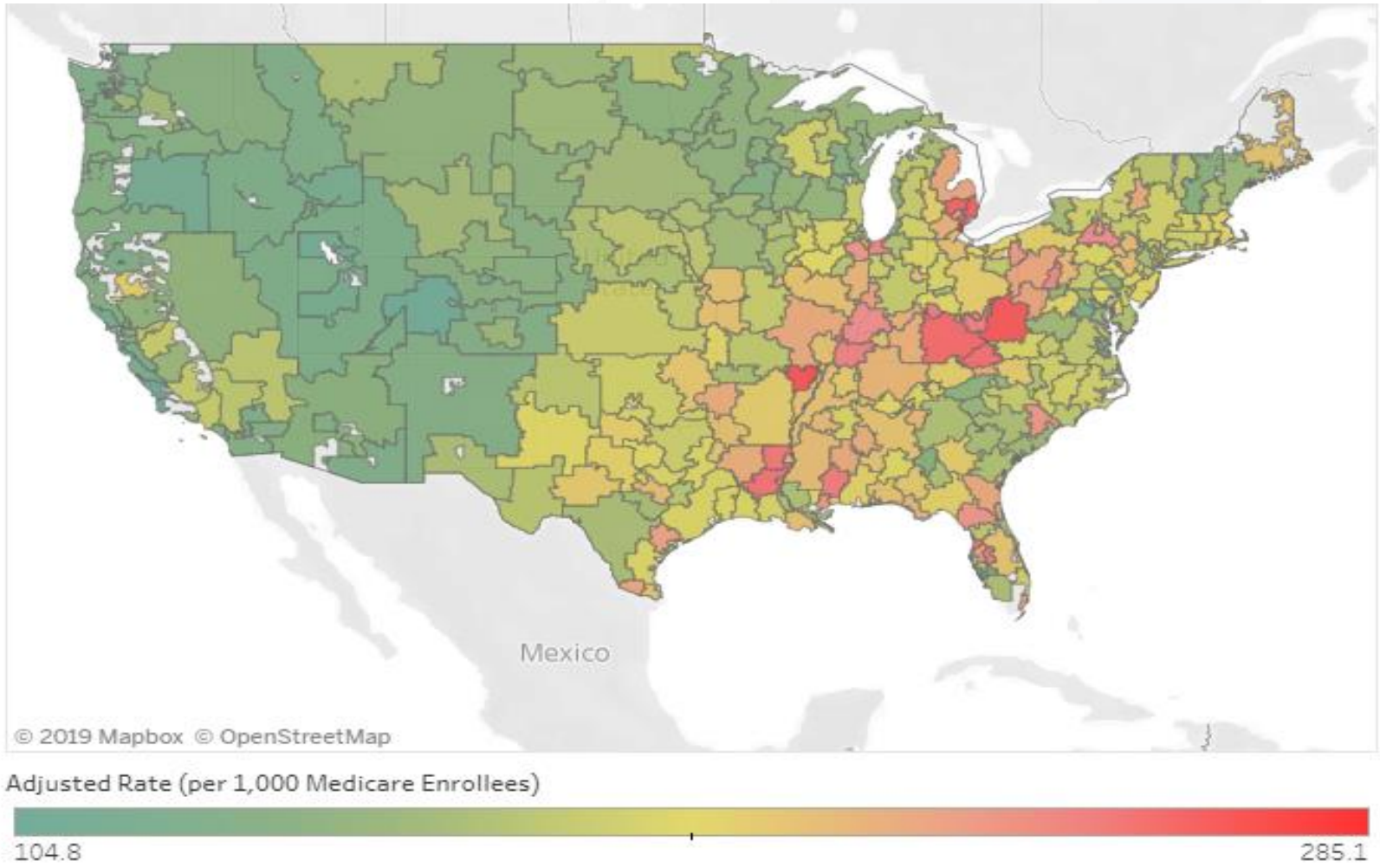
As the only association focused on telehealth, we represent over 400 organizations – including leading healthcare delivery systems, academic institutions, technology solution providers and payers – all committed to the vision that people should access safe, effective, and appropriate care where and when they need it, while enabling clinicians to do good for more people.

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Challenges prepandemic

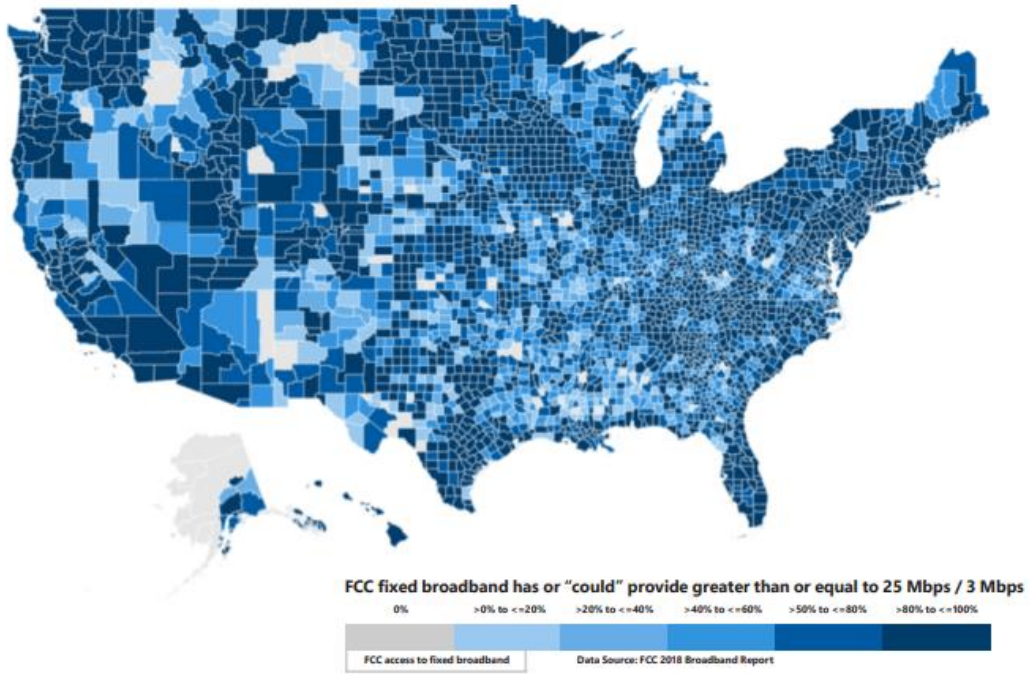
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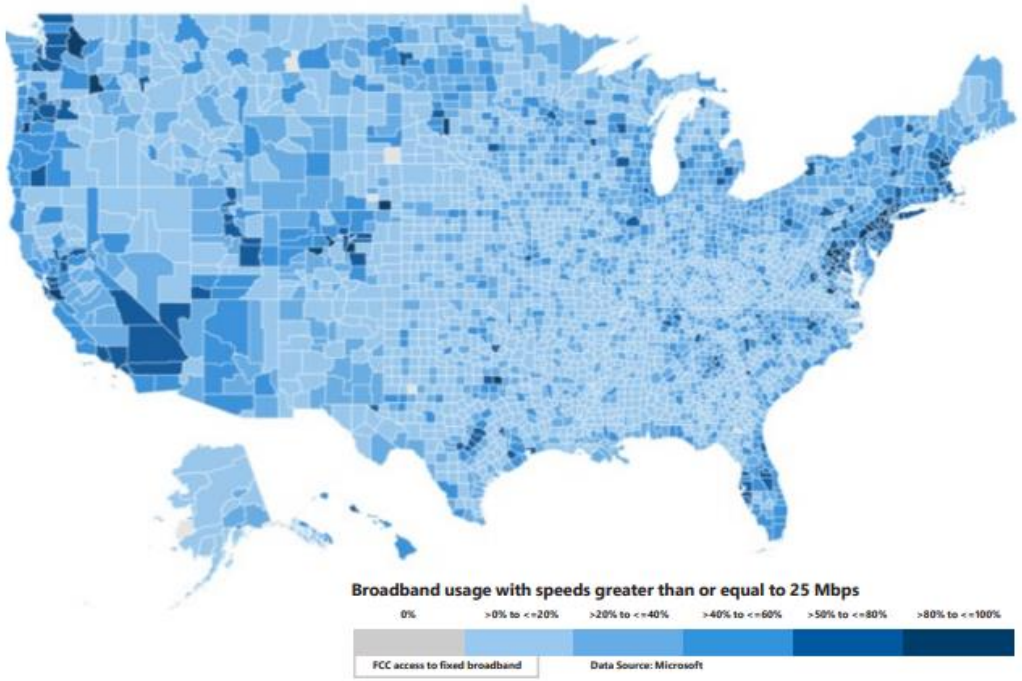
Geography is your healthcare destiny



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Inadequate access to broadband





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November 1999

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INSTITUTE OF MEDICINE

Shaping the Future for Health



TO ERR IS HUMAN:
BUILDING A SAFER HEALTH SYSTEM

Health care in the United States is not as safe as it should be--and can be. At least 44,000 people, and perhaps as many as 98,000 people, die in hospitals each year as a result of medical errors that could have been prevented, according to estimates from two major studies. Even using the lower estimate, preventable medical errors in hospitals exceed attributable deaths to such feared threats as motor-vehicle wrecks, breast cancer, and AIDS.

Copies of To Err is Human: Building a Safer Health System are available for sale from the National Academy Press; call (800) 624-6242 or (202) 334-3313 (in the Washington metropolitan area) Or visit the NAP home page at www.nap.edu. The full text of this report is available at http://www.nap.edu/books/0309068371/html/

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Many other signs the approach was not sustainable

- Insufficient number of clinicians
- Long wait times to see a clinician
- Growth of total healthcare spending

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What we see now

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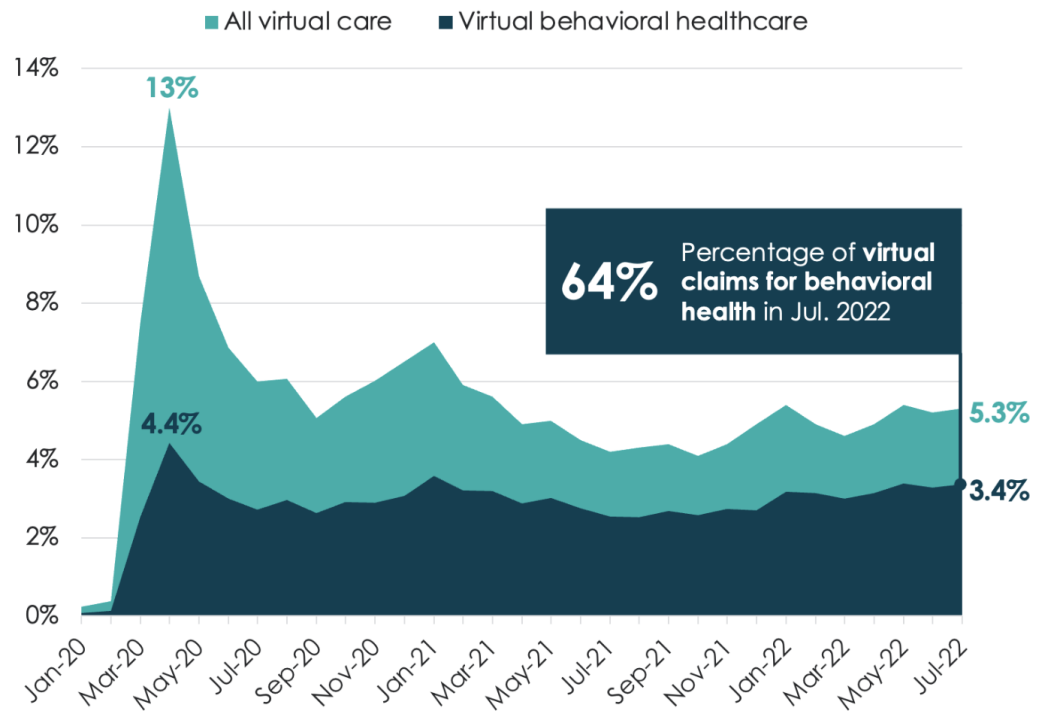
Virtual visits holding steady, majority for behavioral health

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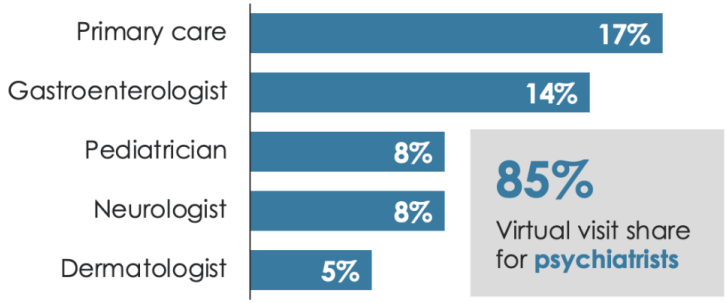
Nearly Half of Consumers Accessing Care Both Virtually and In-Person

Share of Commercial Medical Claims Delivered Virtually

n = 38B medical claims

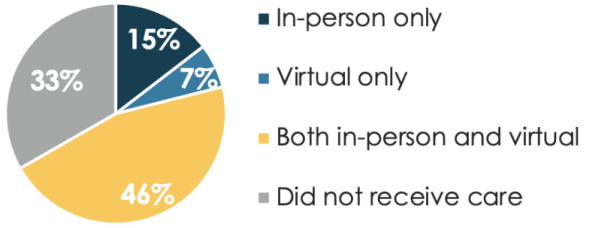


Percentage of Visits Provided Virtually for Top Five Non-Behavioral Health Specialties, May 2022[1]



Share of Consumers Accessing Healthcare by Channel, July 2022

n = 2,700



Gist healthcare

1. Virtual visit percentages from Zocdoc, a care marketplace booking both virtual and in-person visits.

Source: Fair Health. "Monthly Telehealth Regional Tracker." Jan. 20 – Jul. 22; PYMNTS. "The Data Point: 46% of Americans Mixing Telehealth, In-Person Care." 1 Sep. 2022; Zocdoc Reports – The Healthcare Experience: 2022." 20 Jun. 2022; Gist Healthcare analysis.

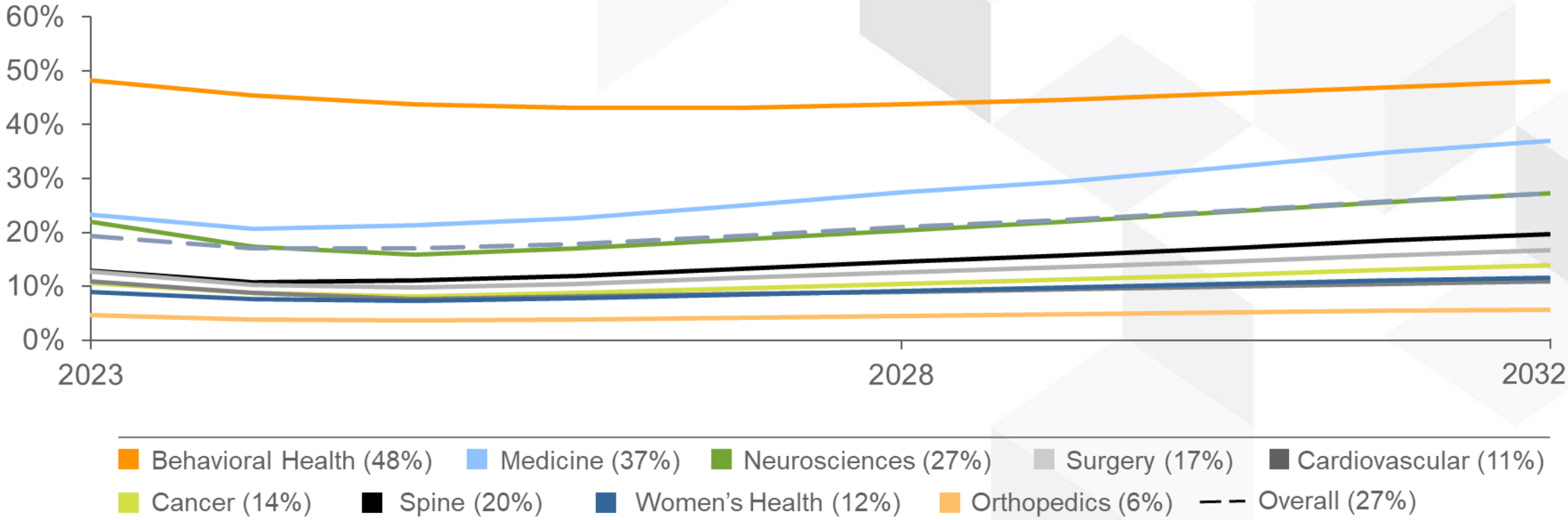
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Expect steady growth in E&M visits shifting to virtual through 2032

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Virtual Visits Shift by Service Line Group

US Market, 2022-2032



Note: Analysis excludes 0–17 age group and excludes volumes for IDC-10 diagnosis code U07.1, COVID-19 infection. **Sources:** Impact of Change®, 2022; HCUP National Inpatient Sample (NIS). Healthcare Cost and Utilization Project (HCUP) 2019. Agency for Healthcare Research and Quality, Rockville, MD; Claritas Pop-Facts®, 2022; Sg2 Analysis, 2022.

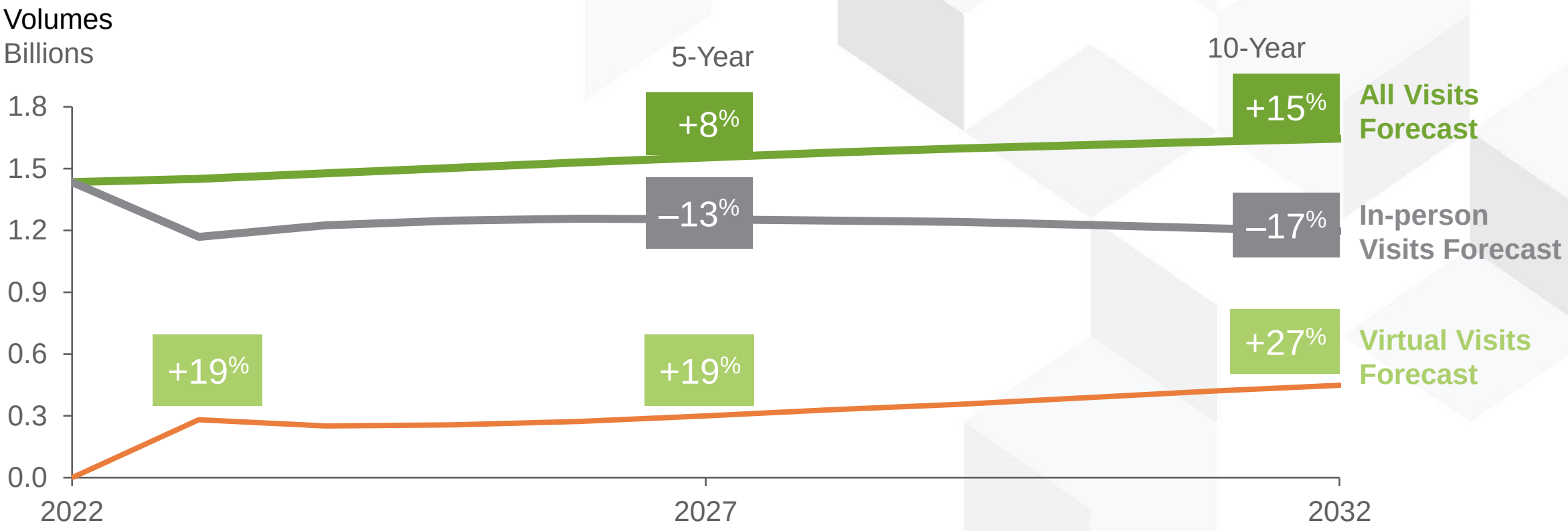
Source: SG2/Vizient

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E&M growth fueled by virtual adoption

E&M Visits Forecast

US Market, 2022-2032



Note: Analysis excludes 0–17 age group. **Sources:** Impact of Change®, 2022; Proprietary Sg2 All-Payer Claims Data Set, 2019; The following 2019 CMS Limited Data Sets (LDS): Carrier, Denominator, Home Health Agency, Hospice, Outpatient, Skilled Nursing Facility; Claritas Pop-Facts®, 2022; Sg2 Analysis, 2022.

Source: Strata

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Were the fears about telehealth merited?

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Results of in-person vs virtual

Assessment of Clinician Diagnostic Concordance With Video Telemedicine in the Integrated Multispecialty Practice at Mayo Clinic During the Beginning of COVID-19 Pandemic From March to June 2020

JAMA Network Open, September 2, 2022

Comparison of quality performance measures for patients receiving in-person vs telemedicine primary care in a large integrated health system

JAMA Network Open, September 26, 2022

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Results of in-person vs virtual

Telehealth Strategies for the Delivery of Maternal Health Care

Annals of Internal Medicine, September 2022

"The results of this study are encouraging because they indicate that telehealth could improve and expand healthcare options, especially for underserved communities and those who may face barriers to accessing traditional care"

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Importance of audio-only

- Federally Qualified Health Centers (FQHCs) found audio-only highly effective and resourceful (Audio-Only Telehealth Supported Care Delivery at FQHCs During Pandemic (mhealthintelligence.com)
- 69% of physicians use audio-only telehealth (AMA: 69% of Physicians Use Audio-Only Telehealth (mhealthintelligence.com)
- Audio-only telehealth is used more than video-based telehealth for behavioral health and primary care (Changes in In-Person, Audio-Only, and Video Visits in California's Federally Qualified Health Centers, 2019-2022 | Health Care Delivery Models | JAMA | JAMA Network)

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Unfounded concerns about fraud, waste and abuse

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JAMA Network Open – January 2022

- Use of Telemedicine for Buprenorphine Inductions in Patients With Commercial Insurance or Medicare Advantage
- No clear evidence shows that telemedicine increases diversion risk

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Unfounded concerns on fraud, waste and abuse

CDC, CMS and the National Institute on Drug Abuse

- Article published in JAMA Psychiatry – August 2022
- Reduced risk of overdose

OIG report – September 2022

- 1,714 providers receiving a total of $127.7 million in Medicare FFS payments
- Total fraud estimated by Johns Hopkins at $60 billion

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Unfounded concerns on fraud, waste and abuse

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The American Journal of Drug and Alcohol Abuse – March 2023

- Patients with OUD are significantly more likely to stick with their treatment plan when offered buprenorphine via telemedicine

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Licensing flexibilities

Journal of Medical Regulation – April 2023

- New Jersey's COVID – 19 Temporary Emergency Reciprocity Licensure Program provided licenses to more than 31,000 out of state healthcare practitioners (over 25% were mental health providers)
- Findings suggest temporary out-of-state mental health providers helped enhance mental healthcare continuity and access

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Outside the hospital walls

Both the Hospital Without Walls and the Acute Hospital Care at Home programs show promising outcomes

- Lower overall mortality
- ~ 30% lower cost of care
- Reduced risk of readmission
- Higher patient satisfaction

Avoiding unnecessary in-person care across multiple service lines

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Patient satisfaction and enthusiasm

- 95% of Medicare beneficiaries were satisfied with their most recent telehealth visit
- 8 in 10 patients said their primary health issue was resolved with a telehealth visit
- About 40% of patients interact with providers more because of telehealth
- 83% of patients had a good quality telehealth visit

Sources: Bipartisan Policy Council, GoodRx Healthcare Survey, c19hcc.org

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Provider satisfaction

- 80% of providers reported that the overall level of care provided via telehealth was better or equal to that of in-person care
- Over 70% of providers reported that telehealth had made patient continuity of care better or much better
- 64% of clinicians say telehealth enables more comprehensive quality care and 61% say it increases efficiency

Source: Good Rx Healthcare Survey, 2021, Project Healthcare, Nashville Entrepreneur Center

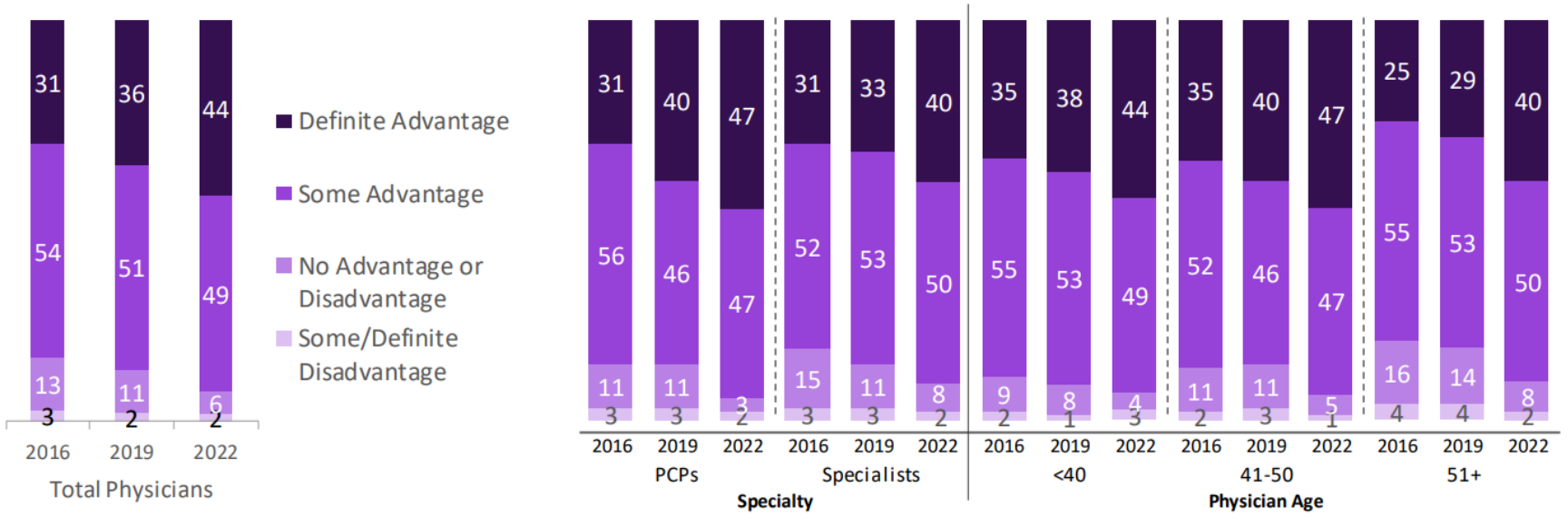
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Physicians feel there is an advantage leveraging telehealth

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There has been an increase in the percentage of physicians that feel there are advantages in leveraging digital tools for patient care.

- Both PCPs and Specialists feel digital health solutions provide advantages in their ability to care for patients.
- Respondents across all age groups indicate an increase in the perceived advantage of digital health solutions. In particular, the 51+ group experienced the largest increase since 2019.



[AMA Digital Health Research (ama-assn.org)]

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Federal policy

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Federal priorities

- **Permanent Medicare Telehealth Coverage**
  - Repeal of Telemental Health In-Person Requirement
  - Permanent removal of Arbitrary Medicare Restrictions
  - First Dollar Coverage of High Deductible Health Plans
  - Telehealth as an Excepted Benefit
  - Acute Hospital Care At Home Program

- **Prescription of Controlled Substances via Telehealth (waiving in-person requirement)**

- **Others: Remote Monitoring, Box 32, DCT, Medicare Advantage, Broadband, Licensing, FDA, AI, Privacy)**

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FY 2023 omnibus summary

End of Year Priority	Extended (or not)	Date of Expiration
First Dollar Coverage of Telehealth Under HDHP-HSAs	☑	December 2024
Extending the Medicare Telehealth Flexibilities • Geographic and originating sites flexibilities • Expanded eligible practitioners • FQHC and RHC telehealth coverage and reimbursement • Eliminate or delay the in-person telemental health requirement • Furnish audio-only telehealth	☑	December 2024
Acute Hospital Care at Home Program	☑	December 2024
Waive In-Person Requirement in the Ryan Haight Act	✘	End of PHE; awaiting DEA final rule
Telehealth as an Excepted Benefit	✘	End of PHE

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FDA NEWS RELEASE

FDA Takes Additional Steps to Advance Decentralized Clinical Trials

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More Press Announcements

For Immediate Release: May 02, 2023

Today, the U.S. Food and Drug Administration is taking additional steps to support the use of decentralized clinical trials (DCTs) for drugs, biologics and devices, where some or all the trial-related activities occur at locations other than traditional clinical trial sites.

Content current as of:
05/02/2023

Regulated Product(s)
Biologics
Drugs
Medical Devices

DEA statement - May 3, 2023

Statement from DEA Administrator Anne Milgram on COVID-19 Telemedicine Flexibilities for Prescription of Controlled Medications

WASHINGTON – The Drug Enforcement Administration received a record 38,000 comments on its proposed telemedicine rules. We take those comments seriously and are considering them carefully. We recognize the importance of telemedicine in providing Americans with access to needed medications, and we have decided to extend the current flexibilities while we work to find a way forward to give Americans that access with appropriate safeguards.

For this reason, last week, DEA, in concert with the Department of Health and Human Services, submitted a draft Temporary Rule to the Office of Management and Budget entitled "Temporary Extension of COVID-19 Telemedicine Flexibilities for Prescription of Controlled Medications." Further details about the rule will become public after its full publication in the Federal Register.

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Another win for the industry

After High Stakes Feb. Meeting, MACs Will Not Make Local Coverage Determination For RPM, RTM Coverage

By Emma Beavins / May 19, 2023 at 4:38 PM

Novitas Solutions and First Coast Service Operations (FCSO) sent an email Friday afternoon (May 19) telling select remote physiologic monitoring and remote therapeutic monitoring advocates that the Medicare Administrative Contractors will not be releasing a local coverage determination at this time after reviewing the extensive list of studies sent by advocates and hearing testimony at the Feb. 28 Contractor Advisory Committee meeting that sought to tease out the value of the services. Most importantly, the MACs' hesitation will give the..

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State policy

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Key state priorities

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Licensure Flexibilities (compacts, registration models)



Prescription of Controlled Substances via Telehealth



Practice of Medicine/Standard of Care Neutrality



Geographic and Originating Site Neutrality



Medicaid and Commerical Coverage

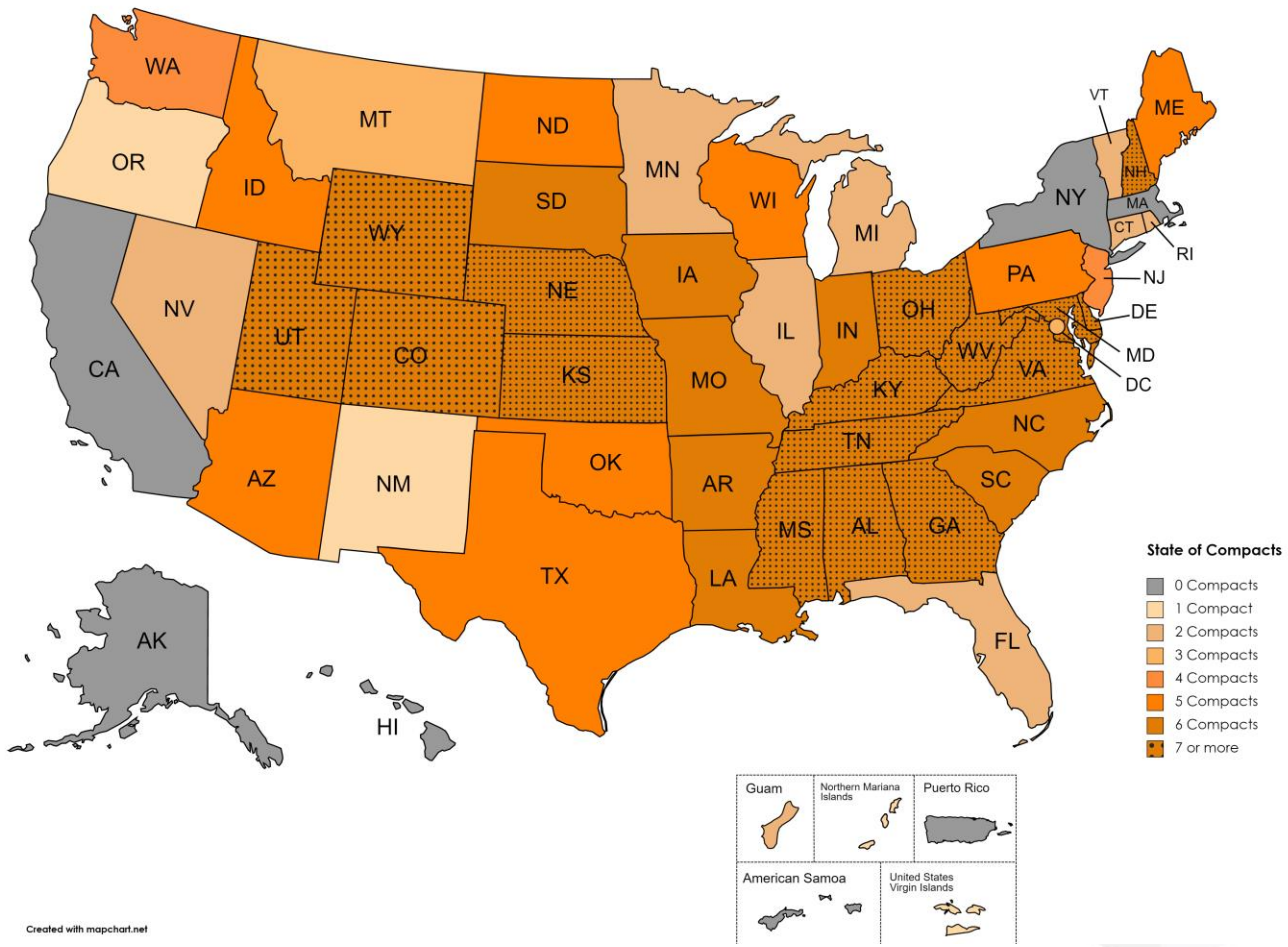
Does Insurance Cover Telehealth?

Technology Neutrality



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State of compacts

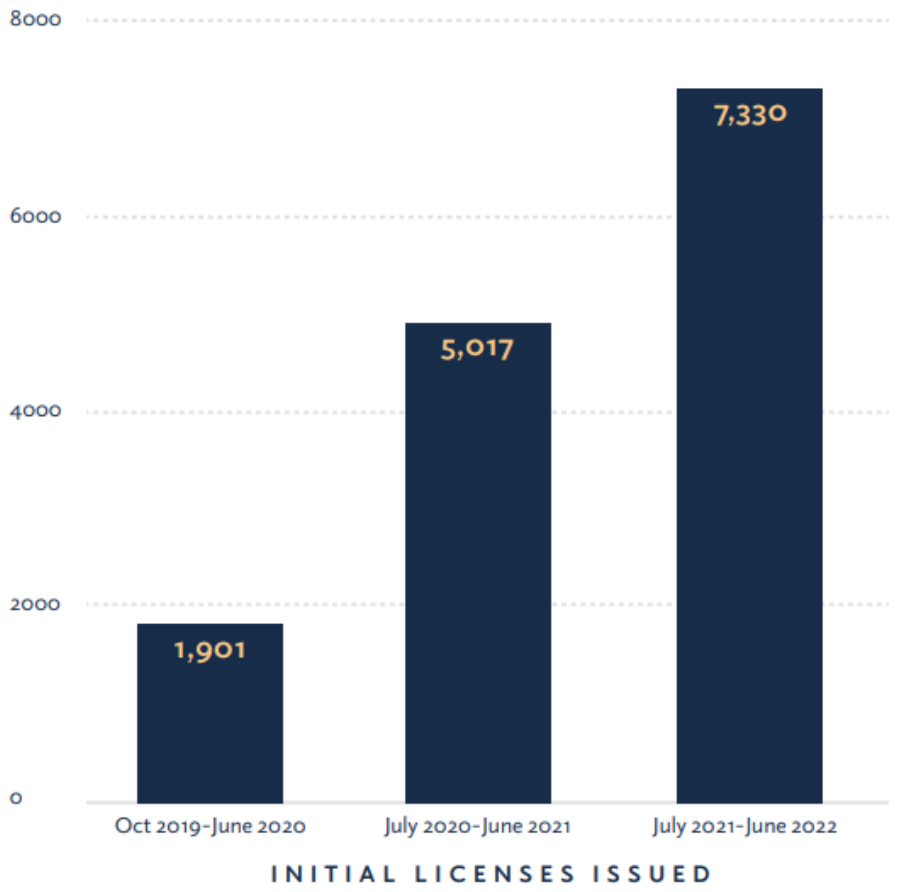


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Telehealth registration model growing

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Figure 1. Number of Approved Out-of-State Telehealth Registrations in Florida



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Barriers to expanding telehealth

- **Modality Mandates:** Clinically unnecessary requirements that providers always use a certain technology to form a relationship or prescribe
- **Holding Telehealth to Higher Standard with Clinically Unnecessary Barriers:** Imposing requirements on telehealth care delivery setting that is not expected in person (referral or hot handoffs)
- **Not Considering Primarily Virtual Providers:** Certain state requirements (often in Medicaid) do not contemplate providers that -- even while licensed-- might not be in physical proximity of patient
- **Prescribing of Controlled Substance Requirements Exceeding Federal Law**
- **Limiting Providers Who Can Use Telehealth Consistent with Scope:** Limit definition of telehealth providers or have supervision requirements that don't account for technology

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Policy coming down the pike

- Artificial Intelligence
- Privacy
- Cybersecurity
- Emerging Technologies



Source: Google

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Looking forward

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Putting health and healthcare in broader context

2023 Edelman Trust Barometer Special Report: Trust and Health

Health has become multifaceted, and those who can bring solutions forward have a responsibility to see health beyond purely the physical

1. More transparency and engagement to research and scientific processes
2. Be a conduit for trusted health information through verified resources
3. Go deep within communities to engage and understand your audiences
4. Mental, physical, community and social health are inextricably linked

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Where consumers are today

- Most Americans are struggling, with 56% unable to cover an unexpected $1,000 bill with savings
- $88 billion in medical debt held by roughly 20% of US households
- Healthcare costs continue to grow, with large employers forecasting a 5 – 6% increase
- Employer strategies for managing costs include expanding or introducing more virtual strategies (for mental health, physical therapy, digital coaching, condition management)

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Americans give our healthcare system poor grades

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West Health-Gallup Healthcare in America Report Card

Name: U.S. Healthcare System **Year:** 2022

Surveyed: The American Public **Survey Period:** June 21-30, 2022

Survey Question: What grade would you give the U.S. healthcare system?

	A Excellent	B Good	C Satisfactory	D Poor	F Fail	D+F Combined	Average Grade
U.S. healthcare system overall	4%	17%	34%	30%	14%	44%	C-
Cost of care	1%	6%	19%	41%	33%	75%	D-
Equitable care	8%	14%	23%	29%	27%	56%	D+
Access to care	9%	22%	31%	26%	12%	38%	C
Quality of care	12%	35%	36%	12%	5%	17%	C+

Source: West Health + Gallup 2022

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How about clinicians

- 74% of physicians are employed by hospitals, health systems or corporate entities
- 25% of clinicians are considering switching careers
- Burnout is the most frequent reason for switching, at 89%
- Net Promoter Score (NPS) – likelihood of recommending their employer – has dropped precipitously among all clinicians

Source: Bain&Company; Project Healthcare

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Definitions

Health equity: Health differences “which are unnecessary and avoidable but, in addition, are also considered unfair and unjust. When there is equity in health, “ideally everyone should have a fair opportunity to attain their full health potential and, more pragmatically, no one should be disadvantaged from achieving this potential, if it can be avoided.” (WHO)

Health disparity and health inequity: Health disparity is defined as the difference in health outcomes between groups within a population.

Health disparity denotes differences, whether unjust or not.

Health inequity denotes differences in health outcomes that are systematic, avoidable, and unjust.

Healthcare disparity: “racial or ethnic differences in the quality of health care that are not due to access-related factors or clinical needs, preferences, and appropriateness of intervention.” (IOM)

Wyatt R, Laderman M, Botwinick L, Mate K, Whittington J. Achieving Health Equity: A Guide for Health Care Organizations. IHI White Paper. Cambridge, Massachusetts: Institute for Healthcare Improvement; 2016. (Available at ihi.org)

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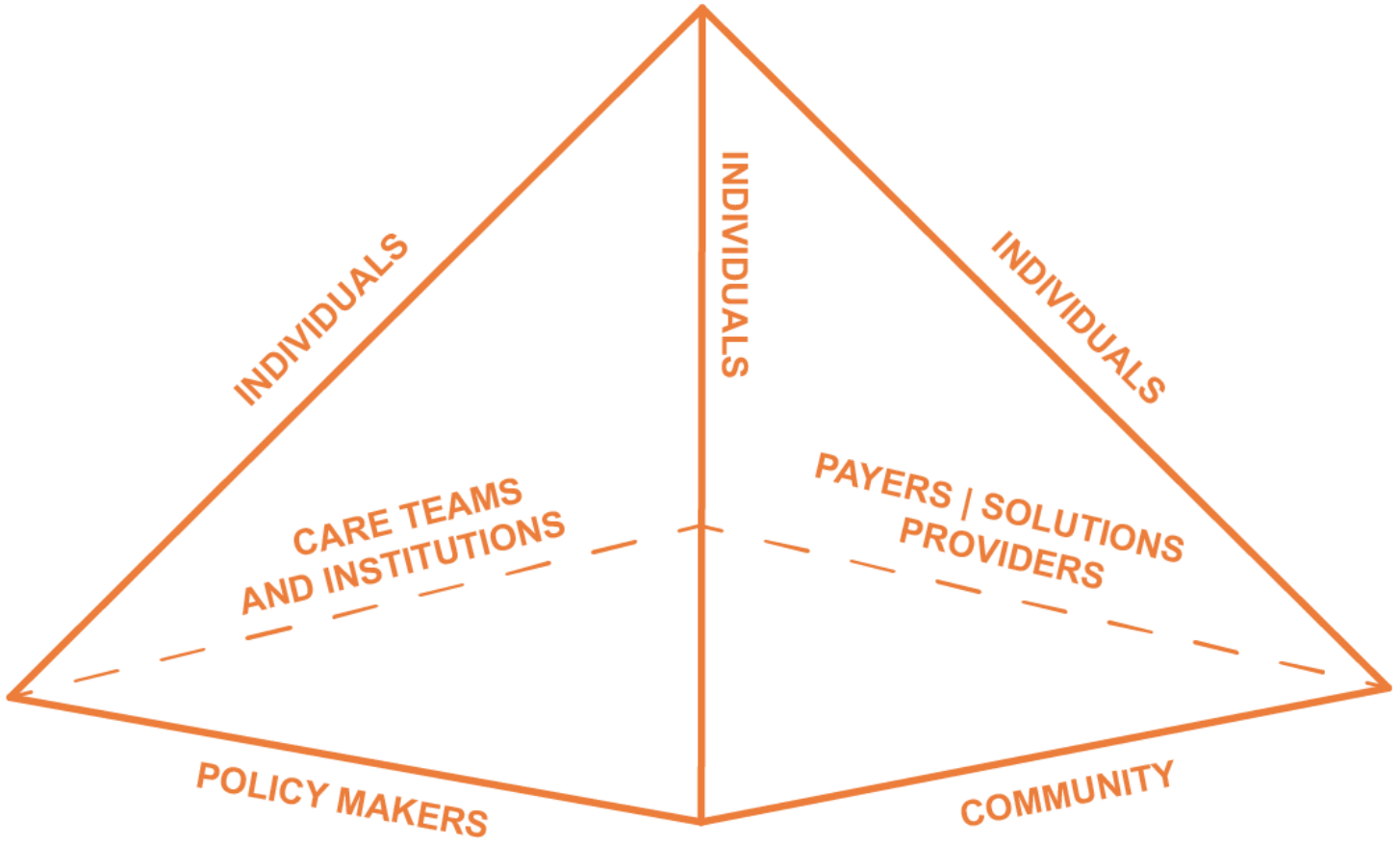
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A Framework for Eliminating Health Disparities Using Telehealth



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Key Stakeholders



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Three-Quarters of Doctors Lament Medical Misinformation Problem

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Physician respondents said they and their peers are responsible for combatting medical misinformation, but roadblocks like patient trust might get in the way.



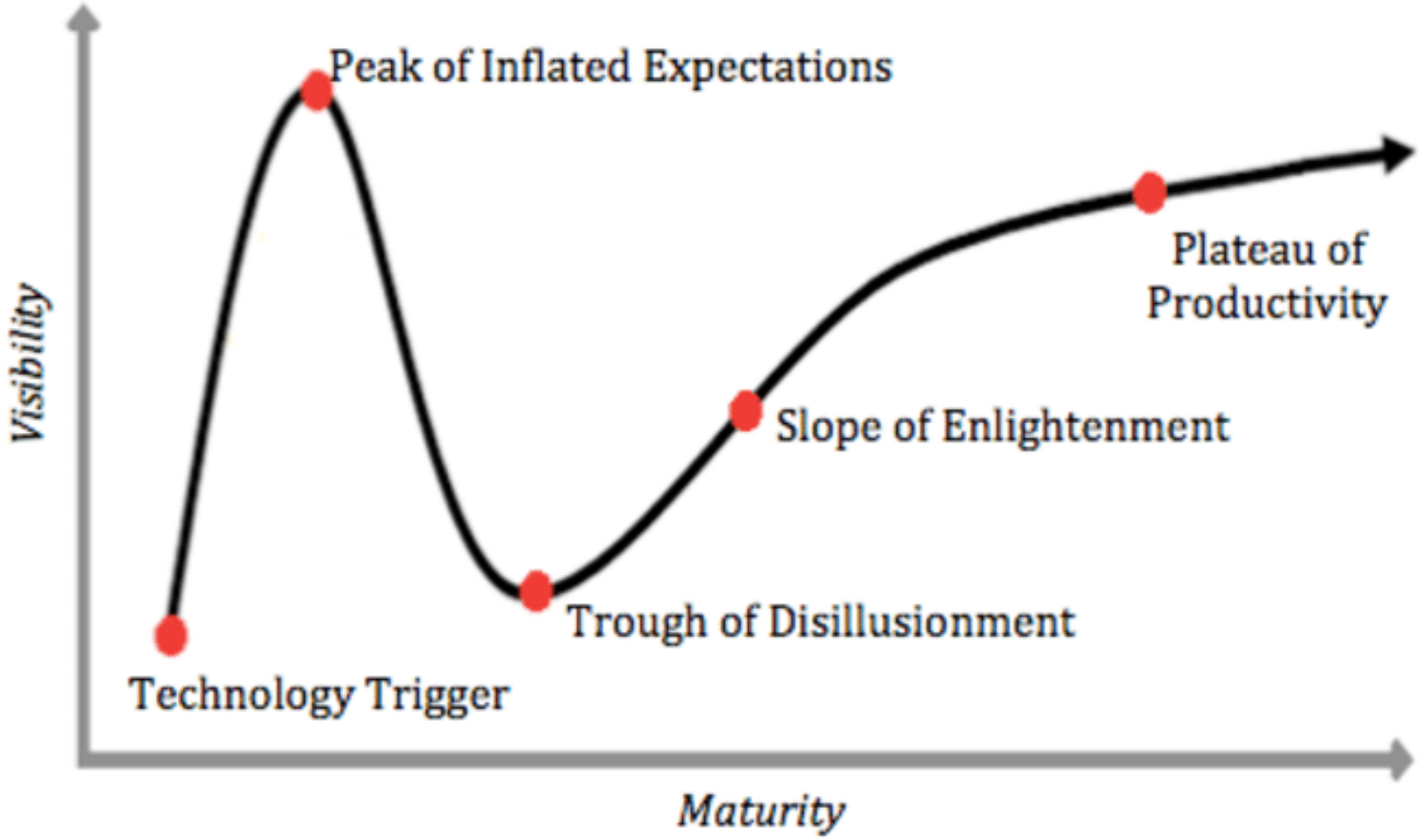
By Sara Heath

April 05, 2023 - The medical misinformation problem isn't going away, with around three-quarters of physicians saying inaccurate medical information has made it harder to treat patients and has impacted patient outcomes, according to a Morning Consult **poll** conducted on behalf of the de Beaumont Foundation.

Patient Engagement Hit (2023, April 5th)

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Gartner Hype Cycle



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Your call to action

Acknowledge, promote and invest in the economic value of good health for all

Embrace and invest in omnichannel health

Help patients understand their virtual options and when to use them

Improve the user experience – for patients, families, clinicians

Anticipate and address emerging privacy issues

Join our movement, join us in our work!

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Thank you!

Ann Mond Johnson

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