OCTOBER 2020

Telehealth initiatives overall have shown potential to complement mainstream healthcare delivery at a lower cost and positive contribution to quality and outcomes (right care, right time).

As discussed in our prior article, *Telehealth Integration into Care Delivery Post COVID-19 (September 2020)* ➚, we reviewed how the pandemic has positioned telehealth as a promising avenue for alternative care delivery within a wider array of health care service offerings.

Telehealth presents opportunity to move from a highly scheduled (episodic) mode of care delivery to a more relational experience – including directly into the patient's home - providing a continuous, data-rich platform that connects patient and providers anytime, anywhere.

Telehealth Opportunity Assessment: A Framework

The goal of this article is to explore avenues to expand beyond simply offering patients the option to connect with their physician over the phone or via video as an alternative to an in-person visit. We lay out an approach (framework) for capturing additional value, leveraging telehealth as part of an integrated solution.

Organizations who have experienced recent increases in the use of telehealth during the COVID 19 pandemic, can apply those learnings and experience toward the design and development of more purposeful integration. Conducting a current state assessment, in any case, is a good place to start.

Mapping a Way Forward

Many of the current trends and forecasts for the future of health care delivery are predicated on assumptions about a greatly expanded role for the "health care consumer" in directing and managing their own health, as well as the promise of continued advancements in "big data" and application of digital and other technologies.

Telehealth sits at these crossroads, and organizations that can begin to map out a strategic roadmap, supporting a more deliberate integration of telehealth, will be in a better position to be at the forefront as developments unfold.

Identifying the best care delivery and business opportunities requires a thorough and thoughtful review of possible impacts and outcomes – providing the foundation for making the "business case" – a basis to prioritize new product and service innovations.

We believe that return on investment (whether reduction in direct or indirect cost or increased revenues) is maximized when telehealth-based solutions are:

- Embedded with a **population health management** approach, designed to engage both patients and providers, and
- Implemented within an **integrated model of care delivery**

Unlocking this potential is best accomplished via a data-driven approach to prioritizing where those opportunities lay and discovering how to best design and develop solutions to capitalize on them.

Population Health Management
- Specialized Populations
- Product and Service Design

Clinical Integration
- Value-based Care
- Clinical Pathways

Enhance Value with Telehealth Integration
- Improved Experience
- Broader Access
- Greater Adoption
- Minimize Gaps in Care
- New Markets

"Right care, right time!"
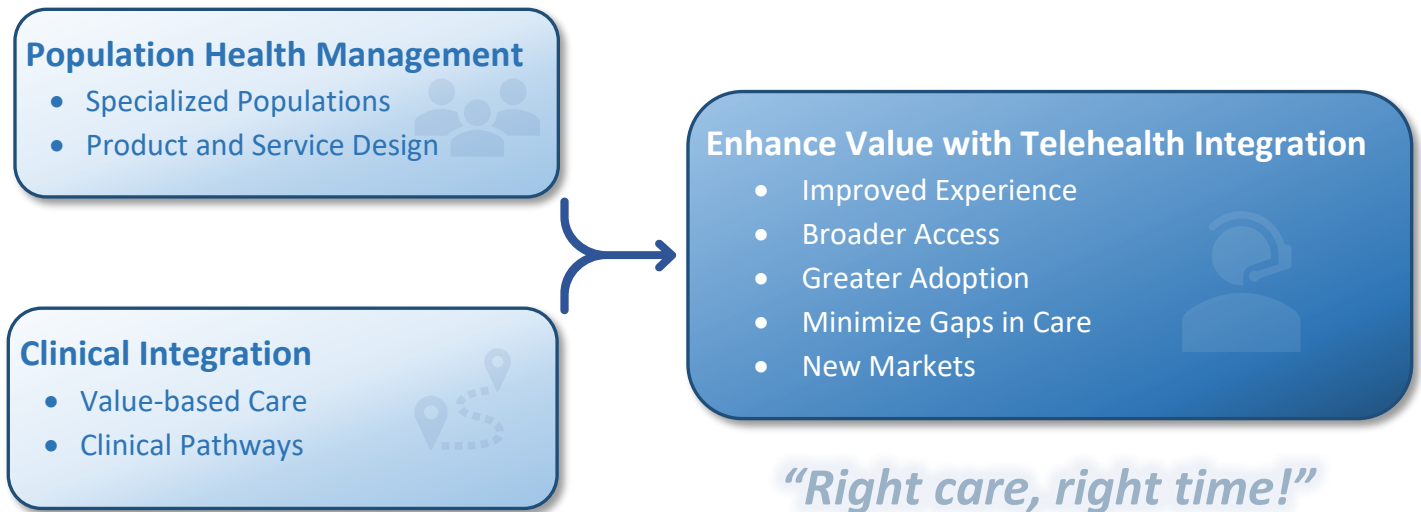
The Case for Population Health Management

If we consider that 90% of total health care spend across the care continuum is in one way or another related to chronic care management (**this according to the National Center for Chronic Disease Prevention & Health Promotion, "Health and Economic Cost of Chronic Disease" 3/23/2020),** and is comprised of frequent visits, regular updated diagnostics, medication and other ongoing treatment/management - it would seem like the development of health management programs

TELE-MENTAL HEALTH USE CASE

Mental and behavioral health care provides an ideal "use case" leveraging telehealth, geared to a defined population.

Benefits:
- Improves experience (comfort of home, able to check in weekly, as needed)
- Diminishes stigma related to being physically present in therapist office)
- Increases access due to provider shortages and geographic disparities
- Decrease high "no shows"
- Enhances ability to efficiently monitor medication and therapies adherence
- Enables routine assessment and re-evaluation
- Promotes interdisciplinary clinical coordination (primary care, behavioral, social services)

incorporating targeted application of telehealth-based services for subsets of chronically ill patients (where it makes sense) could represent fertile ground.
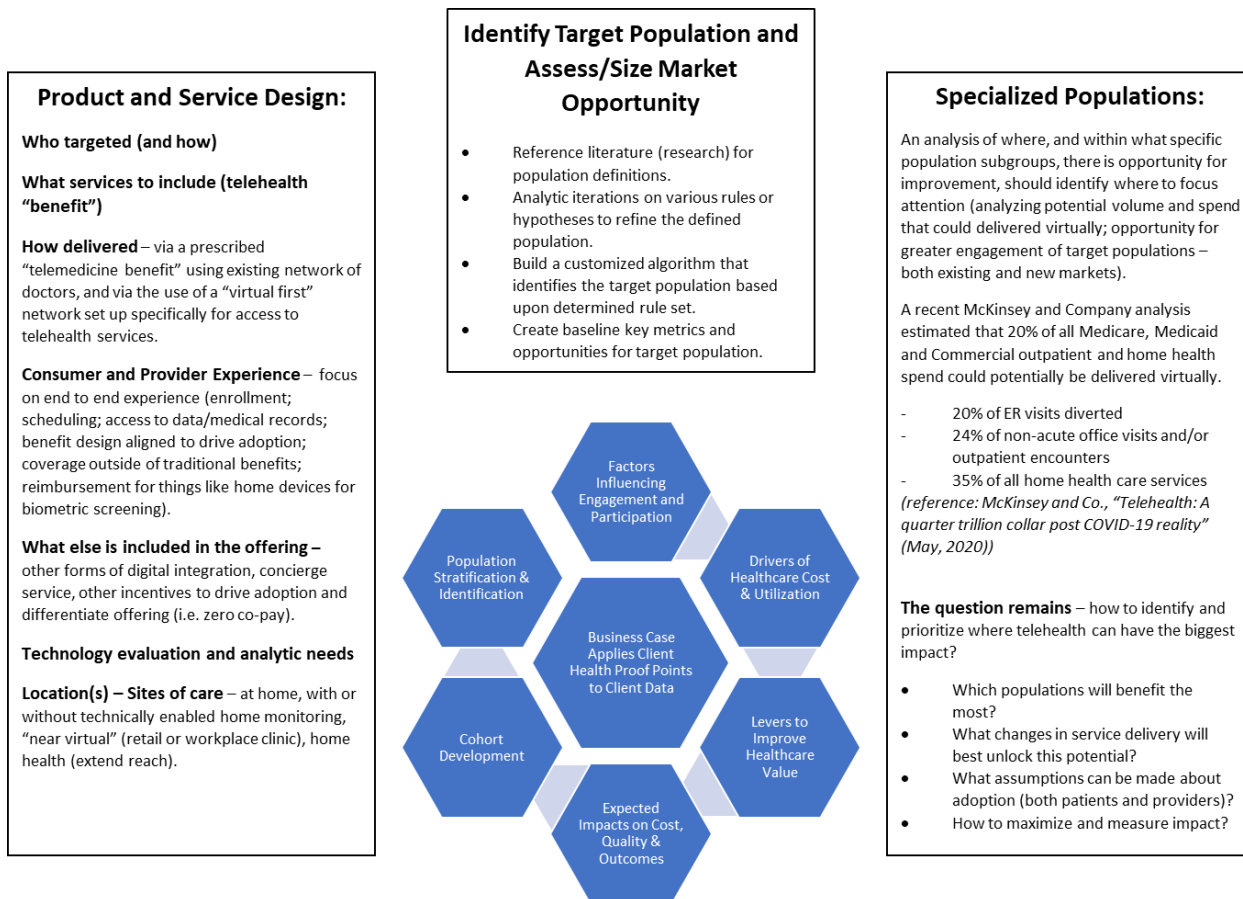
Early telehealth adoption in support of chronic disease management was largely predicted on the patient desire for consumer centric and convenient care. But experience is showing it has even more intrinsic value within a population health prevention and management platform, supporting a shift from "one-off" individual care episodes "over the phone or via video" to ongoing care support as standard practice.

This represents an opportunity to expand the definition of target telehealth patients (or members) from those at the highest risk (i.e. post hospitalization follow up) to a broader "at risk" population base – ongoing monitoring for both at risk and pre-risk individuals.

In the past several years until today, NCQA has made changes to HEDIS reporting that allow telehealth to be used as a quality measurement for providers. This is illustrative of how integral telehealth can be relative to management and measurement of care and outcomes for chronic disease.

How to Identify the Right Target Populations

We work closely with our clients in designing specialized analytics, that identify target populations, provide a baseline for assessing both the size and level of opportunity. We can then create algorithms that will enable "flagging" of populations proactively, for outreach and engagement services and programs.

Product and Service Design:

Who targeted (and how)

What services to include (telehealth "benefit")

How delivered – via a prescribed "telemedicine benefit" using existing network of doctors, and via the use of a "virtual first" network set up specifically for access to telehealth services.

Consumer and Provider Experience – focus on end to end experience (enrollment; scheduling; access to data/medical records; benefit design aligned to drive adoption; coverage outside of traditional benefits; reimbursement for things like home devices for biometric screening).

What else is included in the offering – other forms of digital integration, concierge service, other incentives to drive adoption and differentiate offering (i.e. zero co-pay).

Technology evaluation and analytic needs

Location(s) – Sites of care – at home, with or without technically enabled home monitoring, "near virtual" (retail or workplace clinic), home health (extend reach).

Identify Target Population and Assess/Size Market Opportunity

- Reference literature (research) for population definitions.
- Analytic iterations on various rules or hypotheses to refine the defined population.
- Build a customized algorithm that identifies the target population based upon determined rule set.
- Create baseline key metrics and opportunities for target population.

Specialized Populations:

An analysis of where, and within what specific population subgroups, there is opportunity for improvement, should identify where to focus attention (analyzing potential volume and spend that could delivered virtually; opportunity for greater engagement of target populations – both existing and new markets).

A recent McKinsey and Company analysis estimated that 20% of all Medicare, Medicaid and Commercial outpatient and home health spend could potentially be delivered virtually.

- 20% of ER visits diverted
- 24% of non-acute office visits and/or outpatient encounters
- 35% of all home health care services
(reference: McKinsey and Co., "Telehealth: A quarter trillion collar post COVID-19 reality" (May, 2020))

The question remains – how to identify and prioritize where telehealth can have the biggest impact?

- Which populations will benefit the most?
- What changes in service delivery will best unlock this potential?
- What assumptions can be made about adoption (both patients and providers)?
- How to maximize and measure impact?

Factors Influencing Engagement and Participation

Drivers of Healthcare Cost & Utilization

Population Stratification & Identification

Business Case Applies Client Health Proof Points to Client Data

Levers to Improve Healthcare Value

Cohort Development

Expected Impacts on Cost, Quality & Outcomes

The Case for Telehealth Clinical Integration: Value Based Care

The shift to value-based care is a place where telehealth can play a pivotal role, with a focus on delivering more efficient and effective care at a greater value for patients, providers, and payers. With the continued roll out of value-based care incentive programs that focus on patient outcomes, telehealth can be leveraged proactively – helping to close patient gaps in care, reduce preventable readmissions, track efforts to achieve higher levels of engagement and adherence to a prescribed plan of care.
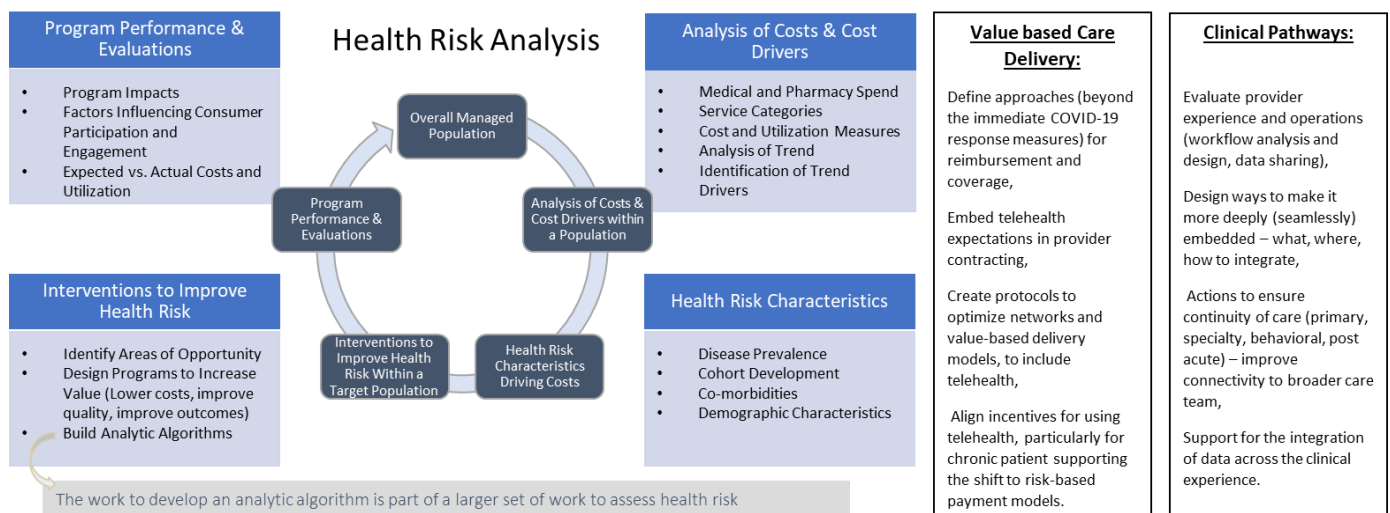
VALUE BASED CARE: TELEHEALTH USE CASE

Telehealth clinical integration supporting value-based care delivery and positioning for risk taking

Benefits:
- Early detection (identify clinical changes via remote monitoring)
- Reduce gaps in care (proactive identification and outreach/scheduling)
- Cost avoidance (substitute telehealth visit during weekends, after hours for more costly urgent care)
- Improved outcomes
- Favorable positioning for risk assumption (improve key metrics tied to financial incentives – readmits, lower episode cost, efficient transitions of care)
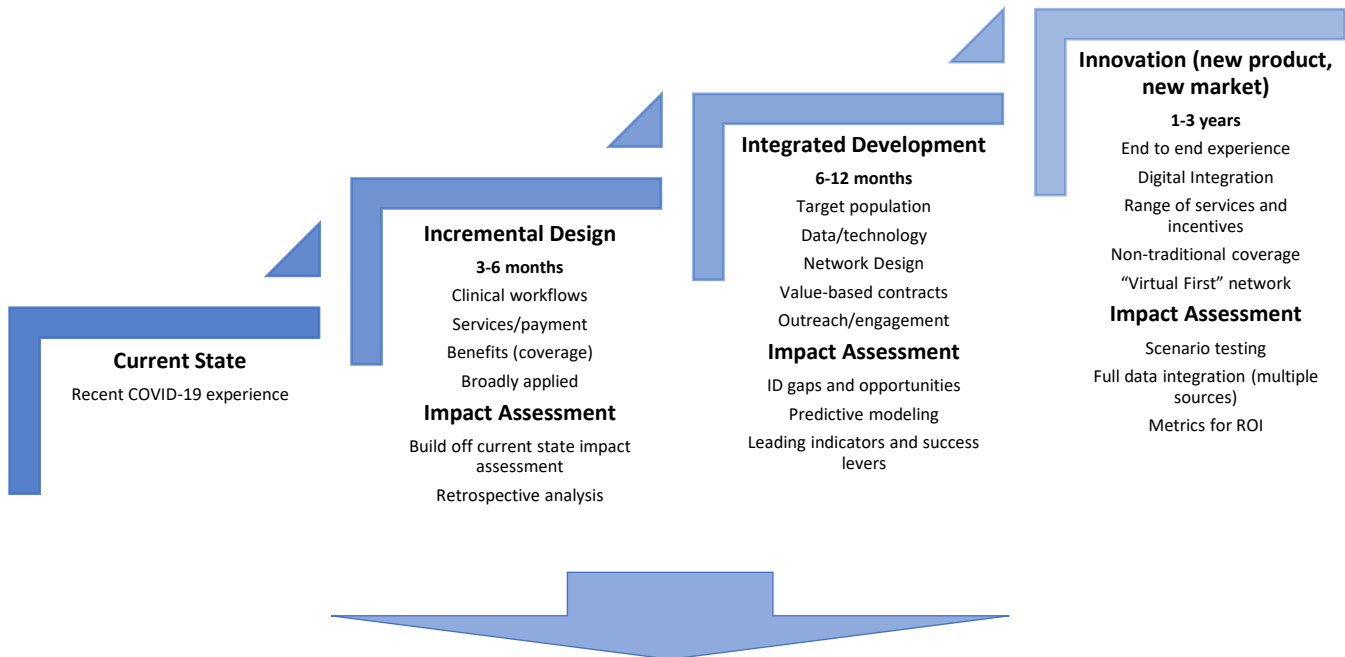
How to Evaluate Population Health Risks and Prioritize Interventions

We work with our clients to help dig deeper into where there are opportunities, from a clinical perspective, to pinpoint areas of health risk that are amenable to the development of programs and interventions to both improve and mitigate risk. This provides a useful foundation for clinical and consumer engagement program and protocol design, supported by the ability to link these improvements to expected outcomes, via analysis of cost and cost drivers.

Health Risk Analysis

Program Performance & Evaluations
- Program Impacts
- Factors Influencing Consumer Participation and Engagement
- Expected vs. Actual Costs and Utilization

Analysis of Costs & Cost Drivers
- Medical and Pharmacy Spend
- Service Categories
- Cost and Utilization Measures
- Analysis of Trend
- Identification of Trend Drivers

Interventions to Improve Health Risk
- Identify Areas of Opportunity
- Design Programs to Increase Value (Lower costs, improve quality, improve outcomes)
- Build Analytic Algorithms

Health Risk Characteristics
- Disease Prevalence
- Cohort Development
- Co-morbidities
- Demographic Characteristics

Cycle diagram: Overall Managed Population → Analysis of Costs & Cost Drivers within a Population → Health Risk Characteristics Driving Costs → Interventions to Improve Health Risk Within a Target Population → Program Performance & Evaluations

The work to develop an analytic algorithm is part of a larger set of work to assess health risk

Value based Care Delivery:

Define approaches (beyond the immediate COVID-19 response measures) for reimbursement and coverage,

Embed telehealth expectations in provider contracting,

Create protocols to optimize networks and value-based delivery models, to include telehealth,

Align incentives for using telehealth, particularly for chronic patient supporting the shift to risk-based payment models.

Clinical Pathways:

Evaluate provider experience and operations (workflow analysis and design, data sharing),

Design ways to make it more deeply (seamlessly) embedded – what, where, how to integrate,

Actions to ensure continuity of care (primary, specialty, behavioral, post acute) – improve connectivity to broader care team,

Support for the integration of data across the clinical experience.

Telehealth Strategic Roadmap

Once a clear direction is determined of where to target opportunities for development and innovation, establishing a strategic roadmap for telehealth can serve as a guidepost for how to build and prioritize development.

Current State

Recent COVID-19 experience

Incremental Design

3-6 months

Clinical workflows

Services/payment

Benefits (coverage)

Broadly applied

Impact Assessment

Build off current state impact assessment

Retrospective analysis

Integrated Development

6-12 months

Target population

Data/technology

Network Design

Value-based contracts

Outreach/engagement

Impact Assessment

ID gaps and opportunities

Predictive modeling

Leading indicators and success levers

Innovation (new product, new market)

1-3 years

End to end experience

Digital Integration

Range of services and incentives

Non-traditional coverage

"Virtual First" network

Impact Assessment

Scenario testing

Full data integration (multiple sources)

Metrics for ROI

Development of a sound analytic plan provides foundation for development of a telehealth roadmap

Starting with a good foundation of insights drawn from a **present experience impact assessment,** as well as an external environmental review (what the latest trends, developments, competitor actions; legislative and regulatory changes) – promising areas for making a few quick incremental changes to current practices and services should become apparent. In most cases, these changes can be made quickly (with minimal investment) and then **ongoing impact analysis** can determine if they provide additional value.

 This is a good way to start on a journey for further integration of telehealth, aimed at targeted populations, closure of gaps in care and other specified benefits.

At the point where investments are needed to achieve further integration, data analysis should shift from **retrospective to prospective**, with identification of leading indicators and success metrics – to both drive and prioritize development and enable the ability the measure impact sooner (than a typical retrospective analysis can provide).

The Opportunity

How do we deliver and manage?

Pull together the puzzle pieces with our experts in analytic, product and data management.

How do we evolve to product execution?

Refine product definition, outline solution build, wrapped by strategic and business planning.

How do we prove value to achieve shared savings?

Deliver the value story and support with data and analytic proof points.

In our practice, we take a flexible approach to working with clients, providing the analytics, measurement and supporting expertise that can be plugged in at various entry points in the development roadmap.

We have a set of proprietary reporting packages and tools that can be easily adapted to serve as the foundation for a more robust analysis plan to support an organization's explorations into topics such as unlocking the potential with Telehealth integration.

Insight Packages™

DataWELL Insights will help you achieve clinical, operational and financial success through ongoing analytics. As a DataWELL client, you will receive ad hoc and on-demand analytics insights. You will also receive a quarterly DataWELL Insights report that includes Measures of Health Risk, Trend Analytics and Customized Executive summary that highlights your organization's performance, risk areas, and opportunities. Our complete Insights Packages are described on our web site.

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