Telehealth, virtual, digital and non-traditional care

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Shifting consumer preferences is expected to drive increased telehealth utilization

**CONSUMER DEMAND**

- Demand for digital healthcare tools is expected to increase, with highest growth in video telemedicine—35% CAGR over next 5 years

- 88% of consumers using telehealth for the first time during COVID-19 would do so again, with 20% of consumers preferring virtual over in-person care

- Nearly 70% of those with chronic conditions think that a virtual solution would help with treatment adherence, including nearly 60% over the age of 45

**POTENTIAL CARE DELIVERED VIRTUALLY**

- Telehealth expected to streamline, augment, or replace healthcare tasks across the full continuum of care (e.g., in-patient, retail/outpatient, and home care settings)

Source: BCG Post Pandemic Planning Engagement, 6/8/20-7/22/20
BCBSA National Council of Physician and Pharmacist Executives Meeting, December 3, 2020
Virtual care - more than just a video conference

Telehealth
Human-to-human care between a member and provider via phone, video, or text

- Care on Demand
- Primary Care
- Tele-Behavioral Health
- Expert Medical Opinion
- Care on Demand
- Tele-Urgent
- Ancillary (PT, Pharmacy, etc.)
- E-Specialty Consultation

Digital
Use of digital tools to share information or interact with members

- Convenient Care 24/7/365
- Asynchronous Care 24/7/365
- Devices and trackers
- Text, Chat
- Behavioral Change (nudges)

In-Home
Human-to-human care or coordination from the member’s home

- Hospitalization at Home
- Home based urgent care
- In-home assessment
- Home Infusions
- Remote monitored PT
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Strategic framework

Increase Access to Care

- Provide access to convenient, on demand (24/7) care including out-of-state licensure limitations
- Expand access for underserved areas (rural, urban) and vulnerable members (home bound, high cost)
- Identify targeted virtual care solutions across the care spectrum
- Align benefit options to optimize care, quality, and cost for members and employers

Improve Population Health

- Efficiently integrate provider, carrier, and vendor data within the health ecosystem
- Push notifications to for care opportunities to close care gaps
- Implement early interventions for targeted populations in a less intensive healthcare setting
- Give providers access to data to enable care coordination, continuity, and quality outcomes

Avoid low value care

- Telehealth can be too convenient
- Fee for service model unlikely to reduce costs
- Payments should match costs to provide service
- Continuation of fee for service model will hinder value-based payment model adoption
- Incorporate virtual care into Value Based Agreements to drive improved health outcomes

Flexibility and Confidentiality

- Need to allow plans to have payment flexibility to better match community needs
- Need to reimaging telehealth within a value-based payment model
- Align with HIPPA standards and guardrails against fraud and abuse
- Need to expand consumer access especially for vulnerable populations including funding broadband and telehealth tools.