Reports

August 2021

The Intersection of Value and Telehealth

Survey Findings on Adoption and Utilization at Health Systems

Center for Connected Medicine

KLAS RESEARCH

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Introduction

There should be little debate over telehealth's surging prominence and priority in the world of digital health technologies over the past year and a half. Many hospitals and health systems were already advancing telehealth solutions prior to the COVID-19 pandemic. When the Center for Connected Medicine (CCM) and KLAS asked health system leaders in early 2020 which digital health technology had shown the most progress in recent years, telehealth was the top answer. Then the pandemic hit, and health care providers of all sizes quickly converted to handling nearly all of their non-coronavirus cares virtually.

The wide-scale implementation and mass migration of patients to telehealth was a watershed moment in the technology's development. But it remains unclear what the future holds. Certainly, telehealth isn't likely to go back to pre-pandemic utilization—health systems have too much invested to let these solutions gather dust. And many patients have experienced the ease and convenience of e-visits and other digital health solutions. Yet, as the findings in this report demonstrate, usage has fallen with the reopening of doctor offices and hospitals.

Where does this leave health systems and their leadership? We believe that health care institutions should focus on the value telehealth can deliver both to patients and the health care system overall. As it happens, the intersection of innovation and value-based care is a primary focus for CCM resources and events during 2021.

This report on telehealth revisits some of the key "value" questions posed in the CCM's most recent "Top of Mind for Top Health Systems" research report, which was published in October 2020. For example, we once again asked survey respondents what metrics they were using to analyze the effectiveness of their telehealth program. While we observe an increase in the number of health systems that are using at least one metric, the number that are attempting to link telehealth use to patient outcomes remains relatively low.

It is our hope that the presentation of these data points will spur conversation among leaders and innovators in health care about the state of telehealth technology and what innovations are needed to advance its impact on value-based care.

Key Findings

1

Fewer telehealth appointments:
A majority of organizations reported that telehealth accounts for less than 20% of their total appointments.

2

Chronic care a focus for the future:
Primary care and behavioral/mental health are the service areas most likely to be using virtual care. Chronic care management is the service area most likely to be expanded in the future.

3

More organizations measuring telehealth:
The number of health systems measuring telehealth usage and patient satisfaction has increased, compared with an earlier survey.

4

Technology/broadband access an obstacle:
The top two barriers to advancing telehealth are patient access to technology/ broadband and uncertainty around future reimbursement levels.

5

Integration less of a challenge:
More than half of respondents reported that their telehealth solution has good integration with their electronic health record system, but about a quarter of those surveyed said there are still gaps.

6

Digital front door the leading access point:
Patient portals and digital front door solutions are the most commonly cited means by which patients access telehealth services.

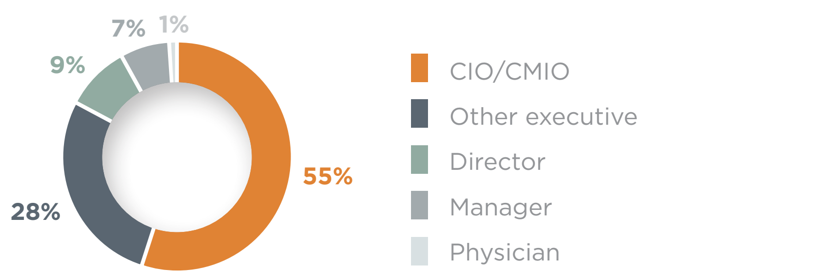
Research Overview and Respondent Profile

The Center for Connected Medicine (CCM) partnered with KLAS Research to survey professionals at U.S. hospitals and health systems. The goal of the research, conducted in May and June 2021, was to better understand how health providers are approaching telehealth technology. For the purposes of this survey, telehealth was defined as health care services delivered via digital and telecommunication technologies, including virtual visits by video and telephone, remote patient monitoring, and electronic correspondence with care teams.

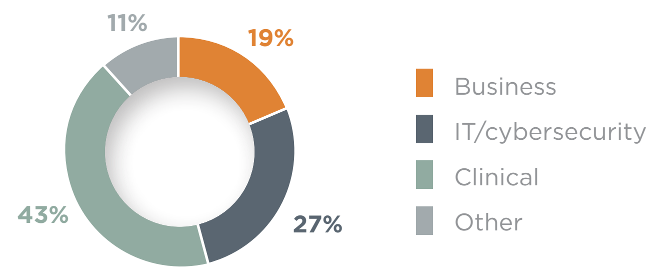
A total of 96 qualified respondents were surveyed, representing a mix of information technology, informatics, business, and clinical roles. Respondents were asked questions about their organization's prioritization and adoption of telehealth.

KLAS Research conducted the online survey, which identified the CCM as a sponsor of the research. Qualified respondents were sent an email from KLAS Research inviting them to participate.

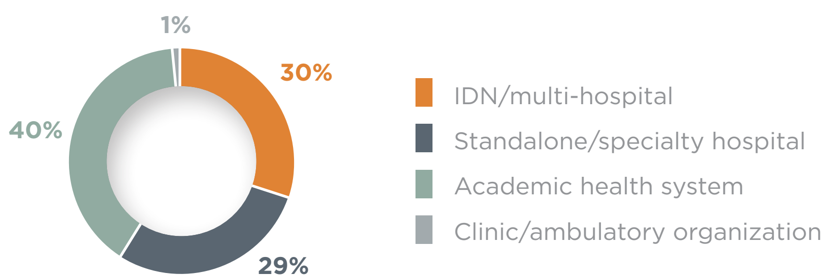
Respondent Job Level (n=96)



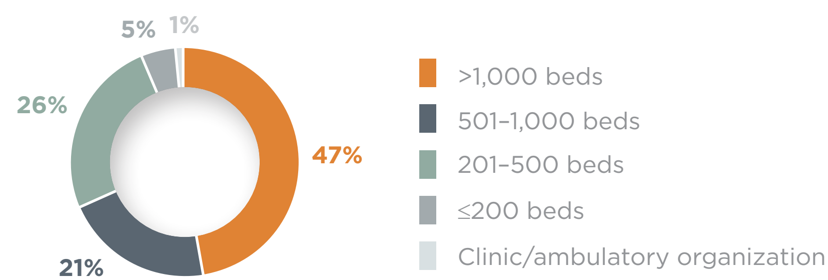
Respondent Job Role (n=96)



Respondent Worksite (n=96)



Respondent Organization Size (n=96)

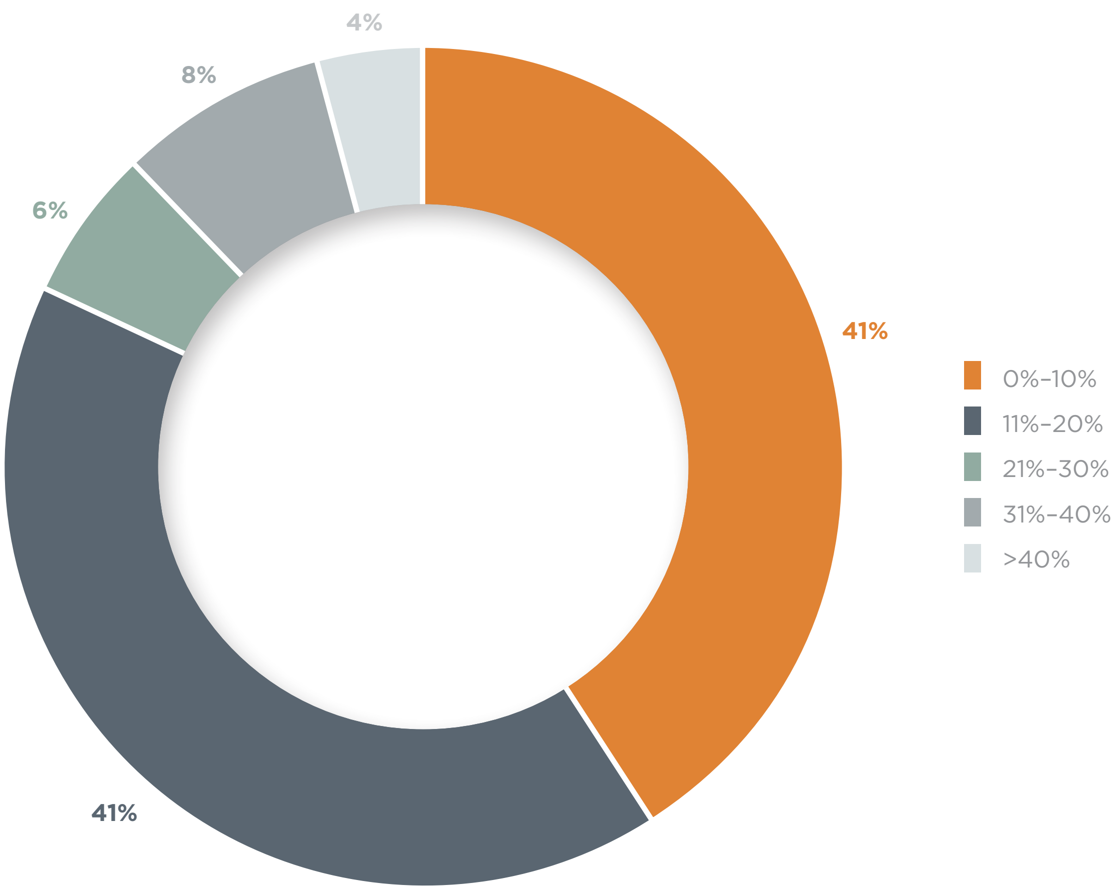


Detailed Findings

A Majority of Organizations Conduct Less Than 20% of Visits Virtually

Despite a surge of telehealth services during the COVID-19 pandemic, more than 80% of organizations report doing less than 20% of their appointments via virtual care. The small handful of respondents currently conducting more than 30% of their appointments virtually often note that their volumes are still inflated by the pandemic and expect their long-term volumes to be lower.

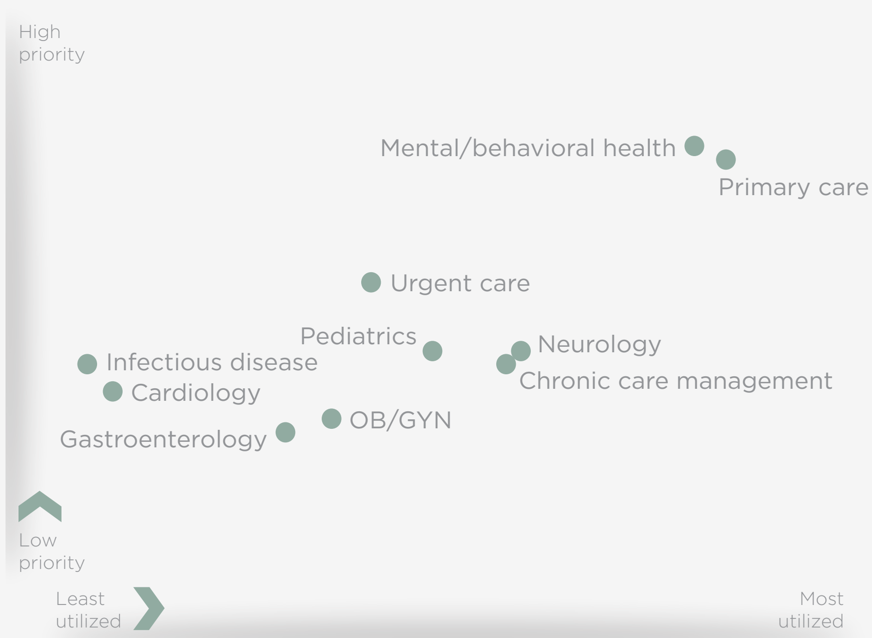
Percent of Appointments Done Virtually (n=93)



Current and Future Telehealth Usage by Service Line

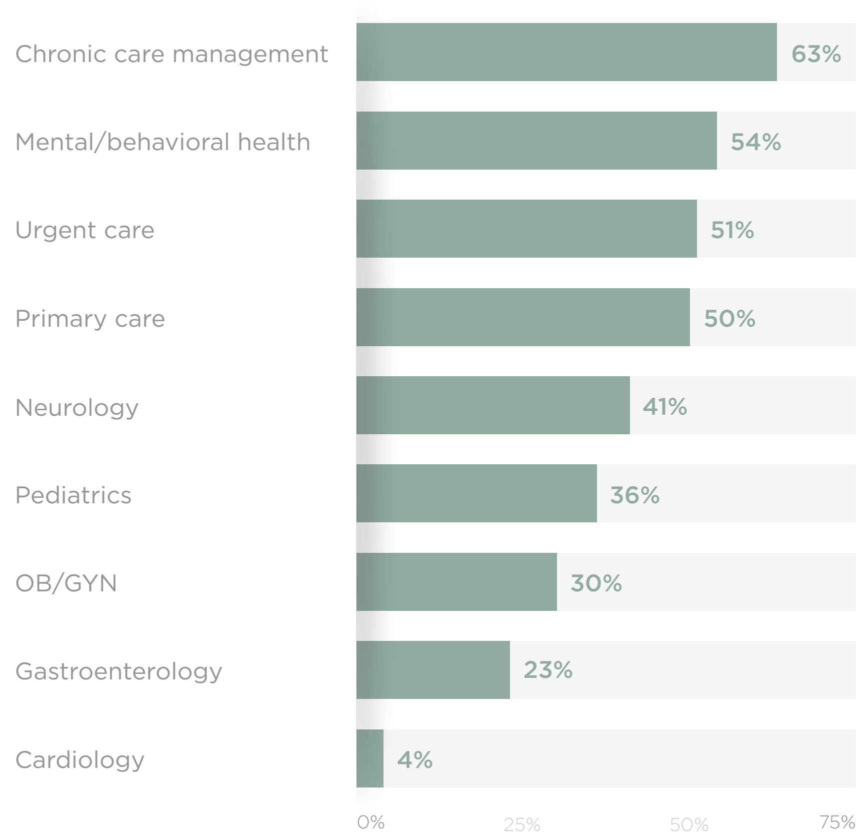
Provider organizations are looking to expand telehealth services to better manage the health of patient populations while keeping costs down. Telehealth services are already used frequently for primary care and behavioral health, and initial success is prompting provider organizations to grow these services as well as expand into other clinical service lines. Two areas likely to see telehealth expansion are chronic care management and urgent care. Offering telehealth services for chronic care patients can provide them with more consistent care, while virtual urgent care visits may likely help patients avoid expensive in-person appointments.

Utilization vs. Priority—by Service Line (n=96)



Areas of Future Expansion for Telehealth (n=96)

Respondents could select more than one option.

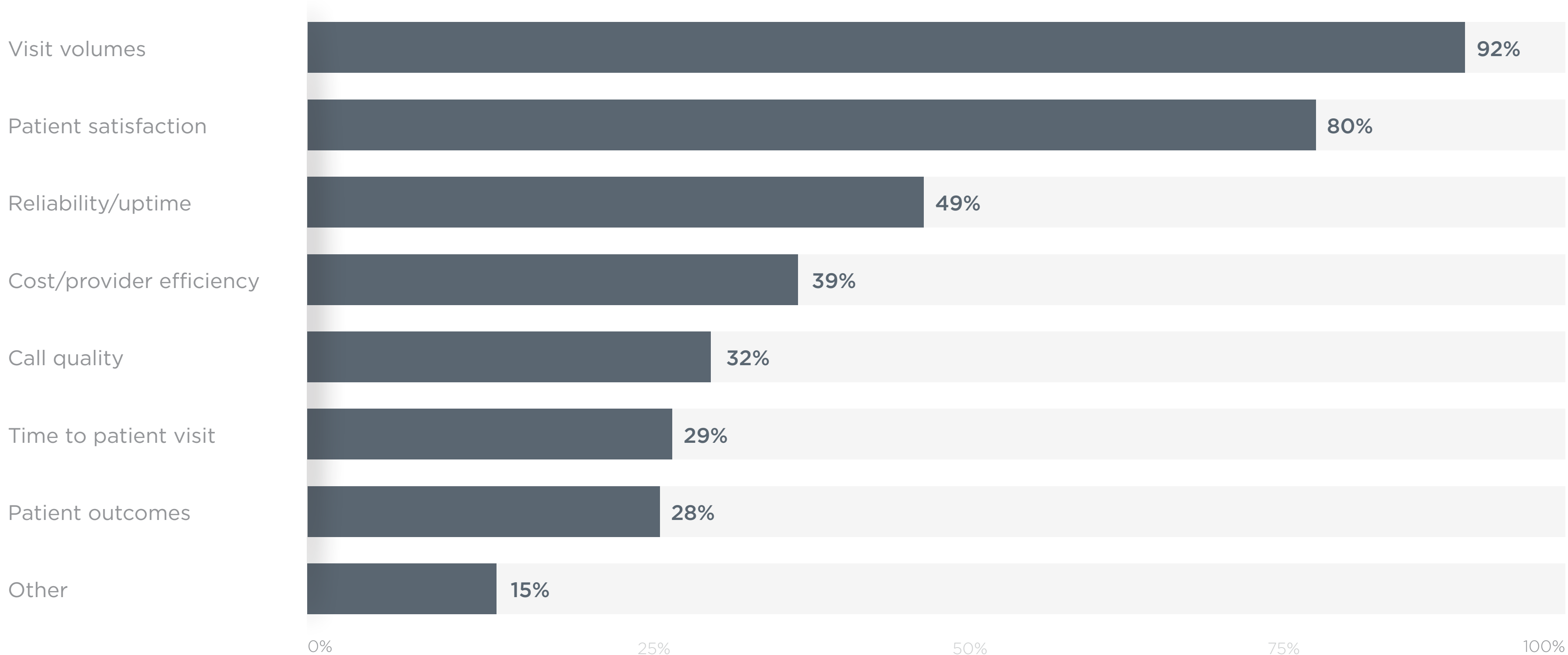


Measuring Telehealth's Impact

In the "Top of Mind for Top Health Systems" research report published by CCM in October 2020, 77% of respondents were using at least one metric to measure their telehealth program; that percentage has now jumped to 92%. Measurement of visit volumes and patient satisfaction ratings has increased significantly since the 2020 report, and these metrics are now the ones most commonly used to measure success. Use of other metrics, such as provider efficiency and patient outcomes, has also increased.

Metrics Most Often Used to Measure Telehealth (n=96)

Respondents could select more than one option.



Note: Other metrics include connection rate, diagnosis clinical specialty, equity, length of visit, provider satisfaction, reimbursement, technical issues, type of visit, and utilization of medical translators.

Common Barriers to Telehealth Adoption and How Organizations Are Overcoming Them

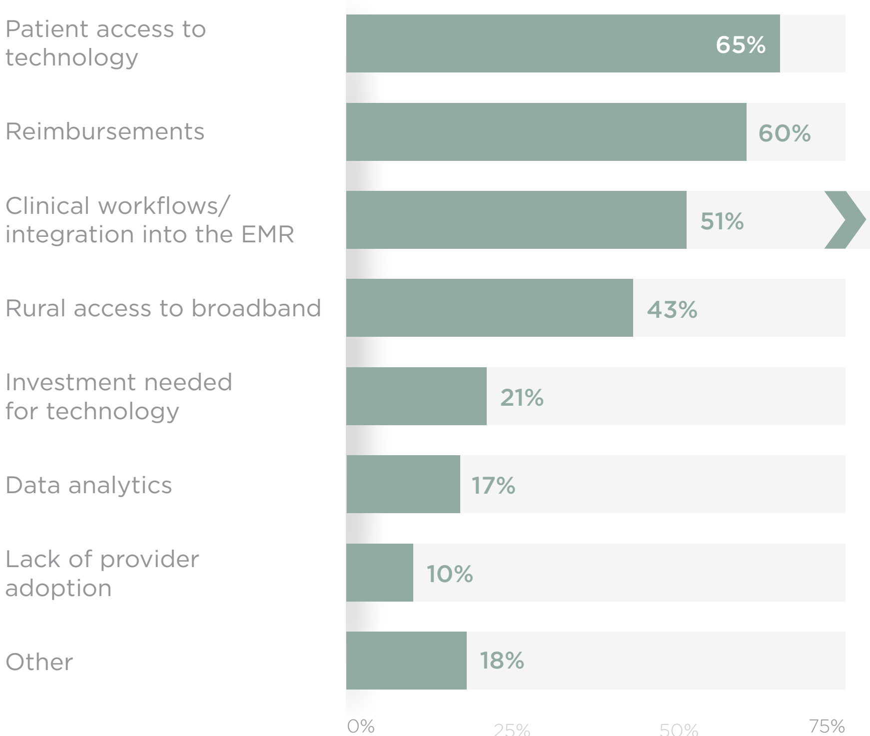
Organizations report that the top barriers to advancing telehealth usage are lack of patient access to technology and broadband issues that prevent patients, especially those in rural areas, from accessing virtual care options. To address this challenge, respondents are using grant funding and advocating with the government for improved technology/broadband access.

The second largest barrier is uncertainty around reimbursements for virtual care appointments. One manager of virtual health shared, *"COVID-19 legislation has been an enabler for reimbursement. I hope we don't go back to 2019 rules when those waivers expire."* Organizations mention that they are working with industry associations and advocating the government for continued reimbursements.

Another commonly cited barrier is the need for better telehealth technology and electronic health record (EHR) integration. The rapid expansion of telehealth solutions during the pandemic left many organizations with poorly developed technology and limited EHR integration. Many respondents are exploring options for investment in these areas.

What Are the Biggest Obstacles to Advancing Telehealth at Your Organization? (n=96)

Respondents were asked to identify their top three obstacles.

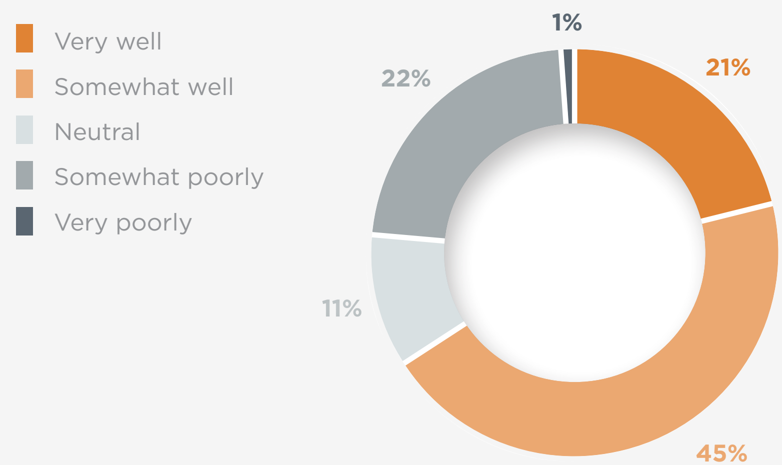


Note: Other obstacles include clinical model evolution, competing priorities, government regulation, lack of internal strategy, remote monitoring, and staffing shortages.

Telehealth Integration

Though the majority of organizations feel their telehealth solution integrates "very well" or "somewhat well" with the rest of their health system, about one-fourth of respondents report poor integration. Many organizations are looking to address this problem.

How Well Do You Feel Your Telehealth Technology Is Integrated into the Overall Health System? (n=94)

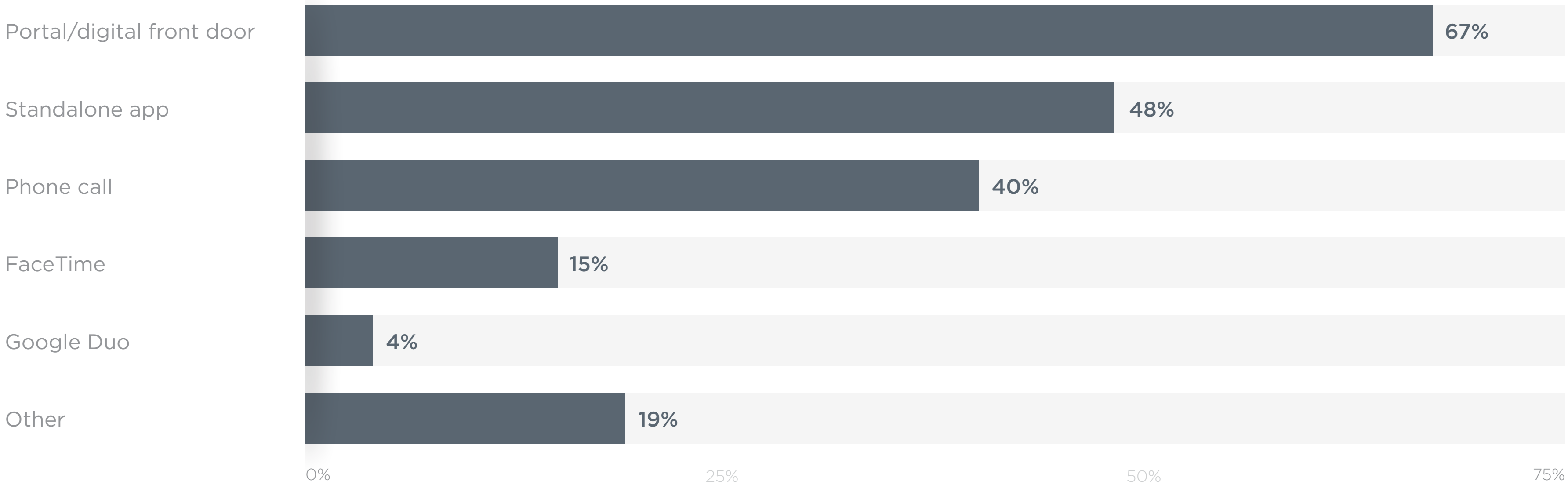


Telehealth Accessibility

The most common response to how patients access virtual care is through a patient portal or digital front door solution. The next most common responses are through standalone applications and phone calls with their provider. The least-cited methods of access are FaceTime and Google Duo; one CIO shared, *"Neither Google nor Apple will sign a business associate agreement, so they are not viable choices."*

How Are Patients Accessing Virtual Care? (n=96)

Respondents could select more than one option.

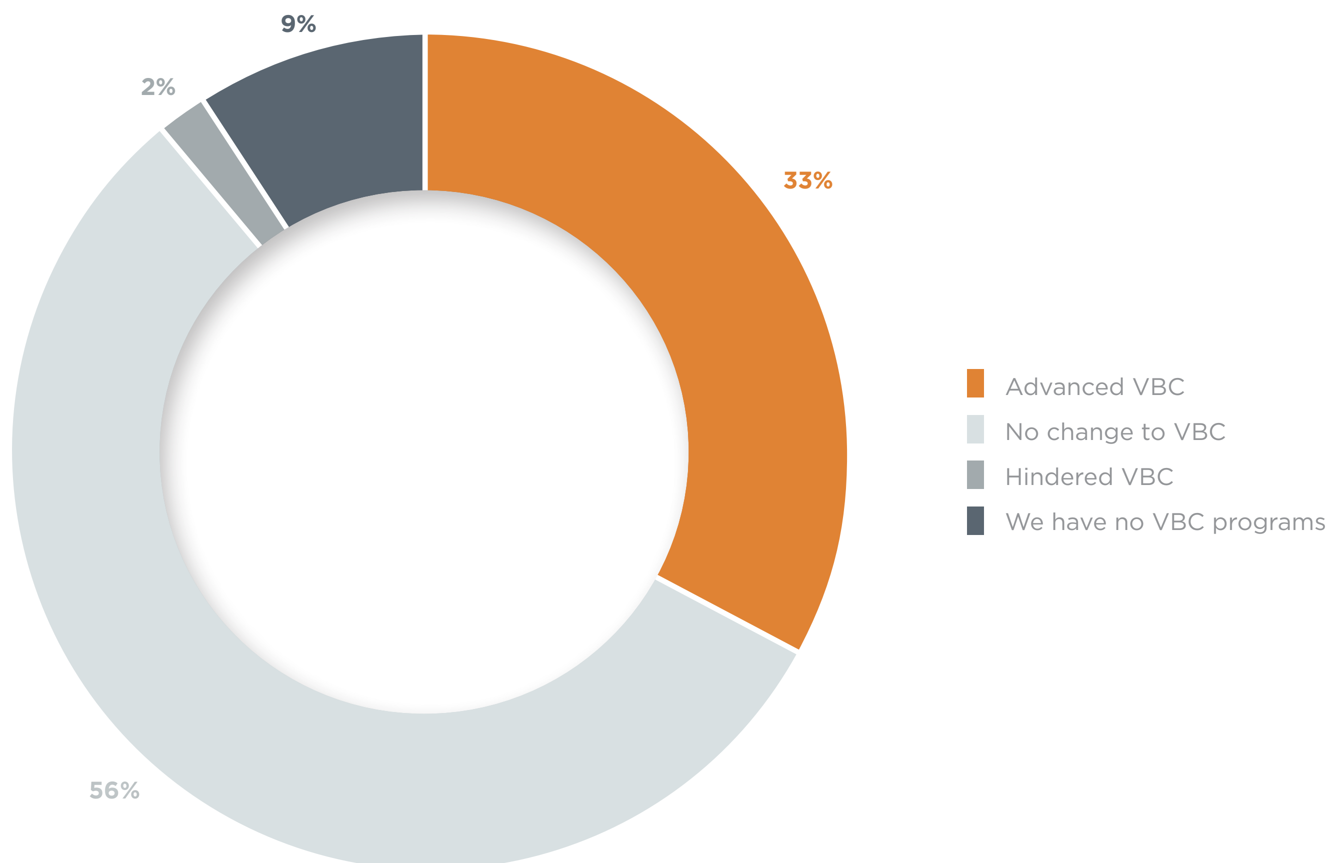


Note: Other access points include Amwell, Doxy.me, Microsoft, SMS, Webex, and Zoom.

Impact of Telehealth Technology on Value-Based Care

The majority of respondents indicate that telehealth technology has not impacted their value-based care programs. Only about one-third indicate that telehealth has helped advance their value-based care program by making it easier for patients to access care.

What Has Telehealth Technology Done for Your Organization's Value-Based Care (VBC) Programs? (n=96)



About the Center for Connected Medicine and KLAS

Center for Connected Medicine

The CCM connects and inspires leaders and innovators who want to advance health care. Collaborating with a network of experts, we serve as a resource for information and events focused on the future of digital health. Established in 2009, the Pittsburgh-based CCM is supported by UPMC and Nokia. Join us at connectedmed.com.

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KLAS Research

Driven by a mission to improve the world's healthcare, KLAS is a healthcare-focused research firm whose data helps provider, payer, and employer organizations make informed software and services decisions. Powered by insights and experiences discovered in the 25,000+ interviews with healthcare organization leaders and end users that KLAS conducts each year, KLAS' work creates transparency in the healthcare market and acts as a catalyst for software vendors and services firms to improve their offerings.

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View more resources and learn about telehealth events from the CCM and its partners at **connectedmed.com**

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