Telehealth 101+
Mini Masterclass

As of May 2020

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Chapters You Will Find Inside

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Telehealth Overview

Insights Informing the Future

The Impact of COVID-19 for Both the HCP & Patient

The situation and expected risks

- As a result of social distancing and office visit limitations, HCPs and patients have limited access to each other

- There has been more cancelations/rescheduling of nonessential physician and specialty appointments, leading to financial and economic hardships for practices, especially for small business owners

- Patients still need to continue treatment plans and get proper care: more patients shifting from 30-day to 90-day Rx supply and/or HCPs are worried about their patients continuing to get treatment

- Overall, there are heightened emotions and safety fears, as well as concerns about what the post-pandemic world will look like

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COVID-19 RESPONSE
Healthcare Engagement in the New Normal

INTRODUCING TELEHEALTH

Virtual Care via Telehealth
What it is…

Telehealth refers broadly to the distribution of health-related services and information via electronic and telecommunications technologies. It includes remote nonclinical services, such as provider training, administrative meetings, and continuing medical education

- Within the healthcare industry the terms "telehealth" and "telemedicine" are used interchangeably. Telemedicine, however, is thought of as a subset of telehealth

- **Telemedicine** is the practice of medicine using technology to deliver care at a distance. A physician uses a telecommunications infrastructure to deliver care to a patient at a distance

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Telehealth visits boom as doctors and patients embrace physical distancing amid the Coronavirus crisis

Ways in Which the Coronavirus Pandemic Has Caused Disruption to US Healthcare Practitioners*, March 2020
% of respondents

Now use telemedicine because of the restrictions imposed by COVID-19, but have not used telemedicine prior to this pandemic
53%

Still see patients in the office, but overall volume is much lower
31%

See patients both virtually and in the office
24%

See patients through virtual visits only
23%

Note: *specialties in infectious disease, pulmonology, cardiology and oncology
Source: SSCG Media Group, "Going Straight to the Source: Understanding the Informational Needs of HCPs During the COVID-19 Pandemic," April 2, 2020
254416
www.**eMarketer**.com

The need for telehealth is stronger than ever

- The adoption of telemedicine shifted into hyperdrive over the past month, with virtual healthcare surging by 50%
- Analysts now expect general medical care visits to top 200 million this year, up sharply from their original expectation of 36 million visits for 2020
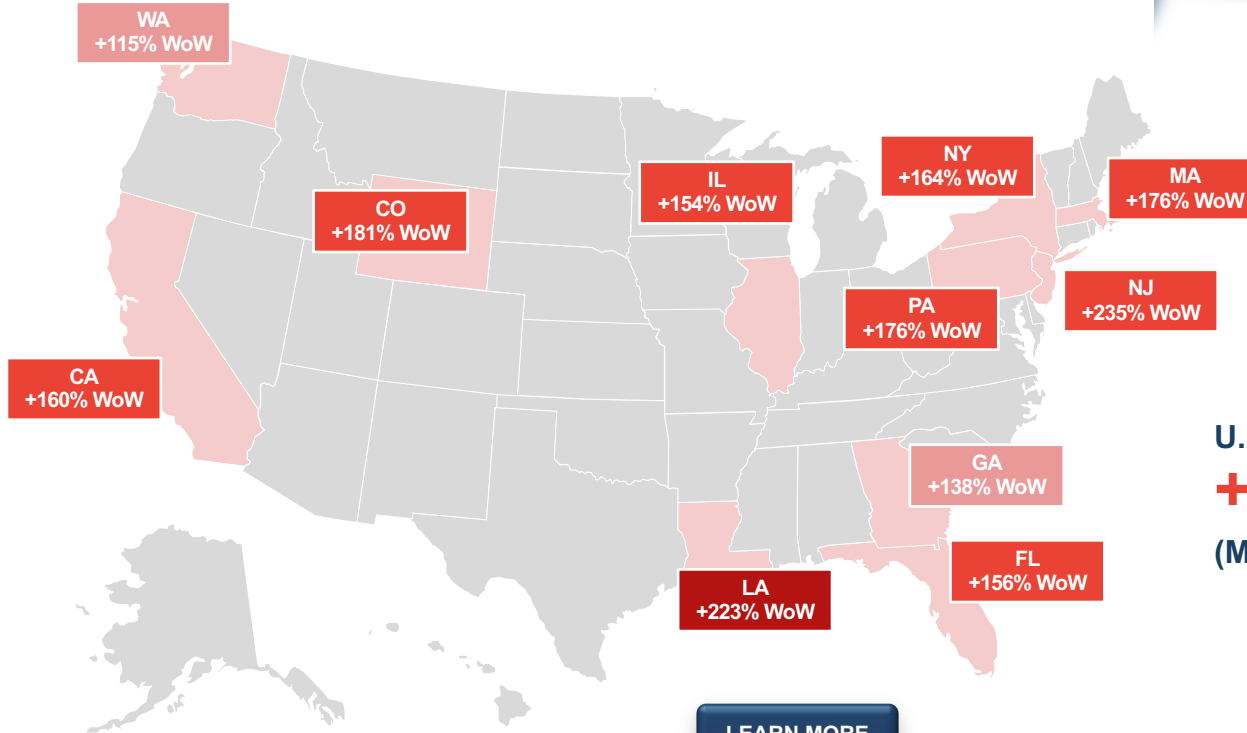
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Source: Forrester Research

CUSTOMER INSIGHT
Telemedicine **search** uptick
A glimpse to the future of patient behavior

FACT: Now when you Google a doctor, paid search will bring virtual care providers to the top of the list.

WA
+115% WoW

CO
+181% WoW

IL
+154% WoW

NY
+164% WoW

MA
+176% WoW

NJ
+235% WoW

PA
+176% WoW

CA
+160% WoW

GA
+138% WoW

FL
+156% WoW

LA
+223% WoW

U.S. Telemedicine Searches
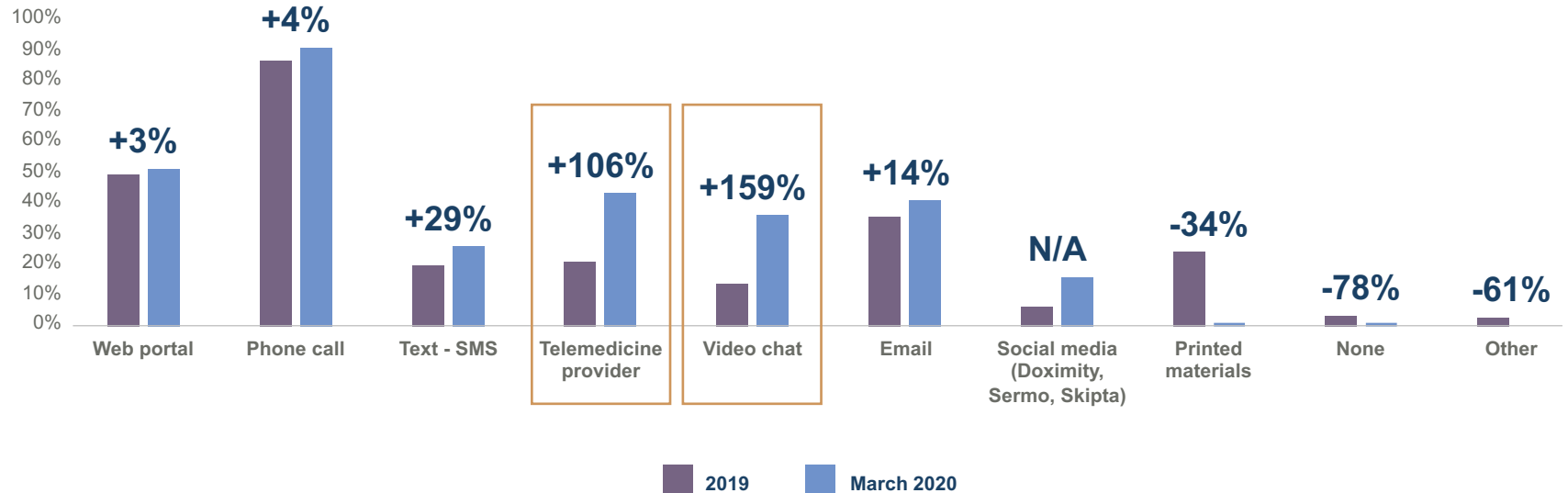**+150%**
(Mar 2020 WoW)

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CUSTOMER INSIGHT

Supercharged engagement by HCPs are igniting the opportunity for telehealth to go mainstream

2019 vs Today: Patient Communication Channels Used

Legend: ■ 2019 ■ March 2020

Chart values (approx.):
- Web portal: **+3%**
- Phone call: **+4%**
- Text - SMS: **+29%**
- Telemedicine provider: **+106%**
- Video chat: **+159%**
- Email: **+14%**
- Social media (Doximity, Sermo, Skipta): **N/A**
- Printed materials: **-34%**
- None: **-78%**
- Other: **-61%**

AT/Savanta Survey, Fielded 03/2020.
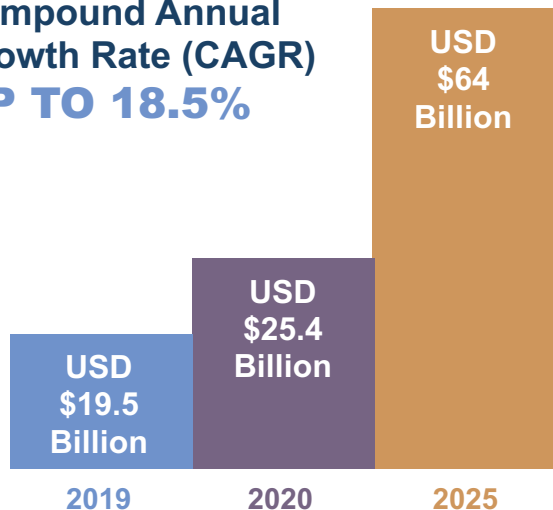AbelsonTaylor surveyed 500 physicians with an average practice tenure of 17 years.

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A rapidly growing infrastructure — U.S. telehealth market to reach $64B by 2025

Compound Annual Growth Rate (CAGR)
UP TO 18.5%

USD $19.5 Billion — 2019

USD $25.4 Billion — 2020

USD $64 Billion — 2025

Driving factors of exponential growth over the forecasted timespan

- **Teleconsulting service segment** projected to hold a valuation of $28.1 billion by 2025

- **Hardware subsegment** expected to record a CAGR of 18.7% as a result of smartphones, tablets, and advancements in technology

- **Telehome segment**, which primarily caters to patients who suffer from chronic diseases and are advised to not travel frequently, slated to experience exponential growth of 19%

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TELEMEDICINE UPDATE

A onetime guardrail, there's now a shift in HIPAA restrictions

US waives potential health privacy penalties during coronavirus crisis

Doctors in the states can start using Facebook Messenger and FaceTime to diagnose patients, without worrying about violating privacy laws.

Alfred Ng · March 17, 2020 12:14 PM PDT   ▶ LISTEN - 02:34

US doctors are now able to tap FaceTime as a way to see patients during the coronavirus

What you need to know about the law of the land TODAY

• During the COVID-19 national emergency, the Office for Civil Rights (OCR) will not impose penalties for noncompliance with the regulatory requirements under the HIPAA Rules against covered healthcare providers in connection with the good faith provision of telehealth

• By loosening HIPPA compliance, the government is allowing HCPs to use **non–public facing tools** in private and personal life, regardless of diagnosis/need for treatment

– **Compliant video communications**: Apple FaceTime, Facebook Messenger video chat, Skype for Business/Microsoft Teams, Updox, Vsee, Zoom for Healthcare, Doxy.me, Google G Suite & Hangouts Meet, Cisco Webex Meetings/Webex Teams, Amazon Chime, GoToMeeting, Spruce healthcare messenger

– **Not allowed**: Facebook Live, Twitch, TikTok, and similar video communication applications are public facing, and should **not** be used in the provision of telehealth by covered healthcare providers

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NEW!
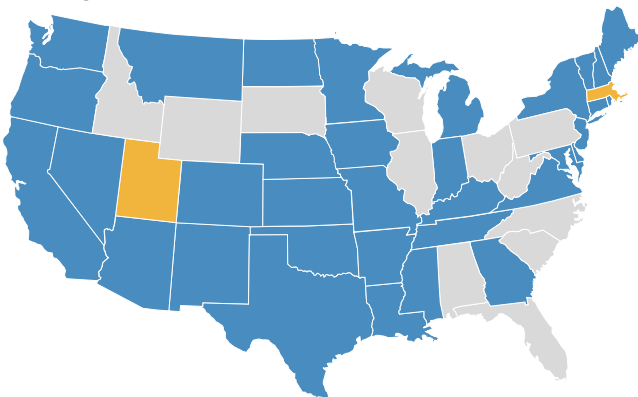
Many insurers are now covering telemedicine in the U.S.

Blue states below have mandates for private payer telehealth reimbursement!

Telemedicine Parity Law

Proposed Parity Law

37 states have laws mandating private insurance coverage of telemedicine

2 states have proposed or pending laws

Covered services: Real-time communication, store-and-forward technology, remote patient monitoring, and a newly developing focus on mhealth (mobile health) for health education and other services

Documentation for reimbursement

- HCP documentation needs to include call format, evaluation, physical exams if possible, and time spent in the encounter

- When billing for time, **more than 50%** has to be spent on counseling and coordinating care

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As of March 2020.

Formats & Leading Platforms
Telehealth Streams

THE OPPORTUNITY FOR HCPs TO ENGAGE WITH THEIR PATIENTS

Reachable U.S. audiences via the following technologies

| Texting	Video Conferencing	Voice Smart Speakers	Chatbot Digital Health Apps	IoMT Wearable Devices
57% of smartphone users have used Facebook Messenger	**55%** of adults use video chat at least once a month	**84%** of smartphone users have tried one	**50%** of smartphone users have used one	**22%** of smartphone users own a smartwatch
51% of adults use a messaging app at least once a month	**25%** of millennials use video chat every day	**52%** use it on a daily basis	**21%** use it on a daily basis	**21%** plan to buy one within a year

TELEMEDICINE STREAM
Texting

👍 Advantages

- Easy access and low entry barrier means high potential audience reach

- Good for nonurgent medical conditions, as texting allows for a more relaxed, asynchronous conversation

- Can send pictures (eg, skin conditions) as visual aid

👎 Disadvantages

- Less intimate

- More effective if there is already an established relationship
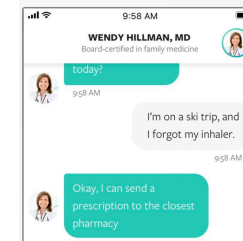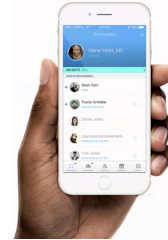
Notable Platform

- **98point6:** Built by physicians for physicians, a network of board-certified physicians offering text-based primary care in 3 phases—Tell Us Your Symptoms, Get Diagnosis & Treatment, and Personal Care Plan

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TELEMEDICINE STREAM
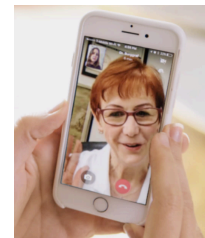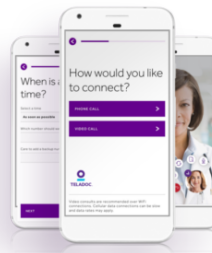# Video Conferencing

Advantages

- Web-based easy access
- High engagement rate based on its live interactive nature

Disadvantages

- Requires proper provider etiquette and technology fluency to feel comfortable in new personalized format
- Needs strong network infrastructure

Notable Platforms

- Originals and leaders in the space, **Doctor On Demand**, **Teledoc**, and **Doxy.me** are the most well-known telehealth providers. They have an established and large network of doctors, and work directly with insurance companies

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TELEMEDICINE STREAM
Voice

👍 Advantages

- Convenient, hands-free access to medical information makes it ideal for onboarding patients

- User-friendly for all age groups, regardless of technological expertise

👎 Disadvantages

- Lack of visuals will make it harder to diagnosis some conditions

- Concerns about technology completeness

Notable Platform

- Alexa is the only Voice that is HIPAA compliant. In April 2019, **Atrium Health debuted an Amazon Alexa skill** to help patients locate urgent and emergency care facilities and book appointments by speaking to their devices

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TELEMEDICINE STREAM
Chatbot

👍 Advantages

- Quick first-point-of-care management, especially easy for making appointments, checking insurance coverage lists, getting preliminary screenings, questionnaires, and resources
- Assistant-like support, review and transfer information to doctors based on symptoms
- Quick answers 24/7 for high conversion rate

👎 Disadvantages

- Contingent on power of AI and its algorithm
- Chatbots still need to integrate with EMR/EHR to get patient's baseline data

Notable Platform

- **Babylon Health:** Doctors "listen and look" carefully to diagnose the patient and then write prescriptions or refer to a specialist if required

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TELEHEALTH STREAM
Internet of Medical Things (IoMT)

Advantages

- Accurate diagnosis and better treatment with personal biometrical data

- Consistent tracking and self-monitoring to ensure quality of aftercare

- Data capture

Disadvantages

- High entry barrier for devices; less audience reach based on socioeconomic status

Notable Platforms & Tools

- **PillPack** by Amazon

- **Apple Health app & Watch**

- **Connected thermometers**

- **Google Glass**: Surgeons are using it to facilitate and record operations, retrieving and sending information to EMR through the device; emergency-medicine physicians are getting specialist consults by transmitting video or images taken by Glass

✽ Medical ID   Edit

John Appleseed
July 1, 1982 (32)

Medical Conditions
Hypertension

Medical Note
In case of emergency, please call Chloe Appleseed and Dr. Michael O'Reilly.

Allergies & Reaction
Penicillin - Severe skin rash

Medications
Lisinopril (10mg by mouth once a day)
Hydrochlorothiazide (12.5mg by mouth once a day)

Emergency Contact
Chloe Appleseed

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SUMMARY OF TELEMEDICINE PROVIDERS

As of March 2020.

HCP Implementation

'Rules' of Engagement & the Path Forward

Telehealth as the New Practice Paradigm: **A WIN-WIN!**

Benefits for the
HEALTHCARE PROVIDER

Benefits for the
PATIENT

- Saves on travel time and thus, providers can see more patients, resulting in more revenue for the practice

- Expands patient access to care, especially in underserved regions/population; ability to address healthcare shortages in remote areas

- Facilitates collection of data and transmission of electronic medical reports; helps with ehealth patient monitoring

- Streamlines and digitizes workflow, enhancing the healthcare delivery model

- Convenient, on-demand access to healthcare wherever, whenever needed; no travel necessary

- Care for elderly or disabled patients with mobility issues

- Patients are more engaged and active participants

- Limits the spread of viruses to others

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HCP RESPONSIBILITIES
Identify the new normal workflow and change the culture

Optimize practices for telehealth

- Clearly define and identify the new normal workflow

- Evaluate current technologies to support implementation, such as a patient portal; choose preferred platform/software that allows patient to do the very least possible

- Operationalize with staff so they are all speaking the same language and can help patients transition and understand them virtually

- Champion more tech-savvy staff to lead the onboarding and adoption

- Ensure ongoing coverage for existing patients and access for new patients

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HCP RESPONSIBILITIES

Ensure patients are prepared and ready every step of the way

Communication timeline

2-3 Days Prior	Day Before Call	Appointment Day
• Send appointment reminder	• Send virtual experience tips, expectations, etc. • Clearly define staff roles • Assessment via questionnaire	• Virtual visit • Treatment + plan via patient portal

What the patient can do in advance

- Complete online registration (survey, insurance verification, digital diagnostic, etc.)
- Send in any connected device data and digital onboarding assessments
- Download software/telehealth platforms
- Prepare list of questions to ask
- Have medication list (name and dosage) ready to review

HCP RESPONSIBILITIES

Create a welcoming environment: telemedicine etiquette

Best practices for a positive virtual experience

- Be prepared for the individual you are seeing

- Join in advance/be on time

- Make sure the patient can hear and see you

- Notify the patient of anyone else in the room

- Talk to the patient in the camera to mimic eye contact

- Make sure face is well-lit

- Turn off device popups and notifications

- Have references and visuals available to screen share for education

- Consider headphones to protect patient privacy

- Be clear with post-visit instructions and care plan

- Send instructions electronically

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Industry Opportunities

Digital Recommendations & Advertising Exploration

Integrating Into the Telehealth Journey

BEFORE
Discover & Educate

- Practice Operation Tools

DURING
Strengthen & Integrate

- Live Telemedicine Engagement Resources
- Digital Point of Care Media & Experiential

AFTER
Personalize & Foster

- Digital Point of Care Media (retargeting)
- Full-circle Retargeting

BEFORE

The Tea on Telemed: Practice Operation Tools

PURPOSE
HCPs and office staff need to feel supported and empowered as they navigate and adapt to telemedicine. Companies/brands who show up right—agile and authentic—will maintain and garner long-lasting trust.

RATIONALE
Win today by fostering relationships and delivering materials that benefit customers now. Be there to support and educate HCPs through their transition.

THOUGHT STARTER DIGITAL EXECUTIONS

- **DIY Telemedicine Kit:** Tips and best practices for starting/optimizing the virtual experience via video and printed materials—and through the lens of HCPs

- **Virtual Solutions Assistant (VSA): In its basic form,** available 24/7 to answer burning telemedicine questions. The AI technology will be able to connect HCPs to their personal sales rep for when those "in-person" touchpoints are also required

- **SEO:** From website to social, prioritizing quick, simple SEO changes to ensure you are there when searched for, complementing telemedicine proficiency. Please note, this tactic is also applicable for "during" and "after"

DURING

HCP Live: Telemedicine Engagement Resources

PURPOSE
HCPs and staff need to guide patients more than ever, giving them pertinent information that makes them want to continue or start on the right treatment and path forward.

RATIONALE
Creative and meaningful ways to enhance and elevate the HCP-led telemedicine experience ensures patients feel educated and comfortable in their treatment journey.

THOUGHT STARTER DIGITAL EXECUTIONS

- **The Companion (Doctor-Patient Discussion Guide):** During compliant screen-sharing calls, an interactive PDF that effectively showcases product use and educational information to the patient. Take it next level with embedded video tutorials and patient success stories

- **Digital Magazine:** Presented real-time, leveraging a product called FlippingBook that converts external-facing PDFs to HTML5 docs. User-friendly and familiar, the pages flip and turn like a magazine to fully immerse the patient in onboarding, product experiences, and more.

DURING

Digital Point of Care: The New 'Experiential'

PURPOSE

Show up for patients and caregivers in real-time at point of care with new formats and opportunities for discovery.

RATIONALE

Never-been-done high-quality touchpoints make visits more engaging and memorable, especially when customers are in the right mindset.

THOUGHT STARTER ADVERTISING OPPORTUNITIES

- **Instant Insights:** Upon consent, interactive quiz units living inside the waiting/entry screen of the telehealth video platform

- **Gamification:** Bring a coveted trend to the "waiting room." Entertainment meets branded animation while patients stand by for their HCP to start the session (e.g., puzzle, crossword, branded solitaire)

Outcome HEALTH

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DURING

AFTER

Digital Point of Care: Targeted Media Levers

PURPOSE
Fill the whitespace brands covet but are unable to address through the traditional point of care journey.

RATIONALE
Deliver the highest possible one-to-one engagement to target audiences with agility, bringing to life the most relevant messaging.

THOUGHT STARTER ADVERTISING OPPORTUNITIES

- **Point of Care Media Banners:** Delivered to patients during and after wait time (digital media retargeting)

- **Programmatic Over-the-top (OTT):** Targeted content from telehealth to connected streaming devices so patient messaging pull-through is consistent and fluid

- **60-second Brand Commercial:** Video spot running alongside other highly curated editorial content inside the telemedicine waiting room landscape

POPULUS

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AFTER

The Push Effect: Full-circle Retargeting

PURPOSE
As a follow-up to telemedicine experiences, ensure HCP and Staff continue thoughtful dialogue with their patients.

RATIONALE
Focus on the experience holistically, continuing to make strategic and personalized interactions that are paramount.

THOUGHT STARTER DIGITAL EXECUTIONS

- **Practice-Triggered Emails:** Sent directly to patients utilizing designed, pre-coded emails. Content to be varied to cover topics such as requested product information, links to videos, and requests (and instructions) for patients to make the next appointment

- **Text Push Notifications:** As part of engaging users on multiple channels, personalized notifications and CTAs from staff to patient

- **EHR Enhancement with OptimizeRx:** With proven success, complement telehealth output with messaging integration, reaching 16,000 HCPs in 370+ EHR channels

OptimizeRx

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Thank you

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