



# A Review of Telehealth Trends: Informing the Future of Virtual Care

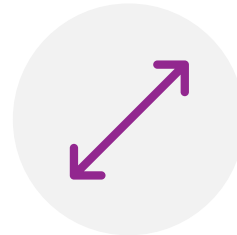
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# Where we've been...

## *AMA digital health research: 2016 to 2019*



Adoption had increased for all digital health solutions, particularly for tele-visits/virtual visits and remote monitoring for improved patient care



As of end of 2019, despite growth across the board, still much room for improvement in terms of wide-scale adoption



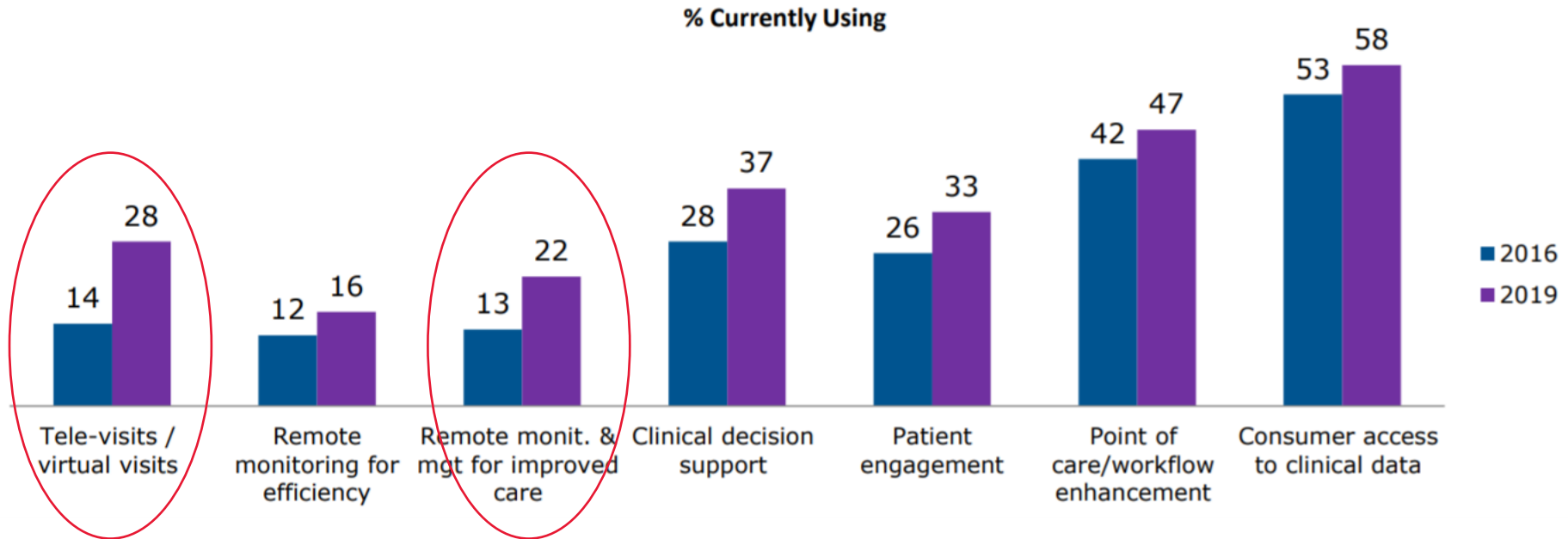
More physicians than ever recognized digital health tools as an advantage for driving improved efficiency and safety in health care



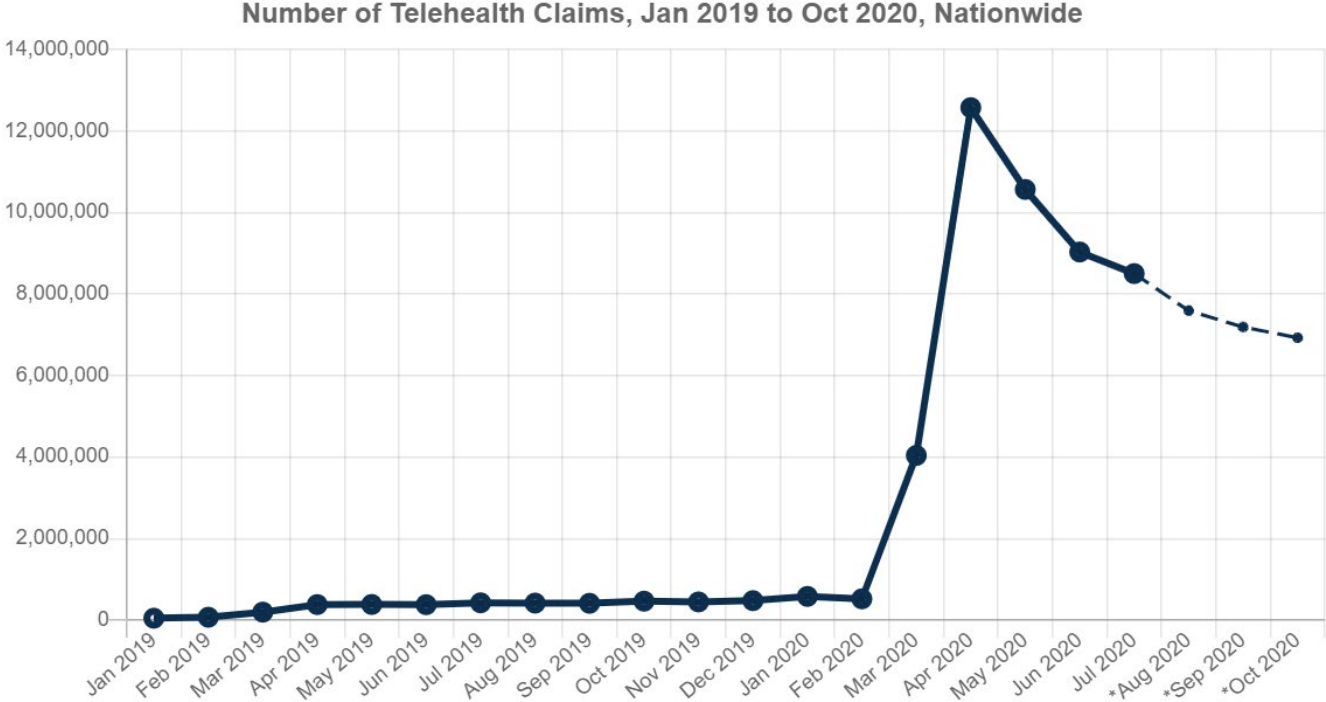
Physicians key requirements remained: Does it work, will I receive proper payment, will I be liable, will it work in my practice

# Use of digital health tools has risen significantly

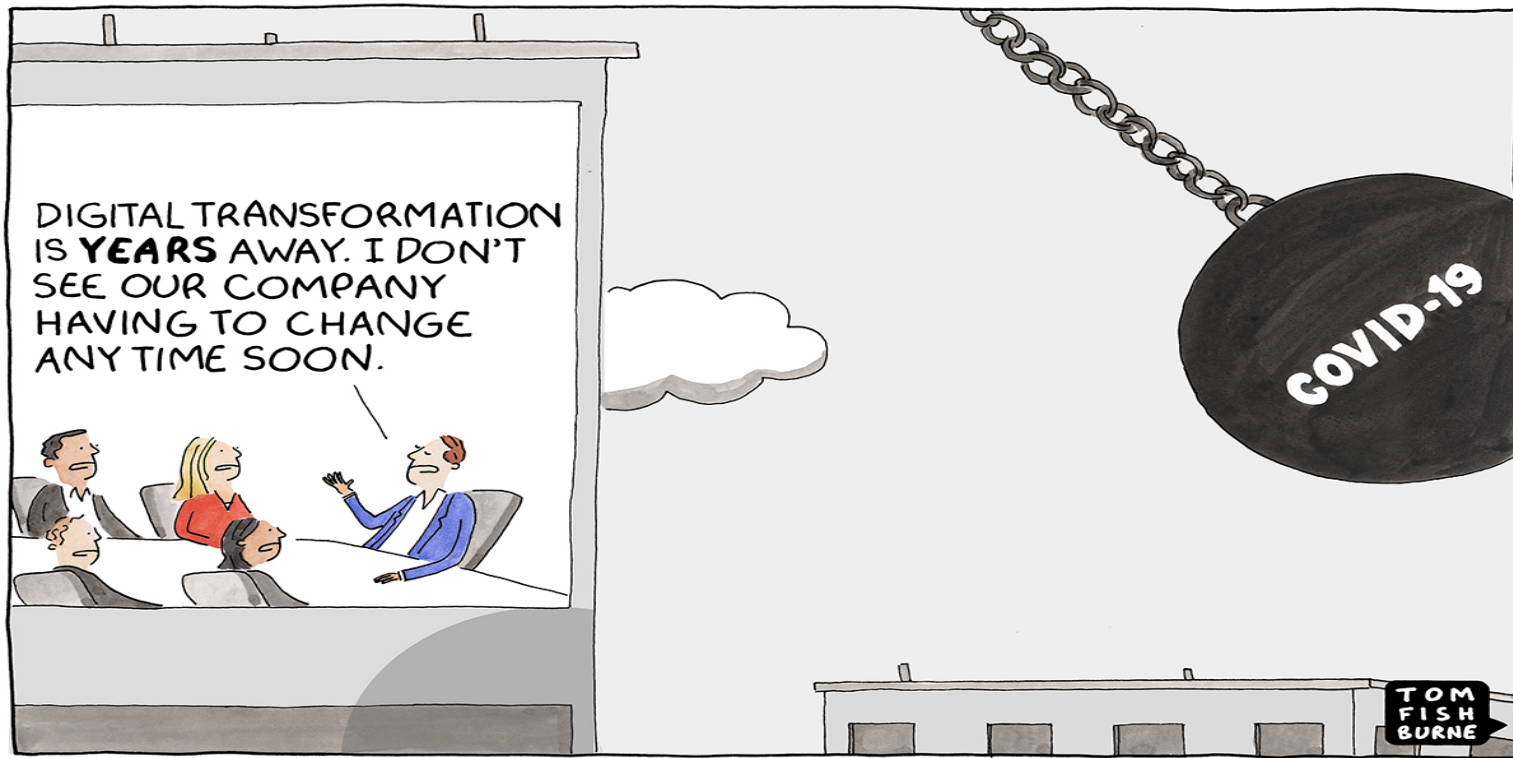
Tele-visits have seen the greatest growth, doubling in use since 2016.



# Where we are today...



# How did we get here?

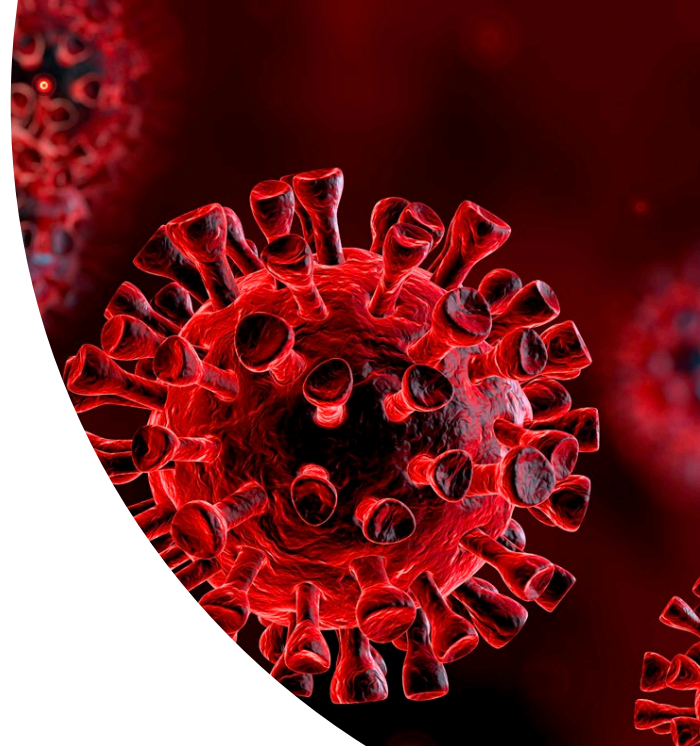


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# The impact of COVID

With the COVID-19 pandemic and its impact on access to medical care, telehealth has been a “go-to” way to facilitate care in an effort to keep physicians, care teams, and patients safe. The tools and guidelines being created now are already helping many to use telemedicine and will continue to help define its role at this moment, and shape the future of physician practice.

- Regulatory changes
- Coverage expansions
- Coding
- Practice Implementation





# Trends in Telehealth: Informing the Future of Virtual Care

**Kamalika Roy, MD**  
Member since 2012

# The Telehealth Impact Study: physician survey

## *Overview & methodology*

- The survey was fielded by the COVID-19 Telehealth Impact Study Work Group of the COVID-19 Healthcare Coalition, a collaboration between AMA, Mitre, Mayo Clinic, DiMe, ATA, MassChallenge HealthTech, and Change Healthcare.
- Using a convenience sample approach, the survey was distributed through various networks and channels across members of the work group.
- The survey was open from July 13 – August 15, 2020.
- We received 1,594 responses.



# Research aims

Using the survey, the work group sought to characterize the experience and attitudes of physicians and other front-line clinicians during the COVID-19 pandemic. This work will help understand what's working well and where barriers still exist to continue developing resources and guiding medical practices, payers and government regulators in the months ahead as we create a new normal for clinical care.

## KEY QUESTIONS

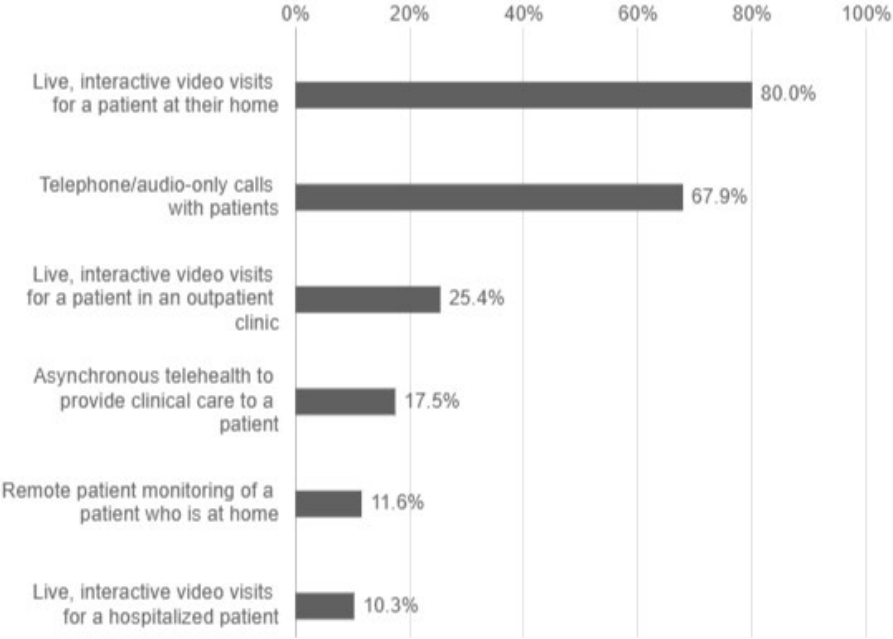
1. How well did telehealth serve the clinical needs of patients during the COVID-19 pandemic?
2. What telehealth platforms and technologies did providers use during the pandemic?
3. What were the strengths and weaknesses of telehealth related to quality of care?
4. What are provider expectations for the use of telehealth after the pandemic?



# Key Findings

# Telehealth usage

“ Which of the following types of telehealth are you using to provide clinical care? (choose all that apply) ”



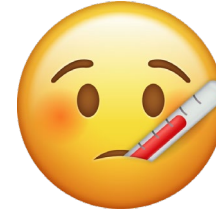
# Impact on the quadruple aim



## Clinical Outcomes

Over 75% of clinicians responding to the survey indicated that telehealth enabled them to provide quality care for COVID-19 related care, acute care, chronic disease management, hospital/ED follow-up, care coordination, preventative care, and mental/behavioral health.

- 60% of clinicians reported that telehealth has improved the health of their patients.



## Patient Experience

More than 80% of respondents indicated that telehealth improved the timeliness of care for their patients with a similar percentage of clinicians sharing that their patients have reacted favorably to leveraging telehealth for care.

# Impact on the quadruple aim



## Cost

Respondents indicated that telehealth both improved costs of care for their patients (61% either agreeing or strongly agreeing) as well as improved the financial health of their practice (56% either agreeing or strongly agreeing).



## Professional Satisfaction

A majority of clinician respondents also indicated that telehealth has improved the satisfaction of their work (55%).

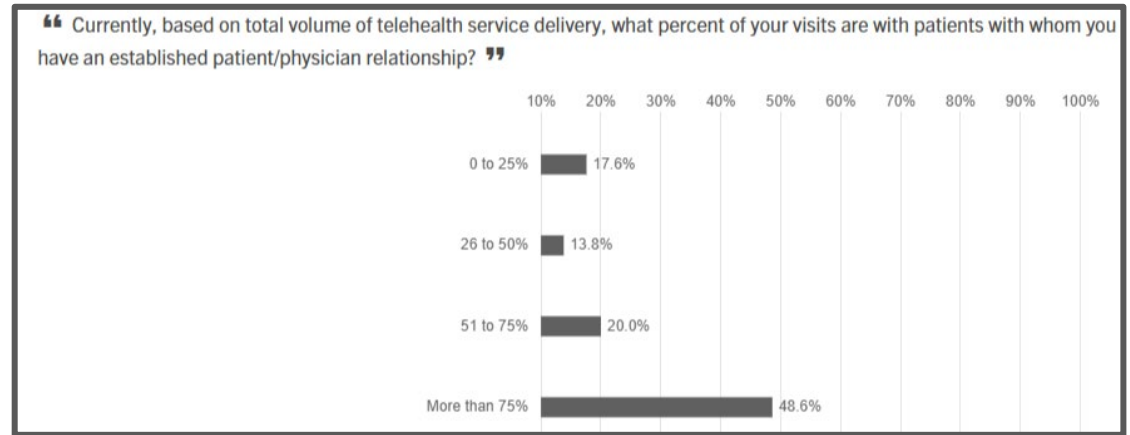
# Barriers and challenges

- 73.3% of clinician respondents indicated that no or low reimbursement will be a major challenge post-COVID.
- Over 64% of respondents indicated technology challenges for patients as a barrier to sustainable use of telehealth.
  - Perceived barriers for patients included lack of access to technology and internet/broadband, and low digital literacy.
- 58% of physician respondents are not able to currently access their telehealth technology directly from their EHR.
  - There were also several anticipated workflow challenges including integration with EHR (30.3%) and other health care technologies (27.9%), building telehealth-specific workflows (25.7%), and lack of technical support (25.3%).

# Additional insights – continuity of care

Adoption of telehealth in physician practices has increased dramatically and patients are now more likely to be able to access telehealth services within their existing medical home.

This is further indicated by 50% of respondents indicating that 75% of patients being seen via telehealth were patients with which there was an existing patient-physician relationship.



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## Additional insights - RPM

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Only 11% of respondents indicated they were performing remote patient monitoring on patients in their home; however, with over 72% of clinicians interested in continuing to use telehealth for chronic care management, we could see an increase in remote patient monitoring tools to augment virtual care.

Of those clinicians using RPM in practice, the most commonly used tools to help provide better care via telehealth include Smartphones (camera), blood pressure cuffs, body weight scales, and pulse oximeters. Currently, data is most often shared manually either verbally over the phone or via email.

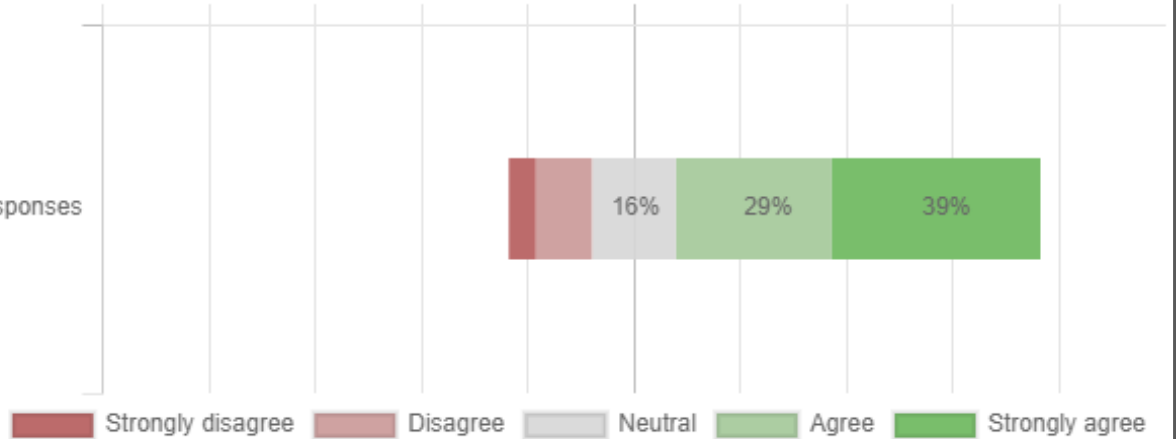




# Additional insights – future use

“ I am personally motivated to increase use of telehealth in my practice ”

All Responses





# What physicians are saying...

# Physicians say increased connection to patients via telehealth has had a positive impact on health.

- **Convenience** – telehealth is more convenient for patients who work or have families – they can see the doctor without significantly disrupting their schedules.
- **Access to Care** – patients who have transportation challenges or schedule limitations are more easily able access care through telehealth.
- **Routine and preventive checks** – physicians report improved attendance at routine visits and better adherence because of improved convenience and access. This is especially true in states where deductibles are waived due to COVID mandates.
- **Avoided putting off care** – physicians say many patients would have delayed or neglected care during the pandemic were it not for telehealth visits. Telehealth enabled them to be seen sooner and ultimately receive better care.

*“It seems like [telehealth is] allowing us to be a little bit more connected with people than we maybe were able to before. Because it's like, one less barrier.”*

# They also noted the ways in which telehealth impacted physicians and their own practices.

## POSITIVE IMPACTS

- Able to experience the wide number of applications for telehealth and see potential for future opportunities
- Some patients are more open to sharing personal details and challenges than in an office setting.
- Positive financial impacts – minimized losses from pandemic, operational efficiencies for one

*“It’s highly efficient and profitable, because there’s no overhead in all this. It’s kind of like, to me, like adding an extra exam room to my office, but without having to pay for the build out and the rent on that space.”*

## NEGATIVE IMPACTS

- Not having the same relationship with patients – less “joyful” for some
- Difficulty in adapting to new protocol and changes
- Burnout from switching between telehealth and in-person visits

*“Going back and forth between telemedicine and in person is super stressful, it’s worse than one or the other [...] Um, you know, a day doesn’t go by that you’re not letting down at least a third of the people. You’re supposed to be meeting their needs.”*

# Looking towards the future, most agreed that telehealth is here to stay, but it might look different after the pandemic.

*"[Telehealth] is going to become more and more commonplace and become a larger portion of my practice."*

*"I think once things settle down... and we don't feel like we HAVE to use telehealth, then I think we'll be able to sit back and say, okay, you know, now that we sort of have a choice about how to use it, how are we going to integrate it?"*

- **Post COVID, most hope to continue offering at least some telehealth alongside in-person visits.** Some are more enthusiastic and see it being a larger portion of their practice. But there was still too much uncertainty for most to make concrete plans.
- **The main drivers for keeping telehealth seemed to be for patient access and convenience,** especially for working individuals, elderly patients, less mobile patients, or patients who are out of town/state. Physicians see value in being able to connect with patients more easily and/or more frequently.
- **The future of payer policies will be crucial to future use.** Coverage for telehealth, especially when paid at parity, immensely facilitated adoption. Many are uncertain if this will remain post COVID – if not, this would pose a huge obstacle to their plans for continued telehealth usage.
- **Remote patient monitoring could be a next step.** There is interest in incorporating RPM down the road to complement telehealth.

# What physicians are saying...

*“It [telehealth] also increases the communication with patients, which is really what breakdowns care the most; therefore, being able to get paid for it will be the biggest thing for medicine in the future.”*

*“I have the patient's grab their pill bottles and I look at their pills, because sometimes I can't remember if they're scored or not. And so I actually have them, show me that or pull up prescription and pull out their actual bottles. Or very often when I do blood pressure monitoring, which I do quite often. I have to do a blood pressure while I'm on the phone with them. So it's, it's actually very helpful for them to sometimes be home so that we can see what exactly they're taking because sometimes they are not really even sure so it's been helpful.”*

*“Most of us have actually and will find that there are rewards and margins to be created by virtue of the cost containment that we can create through better monitoring and interaction with our patients through telemedicine.”*



# Emerging telehealth best practices

- Strategizing beyond COVID
- A team-based care approach
- Technology that supports a long-term, sustainable telehealth program
- Engaging patients

# Key areas of opportunity

- Addressing barriers such as access to technology and internet, and digital literacy
- Additional assessment of impact on key aspects of the quadruple aim – what's the ROI for telehealth?
- What are the right use cases for telehealth?
- Optimal mix of virtual and in-person care



# Final thoughts...

- Physicians across the country are largely positive regarding their experience with telehealth and plans for continued use.
- The existing and anticipated challenges and barriers to continued use of telehealth present an opportunity to focus on these areas for improvement to optimize telehealth with in-person care and make it a sustainable way to provide and access care.
- Telehealth isn't for everything or everyone.

# Additional AMA resources

- [AMA digital health research](#)
- [Telehealth quick guide](#) has detailed information to support physicians and practices in expediting implementation of telemedicine
- [AMA Digital Health Implementation Playbook Series](#) is a set of comprehensive guides to implementing digital health solutions in practice
  - [Telehealth Implementation Playbook](#)
  - [Remote Patient Monitoring Playbook](#)
- The full physician survey results and analysis can be found at: <https://c19hcc.org/telehealth/physician-survey-analysis/>

# Let's keep the conversation going...




Physician Innovation  
Network

**Q&A - Telehealth in 2021**

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As part of AMA's Emerging Topics webinar series, our panelists presented on trends from 2020 and what opportunities exist to optimize telehealth and virtual care for enhanced impact as well as what physicians, practices, and health systems need to know for 2021 related to...

Experts 

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Feb 03, 2021 10:00 am EST	Feb 06, 2021 12:59 am EST	11 Views

[Join us for the virtual discussion here.](#)





# Thank you!



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