

COVID-19 Briefing Series

Telehealth as the New Normal?

How COVID-19 is Shifting the Patient Journey

Since earlier this year when the COVID-19 virus outbreak began and quickly made its way around the globe, the way in which we operate has changed. In the spirit of preserving health and safety, governments around the world have instructed their residents to avoid close contact with others.

As a result, virtual communication for personal as well as business interactions is on the rise. Given social distancing is expected to be the new normal for a while, it also changes how we receive our healthcare services.



Physicians in the US have started shifting to telehealth services to keep up with patient demand without risking their lives and the lives of their patients. Trinity explored this trend, its impact on the patient journey and implications for the biopharmaceutical industry.

Background: Trinity along with Toluna, a leading provider of intelligence for healthcare, consumer and other industries, surveyed 561 healthcare providers (HCPs) in the US to understand the impact of COVID-19 on current practices, including how it has impacted their engagement in telehealth activities. The research sample included 462 physicians across 35 specialties, 70 nurses and 29 physician assistants. The survey was fielded between March 26th and April 1st, 2020.

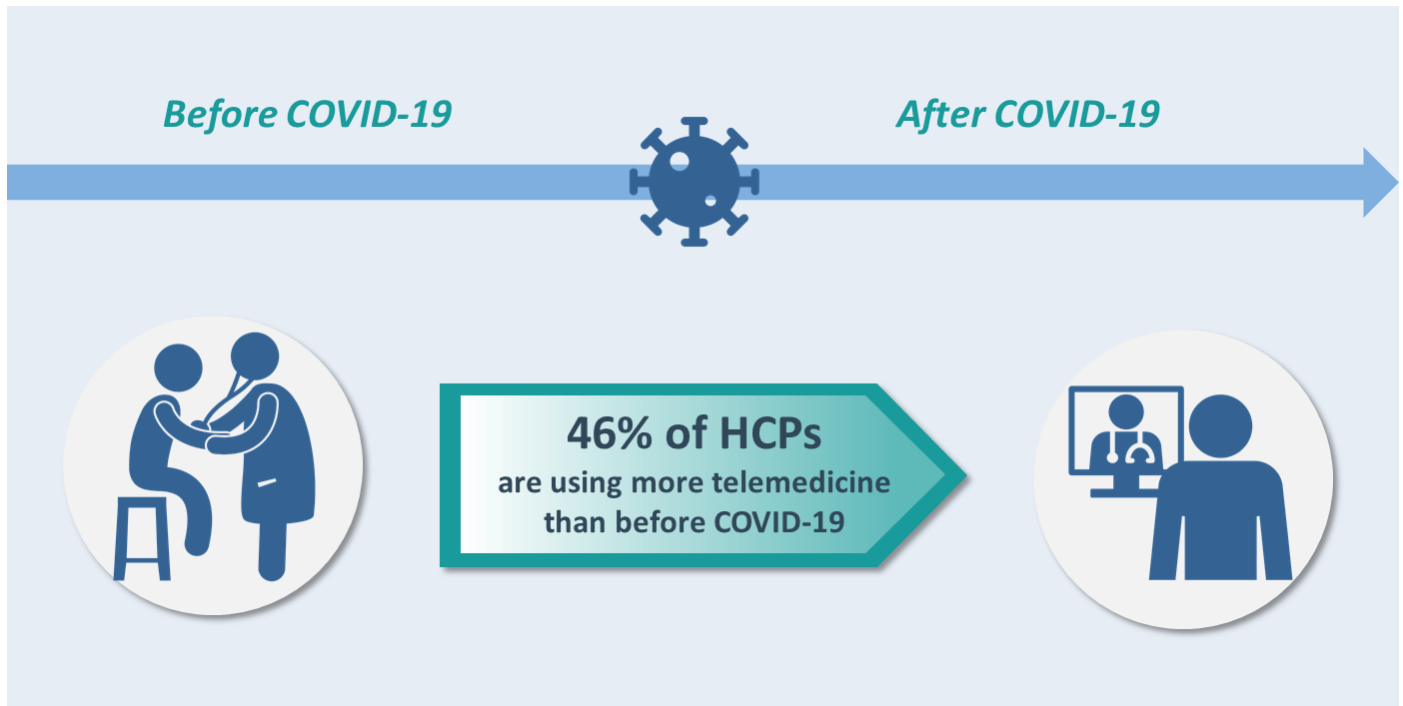
How has use of telehealth changed since the COVID-19 pandemic?

While some institutions such as organizations forming the South Carolina Telehealth Alliance (SCTA)¹ invested in telehealth infrastructure pre-COVID-19, the new restrictions are forcing practices around the country to adopt telehealth services. The survey conducted by Trinity in partnership with Toluna finds that 46% of HCPs across a wide range of specialties are using more telemedicine than before COVID-19.

One urologist at an academic practice located in the Southeast region of the US stated, “We were essentially performing no telehealth visits prior to COVID. At this point, on average each provider is performing about ten telehealth visits weekly, but this is rapidly increasing.”



46% of HCPs Across a Wide Range of Specialties Are Using More Telemedicine Than Before COVID-19



1. * <http://sctelehealth.org/>

Which practices are using telehealth?

The results of the survey show that those who use telehealth services are more likely to be from the Northeast region of the US, a COVID-19 hotspot at the time the survey was fielded. Additionally, private telehealth service companies such as Teladoc and Amwell have reported massive spikes in visit volume.² Teladoc is averaging 15,000 patient visits a day in the US, 50% higher than in February, and Amwell has seen a 350% increase from the normal expected volume of calls this time of year.

Telemedicine users are more likely to practice in private/clinic settings (than hospitals) and report fewer on-site patient visits post-COVID-19 outbreak, making telehealth services an essential tool to complete follow-up visits, continue monitoring patients on certain treatments and secure needed revenue to sustain business.

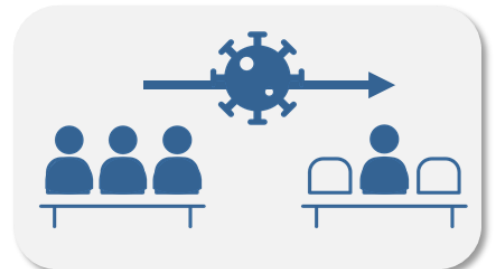
Currently Radiologists, Psychiatrists, and Cardiologists are leading the charge in providing telemedicine, but many other specialties are also getting on board with telehealth services.

With more and more practices and health care systems in the US expanding and initiating telehealth services during the COVID-19 crisis, the trend is likely to make a lasting impact on how physicians and patients interact in the future. Furthermore, there is a push at the federal level towards incorporating more telehealth services, as the FCC has asked for \$200m from the CARES Act to be allocated to telehealth³.

Characteristics of HCPS Using More Telemedicine



More likely to be focused in the Northeast



Have fewer patients coming into their practice



More likely to work in private/clinic setting

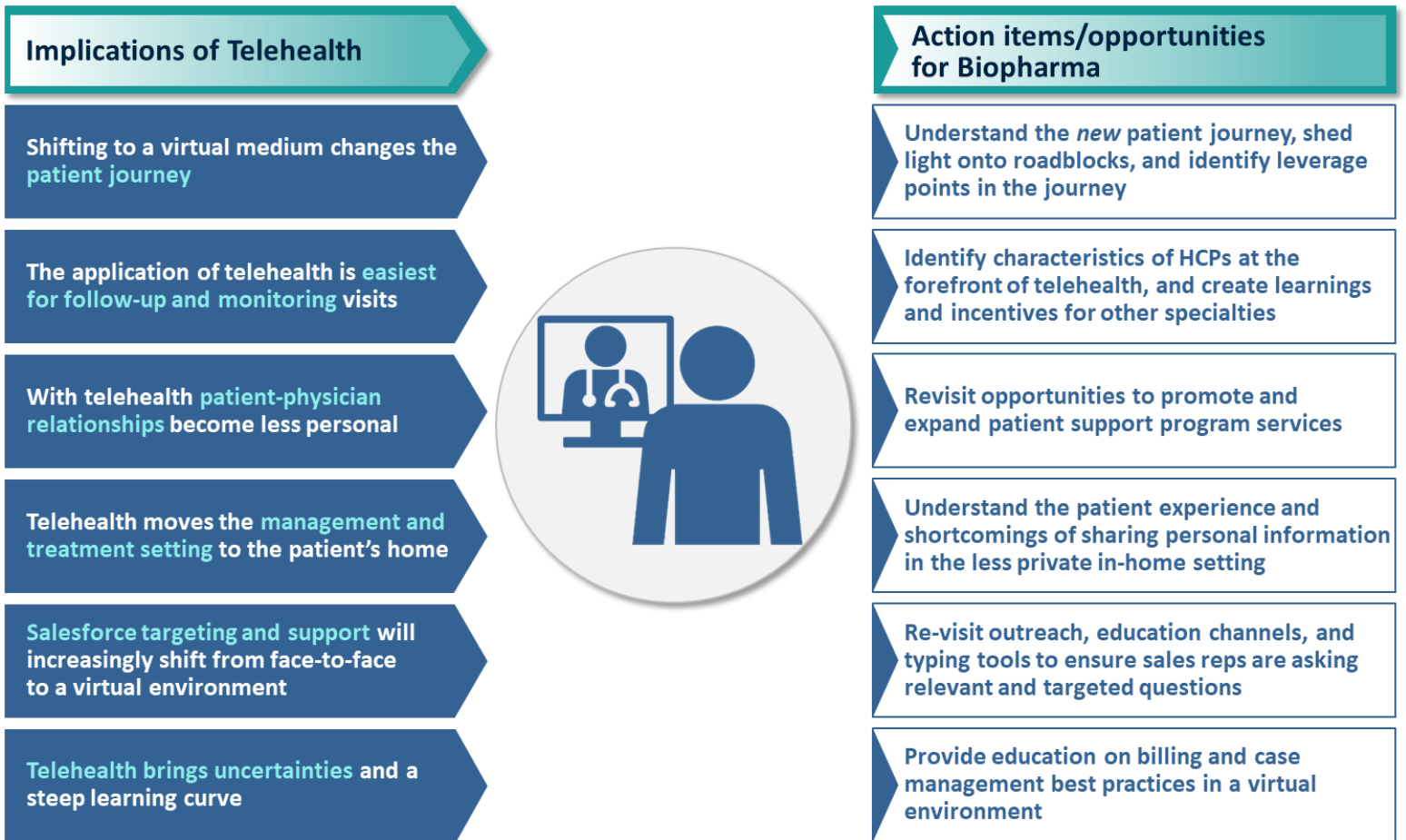
2. <https://www.fiercehealthcare.com/tech/fcc-chief-unveils-200m-program-to-boost-telehealth-services-amid-covid-outbreak-0>
 3. <https://www.fiercehealthcare.com/tech/fcc-chief-unveils-200m-program-to-boost-telehealth-services-amid-covid-outbreak-0>

What does the shift to telehealth mean for the future of medical treatment and the patient journey?

Convenience, of course.

Telemedicine provides another option for physicians to see their patients, either to increase efficiency with simple follow-up and monitoring visits or when the patient (or physician) is too ill to leave the house or traveling.

This shift in the medium of patient care will trigger changes to the patient journey and while it has many benefits, it will also have some growing pains for HCPs, patients and manufacturers. A 360° view into the dynamics of telehealth and implications for all stakeholders is needed to translate the shift in patient care into new opportunities.



Presentation patterns, diagnosis opportunities and treatment paradigms will shift, making it inevitable to understand how the different nature of the patient-physician interaction influences the patient experience and treater behaviors. Along this new patient journey, there will be different leverage points to support with diagnosis and treatment, promote or expand the use of patient support program (PSP) services and build stronger manufacturer-patient connections.

For most physicians and practices, telehealth is still uncharted territory. From education on how to bill for medications and services to navigating case management and technology support, your field force can be a tremendous resource for HCPs they serve.

While physicians acknowledge that telemedicine has advantages such as “easy and quick follow-up visits for established patients,” one ENT notes there are some challenges and needs accompanying the shift to telemedicine. When asked what assistance is needed to support the use of telemedicine right now, “Confidence in the [reliability of the] IT system, EHR integration would be great for ordering tests/prescriptions, medicolegal guidance, and reimbursement guidance” were mentioned by this ENT as areas where support would be valuable.

Some key questions to consider for biopharma as telehealth becomes more common place:

- How can you make (virtual) rep visits useful for understanding practices’ changing dynamics and utilization of telehealth?
- How can you, as the manufacturer, support practices to improve relationships with HCPs while making their shift to telehealth easier?
- What challenges come with incorporating telehealth for your brand, and how can you help practices address these challenges?
- How can you provide patients of all ages with continued access to their medications and improve case management and patient support programs?
- In which ways can you educate physicians to be mindful of the patient experience and their surrounding during Telehealth visits?

Conclusion and Summary

Given the substantial resources health systems and practices are investing into telehealth, it is likely here to stay. While telehealth offers benefits and convenience for treaters and patients, a lot of outstanding questions remain around reimbursement, technology, and most importantly patient outcomes. For biopharma, the shift in patient care and management provides an opportunity to support physicians in maintaining continuity in their practices, but also makes it crucial to react to telemedicine implications for continued physician and patient relationships.

For more information, please contact Trinity at info@trinitylifesciences.com

About Trinity

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