

True or False

Q: National Telehealth Vendors (i.e. AmWell, Teladoc, Doctors on Demand) provided more telehealth visits in 2020 than local Providers?



True or False

Q: National Telehealth Vendors (i.e. AmWell, Teladoc, Doctors on Demand) provided more telehealth visits in 2020 than local Providers?

A: False. In 2020, 96% of UHC telehealth claims were paid to local providers while 4% were paid to the national telehealth vendors.



Consumer, Payer, Provider Perspective



Key Themes

Research Finding trends:

- Telehealth utilization trends (UHC telehealth up 20x YTD in 2020 compared to 2019) & current user demographics (ie younger, women, high income, urban). Although UHC top utilizer of telehealth are age 55-64.
- Top consumer benefit of telehealth (convenience).
- Consumers lack understanding of how/when/why to use telehealth.
- Consumer perceptions around cost (they expect it to be cheaper than in-person).

Research Finding Differences:

- Top consumer barrier to using telehealth (unclear if it's quality of care/trust, ability to diagnose, doctor choice, seeing their personal provider).

What's missing?

- Consumer experience – high level insights but need specific UI/UX preferences/needs.
- Communication preferences – how/when/where do they want to hear about telehealth?
- Consumer personas.
- Provider preferences/wants/needs when it comes to a telehealth solution.

Consumer Research Overview

Objective of the research: Understand what consumers would and would not use telehealth for, key factors in decision making, and how they want to hear about these services.

Main takeaway: Consumers' top factors when deciding whether to use telehealth include the convenience of not having to go to a provider office, their confidence in the quality of care they would receive, and whether they can see their own health care provider.

Insights:

- Consumers most receptive to telehealth are younger, with higher income, in an urban setting, and on a commercial health care plan.
- Being able to see their personal provider is twice as important as being able to see a local provider.
- The types of care consumers are most likely to use for telehealth include getting a prescription, managing an ongoing condition, and primary/non-urgent care.
- A telehealth provider must have the ability to send prescriptions to the pharmacy of choice, show the cost beforehand, and provide a treatment/plan summary at the end.

The “must have” telehealth capabilities to ensure a positive experience:

1. Prescription management
2. Having agency to chose the modality of the visit (in person, telehealth, etc.) during scheduling
3. Sharing the cost ahead of time
4. Getting a treatment plan or appointment summary after the visit
5. A live chat option for support and questions

Methodology: Qualtrics online survey. 1,865 responses between 10/1-10/7. Age 18+.

Commercial & Provider Telehealth Overview

Objective of the research: A synthesis of primary and secondary research from April – Oct 2020.

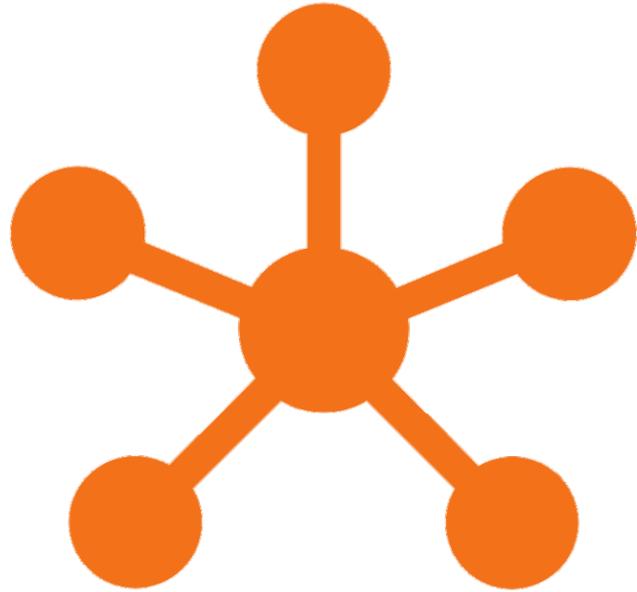
Main takeaway: Consumers love the convenience of telehealth but need education on when and how to use it, consistent naming, an improved and simplified experience, and doctor choice.

Insights Summary:

- Even though telehealth has grown substantially, consumers still lack understanding on when it's available, when it is recommended, how it works, and the cost.
- Consumers expect the cost of telehealth visits to be less than in-person visits. Providers expect to be reimbursed at the same rate as in-person visits.
- Consumers and providers alike are using a wide variety of terms for telehealth – reinforcing the need for clarity and consistency in naming and messages.
- The majority of those that have used telehealth feel the quality of care is as good as or better than in-person.
- Over half of those who have not used telehealth say they would expect the care to be worse than in-person.
- Convenience is the top reason choosing virtual visit (with Teladoc, Amwell, Doctor on Demand)
- Doctor choice, or lack of it, is the biggest hurdle to trying telehealth.
- Consumers still want to have an initial in-person appointment with a doctor, and then are comfortable using telehealth for follow-up appointments.

Merging Virtual & In-Person Care





Health Distribution Model

- A unified platform & experience that connects supply with demand
- Shared resources
- New sites of care
- Enhanced relationships
- Increased engagement
- Improved coordination & continuity of care

Digital health is not simply an extension of traditional delivery model



EXTEND REACH AND ACCESS

Enhance timely access to care for patients through virtual visits and patient-provider communication tools



ENHANCE PATIENT AND PROVIDER EXPERIENCE

Create a seamless patient and provider experience by implementing digital health tools along the entire care journey, from website-based symptom checkers and triage tools, to automated self-scheduling



IMPROVE CARE

Offer improved care quality by enlisting digital health tools to help patients manage chronic conditions and allow providers to monitor patients in real-time and adjust treatment plans accordingly



GAIN EFFICIENCIES AND REDUCE COST

Drive savings for patients and provider organizations by providing digital options with a high quality of care at a lower cost



DRIVE INNOVATION

Use data and analytics to predict health care trends and necessary interventions within a population and accurately serve up clinical decision support to drive greater accuracy of diagnoses and treatment plans



Three primary digital health challenges for providers



No pre-pandemic digital health roadmap

- Rapid technology acquisition lacks alignment with long term strategic needs
- Digital health adoption viewed as short term 'fix' rather than a new delivery option



Prior to COVID-19, health systems using virtual care did so mostly within a "provider-in-triage model"

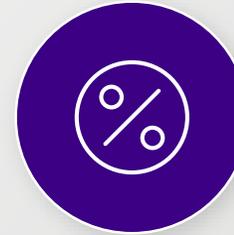


Scarcity of digital health expertise

- Significant gap in emerging digital health technical talent
- Many organizations don't have a centralized digital health leader



Mayo Clinic and Kaiser Permanente only created Chief Digital Officer roles in the 1-2 year



Tight margins pressure digital health to deliver

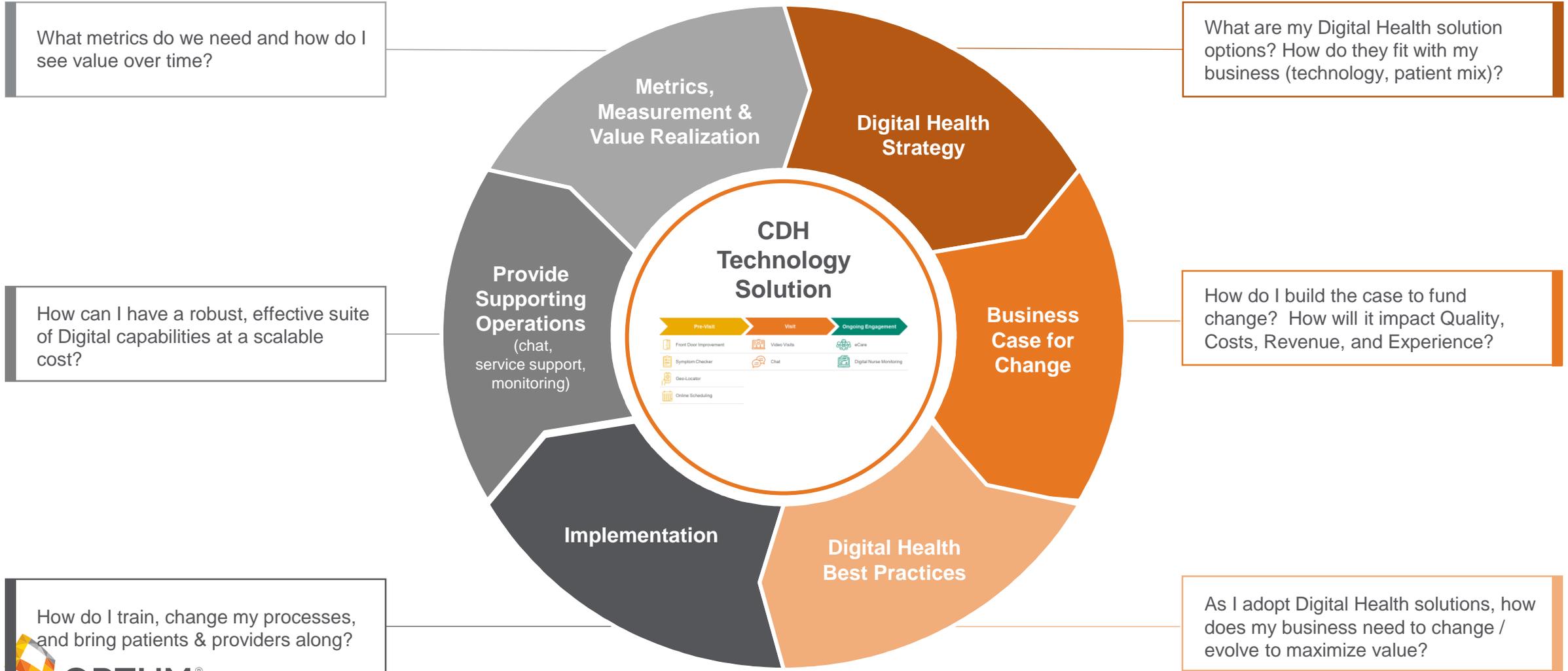
- Pressure to deliver value from current IT investments
- Few funds for new digital health investment without guaranteed ROI



Telehealth solutions deployed for chronic populations can improve total cost of care by 2 to 3 percent

Partnering on every step of the **Digital Health** journey

Our Services



Optum's Center for Digital Health & Optum Virtual Care



OPTUM'S VIRTUAL CARE DELIVERY ORGANIZATION (VCDO)

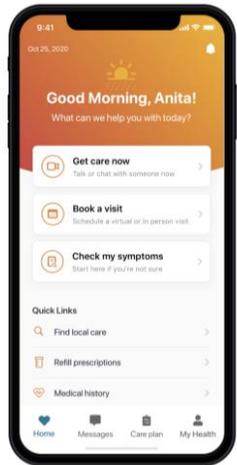
A Virtual Primary, Urgent & Behavioral Health Medical Practice

A dedicated virtual medical group who is reinventing how care is provided using the latest technology to drive simplicity, convenience, better coordination, better outcomes and affordability.

The Model is a virtual-first approach that is augmented by in-home or in-clinic services as needed.



Primary Care, Reimagined.



Primary Care, Reimagined

More than just virtualizing primary care. Go past constraints and reinvent the gateway to care – urgent, chronic, or wellness with integrated behavioral

Tailored Products and a New Cost of Care

Multi-payer solutions that are designed for affordability

Consumer-Driven, “Clicks-and-Bricks”

Trusted partner for patients with integrated, seamless handoff between Virtual and In-Person care

Your Virtual Care Team & Services



Center for Digital Health Suite of Services

Products	Virtual Care Support Services	Virtual Care
<p>Virtual Health Core Platform</p> <p><i>Includes online scheduling, symptom checker, healthbot, precision navigation, video platform, and voice/NLP. The platform is integrated with the local EMR and practice management software</i></p>	<p>Remote Monitoring Center</p> <p><i>A dedicated team of nurses and customer service agents who monitor, coach and coordinate care for an at-risk population using remote monitoring devices and pathways</i></p>	<p>Virtual Urgent & Primary Care</p> <p><i>National coverage with a team of providers and other healthcare professionals who have met our OVC seal of approval.</i></p>
<p>Virtual Care Mobile App</p> <p><i>Offers a locally-branded digital front door through a mobile/web application to access the Virtual Health platform</i></p>	<p>Mobile Phlebotomy Services</p> <p><i>National team of phlebotomists that can be deployed by Providers for lab specimen collection and point of care tests.</i></p>	<p>Virtual Behavioral Health Care</p> <p><i>Robust clinical team offering coaching, therapy, and medication management with innovative technology for ongoing support</i></p>
<p>Remote Monitoring Platform</p> <p><i>An end-to-end solution for disease management offering a tiered technology solutions and care pathways</i></p>	<p>eAssistant</p> <p><i>Serves as the clinical assistant for Telehealth Providers for in-visit assistance and for in-home services. The assistant collects vital signs, lab specimens and facilitates remote physical exams using connected devices.</i></p>	<p>TelePharmacy</p> <p><i>On-demand support for medication management and Rx requests</i></p>
<p>Other Virtual Care Products</p> <p>Coming Soon</p>	<p>Telehealth Device Logistics and Management</p> <p><i>Manages the ordering, shipping, repurposing and lifecycle management of telehealth kits and devices</i></p>	<p>eCare Management, Post Discharge Service & Disease Management</p> <p><i>Nurses, Pharmacists, Social Workers, Dieticians, Skilled health coaches who focus on preventive care, wellness and emotional health, and medical management</i></p>

“Failure is not fatal, but failure to change might be.”

- John
Wooden