



Pursuing Virtual Care: Telehealth Strategies and Lessons Learned

October 25, 2017
2:30 pm – 3:30 pm ET

Agenda

- Welcome and Introductions
 - Jennifer Covich Bordenick, CEO, eHealth Initiative
- Discussion & Comments
 - Kori Krueger, MD
Medical Director, Marshfield Clinic
 - Chris Meyer
Director of Telehealth and Virtual Care, Marshfield Clinic
 - Daniel Olson
VP, Health Systems Solutions, American Well
- Questions & Answers

Housekeeping Issues

- All participants are muted
 - To ask a question or make a comment, please submit via the Q&A feature and we will address as many as possible after the presentations.
- Technical difficulties:
 - Use the chat box and we will respond as soon as possible
- Today's slides will be available for download on eHI's Resource page
www.ehidc.org/resources

Our Mission

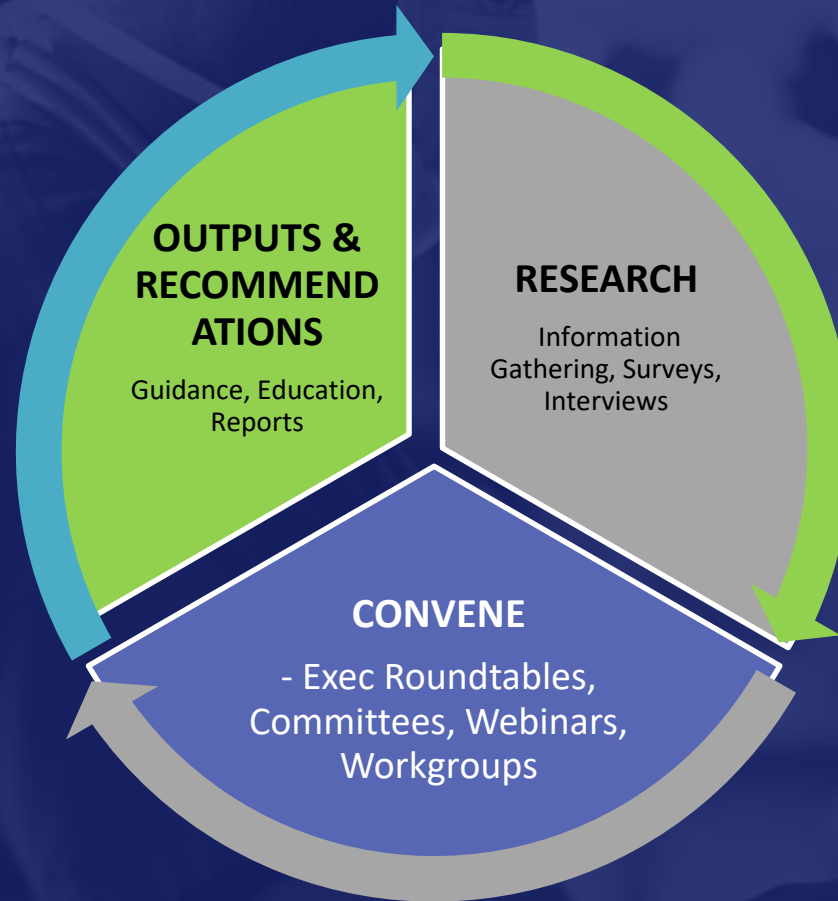
eHealth Initiative's mission is to serve as the industry leader convening executives from multi-stakeholder groups to identify best practices to transform healthcare through use of technology and innovation. eHI conducts, research, education and advocacy activities to support the transformation of healthcare.



Multi-stakeholder Leaders in Every Sector of Healthcare



Roadmap to Transforming Care



Convening Executives To Research & Identify Best Practices

Best Practice
Committees
Identify &
Disseminate
Success Stories



INTEROPERABILITY



DATA ACCESS & PRIVACY



**PATIENT & PROVIDER
TECHNOLOGY ADOPTION**



DATA ANALYTICS

eHealth Resource Center Available With Best Practices & Findings

Best Practice Committees contribute to the eHealth Resource Center www.ehidc.org/resources which provides assistance, education and information to organizations transforming healthcare through the use of information, technology and innovation. The Resource Center is a compilation of reports, presentations, survey results, best practices and case studies from the last 16 years.



Electronic Medication Adherence Collaborative (eMAC)

- Foundation for eHealth Initiative launched a multi-stakeholder Electronic Medication Adherence Collaborative (eMAC).
- Share best practice examples from different analytical and behavioral approaches, educate stakeholders on the insights available. Share information on the effectiveness of programs.
- **IN PERSON MEETING ON DECEMBER 12 IN DC. INTERESTED?**
TELL CLAUDIA.ELLISON@EHIDC.ORG



Save the Date: February 7 – 8, 2018
Top of the Hill, Washington, DC

eHealth Initiative Executive Summit: 2020 Roadmap Refresh



*Attendance is limited to eHealth Initiative members and
invited C-Level Executives*

This webinar was made possible through the generosity and support of Marshfield Clinic!



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HEALTH SYSTEM

PURSUING VIRTUAL CARE

Telehealth Strategies and Lessons Learned



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HEALTH SYSTEM

Kori Krueger, MD, Medical Director, Institute for Quality, Innovation, and Patient Safety, Marshfield Clinic Health System

Chris Meyer, Director of Telehealth and Virtual Care, Marshfield Clinic Health System

Daniel Olson, Vice President, Health Systems Solutions, American Well

Agenda

1. Introduction to Marshfield Clinic Health System
2. MCHS Telehealth Strategy
3. MCHS Virtual Services: **Care My Way Now**
4. Future Initiatives
5. American Well
6. Question and Answer

Dr. Kori Kruger, Medical Director, IQIPS



Dr. Kori Krueger, MD, M.B.A.
Medical Director
Marshfield Clinic Health System
Institute for Quality, Innovation and Patient Safety (IQIPS)

Introduction to Marshfield Clinic Health System & Telehealth Strategy

Who We Are

MISSION

WE ENRICH LIVES

...to create healthy communities through accessible, affordable, compassionate health care

VISION

WE WILL INNOVATE AND DEFINE THE FUTURE OF HEALTHCARE FOR GENERATIONS

...and will be the consumers first choice for healthcare

VALUES

PATIENT-CENTERED: We listen, serve and put the needs of the patient first

TRUST: We earn trust through honesty, integrity, respect and compassion

TEAMWORK: We work together, respecting each other and our professional roles

EXCELLENCE: Through research, education and best practice, we deliver exceptional care

AFFODABILITY: We are accountable as we manage resources and deliver value-based care



55 CLINICAL LOCATIONS *in* **34** WISCONSIN COMMUNITIES

Security Health Plan
**5TH LARGEST
HEALTH PLAN**
in WISCONSIN

 **1,250**
PROVIDERS



INTEGRATED DELIVERY SYSTEM

3 Hospitals

3 SNFs

4 ASCs

7 Urgent Cares

10 Dental Clinics

17 Pharmacies

33 Clinical Laboratories

& Veterinary Lab Services

336,000
Unique Patients

3.5M Patient
Encounters

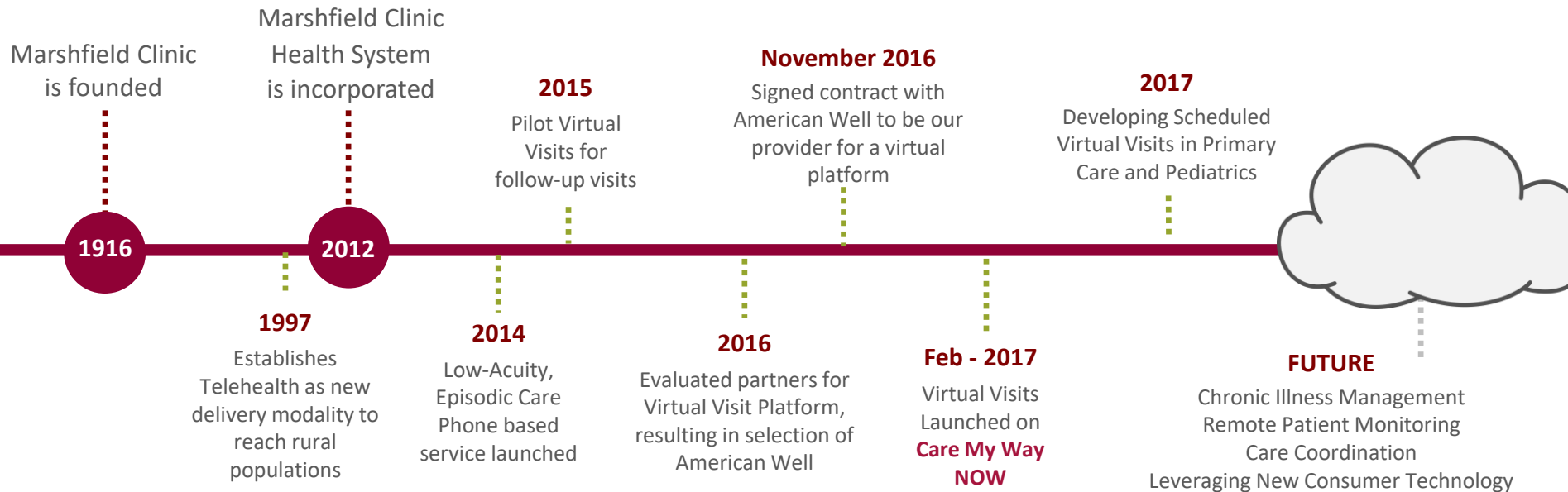
\$2 Billion
in REVENUE

BETWEEN
delivery system
and health plan

ACADEMIC LOCATION *for the*
University of Wisconsin
School of Medicine & Public Health



Where We've Been...and where we are headed



1916
Marshfield Clinic begins as a group practice in Marshfield with six founding physicians

TODAY
MCHS has about 1,200 physicians and health professionals and 8,000 employees in 50+ locations



Our Strategy for Telehealth

1. Focus on our mission
We Enrich Lives...
2. Build Provider and Administrative Support (Look to Strategic Plan)
Increased capacity, access
Reduce costs
Patient Engagement
3. Stay/Get involved
American Telemed. Association
Build relationships with
Payers/Legislators
Talk to businesses, civic groups
4. Get Started
Avoid “Analysis Paralysis”

You need to skate to where
the puck will be, not where
it has been.

~Wayne Gretzky



<http://flic.kr/p/4CXYcm>

Where will health care be in 5, 7 or 10 years
and how do we position ourselves to take
advantage of those opportunities and
minimize threats?

Chris Meyer, Director of Telehealth and Virtual Care



Chris Meyer
Director of Telehealth and Virtual Care
MCHS Institute for Quality, Innovation and Patient Safety (IQIPS)

**Use Case: Care My Way Now
&
Lessons Learned**

Remember...

The future is already here, it's just not evenly distributed

William Gibson

Most people **OVER** estimate what they can do in one year and **UNDER** estimate what they can accomplish in ten years.

Bill Gates

Care My Way Now



What is Care My Way Now?

Low-Acuity Episodic Care delivered via telephone or real-time two-way video

Why Offer this Service?

Increase Capacity of PCPs

Decrease Costs for routine care

Maintain patient contact for all healthcare needs

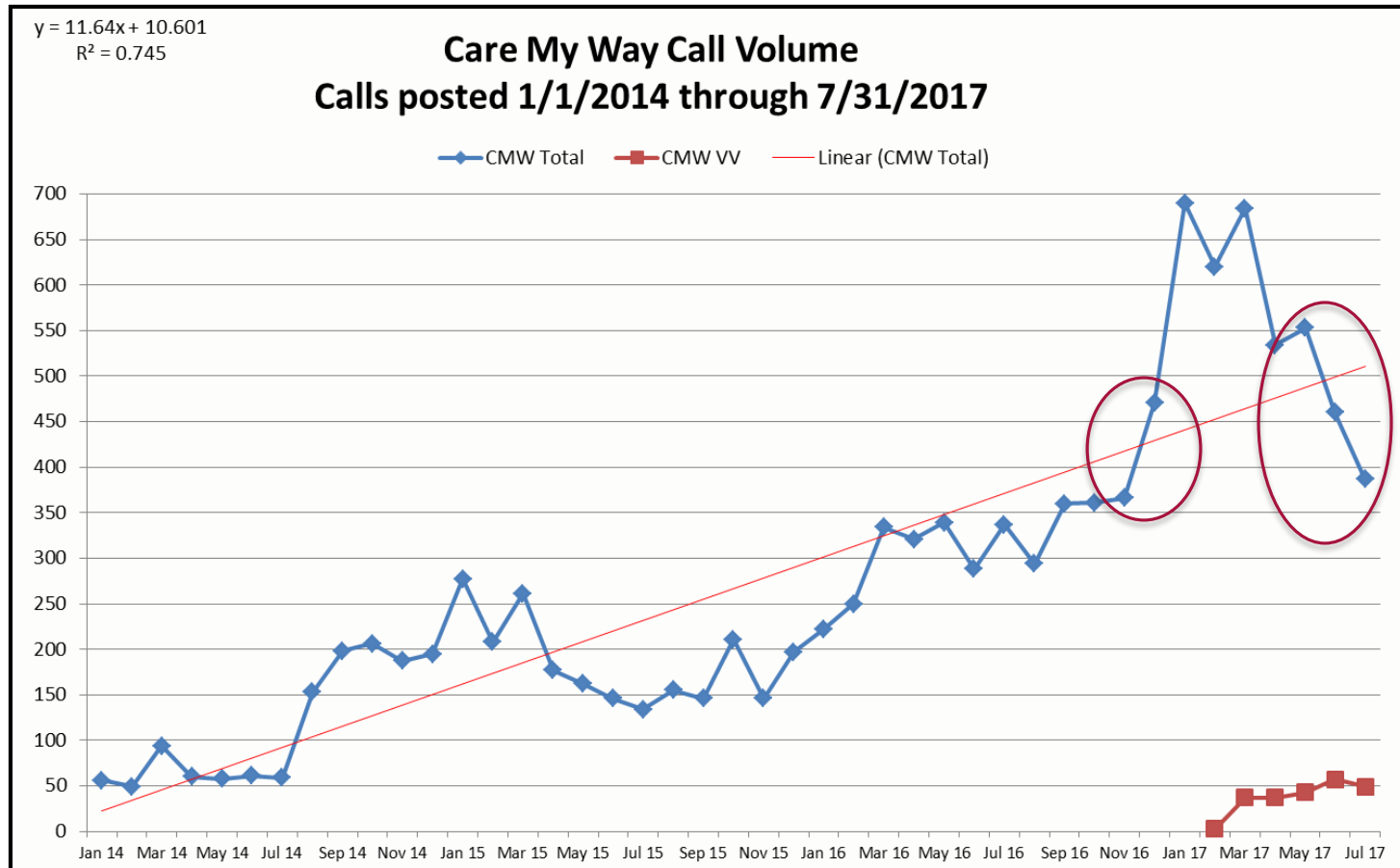
Care My Way Now

- 12,251 Treated visits since January 2014 (as of October 1, 2017)
- 20-30% of Patients are referred to PCP or UC
- Top Diagnosis:
 - Sinusitis – 5,285
 - UTI – 3,467
 - Pink-Eye – 911
- 26% of CMW patients do not have a PCP
- 14% of CMW patients have a PCP outside MCHS
- 71% of callers are female
- Average Age is 41
- 27% of people treated would not otherwise seek care
- 10% would have gone to ED

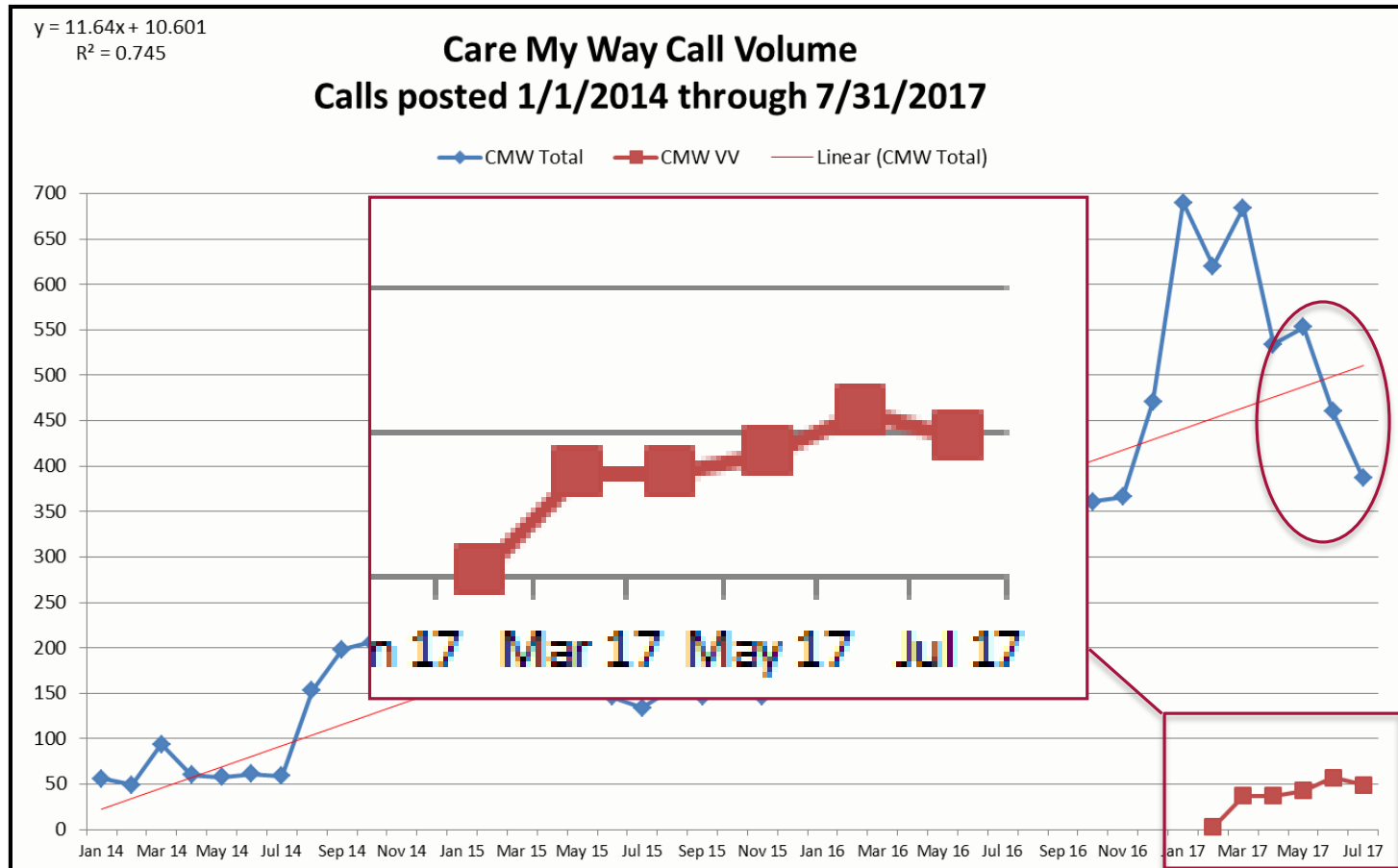
4900 Contacts with customers not currently patients

Significant considerations in either a quality-focused or capitated environment

Care My Way Now – Growth



Care My Way Now – Growth

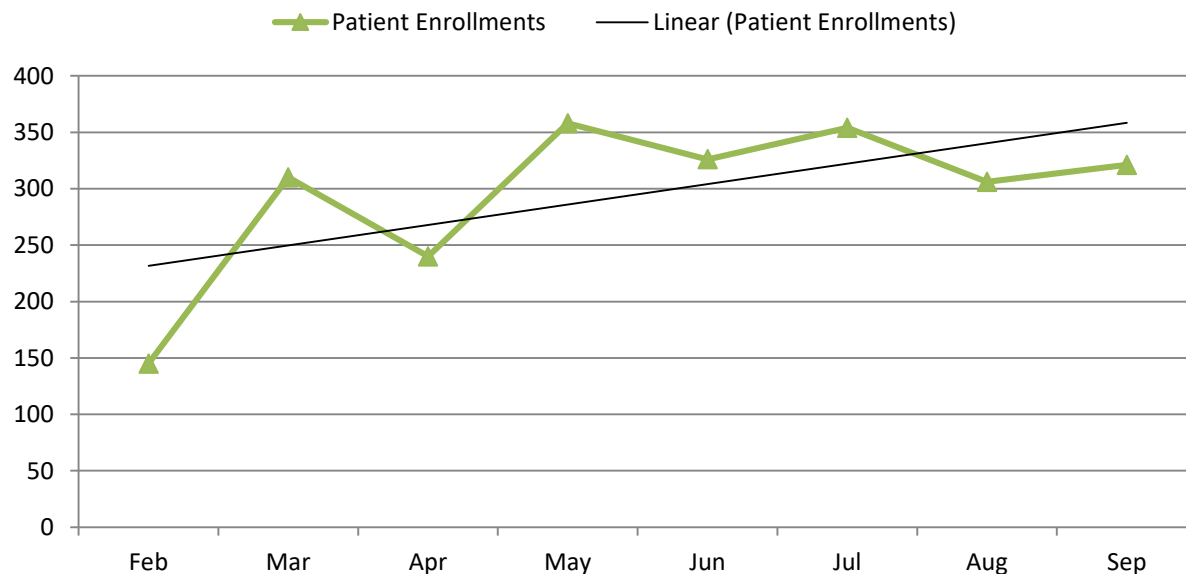


Care My Way Now – Lessons Learned - Enrollment

Growth is measured not just in actual visits, but in consumers downloading, installing and creating an account in the app.

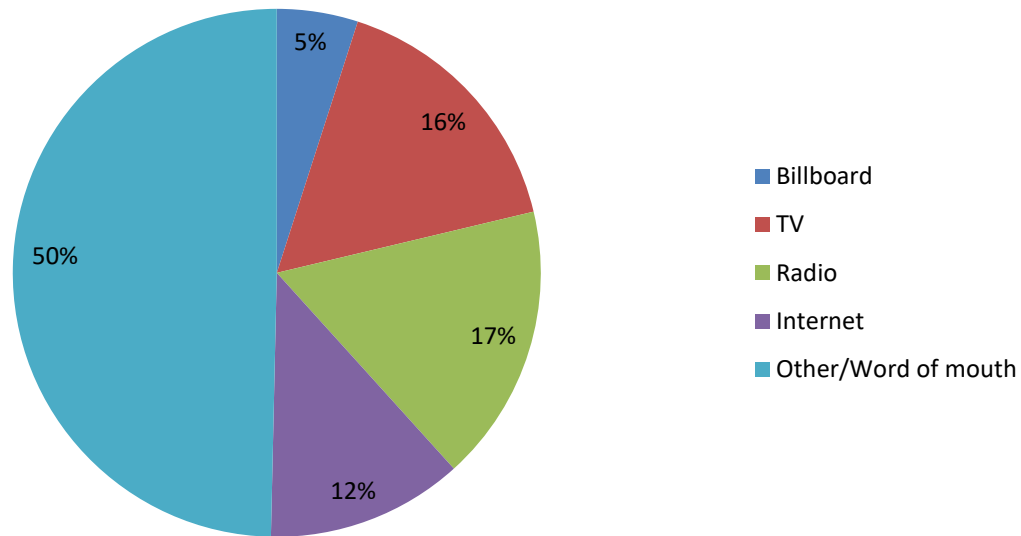
Total=2,360

Virtual Visit Enrollments



Care My Way Now – Lessons Learned - Marketing \$'s

Where People Learn About Care My Way NOW



n=297

Care My Way Now – Lessons Learned – Patient Satisfaction

Thank you for offering this service! You have no idea what a huge blessing this service was to us. Because of you, our ill son was treated that night for his infection! It would have cost us hundreds of dollars to go to walk-in with him as we do not have insurance. (Something that would have been a huge financial hit). Everyone on the phone was very helpful and thanked us for calling you! Thank you for being available!

CMW Patient 4/19/17

It was fast & easy! Wonderful!.

CMW Patient 6/8/17

This was a great service. We were on vacation over a holiday weekend and wasn't sure where to go. Will definitely remember this for the future.

CMW Patient 7/12/17

Great experience Busy schedule does not permit a long doctor office visit. Very awesome

CMW Patient 8/18/17



4.9/5 – Patient Rating

Care My Way Now – Lessons Learned

- A successful vendor partnership can greatly reduce your time to market
No need to build a better mousetrap
- Don't assume Virtual Visits are just for Millennials
Seniors will adapt to virtual care systems to remain independent longer
- Don't assume people have reliable broadband access
Steadily increasing, but still severely lacking in rural areas
- Don't market to a demographic, rather to an Archetype
 - Not Women ages 35-45
 - Care Givers/Busy Schedules
- Incentivize whenever possible
 - Providers, patients and payers

Future Initiatives

Future Initiatives – Patient Generated Health Data

- How can we leverage Patient-Generated Health Data to deliver better care?
- What data do we need
- What will we do with the data
- What limitations and opportunities does this present?



What are patient-generated health data?

Patient-generated health data (PGHD) are health-related data created, recorded, or gathered by or from patients (or family members or other caregivers) to help address a health concern.

- PGHD include, but are not limited to:
- health history
- treatment history
- biometric data
- symptoms
- lifestyle choices

Source: www.healthit.gov, Patient-Generated Health Data (May, 2017)

Future Initiatives – Chronic Illness Management

- Proactive Services in place for
 - Congestive Heart Failure
 - Anticoagulation
- Data supports expected quality improvements
- How can Virtual Visits increase the quality of these programs
- How can this be replicated for other Chronic Illnesses?



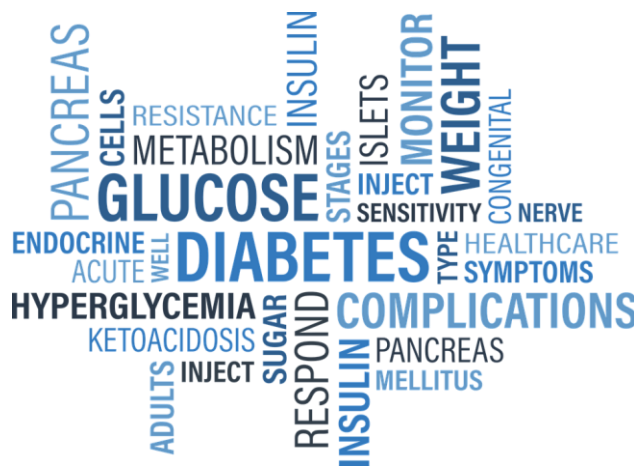
MCHS Remote Monitoring and Proactive Care

Heart Failure Clinic
Patients Enrolled: 1,443

Anticoagulation Clinic
Patients Enrolled: 6,553

Future Initiatives – Education

- Education is powerful!
- How can we deliver health education in a way that is more impactful?
 - Brochures vs. Virtual Visit with a trained educator



DIABETES



Current Initiatives

- Educating newly diagnoses diabetics via telehealth and potentially virtual visits
- Obesity Counseling to youth enrolled in after school program that also have elevated BMI
- Medication Adherence counseling for newly diagnoses asthmatics

American Well

How Health Systems Drive Value from Telehealth



October 25, 2017

Today's presenter



Daniel Olson
American Well
Group Vice President, Health Systems

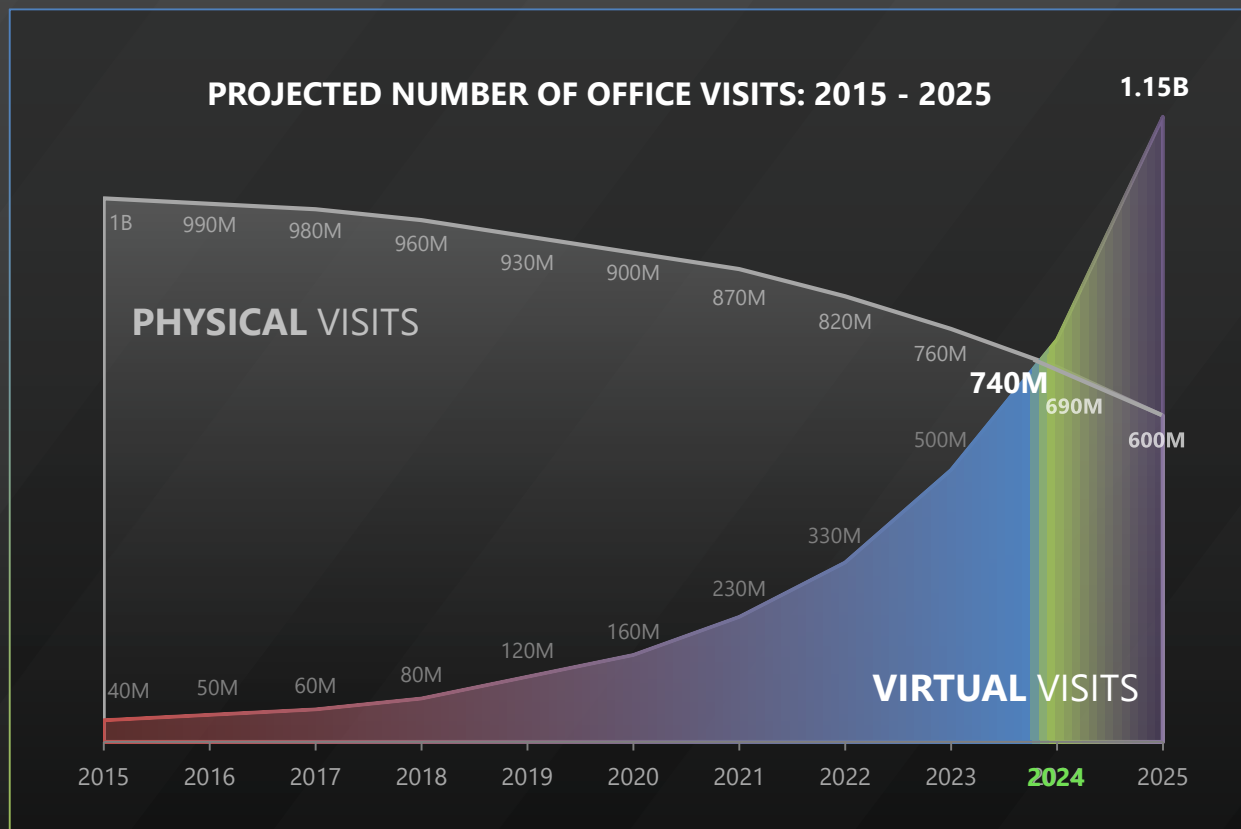
Telehealth Is becoming healthcare (and vice versa)

FORTUNE MAGAZINE

Here's What Your Future Doctor Visits Could Look Like

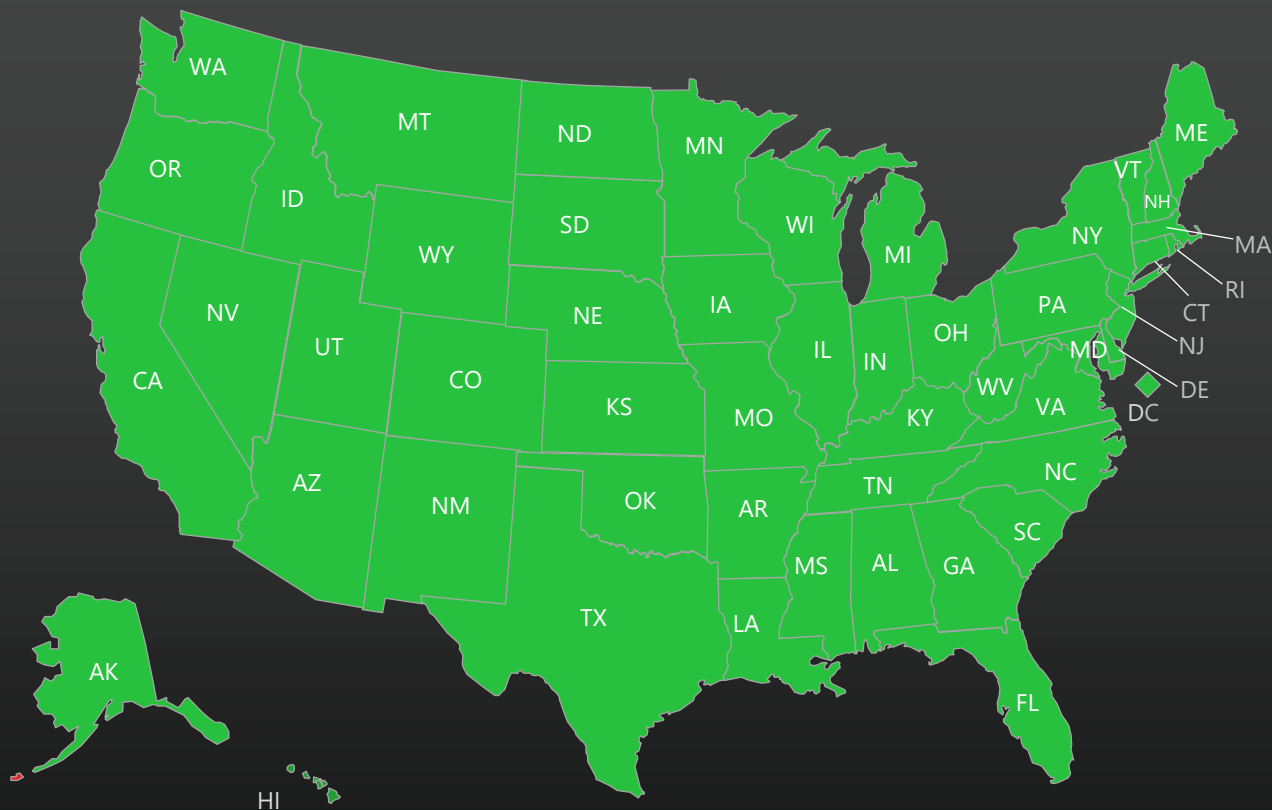
“ Tomorrow's office visit will increasingly take place everywhere but the office.”

- Dr. Eric Topol
May 2nd 2017



Source: Fortune, Ray Dorsey/Eric Topol - <http://fortune.com/2017/05/02/brainstorm-health-2017/>

A long road to removing barriers has resulted in success



 CLEAR

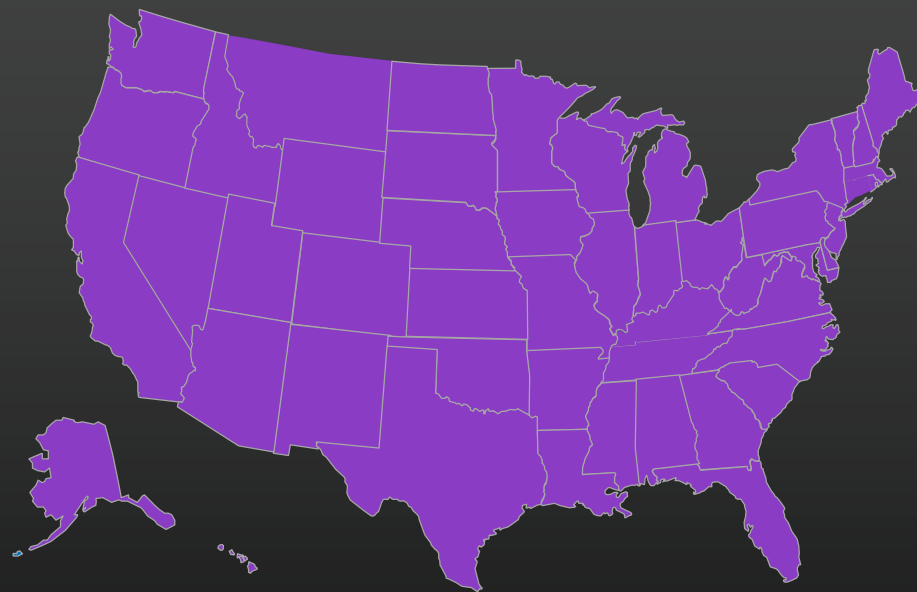
Consultation and prescribing can occur with the exception of Controlled Substances*



American Well®

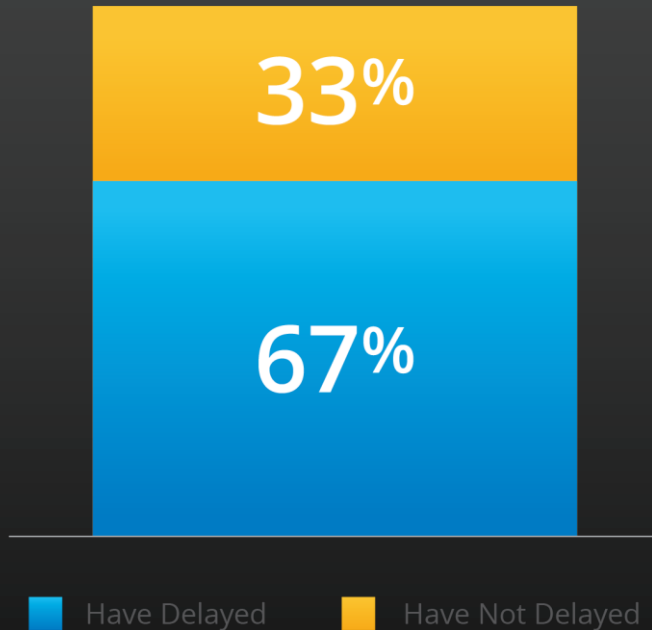
Our Consumer Survey:

- ✓ 4,000+ consumers across the U.S.
- ✓ Fielded in August/Sept. 2016
- ✓ Nationally projectable survey



Market dynamics driving telehealth adoption – access, cost, consumerism...

Have you ever delayed talking to a nurse or a doctor about a health problem?



Base: n = 2,100

Consumers are delaying care because:



It costs too much



It takes too long to get in to see a doctor or nurse



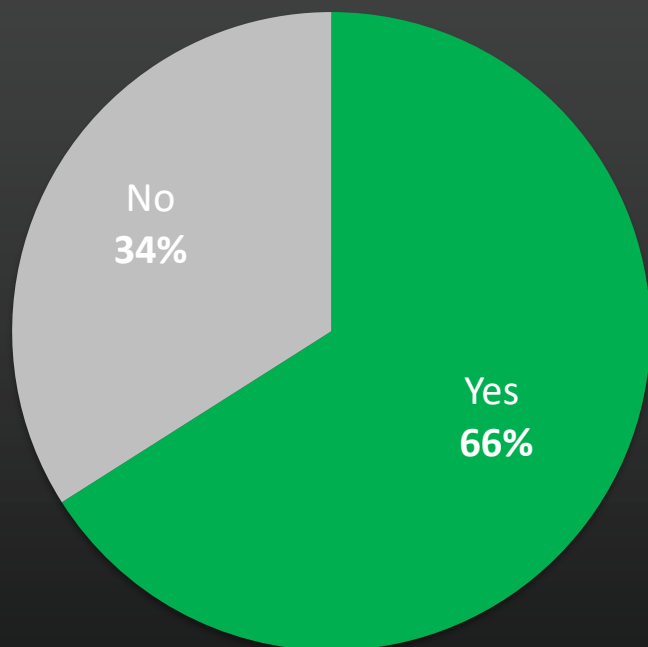
They hoped the problem would go away on its own



They are too busy

Consumers are willing to seek care via video...and like it when they do!

Would you be willing to see a doctor over video? **Yes**



Who's willing to see a doctor over video?

66% of Americans

72% of parents with children under 18

72% of those aged 45-54

53% of those over age 65



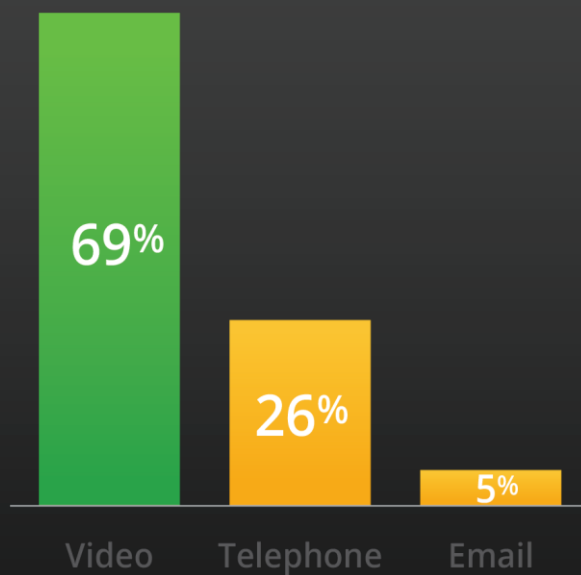
Patient Rating of Providers = Avg rating: 4.8

Patient Rating of Overall Experience = Avg Rating 4.7

Base: n = 2,100

Consumers see video as the most accurate for telehealth diagnosis

If you had to choose, which do you think would result in the most accurate diagnosis:



Base: n=2,100

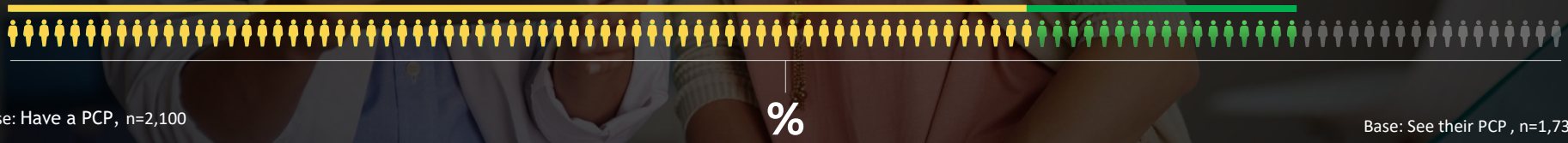


Patients would like their own PCPs to offer video visits

Do you have a PCP? Of those who have a PCP,

65%
said they would like to see
their PCP over video

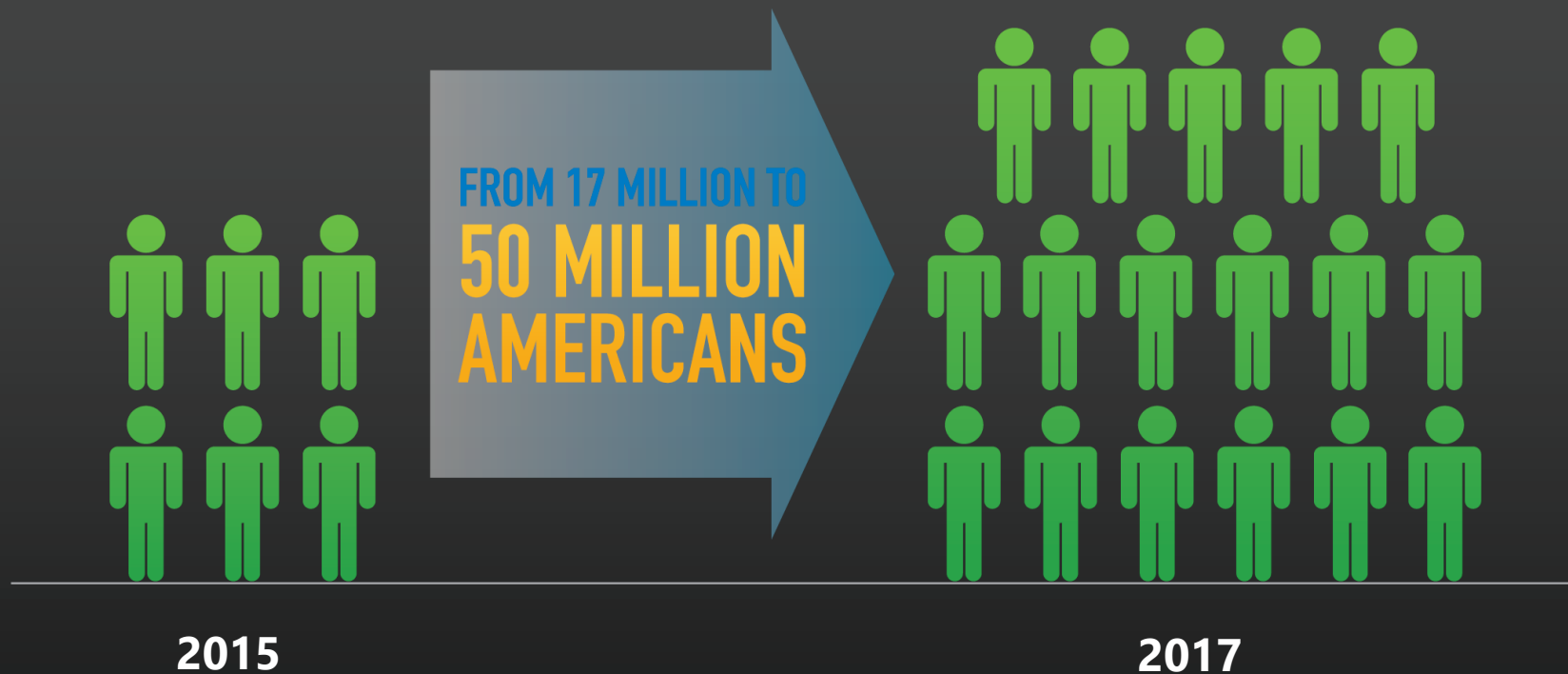
83%
of consumers
said Yes



In fact, 1 in 5 consumers would **switch** physicians for video visits



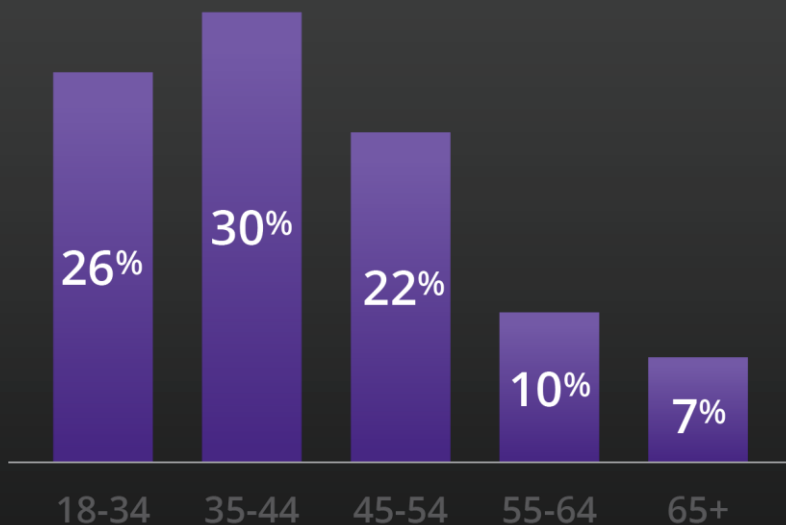
That means *50 million* Americans are potentially on the move



* Numbers were calculated in the following way: 323M (U.S. Population, U.S. Census Bureau, 2016) x 77% (U.S. Population Age 18+, U.S. Census Bureau, 2016) x 20% (Consumers with a PCP who would switch PCP for video visits, American Well 2017 Consumer Survey) = 50M
318M (U.S. Population, U.S. Census Bureau, 2014) x 77% (U.S. Population Age 18+, U.S. Census Bureau, 2014) x 7% (Consumers with a PCP who would switch PCP for video visits, American Well 2015 Consumer Survey) = 17M

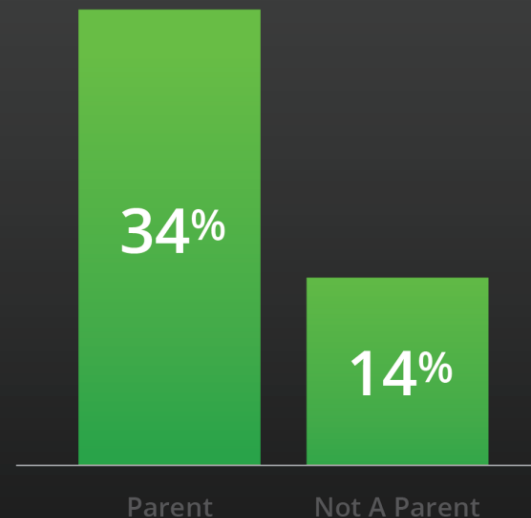
Who is willing to switch PCPs

Willingness to switch PCPs for video visits across age groups



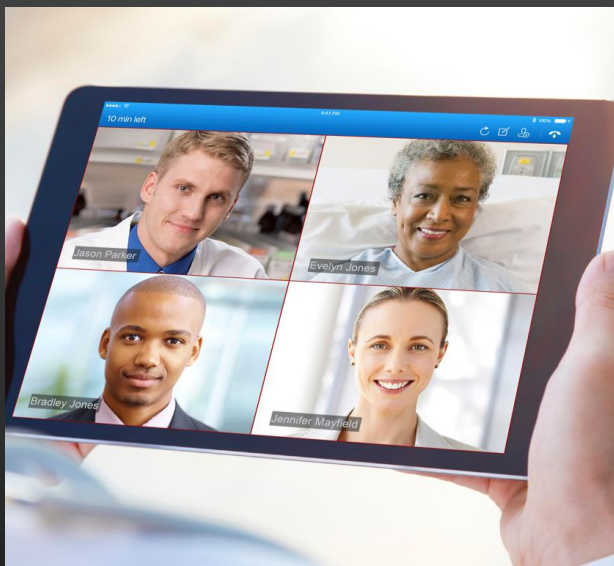
Base: n=2,007

Parents' & non-parents' would switch PCPs for video visits



Base: Parents of children under age 18. n=527 & non-parents, n+1,480

What we do



TECHNOLOGY



CLINICAL SERVICES



DEPLOYMENT PARTNER

1

A single focus on telehealth and a single telehealth infrastructure to support a growing ecosystem of unique clients

2007

A 10 year telehealth journey; private and profitable

8

Major markets served

75+

Unique brands of telehealth

2,000+

Employer clients

8,000

Number of client providers using our technology

138,000,000+

People that have access to American Well through their health plan

250+

Health system and health plan clients and partners

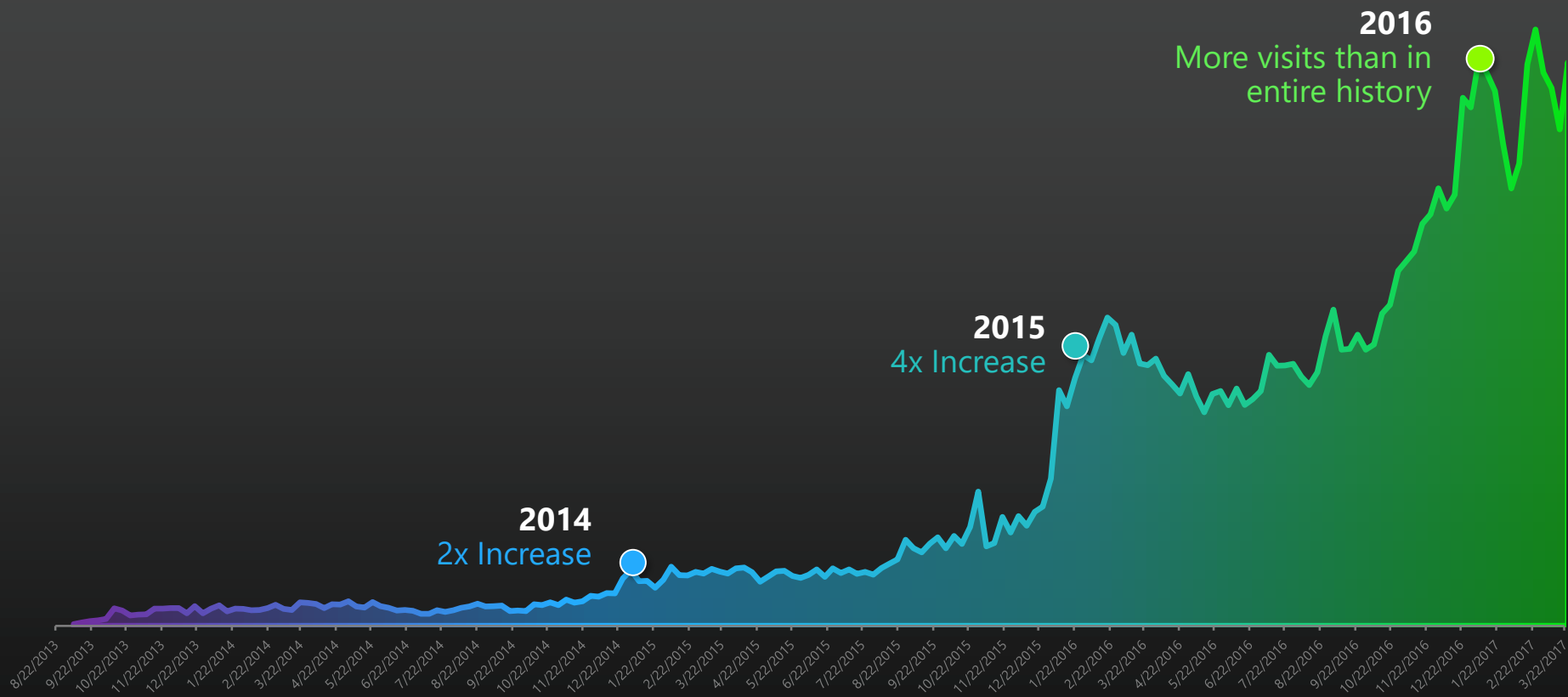
100+

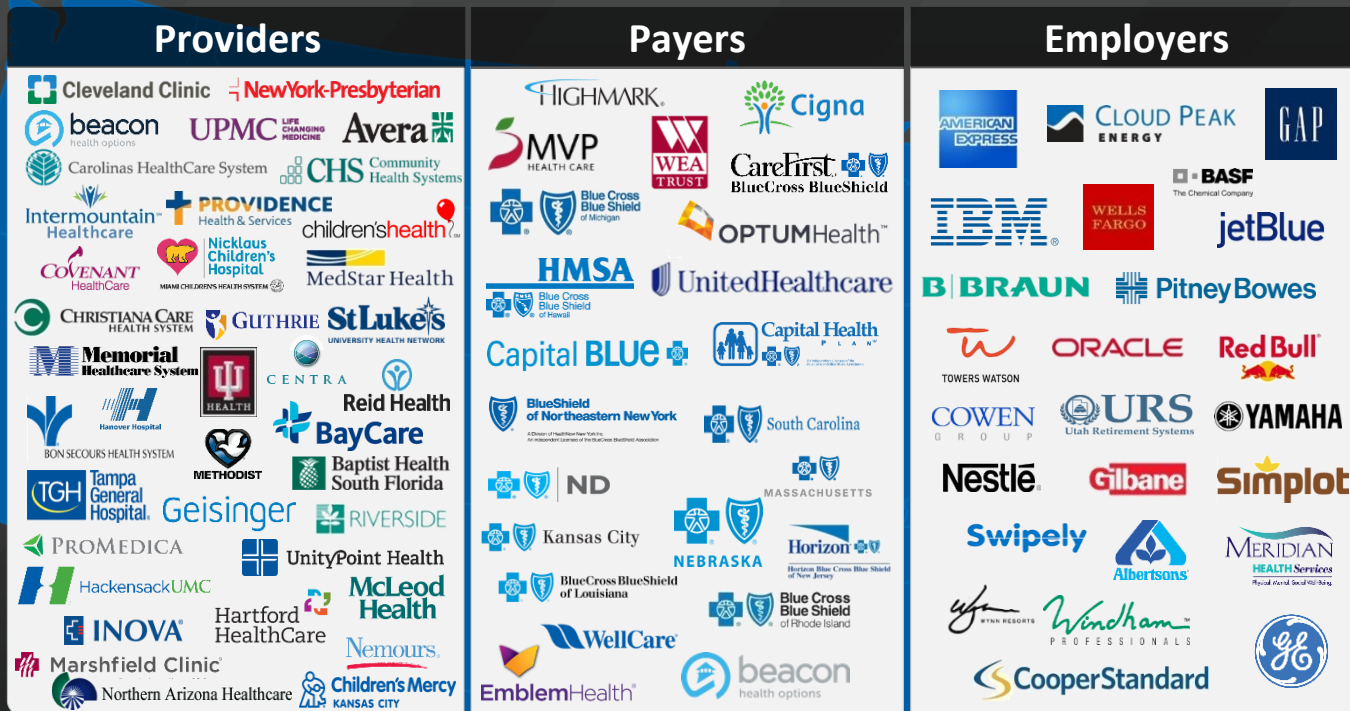
Unique use cases in use by our client base

\$300M+

R&D / Technology Investments

American Well is fueling the growth





A Diverse & Growing Ecosystem
950+ hospitals

Supporting the full spectrum of healthcare relationships



PATIENT to PROVIDER

Urgent Care, Behavioral Health, Nutrition
Nurse/Coach/Trainer Triage
Employer Offerings, Retail Kiosks



PROVIDER to PATIENT

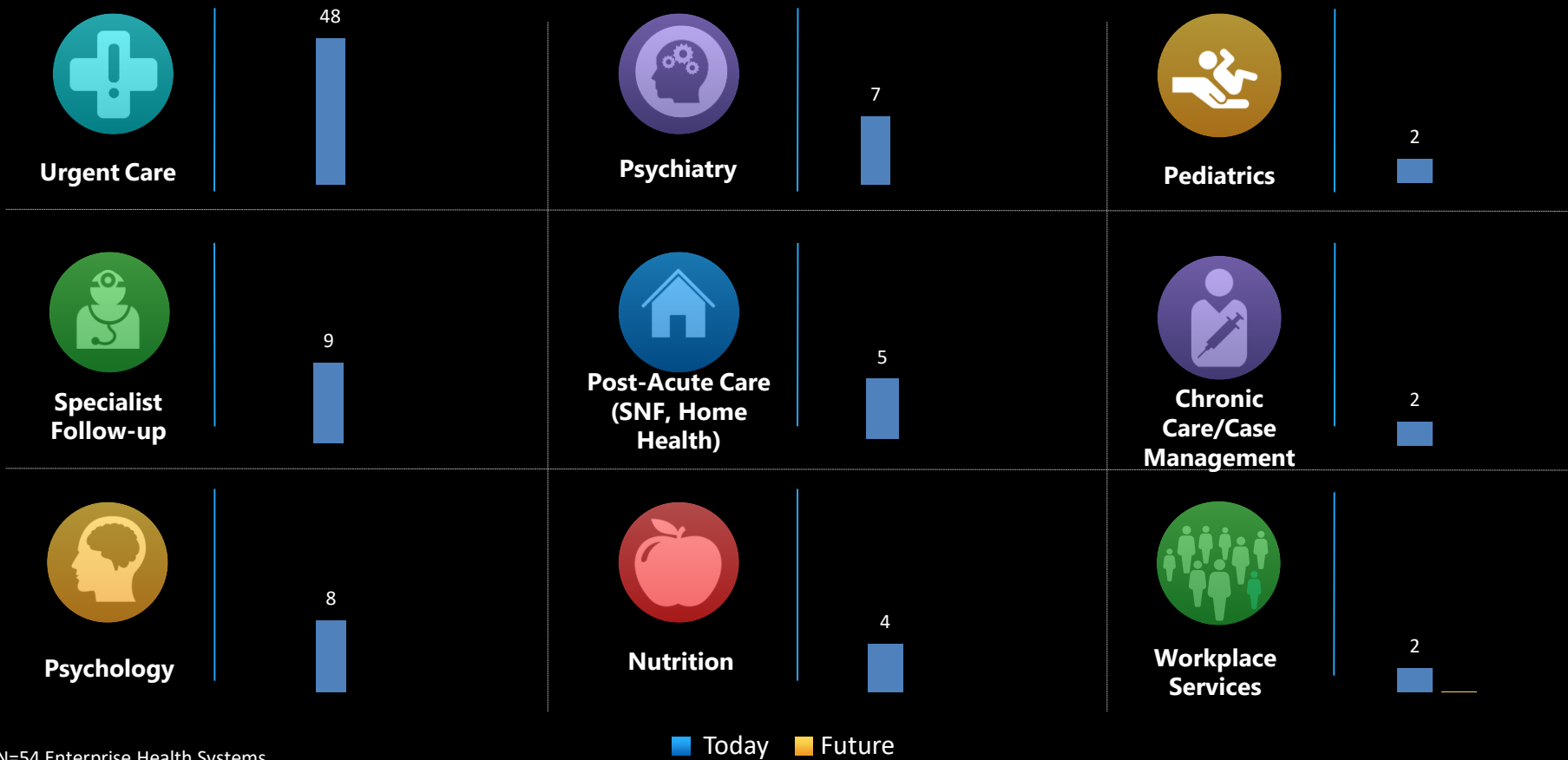
Follow Up Care, Specialty Care, 2nd Opinion
Visiting Therapist, Post Acute Care
Medication Management, Population Health



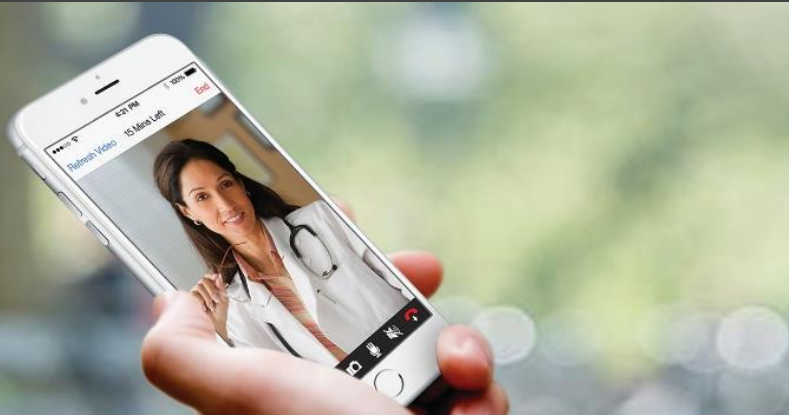
PROVIDER to PROVIDER

Curbside Consults, School-based Care
Allied Professional to Specialist
Post Acute Care, Tele Carts across Network

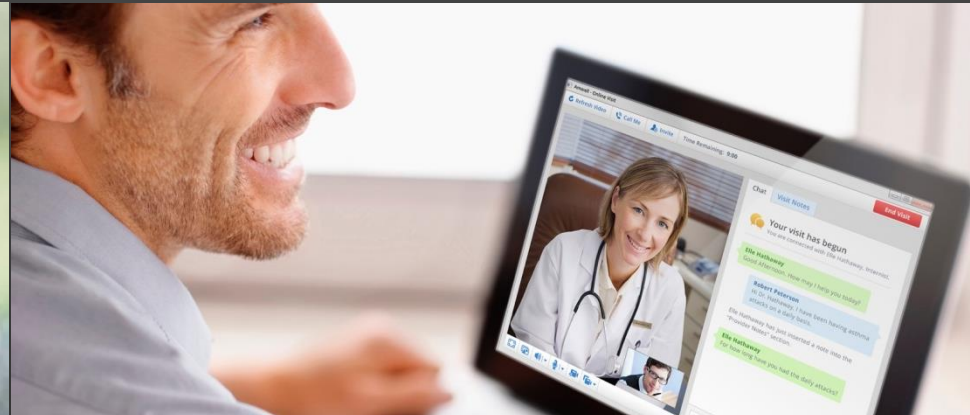
Top use cases used by health systems



Bringing care to patients in a number of different ways



Mobile Apps



Web



Phone

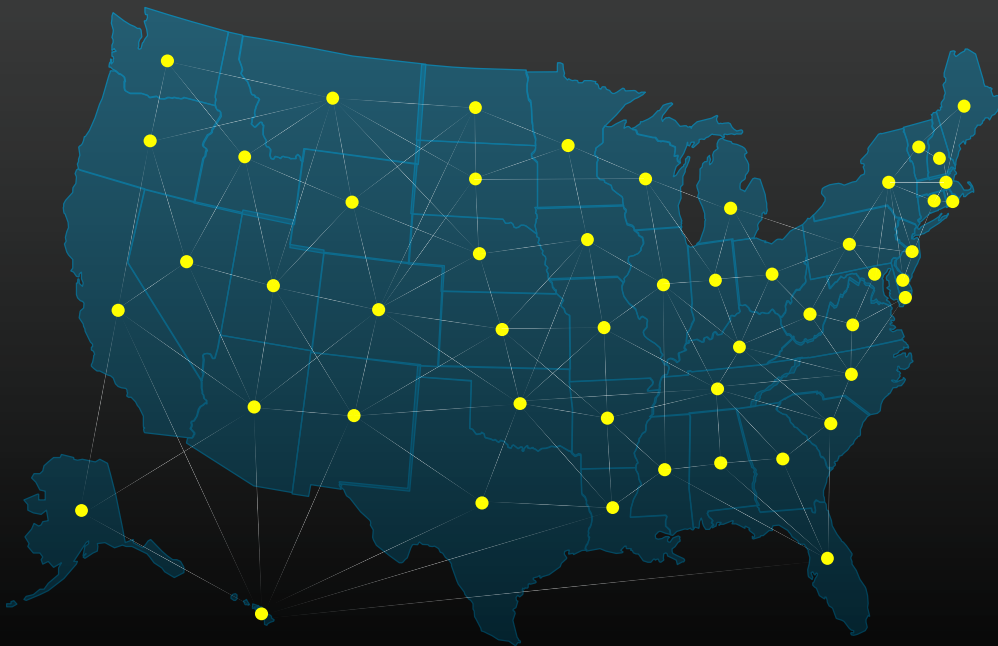


Kiosk

Online Care Group

Covering 50 states

Urgent Care | Behavioral Health | Nutrition | Breastfeeding Support



- National Medical Group – telehealth only
- Uniquely trained and experienced in telehealth
- Board-certified, multi-state licensed physicians
- Multi-disciplinary including urgent care, behavioral health, nutritionists and lactation consultants
- Patient choice of provider
- 24/7/365
- 5-10 minutes average wait time for Urgent Care
- Network Operations Center supports quality assurance, credentialing, and scheduling
- Mixed network compatibility works in conjunction with your clinical initiatives and providers
- NCQA-Certified (100% audit), FSMB Compliant, First to be ATA accredited

How health systems are promoting their telehealth programs

56%

Feature Telehealth on Website Homepage

69%

Run Paid Digital Advertising

- 52% on their own
- 17% through American Well

67%

Run Email Campaigns

- 54% on their own
- 13% through American Well

24%

Had a Web Review

31%

Have In-Clinic Marketing

N=54 Enterprise Health Systems

Pillars of success... shared by high performing telehealth customers

LEADERSHIP/ EXECUTIVE SPONSORSHIP

Active engagement and involvement at senior levels; frequent steering committee meetings

PROVIDER ENGAGEMENT

Ongoing training, engagement and best practices shared by clinical champions

PATIENT FOCUS

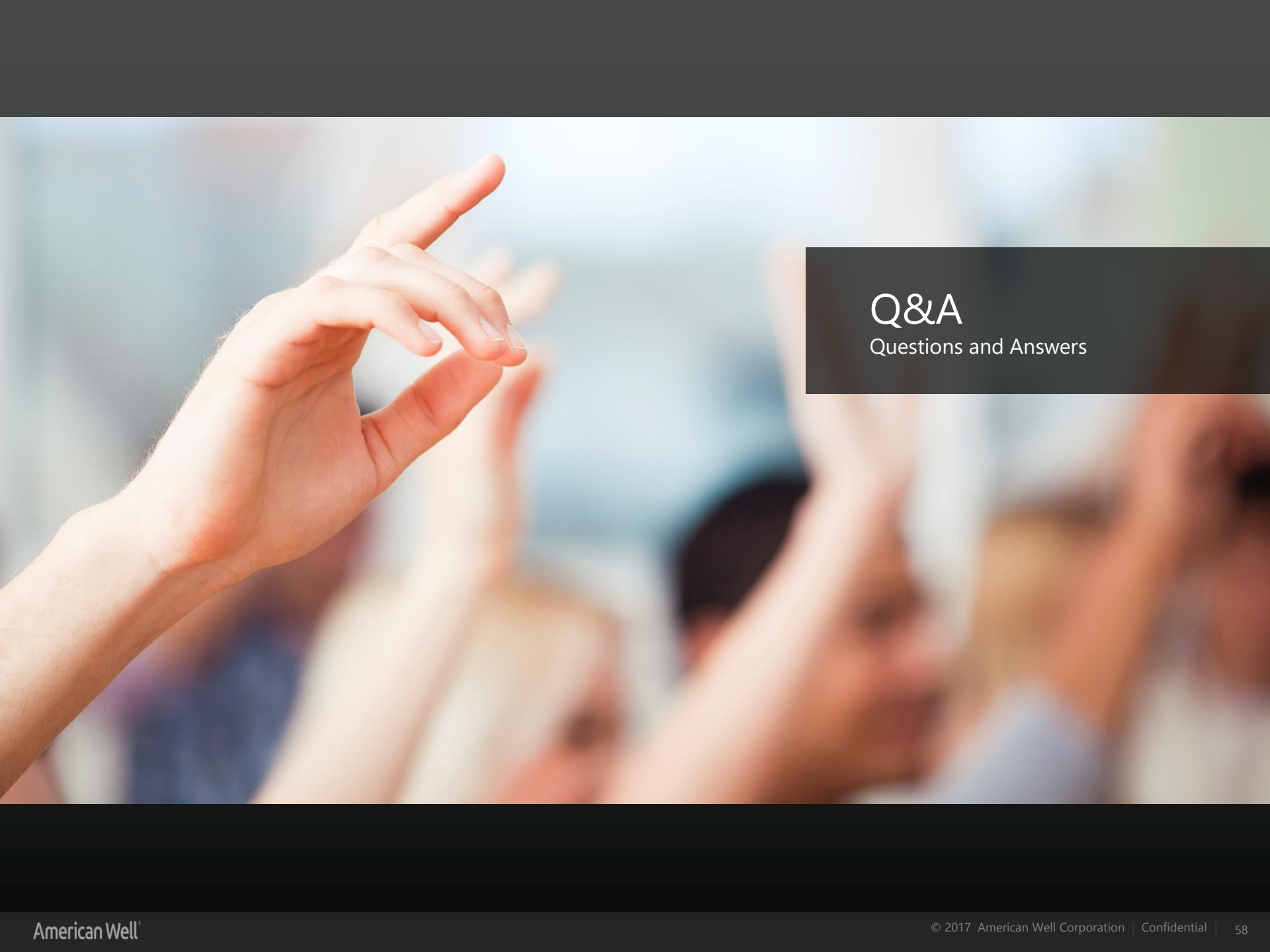
Determination of the right audience for each use case rollout and drive awareness with audience

USE CASE FOCUS

Based on provider, community and corporate needs. Leverage service line excellence, customize work flows.

MARKETING STRATEGY

Plan that targets right audience using best practices and cost effective methods as well as monitor success metrics

A close-up, shallow depth-of-field photograph of a hand reaching up, with fingers slightly curled. The hand is in sharp focus, while the background is a blurred crowd of people, suggesting a public event or gathering. The lighting is soft and natural, coming from the side.

Q&A

Questions and Answers

Q&A



This webinar was made possible through the generosity and support of Marshfield Clinic!



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HEALTH SYSTEM