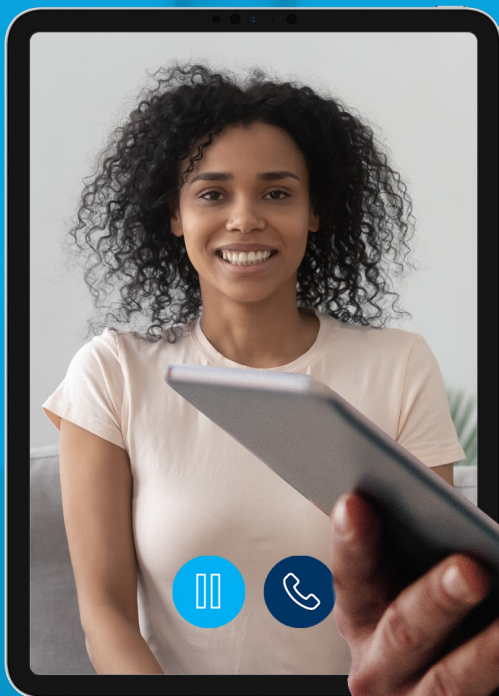


# The 2020 Virtual Care Report

*Navigating Patient Care  
in a Post-COVID World*

**The Telehealth Trifecta:** What it will take to transform healthcare practices, keep pace with changing patient expectations and fix reimbursement hurdles



# Introduction

*The telehealth boom raises questions of what's next.*

Telehealth was first introduced in the 1950s. Prior to COVID-19, there were many barriers to adoption, and it was often considered a novelty. The 2020 pandemic changed everything about healthcare. Within four weeks telehealth surged, seeing a

**4,300%** year-over-year increase in claims for March 2020.

It is now being used by roughly half of Americans and provided by an overwhelming majority of healthcare providers. Yet, concerns about reimbursement and other barriers remain about the use of telehealth beyond COVID-19.

In order to learn about the economic impact of COVID-19, how perceptions of telehealth have changed and how it will be used post-COVID-19, Updox surveyed more than 650 physicians<sup>1</sup> and more than 1,200 consumers.<sup>2</sup> Their responses underscore the need to continue investing in virtual care solutions across the entire patient experience and ensuring reimbursement follows suit. Read on to learn what the data says about the state of virtual care post-COVID, and what the industry needs to do to ensure long-term payment reform.

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# Prior to COVID-19, Telehealth was Considered a Novelty

The first uses of telemedicine to transmit video, images and complex medical data occurred in the late 1950s when the University of Nebraska used interactive telemedicine to transmit neurological examinations and other information across campus to medical students.<sup>3</sup> Unlike many other technologies, widespread adoption of telehealth has been relatively slow.

Fast forward 60 years, according to Updox's survey only **18.7%** of providers offered telehealth pre-COVID-19. Of those offering telehealth, the majority (**66.7%**) reported that less than **25%** of their practice visits were offered via telehealth, and **58.1%** mentioned they found telehealth to be slightly important to not important at all.

## Top Telehealth Barriers:

- 1 Lack of uniform coverage policies across insurers and states
- 2 High startup costs
- 3 Workflow reconfiguration
- 4 Clinician buy-in
- 5 Patient interest

In addition to financial and regulatory challenges, many providers simply believed telehealth wasn't necessary or perhaps arrived before its time -- despite its initial use cases. Furthermore, a 2019 survey conducted by the American College of Physicians (ACP) found that additional barriers to adoption included ***patients having to download new apps or access new technologies and stark concerns regarding privacy and patient data.***



# Telehealth Rockets into the Public's Consciousness Overnight

In March 2020, after The World Health Organization officially announced the novel coronavirus COVID-19 a pandemic, telehealth became “the new norm” almost overnight.

Most practices and health systems had already employed some type of technology to manage patient intake and appointment reminders. Once COVID hit, providers saw an urgent need to connect with their patients and provide care in a safe and effective way, and doing so was their primary concern. As a result of the need, **93.8% of providers reported offering telehealth**. And of those using telehealth, the majority (60.2%) reported more than 50% of practice visits were offered via telehealth - a more than **25%** increase - and **81.6%** providers found telehealth to be very or extremely important to them.

## WE ASKED PHYSICIANS:

*Did you find telehealth to be important to your practice during the pandemic?*

Yes

**81.6%**

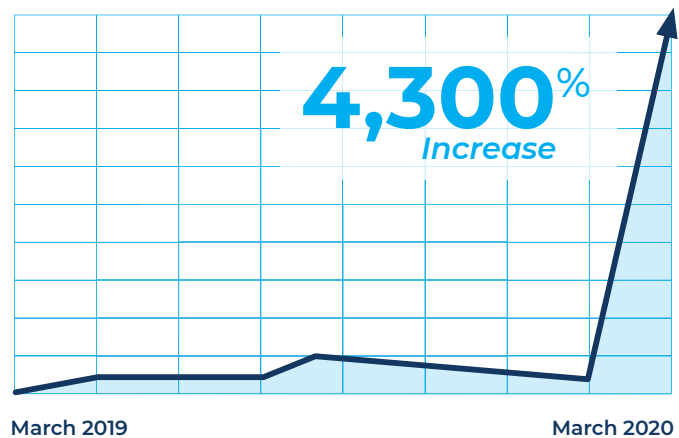
No

**18.4%**

This rapid growth in telehealth adoption was fueled by two main factors: relaxed rules around enforcement and reimbursement and new safety demands from patients and staff. Prior to COVID-19, reimbursements for telehealth were focused on rural or underserved areas. Likewise, regional inconsistencies and varying rules for reimbursement by individual insurers limited its adoption.

CMS and other governing bodies relaxed regulations around technology and reimbursements to ensure providers were able to see more patients, triage patients without in-person office visits and generate needed revenue. **As a result, telehealth surged, seeing a 4,300% year-over-year increase in claims for March 2020.**

Increased Telehealth use due to COVID-19



# Use Cases for Telehealth Expand During the Pandemic

Both prior to and during the early stages of the COVID-19 pandemic, three main visit types were offered via telehealth:



**Medication  
Management**



**Chronic  
Disease**



**Sick  
Visits**

COVID-19 highlighted the need for additional instances where telehealth plays an important role. Today, telehealth is being effectively used in many unique scenarios:



## Avoiding the Emergency Room

A patient with mild respiratory symptoms needs evaluation but was told not to go to the emergency room.



## COVID-19 Contact Tracing Test

A patient has no symptoms of COVID-19, but had contact with someone infected by the novel coronavirus and wants to be evaluated.



## Health Facility Closures Due to COVID-19

A patient needs care for a reason unrelated to COVID-19 (e.g. management of chronic health condition), but cannot go in-person due to clinic closure or fear of coronavirus exposure.



## Quarantine Care Made Possible

A provider is under quarantine due to COVID-19, but can continue to see patients from their home via virtual visits.



## Safely Treat COVID-19 via Telehealth

A patient with severe symptoms of COVID-19 is hospitalized, and needs a specialty consult with an infectious disease doctor in a remote location.

# Patients Expect Convenience, Safety & Choice

In order to understand the patient perspective on the trend toward telehealth, Updox surveyed more than 2,000 patients via The Harris Poll.<sup>4</sup> Their responses highlight how telehealth has become integral to the patient experience and the need for the industry to continue investing in virtual care technology and accessibility. The consumerization of healthcare - convenience, digital channels and an ongoing engaged relationship between patients and their doctors - has been on its way for years. The pandemic accelerated this demand significantly.

In 2019,  
**11%** of consumers  
used telehealth.<sup>5</sup>

Over **42%** of  
Americans have  
used telehealth  
since the pandemic began.<sup>6</sup>

**76%** of patients  
are interested in using  
telehealth going forward.<sup>7</sup>

Results of the survey show that more than **8 in 10 patients** who have used telehealth services since COVID-19 love/like it. Patients have become accustomed to telehealth and want to continue using it post-pandemic. Their preferences for virtual care options include safety, convenience, and the freedom to choose their own physician.

## Safety

Of patients who like using telehealth services, **63%** say they like it because they don't have to worry about being exposed to other potentially sick patients. This preference is stronger in women - **with 72% of women vs. 54% of men** saying they like using telehealth services due to not having to worry about being exposed.

## Convenience

Of respondents who like using telehealth services, **65%** say it's more convenient. Additionally, of Americans who like using telehealth services, **44%** like it because it's easier to schedule an appointment via telehealth than an in-office appointment, and **38%** say they like it because follow-ups and communications post-appointment are more streamlined. When thinking about the use of telehealth post COVID-19, **more than a quarter of Americans (26%) and 30% of those aged 55+** also say not having to download any special apps or programs would be important to them.

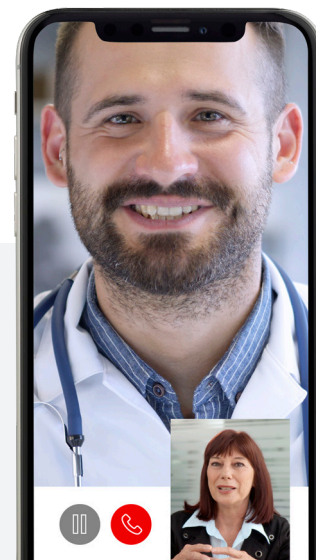
## Choice

**Nearly half of Americans (49%)** say that if they were to use telehealth services post COVID-19, seeing or speaking with a healthcare professional of their choice, rather than someone assigned to them, would be important to them.

# Telehealth is Forging Ahead, Reimbursement is Following Suit

There is still uncertainty amongst providers as to how long they anticipate it will take for their practices to be back up and running at pre-COVID-19 visit and reimbursement levels. However, providers who implemented telehealth via Updox are more certain that they will be back up and running in 2-6 months compared to those who selected another partner for telehealth (45.9% vs 34.8%). In fact, some practices that leveraged Updox telehealth retained upwards of **75 percent** of their normal patient volume during COVID despite offices being fully closed.<sup>8</sup> In a post-COVID environment, telehealth is no longer a novelty - it is a requirement to stay in business.

More than **56 percent** of Updox survey respondents report telehealth to be very to extremely important to the future of their practice, and **95.2% report they plan to offer telehealth in the future.**



Despite it being vital to their practice, some physicians are concerned that telehealth adoption and coverage will revert back to pre-COVID rates after the pandemic. According to the physician survey, as stay-at-home restrictions are lifted, the biggest barrier they see to long-term adoption of telehealth is reimbursement (**55.1%**).

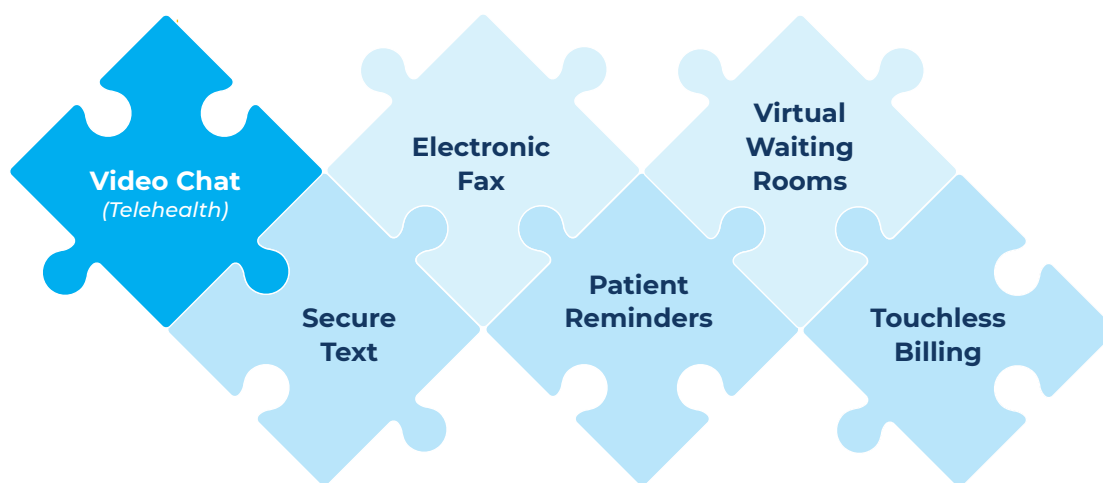
COVID-19 has forever changed healthcare delivery, and telehealth is not likely to drop back to its pre-COVID rates. Reimbursement is critical for practices to maintain revenue. With patient and physician needs growing, reimbursement options will continue to follow. A number of new bills have been introduced to Congress for telehealth coverage beyond COVID-19. Many states, including Colorado and Idaho, have also already taken steps to ensure that reimbursement provisions made available during COVID will be made permanent.

While many bills have been introduced, legislators need to hear from their constituents about the importance of moving legislation forward. There is power in numbers, and providers should join in the advocacy efforts of their professional associations. The American Medical Association, American Academy of Family Physicians, and American Academy of Pediatrics are just a few of many associations actively advocating for telehealth and providing resources to their members. The industry should also work together and stand with physicians and advocacy groups in supporting proactive action until this issue is addressed.

# Virtual Care in the Post-Covid Environment will Span the Entire Patient Experience

As practices transition to the post-COVID-19 world, telehealth will remain extremely important. Patients will increasingly demand flexibility and convenience, and practices need to be able to continue providing care safely while maintaining revenue flow. The options for telehealth and virtual care will continue to evolve to meet patient and physician needs in a post-COVID environment.

**However, it's important to remember that telehealth is just one piece of the puzzle.**



Practicing healthcare in a post-COVID environment includes implementing a full virtual care strategy that is not only cost-effective and resource-efficient, but that improves the patient experience both inside and out of the practice. Virtual care will be integrated throughout the entire practice workflow. This encompasses all patient engagement solutions such as video chat, secure text, electronic fax, patient reminders and touchless billing.

Beyond these, solutions to help manage the in-person patient experience from intake to treatment - which support social distancing and eliminate inefficiencies and unnecessary wait times for both patients and physicians - will be critical. New contactless solutions, such as virtual check-in and waiting rooms or completing and managing electronic forms, will help improve safety, clinical workflow and efficiency, all while enabling doctors to spend more time with patients.

As providers look ahead, they must expand their offerings to combine other technologies across the in- and out-of-office experience to create a true virtual care environment. By developing a roadmap to leverage virtual care both now and post-COVID-19, physicians can ultimately be more productive, better engage with patients and run a more profitable practice. Developing a virtual health strategy is imperative to long-term success and improved outcomes through a more comprehensive patient experience.



# Conclusion

Healthcare has forever changed since the start of 2020. Physicians and patients have both indicated their desire to leverage telehealth as part of the ongoing continuum of care - and supporting [permanent reimbursement of virtual care](#) beyond COVID-19 is key to making that a reality. Only then will we truly transform care, and as an industry, collectively assist in maximizing patient engagement, improving outcomes and enabling more timely, efficient connections between patients and their physicians.

## YOU CAN DO THIS BY:

- Supporting your professional associations
- Contacting your local congressional leaders
- Signing petitions on both a local and national level encouraging reimbursement legislation
- Writing op-eds and speaking out on social media, lending your voice to the issue

After you've called your congressional and professional contacts, call us or visit [updox.com](https://updox.com). We understand how healthcare has changed over the past months and we're here to help you navigate your options as you rebuild your business. We'll show you how to improve your patients' access to care in a safe and efficient way and set your practice up for success in a post-COVID virtual environment.



# About the Surveys



## Physician Survey

Updox surveyed more than 650 physicians to determine the economic impact of COVID-19, telehealth during the COVID-19 pandemic, how perceptions changed pre-COVID-19 and now regarding telehealth and how telehealth will be used post-COVID-19 pandemic. A majority of respondents are physicians practicing primary care at solo/independent practices or have 1-2 physician or non-physician practitioners on staff using at least one element of the Updox platform.



## Patient Survey

The patient survey was conducted online within the United States by The Harris Poll on behalf of Updox from May 12-14, 2020, among 2,067 U.S. adults ages 18 and older, among whom 1,293 like using telehealth services. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

## About Updox:

The only place to manage healthcare communications across both in-person and virtual care, Updox offers one consolidated inbox for healthcare providers to manage the entire patient journey and office productivity. Through an all-in-one platform, Updox provides a broad set of capabilities for virtual health, patient engagement, and paperless office efficiency that work together to reduce costs and drive revenue.

Updox is integrated with more than 100 electronic health records (EHR) and pharmacy management systems and serves more than 560,000 users and 210 million patients. Updox customers also benefit from an engaged user community for benchmarking, idea exchange and networking. Visit [updox.com](https://updox.com) for more information.

# Resources

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