



Telehealth Use



Comprehensive Planning Committee
August 19, 2021



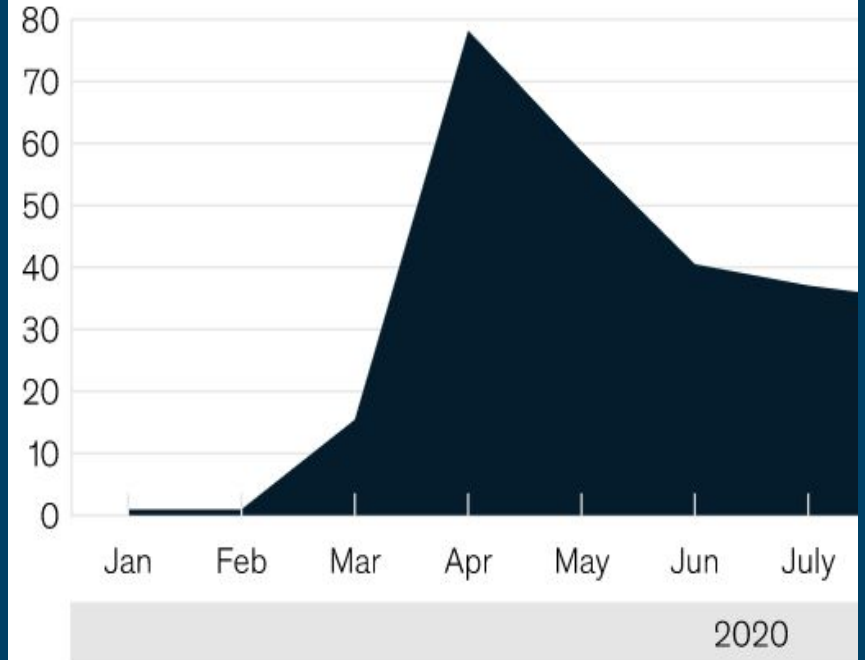
From the Allocations Process:

- Have the Comprehensive Planning Committee determine utilization of and comfort level with telehealth.
- Have the Comprehensive Planning Committee collect more information on the Digital Divide and corresponding accessibility resources, such as support services for digital literacy.

Telehealth: A quarter-trillion dollar post-COVID reality?

McKinsey
July 9, 2021

Telehealth claims volumes, compared to pre-Covid-19 levels



A shift in financial focus:

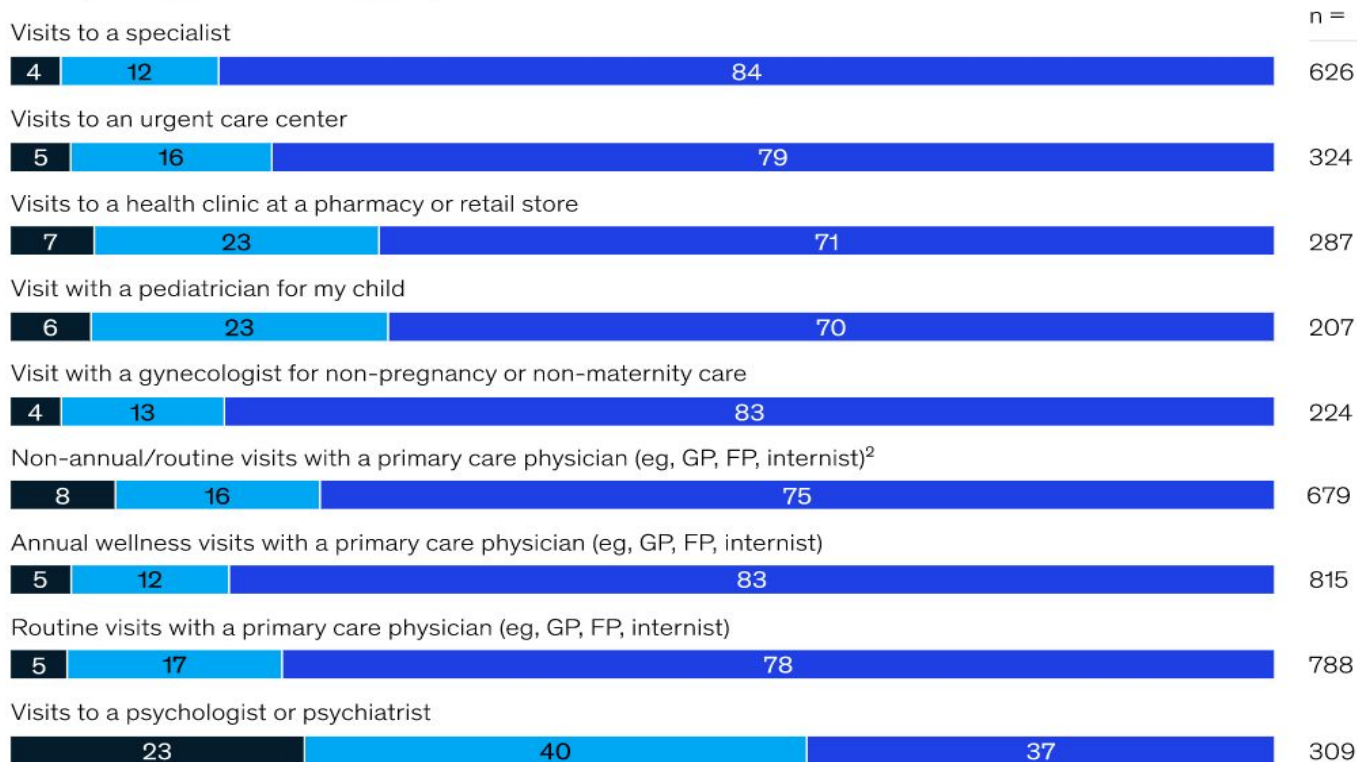
- ***Estimated*** \$250 billion of US healthcare could be shifted to virtual support.
- Investments in digital health companies ***projected*** to almost double in 2021 and be around \$25-30 billion.

A breakdown of modality:

Modality of most recent appointment by setting, current as of June 14, 2021

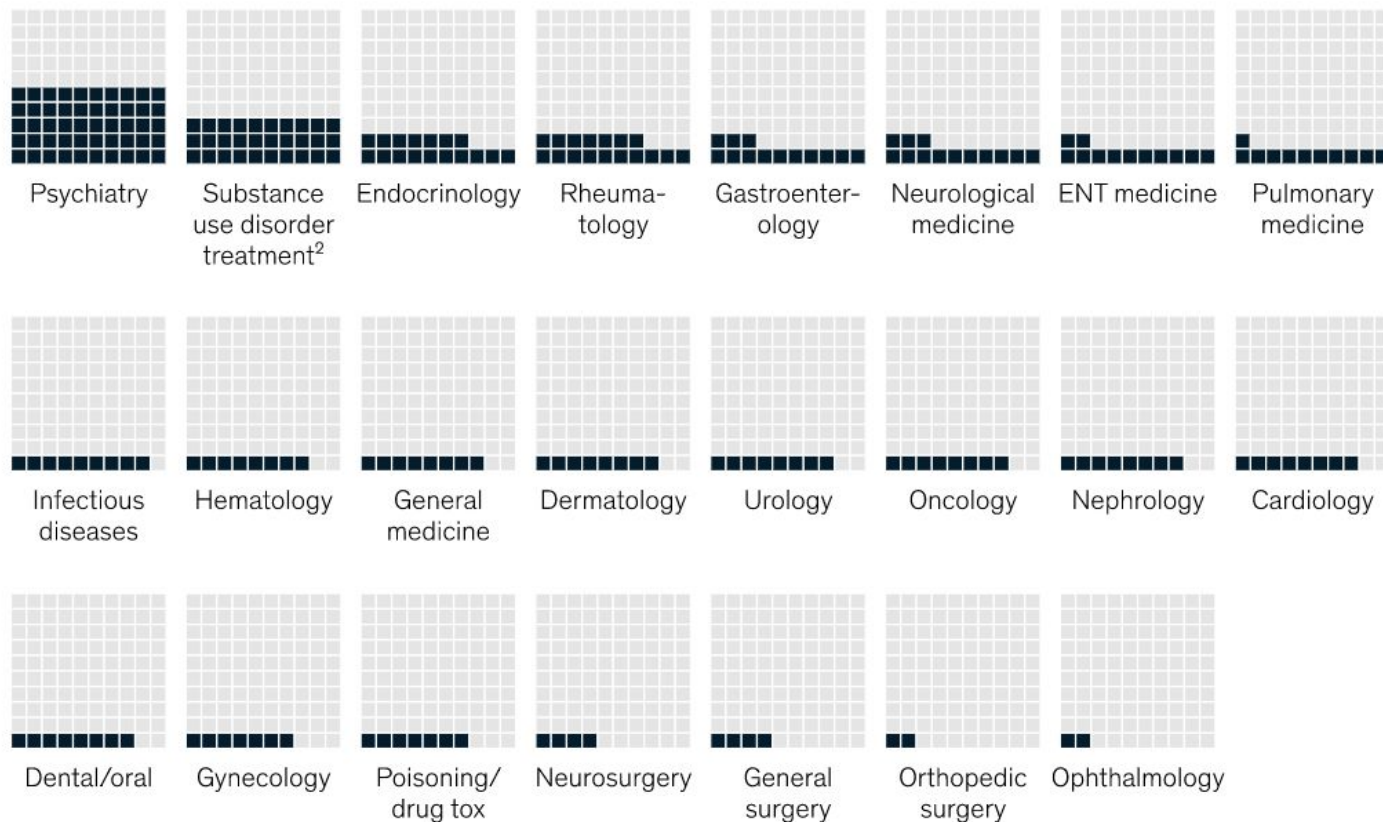
Respondents who reported receiving care in the specified setting (sample size varies by row),¹ %

■ Telephone ■ Telemedicine ■ In-person



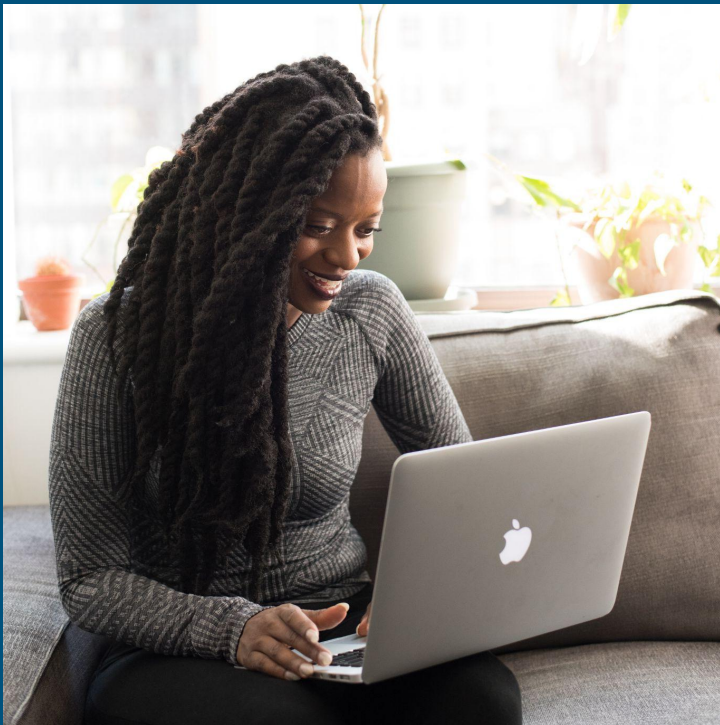
It depends on the service:

Share of telehealth of outpatient and office visit claims by specialty (February 2021¹), %



Perceptions of telehealth have improved

On the client level



...and on the provider level



“Digital front doors” & more benefits listed:

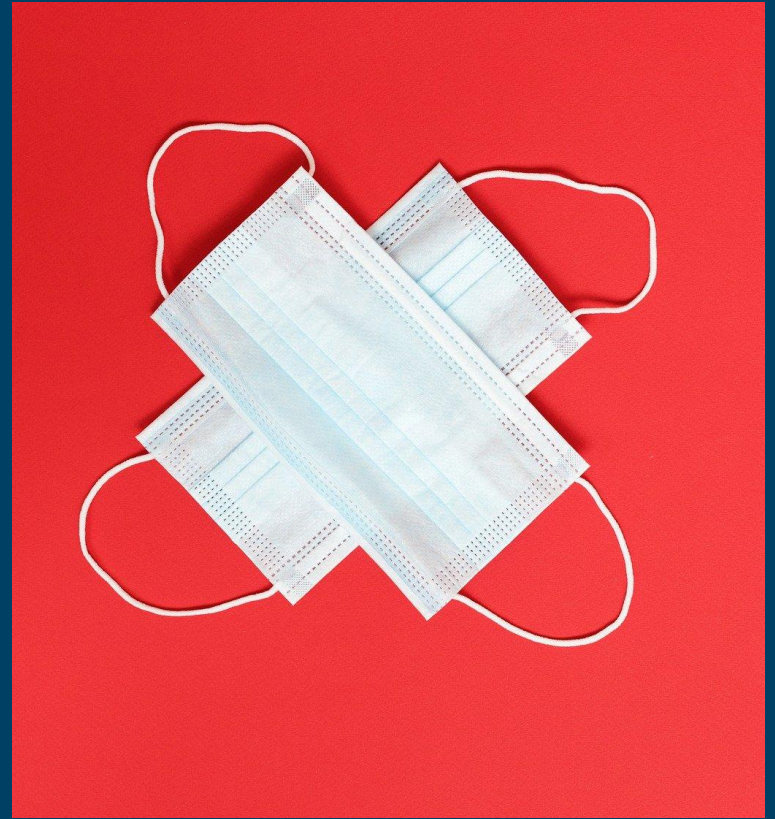
1. Convenience
2. Rural Areas & Increased Access
3. Improved Health Outcomes
4. Affordability



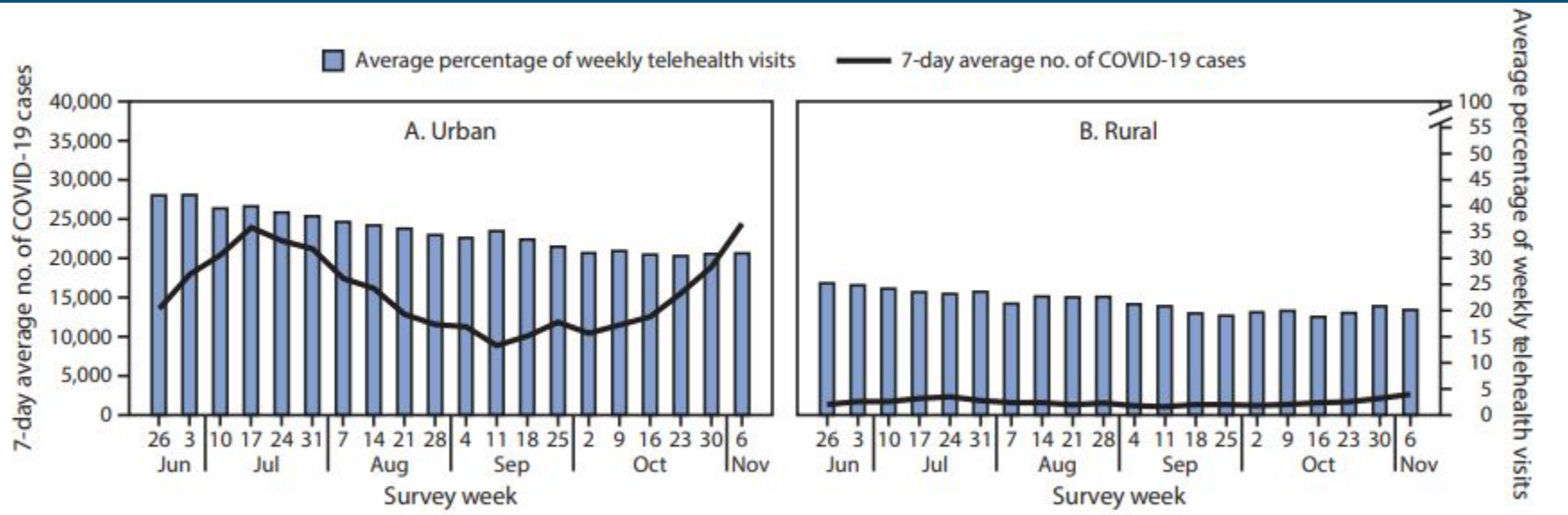
Trends in Telehealth Use

Morbidity and Mortality
Weekly Report (MMWR)

June - November 2020



Rural vs Urban:



The barriers & concerns:

- Continued device & broadband support
- Logistics
- Training
- The need for CONTINUED flexibility for Medicaid & Medicare telehealth reimbursement policy



Both studies agree that...

1. Telehealth improves health outcomes
 2. Telehealth is important for the future of healthcare
 3. Telehealth is beneficial to those with limited access to care
-

NJ and PA have both expanded telehealth coverage

- New Jersey will continue expanded coverage until 90 days following the end of **both** the public health emergency **and** state of emergency.
- Will continue to move beyond January 11, 2022 unless the Governor moves to end the state of emergency.
- Pennsylvania will continue expanded coverage “for the duration of the COVID-19 emergency.”