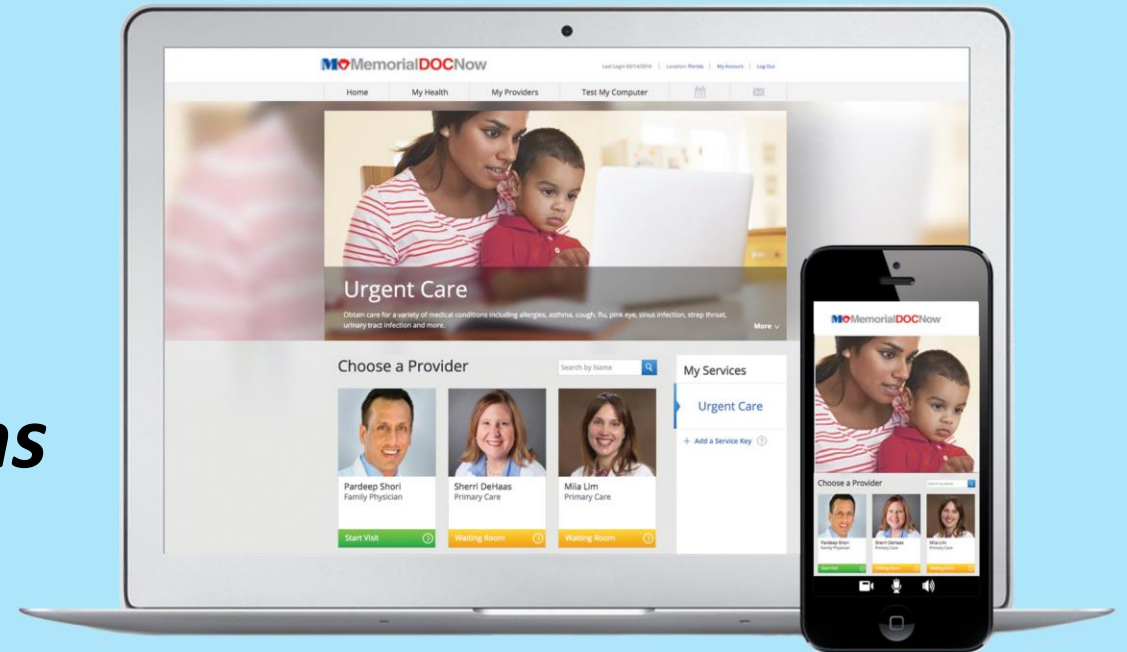




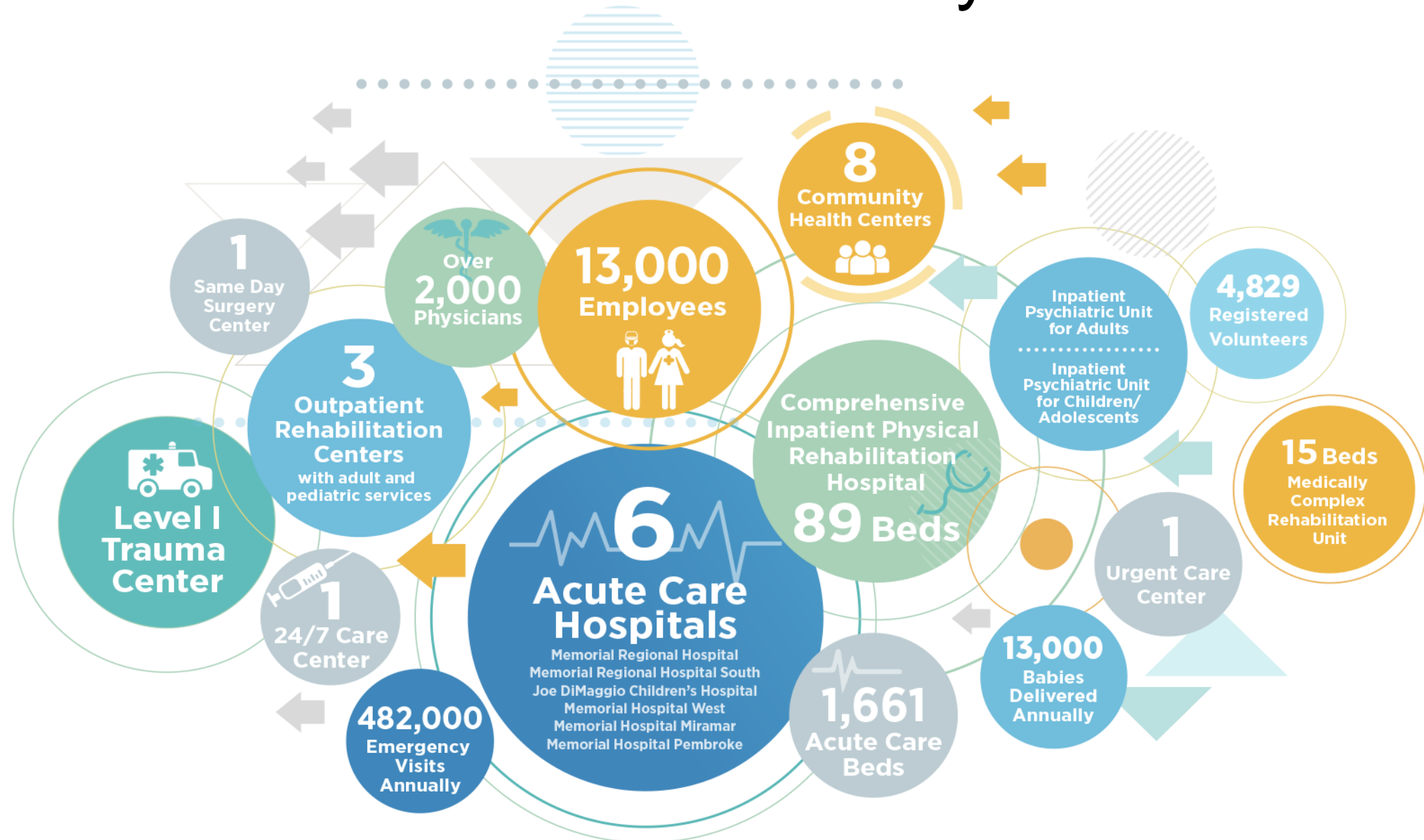
Integrate 2019

The Future of Telehealth, Innovations & Market Disruptions

William Manzie
Administrative Director of Telehealth
Memorial Healthcare System



About Memorial Healthcare System



What Got Us Here Won't Get Us There

- In 2017, the United States spent about \$3.5 trillion, or 18 percent of GDP, on health expenditures – more than twice the average among developed countries
- During 2016, combined and state spending for Medicaid totaled about \$21.8 billion in Florida
- Florida ranked #48 for overall health care among 50 states + the District of Columbia. Florida ranked 49th for access, quality and use of health care
- Chronic diseases are among the **leading causes** of morbidity, mortality and disability
- Behavioral health disorders increase the risk of many major causes of death in Florida

How Do We Begin to Get There?

Improving Healthcare with out of the box thinking while focusing on the Triple Aim...

1. Improving the patient experience
2. Reducing the per capita costs of health care
3. Improving the health of populations overall

“If you are not taking steps to move forward, you are unintentionally moving backwards”

Focus of Telehealth

*Increase
patient
engagement*

*Care in
'real time'*

*Reinforce
self-care
techniques*

*Increase
access to
care*

Embracing Telehealth



90% of employers are currently offering or planning to offer telehealth

Towers Watson

When the Veterans Health Administration used telehealth for their post-cardiac arrest care program, hospital **readmissions fell by 51%**

American Hospital Association



Healthcare executives cite improved patient satisfaction scores as providing the **biggest ROI**

ReachHealth

More than **one-half** of all US hospitals have a telehealth program



American Telemedicine Association

ICU telemedicine programs are associated with **better survival rates** and reduced hospital lengths of stay

American Hospital Association



The average cost per in-person visit is \$125, while the average **cost** for a telehealth visit is around \$45

US News & World Report

What Happens When You Don't Adapt or Adopt



1



Inability to meet
your customers'
changing demand

2



Slow time-to-
market compared
to your
competition

3



Scaling
inefficiencies from
lack of system
integration

4



Continuous resource
and infrastructure
allocation for
development and
maintenance

5






Unable to
capitalize on
new technology
advancements

The Value of Telehealth

As we have heard time and time again, focusing on the triple aim in healthcare will yield valuable results. As such, selecting telehealth investments based on goals should be priority.

Telehealth-enabled imperatives for growth, value-based care goals

	Growth	Value-based care
 Real-time virtual visits	<ul style="list-style-type: none"> <input type="checkbox"/> Enhance patient access and convenience <input type="checkbox"/> Attract and retain new patients 	<ul style="list-style-type: none"> <input type="checkbox"/> Reduce costs by shifting patients to lower cost settings <input type="checkbox"/> Cut patient/provider travel time
 Remote patient monitoring	<ul style="list-style-type: none"> <input type="checkbox"/> Differentiate from competitors <input type="checkbox"/> Align with consumer interest in technology 	<ul style="list-style-type: none"> <input type="checkbox"/> Reduce avoidable emergency department utilization and 30-day readmissions
 Asynchronous store-and-forward	<ul style="list-style-type: none"> <input type="checkbox"/> Reduce wait time to next appointment and no-show rates <input type="checkbox"/> Achieve operational efficiencies 	<ul style="list-style-type: none"> <input type="checkbox"/> Increase patient activation and engagement <input type="checkbox"/> Expand specialist coverage

Continuity of Care

- Improving quality of care by enhancing how care is delivered both within and beyond the walls of the hospital
- Using telehealth as a means to improve patient management between providers
- Creating a “patient never truly gets discharged” model and avoiding the “black hole” of care
- There is no “I” in healthcare



Using Telehealth to Achieve Our Goals

Managing Patients Chronic Conditions Differently

- Most health care-related costs in the U.S. are associated with chronic disease conditions
- The percentage of children with chronic conditions has risen dramatically
- Converting from a reactive system to a proactive system
- Look at the highest risk populations and develop targeted programs (population health)
- As a result, Memorial Healthcare System offers the following telehealth programs:
 - Remote patient monitoring
 - Ability to track results in EMR
 - TelePharmacy
 - Complex chronic care via Telehealth
 - TeleAsthma
 - Delivering care in the home
 - TelePrimary Care
 - TeleBehavioral Health
 - HIV care plan compliance
 - TeleOncology

Never Truly Being Discharged

Using telehealth to create solutions where our care of the patient continues after discharge.

- Utilizing telehealth technology to connect with patients sooner and more frequently
- Providing a virtual resource to assist with social determinants of health, care navigators or a re-connection point
- Developing a support system for secondary conditions such as wound care

As a result, Memorial Healthcare System offers the following telehealth programs:

- Wound care (soon, TeleWound Care)
- Telehelath on-call
- Virtual Lactation Consultant
- TeleNutritionist
- Post-surgical follow-up
- TeleBehavioral Health
- Post-discharge TelePharmacy
- Virtual Primary Care Coordination



Memorial Primary Care In-Home Telehealth Program

In-Home Telehealth

Target population

- Patients who require individualized telehealth home visits:
Chronic conditions such as COPD, CHF, Diabetes, and Hypertension

Goals of program

- Increase access to care
- Provide quality care
- Improve patient experience
- Decrease costs-avoid ED utilizations and hospitalizations

Patient Outcomes

Patients Served	222 patients
Patients who avoided a hospital admission within 30 days of the telehealth visit.	92%
Patients avoided a emergency room visit within 30 days of the telehealth visit.	87%
Patients returned to Primary Care Physician within 30 days of telehealth visit.	67%
Telehealth patients with online MyChart access to health information and can communicate directly with PCP: medical advice, make appointments, review labs/tests	60%



Memorial Healthcare System's Approach to the Opioid Crisis

On-Demand Assisted Services

Opioid Crisis

- From Florida data in 2014, 89.5% reported needing but not receiving treatment for Opioid Abuse. This is from a population aged 12 or older reporting illicit drug dependence or abuse.
- Florida saw 5,088 drug related deaths in 2017
- Drug related deaths per 100,000 - Florida 24.2, National 21.6

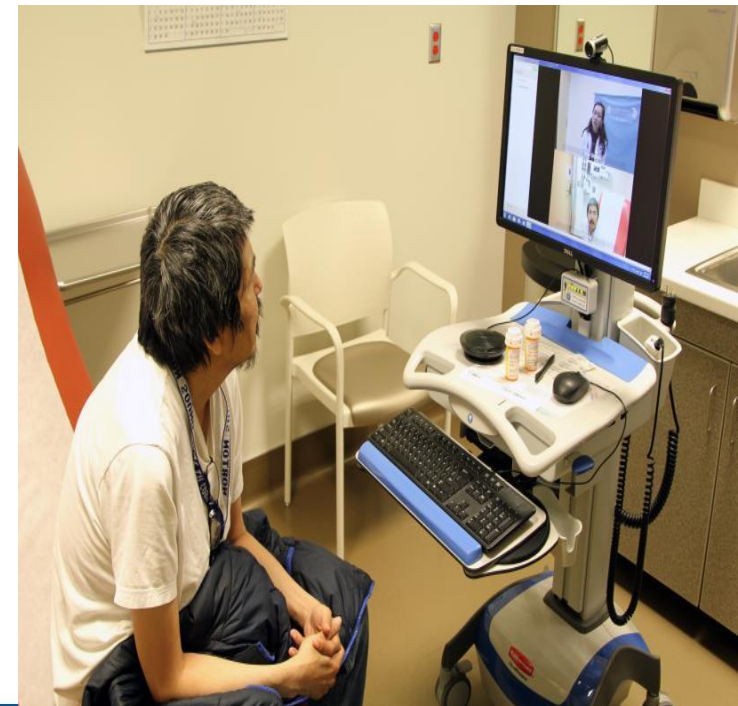
As a result, Memorial Healthcare System offers programs to assist in the opioid crisis. The following telehealth programs are used to augment what is being done today in person.

- Telehealth to expand access (MAT program)
- Virtual pharmacist (prevention and education including distribution of narcan kits)
- Additional opportunities: expanding virtual treatment options for recovery

MHS Tele-Health ED Treatment

Telehealth MAT Workflow allows Memorial to Utilize Clinical Resources more efficiently

- MAT telehealth consults connect 4 ED's with the primary MAT ED program at MRH
- Psychiatric RN's in the Behavioral Health Unit at MRH link with potential MAT patients at all hospital ED's via telehealth
- MRH Psychiatrist able to initiate MAT induction
- MAT staff will follow the patient and continue to engage
- As a result of the Telehealth MAT program, Memorial has experienced improved engagement by the patient and family to receive care.





Additional Telehealth Services

On-Demand Assisted Services

Stroke

- Consults are conducted with patients who present to the ER with a possible stroke
- Neurologist on-call uses telehealth to virtually connect with the on-site clinical team
- The neurologist is able to view, visually examine the patient and zoom into the extremities as well as facial features
- The purpose of the program is to improve clinical outcomes by:
 - Reducing door to needle times
 - Discontinuing unnecessary TPA treatment
 - Provide a higher level of physician specialty support
- TeleStroke is similarly used for in-patient stroke alerts
 - Time to treatment is key



As a result, Memorial Healthcare System implemented a telehealth program which facilitates an expedited on-demand physician connection using a smartphone and a telehealth cart.

Employers Empower Workforce Health

Telehealth interest grows with desire to curb costs, absenteeism and employee maintenance is how to accomplish this.

Employee absence, demonstrable loss



\$226B

Cost of absenteeism
to U.S. employers¹

The case for savings



\$6B

Estimated savings among US
employers with at least 1,000
employees with virtual consults
versus escalated care options²

Embracing telehealth to contain costs



51%

Large employers that identify
virtual health solutions as their
top health care initiative in 2019



26%

Large employers that financially
incentivize telehealth utilization



Employee Services

With our commitment to the triple aim and what we are doing to better manage our patient population, Memorial Healthcare System also committed to better managing the care of our employees.

- 24/7 application based connection to a physician
- Available MemorialDOCNow station in our largest hospital available to working employees 24/7
- Employees receive this as a free benefit

Advantages

- Offer employees a lower cost of care where appropriate
- Reduce absenteeism
- Initiate treatment of illness sooner

Stats

- 94% patient satisfaction
- 97% of patients surveyed said their health care concern was resolved
- 37% of patients surveyed said they would have gone to the ER



The Proactive Approach

The prospect of healthcare organizations implementing remote patient monitoring (RPM) technology increases the capacity for clinicians to manage more patients. In addition, RPM allows the clinician to monitor patients and proactively identify any negative trends.

- Monitoring patients and proactively identifying negative trends reduces the likelihood of an ER visit or readmission
- RPM allows the care team to actively manage the patients condition with the physician, pharmacy and other clinicians in a timely manor
- Better access to healthcare by communicating with patients in their home
- Improved quality of care due to the frequency of connections
- Peace of mind and daily assurance by support of self management
- Improved support, education and feedback due to interoperability



Consumer Virtual Care Online

Integrated Partnerships...

- Diplomat Beach Resort
- Newport Beachside Resort and Spa
- Ft Lauderdale Marriot
- Ritz Carlton
- Circ Hotel
- Costa Hollywood Beach Resort
- W Hotel Ft. Lauderdale

Open to all consumers for \$59 and advertise by hotel staff as a clinical option when requested



Telehealth Legislation Landscape



Telehealth in Tallahassee

On **April 29, 2019**, the House and Senate signed off on bill **HB 23** that establishes a regulatory framework for “telehealth” in the state of Florida.



The diagram consists of two blue circular nodes, each connected to a light blue rectangular text box. The first node is labeled 'Access' and is connected to a box containing the text 'Can use out of state physicians so long as they register with the state.' The second node is labeled 'Payment' and is connected to a box containing the text 'No mandate for parity payment of telehealth services'.

Access

Can use out of state physicians so long as they register with the state.

Payment

No mandate for parity payment of telehealth services

Billing for Telehealth

Private & Commercial

- Many national plans are beginning to expand to include Telehealth
- Parity policies varies from state to state

Medicare

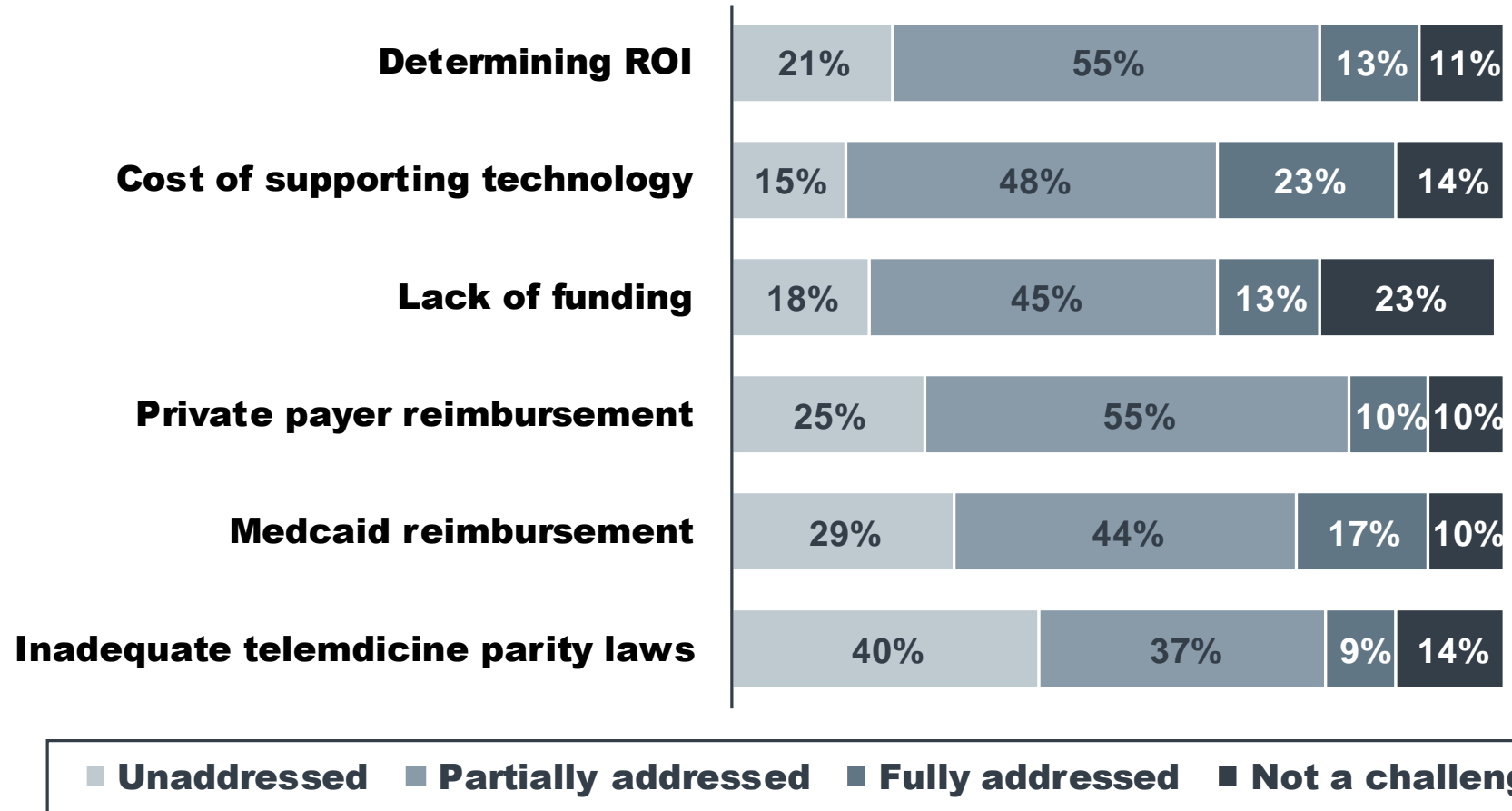
- New reimbursement codes for virtual check-in services, remote evaluation of recorded images and videos submitted by patients
- Coverage for purposes of diagnosis, evaluation, or treatment of symptoms of an acute stroke

Florida Medicaid

- MMA care plans covers telehealth services to the same extent the services would be covered in person
- Coverage to include store it forward and remote patient monitoring services

Telehealth Program Challenges

Threat to bottom line is a key challenge to providers and health systems.



Telehealth Program Challenges cont.

- Inadequate telehealth parity laws and reimbursement
- Differentiating telehealth regulations between governing bodies
- Integration between solution platforms
- Patient education
- Segmented systems creating workflow challenges
- Perception



An Industry Looking Towards the Future

- Artificial Intelligence (AI)
- Chat bots
- Expanded remote patient monitoring capabilities
- Hospital at home
- Moving beyond the direct to consumer model
- Greater utilization of connected devices
- Deeper integration amongst delivery platforms
- Asynchronous telehealth communications
- 5G mobile cellular phone technologies
- Expanded broadband as commented by the FCC
- Virtual Reality



Memorial Healthcare Systems Vision

As a system, Memorial Healthcare System is moving towards a more innovative cost savings approach to delivering care.

- Remote Patient Monitoring
- Home Health Video Visits
- Enabling Care Managers with Video
- Post Surgical Connections
- Behavioral Health Support for Patients with Chronic Conditions
- Treatment Plan Compliance Support
- Clinical Resource Sharing
- On-call Video Support
- BYOD Support
- Chronic Condition Management
- Employer Health

Conclusion

We as healthcare leaders must continue looking for non-traditional methods of delivering care to provide solutions which will improve upon the current state of healthcare.

Utilizing telehealth provides unlimited opportunities that focus on the triple aim:

1. Improving the patient experience
2. Reducing the per capita costs of health care
3. Improving the health of populations overall

“Our only limitation is our imagination!”

Bill Manzie