Impact of the COVID-19 pandemic on the uptake of telehealth services: A survey of US payers

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Background

- In February 2020, the Centers for Disease Control and Prevention (CDC) issued guidance advising healthcare providers to adopt social distance practices, specifically recommending healthcare facilities offer clinical services through virtual means such as telehealth[1]
- Telehealth services have expanded rapidly and dramatically during the COVID-19 pandemic[2]
- Emergency government action has helped encourage the use of telehealth services by temporarily removing barriers to accessing telehealth and expanding the scope of covered services[3]
- Many private payers have followed suit by expanding their coverage of telehealth services[4]
- Although many private payers have aligned with government telehealth service expansion, it is unclear to what extent different organizations have expanded their coverage of telehealth services and if these changes will remain permanent

Objective

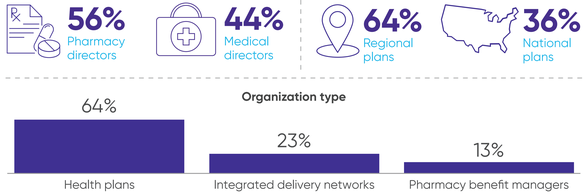
- To evaluate current and future patterns of coverage for telehealth services as a result of the COVID-19 pandemic

Methods

- An online survey was fielded during November 2020 to a panel of managed care professionals from Xcenda's Managed Care Network (MCN)
  - The MCN is a proprietary research panel, with over 160 healthcare executives, medical and pharmacy directors, and other experienced individuals in managed care, representing over 275 million covered lives
- Respondents included in the survey were required to be active formulary decision makers within an organization that currently covers telehealth services

Figure 1. Respondent Demographics

- A total of 39 advisors from Xcenda's MCN completed the survey:

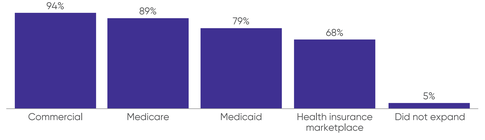


Results

Payer expansion of covered telehealth services during COVID-19

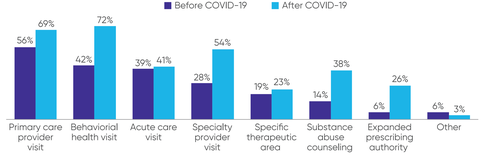
- 95% of respondents indicated that they expanded the coverage of telehealth services in at least 1 line of business (**Figure 2**)
- After the COVID-19 pandemic began, there was a 30% increase in the number of respondents indicating that they covered behavioral health visits via telehealth, a 26% increase in the number of respondents covering specialty provider visits via telehealth, and a 24% increase in the number of respondents covering substance abuse counseling via telehealth (**Figure 3**)
- 70% of respondents stated that some or all of the telehealth services covered under their expansion will remain permanent
- 76% of respondents stated that patient copays for telehealth services had been reduced or eliminated
- 54% of respondents stated that reimbursement to providers for telehealth services were now equivalent to face-to-face visits

Figure 2. Percentage of respondents expanding telehealth coverage due to COVID-19 by line of business



Q1: In response to the COVID-19 pandemic, did your organization expand the coverage of telehealth services in any plan or line of business? (N=39)

Figure 3. Percentage of respondents covering specified telehealth services before and after the COVID-19 pandemic began

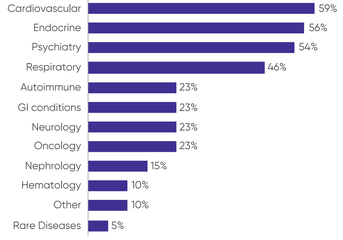


Q2: What services were included in your organization's expansion of telehealth due to the COVID-19 pandemic? (before: N=36; after: N=39)

Telehealth utilization trends by disease category

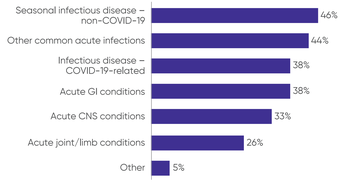
- 77% of respondents indicated that they had seen an increase in telehealth utilization for the treatment of chronic conditions and 67% had seen an increase in utilization for the treatment of acute conditions
- Chronic condition categories that were most often reported as having seen an increase in utilization included cardiovascular (59%), endocrine (56%), and psychiatry (54%) (**Figure 4**)
- Acute conditions that were most often reported as having seen an increase in utilization included seasonal non-COVID-19 infectious diseases (eg, flu, cold) (46%), other acute infections (eg, skin, ear) (44%), and COVID-19 related infections (38%) (**Figure 5**)

Figure 4. Percentage of respondents reporting an increase in telehealth utilization for specified chronic conditions



Q3: What chronic disease therapeutic areas have seen a greater increase in the utilization of telehealth services? (N=39)

Figure 5. Percentage of respondents reporting an increase in telehealth utilization for specified acute conditions



Q4: What acute disease therapeutic areas have seen a greater increase in the utilization of telehealth services? (N=39)

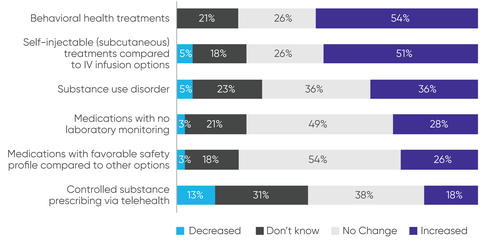
Drug utilization trends during COVID-19

- Respondents indicated that utilization of some categories of medications increased during the COVID-19 pandemic (**Figure 6**)
- 54% of respondents reported increased utilization of behavioral health medications, 51% observed an increase in the utilization of self injectable medications compared to IV infusions, 36% reported increased utilization of substance abuse disorder medications, and 28% reported an increase in the utilization of medications that do not require laboratory monitoring

Site of care utilization trends during COVID-19

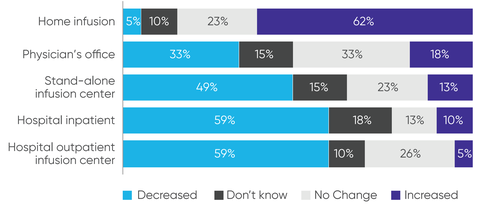
- 62% of respondents reported an increase in utilization of home infusion as a site of care for infusible medications (**Figure 7**)
- Other sites of care that respondents reported as having seen a decrease in utilization include physician offices (33%), stand-alone infusion centers (49%), hospital inpatient (59%), and hospital outpatient (59%)

Figure 6. Percentage of respondents reporting change in utilization of specified drug categories due to COVID-19



Q5: Please indicate if your organization has seen a change in utilization in any of the following drug categories as a result of COVID-19. (N=39)

Figure 7. Percentage of respondents reporting change in utilization of sites of care for infusible drugs due to COVID-19

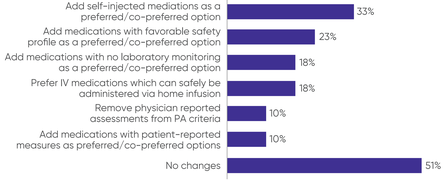


Q6: Please indicate if your organization has seen a change in utilization for the following sites of care for infused products as result of COVID-19. (N=39)

Formulary management changes due to telehealth expansion

- A portion of respondents anticipate formulary changes will occur as a result of their organization's telehealth expansion (**Figure 8**)
- 33% of respondents indicated that they anticipate adding self-injectable medications as a preferred/co-preferred option in line with physician-administered infusion products, 23% anticipate adding medications with favorable safety profiles as a preferred/co-preferred option, and 18% anticipate adding medications that do not require laboratory monitoring as a preferred/co-preferred option
- 51% of advisors stated that the expansion of covered telehealth services would not change their formulary management decisions

Figure 8. Percentage of respondents who anticipate specified formulary changes due to expansion of telehealth services



Q7: Do you anticipate that the expansion of telehealth services may result in any of the following formulary management changes? (N=39)

Limitations

- Survey results were descriptive in nature and based on a small number of respondents and thus may not be generalizable to all payer organizations or payer types
- Because all respondents voluntarily completed the survey, voluntary response bias may exist, and survey results may over-represent respondents with stronger utilization of telehealth services

Conclusions

- In response to the COVID-19 pandemic, payers in this study expanded coverage of telehealth services
- Payers expanded access to a variety of services, beyond COVID-19-related visits, as well as the scope of reimbursed services
- Utilization of telehealth services has increased for both chronic and acute conditions
- During the COVID-19 pandemic, there has been an increase in the utilization of certain categories of drugs including self-administered drugs and in-home infusion as a site of care for physician-administered IV drugs
- Telehealth expansion may change the formulary management philosophy for a portion of payers
- Telehealth services will likely remain a prominent mode of providing healthcare in the future

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