

# National Rural Health Information Technology (HIT) Collation Meeting

Industry-Based Telehealth and the Impact on Rural Health



# Speakers



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# Agenda

Topic	Speaker
Introductions	Donna McHale
Session Learning Objectives	Donna McHale
Power of Telehealth	Donna McHale
Employee-Based Telehealth Trends	Donna McHale
Big Technology in Healthcare	Jessica Duke
Riding the Wave of Disruption to Innovation	Jessica Duke
Growing Partnerships	Jessica Duke
Key Session Takeaways	Donna McHale

# Session Learning Objectives

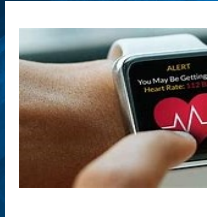
- Understand **current trends** for **employee-and industry-based** telehealth programs
- Explore different **possibilities to expand** telehealth programs
- Hear how **big technology companies** are **investing in healthcare**
- Discuss how healthcare **partnerships are changing**
- Hear **what others have done** with their programs

# The Future of Telehealth

## Are These Forms of Healthcare Delivery? **YES!**



Alexa



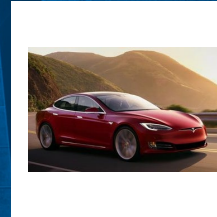
Apple Watch  
with 1-Lead  
EKG



Smart  
Clothes



Groupon  
App



Tesla



Amazon  
Care

**These types of technology are currently delivering some form of healthcare.**

**Think about it.**

# Employee-Based Telehealth Trends

**8 out of 10 large employers** see virtual care and telehealth solutions playing **a significant role in healthcare delivery**  
*(Business Group on Health)*

## \$300

**saved on average per employee a year and \$1000 per family of four** with the use of telemedicine  
*(AMA)*

## 64%

**of employers provided telehealth-based care** to their employees prior to COVID  
*(Business Group on Health)*

## Market Growth

- **By 2023, all employers will offer** minor and acute telehealth services
- **Telebehavioral health** could grow 91 to 96% by 2023
- **Virtual care for musculoskeletal management** could grow **29% in 2022** and **39% by 2023**
- Employers are also expanding other virtual services including the **delivery of health coaching** and **emotional well-being support**

*(Business Group on Health)*

## 76%

**of employers are expanding virtual care solutions and 71% are accelerating telehealth and virtual care offerings**  
*(Willis Towers Watson (WTW) survey)*

## 70%

**of US employees** state they are **likely to use their employer based virtual healthcare services**. Many employers (43%) are planning to **extend services to include chronic condition management and remote monitoring**  
*(Human Resource)*

“ At some point, people will  
access care **how** they want,  
**when** they want, **where** they  
want, for the **price** they want.

*And they'll either get it from  
you or from **somebody else**.* ”

# BIG TECHNOLOGY IN HEALTHCARE

## ACCELERATING THEIR PURSUIT OF THE HEALTHCARE MARKET



### Strengths:

- Amazon Web Services
- HIPAA-eligible voice assistance
- Amazon Care

### Weakness:

- Projects in nascence

### Opportunities:

- Health insurance disruption
- Broad scale telehealth service
- Medical supply delivery

### Threats:

- Data security
- Cloud competition



### Strengths:

- Apple Watch
- Research functions
- Apple Health records
- iPhone consumers

### Weakness:

- Mixed clinical effectiveness
- Limited to iOS

### Opportunities:

- Remote patient monitoring
- Health system partnerships

### Threats:

- Competition from low-cost wearables



### Strengths:

- Google Cloud
- Verily Life Sciences
- AI data analytics

### Weakness:

- Fragmented initiatives

### Opportunities:

- Remote patient monitoring
- EHR market

### Threats:

- Consumer trust
- Data security
- Competition in the wearables space



### Strengths:

- Azure
- Microsoft Genomics
- Health Bot

### Weakness:

- Lack of consumer facing services

### Opportunities:

- Population health
- Clinical decision support
- Chatbot market dominance

### Threats:

- Data security
- Cloud competition



# Riding the Wave of **Disruption to Innovation**



Sustaining Innovation	Disruptive Innovation
Problem is well understood	Problem not well understood
Existing market	New Market
Innovation improves performance, lower cost, incremental changes	Innovation is dramatic and game changing
Customer is believable	Customer doesn't know
Market is predictable	Market is unpredictable
Traditional business methods are sufficient	Traditional business methods fail

*“Retreating from innovation is not an option” – Mayo CEO*

# Amazon Health

## Virtual Expansion and Onsite Care



### Amazon Care

- **Telemedicine and primary care services for employees** and their dependents
- Summer 2021: expanding to other companies in all 50 states
- Services include in-person urgent and primary care services
- Various engagement tools, including follow up visits and received care summaries and follow up reminders

Amazon's **direct-to-consumer partnership** with Healthcare Advisory Network and BasiCare Plus to offer memberships for **zero co-pay telemedicine** with **free prescription drugs**

**Pittsburgh Health Data Alliance** expanded its partnership with **Amazon Web Services** to develop new machine learning models for earlier breast cancer and depression detection

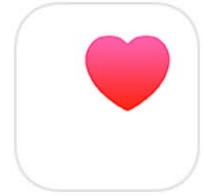
**Amazon launched hospital to home** initiative through **partnership** with **Ascension, Dispatch Health, Elara Caring, Intermountain Healthcare, Home Instead, Landmark Health and Signify**. Group's priorities are focused on **changing reimbursement models** and the **culture around institutional care**

**Best Buy Health** launched a new flip phone equipped with Amazon Alexa voice assistance and **telehealth capabilities that help connect older adults** to healthcare services

**Christiana Care** developed **Alexa skill for home health dubbed Home Care Coach**. It is a care plan delivered as a voice driven capability via Amazon's digital assistance Alexa. Providers can **customize a patient's care plan**, and **patient can ask Alexa questions** about the treatment plan and prescriptions.

# Apple Healthcare

Providing the best technology and intuitive tools for more efficient personalized care



## VA collaborates with Apple

- Program connects qualifying veterans with 50,000 iPads
- Enabling ease of access to telehealth services and VA virtual healthcare and bridges the digital divide for Veterans everywhere

- **Apple** developed a feature in the health app that allows users to access their health records.
- **EHR vendors who have teamed up with Apple:** athenahealth, Cerner, and Epic

**Apple** has partnered with **Duke University School of Medicine and Stanford University Hospital** to remotely monitor and track chronically ill patients through their **HealthKit platform**

**Apple's partnership with Johnson & Johnson** can help **detect and diagnose atrial fibrillation early** using both companies' technology.

**UnitedHealthcare and Aetna partnered with Apple** to provide discounted Apple watches to insured members who walk at least 10,000 steps a day

**Partnering with Ochsner Health System** to manage chronic disease through use of the "O Bar" and **remote patient monitoring devices**. Apple Health app feeds up to date data to the EHR for the provider

# Google Health

Partnering to expand access to virtual care



## Pilot Project with HHS

- Google developed a tool with HHS Agency for Healthcare Research and Quality to remind patients to ask physicians important questions during visits
- Questions can then be emailed to physician's office and to be available during the appointment

Google Cloud **invested in Amwell, a telehealth company.** Will use **artificial intelligence** and **machine learning technologies** to automate waiting room and checkout processes

**Mayo Clinic** launched its first **artificial intelligence** initiative **with Google** to boost radiation therapy planning.

Google and Apple developed an **app to detect when users are close to someone who tests positive for COVID-19**

**Google Health** launched an **app to connect individuals to clinical studies.** Has been used in a study with **Harvard Medical School and Boston Children's** to better understand respiratory illness, including **COVID-19.**

Google's venture capital arm, led a **\$100 million funding** round in **Verana Health**, a technology startup that **analyzes clinical data to advance ophthalmic and neurologic care** and research in February.

A lot of different companies are trying to **consumerize healthcare**, especially addressing the patient in home with remote devices, such as the Apple Watch.

Combined with devices like Alexa or others, **people may start trusting their physician and hospital as one voice of many** in their care opposed to the voice they trust.

That puts pressure on clinics and hospitals, because they don't easily have means to share and consume data from systems in the home. Only certain institutions will be able to forge the gap.

**For allies, Amazon, Microsoft, Intel — these are great partners to healthcare institutions and yet [hospitals] see them as competitors.**

*Keith Bigelow. General Manager and Senior Vice President, Analytics and AI, GE Healthcare*

# Healthcare Ecosystem

## Partnering for Progress

Digital health **collaborative partnerships**, sometimes unique and surprising, will be **key** to optimizing healthcare.



# Growing Partnerships

## How healthcare partnerships are changing



Baptist Health and Home Developer, CC Homes

- Baptist Health South Florida partnered with home developer CC Homes to provide free virtual healthcare services and digital exam kits to new homebuyers



Cleveland based University Hospitals Partnered with NASA

- Create methods and decontaminate personal protective equipment for aerospace applications and COVID-19 front-line workers
- Through the partnership to develop new approaches to sanitizing masks for reuse



United Airlines tapped Cleveland Clinic

- Requested advice on social distancing protocols during flights
- United Airlines CEO stated, "If you look at an airplane, airplanes don't have social distancing. Six feet – we're not going to be 6 feet apart"



Emory Healthcare Partnered with Verizon

- To test 5G-powered healthcare devices, including connected ambulances, medical imaging and remote physical therapy
- Launched 5G ultra-wideband network within Emory Healthcare Innovations Lab



CommonSpirit Health partnered with Paladina Health

- To offer a direct-to-consumer primary care across 137 hospital in 21 states
- Partnership will provide services at clinics in Las Vegas initially and then expand
- Currently in 122 clinics, 19 states

# Uber Health

## Healthcare Disrupter or Biggest Ally?

### **Uber Health can be one of the biggest allies for healthcare**

- Providers can schedule ride shares for patients
- Get real-time GPS tracking and message with drivers
- HIPAA compliant platform available on desktops and mobile devices

**Access to transportation is one the biggest key social determinants of health for vulnerable communities**





# OWN YOUR FUTURE, OR BE DISRUPTED BY IT

The fundamental task (or problem)  
you are trying to get done (or solve)



*Strengthen your business today and create future growth for tomorrow.*

# Key Session Takeaways

- Consumers will access care **how, when, where** and for the **price they want** – from you or **someone else**
- Care delivery comes in **many different forms**
- Your next **competitor** may also be your **partner, e.g., Amazon, Apple, Google, Microsoft**
- Employers see **virtual care** as a **significant part** of healthcare delivery
- Employers are **looking to grow their virtual care** beyond primary care services to include chronic condition management, behavioral health and occupational health
- You can **expand your telehealth services** to an **industry-based telehealth program**
- Understand healthcare **partnerships are changing**
- Be ready to ride the wave of **Disruption** to **Innovation!**

# Contact Information

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# Thank you