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Virtual health in the "new reality"

Accelerated by Covid-19, virtual health is defying long-held opinions

The reimbursement environment makes it so health systems cannot care for patients in the comfort of their home

Older patients will struggle with digital technologies and the experience will be diluted

The patient/physician interaction must occur in person to be effective

High quality care will only occur when patients are physically in a health facility

Now freed from these orthodoxies, organizations can embrace virtual technologies to drive toward a new vision for the future

Staying power of virtual health

Reimagine how health is delivered by developing specific virtual use cases in the "new reality"

The exponential increase in usage is mostly attributed to organizations taking **traditional care pathways and virtualizing them** rather than **reimagining delivery models**
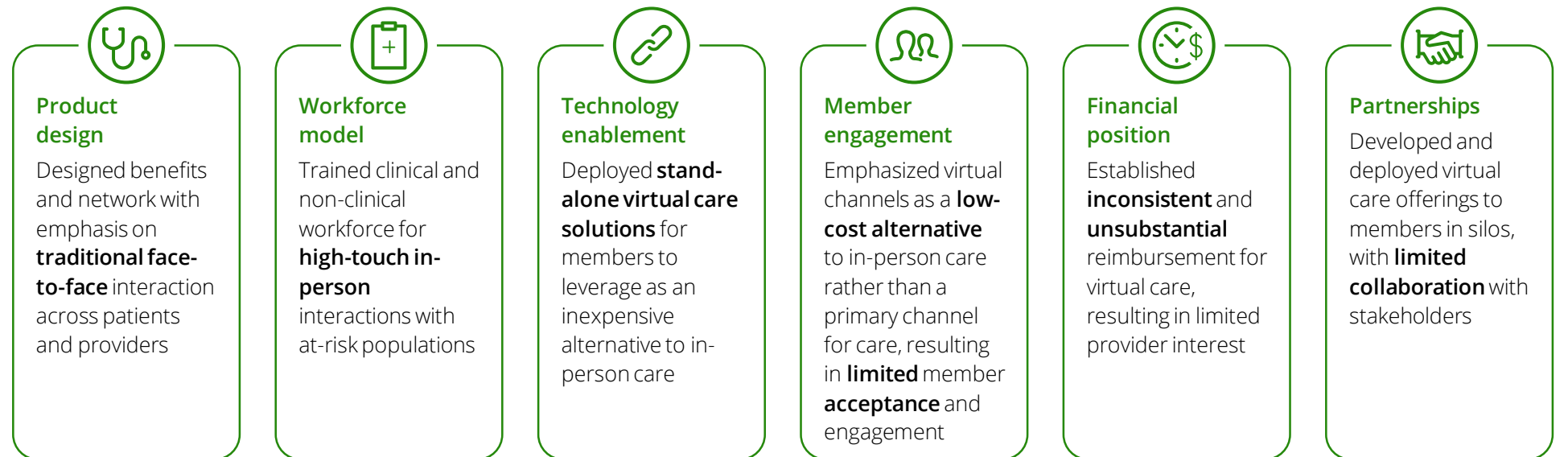
While virtual levels will likely not revert to pre-pandemic rates, current methods of utilizing virtual health as a **stop gap are not sustainable going forward**
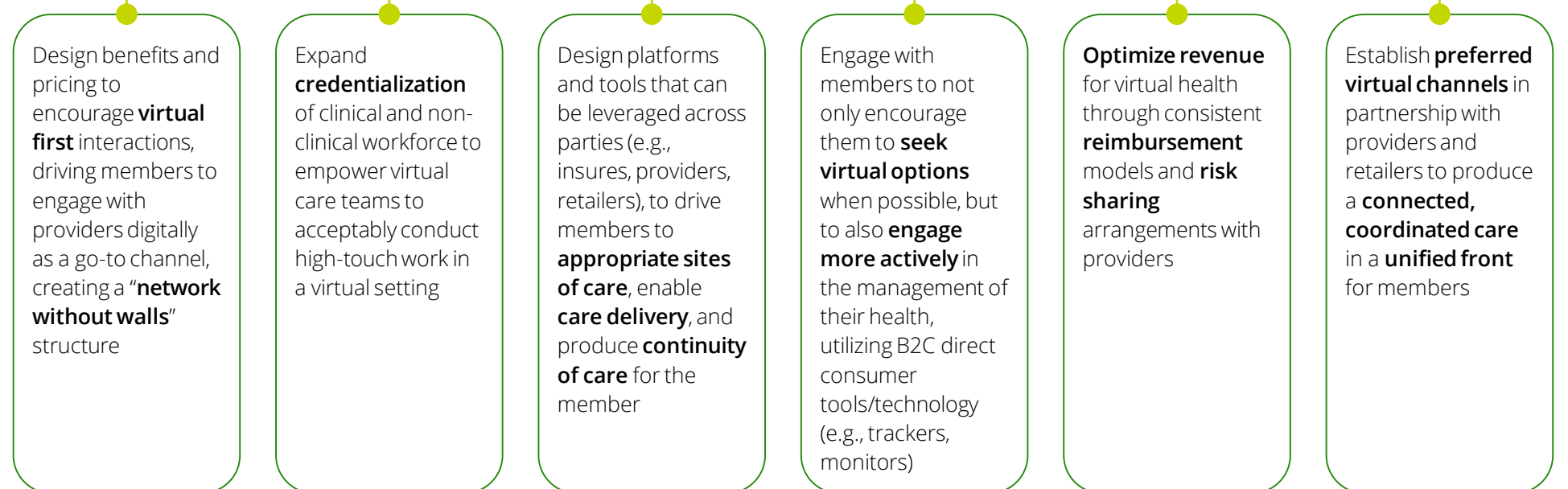
To sustainably transform how care is provided and employ virtual health in meaningful ways, organizations should **reenvision how health is managed and delivered using virtual tools**

Transformation is required for a consumer-centric path forward

Traditionally, health plans and the healthcare ecosystem considered Virtual Health as a substitutive channel for care delivery
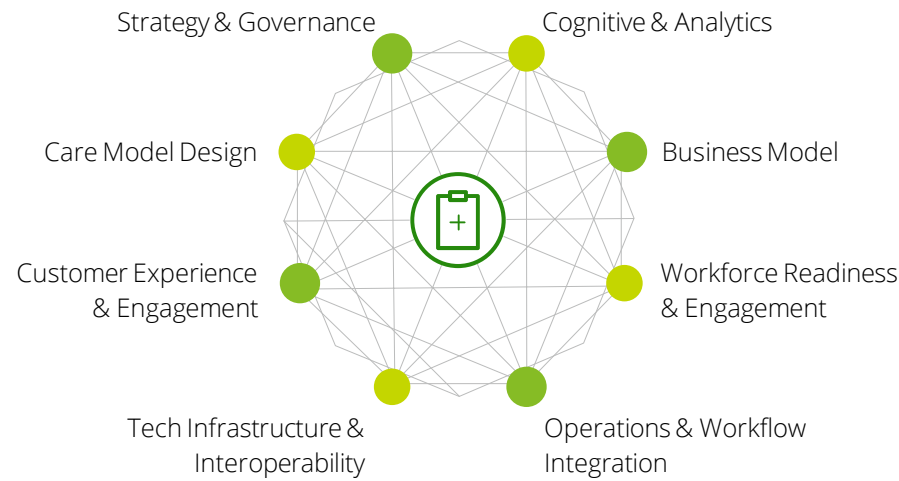
Product design
Designed benefits and network with emphasis on **traditional face-to-face** interaction across patients and providers

Workforce model
Trained clinical and non-clinical workforce for **high-touch in-person** interactions with at-risk populations

Technology enablement
Deployed **stand-alone virtual care solutions** for members to leverage as an inexpensive alternative to in-person care

Member engagement
Emphasized virtual channels as a **low-cost alternative** to in-person care rather than a primary channel for care, resulting in **limited** member **acceptance** and engagement

Financial position
Established **inconsistent** and **unsubstantial** reimbursement for virtual care, resulting in limited provider interest

Partnerships
Developed and deployed virtual care offerings to members in silos, with **limited collaboration** with stakeholders

"New reality" transformation requires capabilities to position Virtual Health as an integral channel for care management and drive reduction in total cost of care

Design benefits and pricing to encourage **virtual first** interactions, driving members to engage with providers digitally as a go-to channel, creating a "**network without walls**" structure

Expand **credentialization** of clinical and non-clinical workforce to empower virtual care teams to acceptably conduct high-touch work in a virtual setting

Design platforms and tools that can be leveraged across parties (e.g., insures, providers, retailers), to drive members to **appropriate sites of care**, enable **care delivery**, and produce **continuity of care** for the member

Engage with members to not only encourage them to **seek virtual options** when possible, but to also **engage more actively** in the management of their health, utilizing B2C direct consumer tools/technology (e.g., trackers, monitors)

Optimize revenue for virtual health through consistent **reimbursement** models and **risk sharing** arrangements with providers

Establish **preferred virtual channels** in partnership with providers and retailers to produce a **connected, coordinated care** in a **unified front** for members

Capabilities to establish a virtual health program

Building a successful patient centered virtual health support network requires the alignment and enhancement of core capabilities across the organization

- Strategy & Governance
- Cognitive & Analytics
- Care Model Design
- Business Model
- Customer Experience & Engagement
- Workforce Readiness & Engagement
- Tech Infrastructure & Interoperability
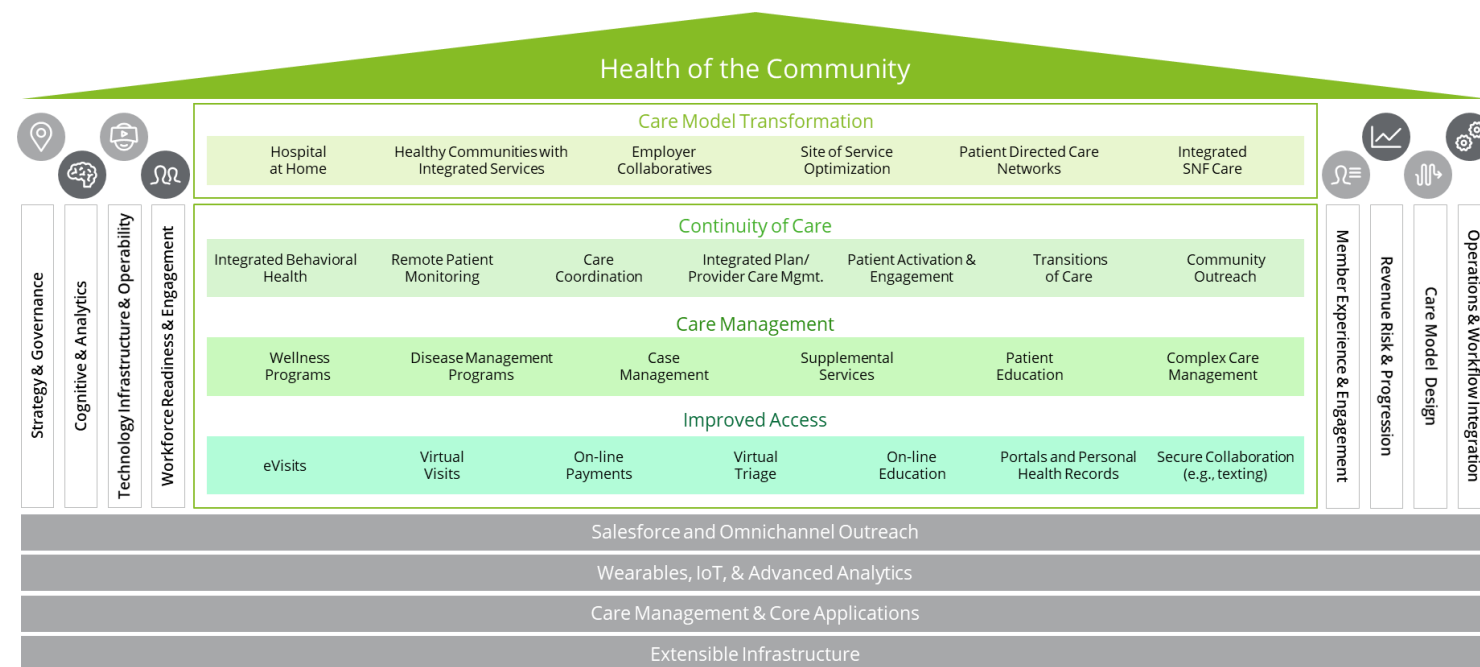- Operations & Workflow Integration

The **Virtual Health Maturity Model** unifies how organizations can compare their capabilities relative to the market and serves as a guide for **assessing current state** capabilities and **desired future state maturity** across the 8 key capabilities for virtual health

Maturity Levels:

1. Foundational	2. Evolving	3. Advanced	4. Innovative

Conceptual architecture

Creating a virtual health ecosystem requires moving from point solutions to continuous processes that span all areas of transformation

Health of the Community

Care Model Transformation
- Hospital at Home
- Healthy Communities with Integrated Services
- Employer Collaboratives
- Site of Service Optimization
- Patient Directed Care Networks
- Integrated SNF Care

Continuity of Care
- Integrated Behavioral Health
- Remote Patient Monitoring
- Care Coordination
- Integrated Plan/ Provider Care Mgmt.
- Patient Activation & Engagement
- Transitions of Care
- Community Outreach

Care Management
- Wellness Programs
- Disease Management Programs
- Case Management
- Supplemental Services
- Patient Education
- Complex Care Management

Improved Access
- eVisits
- Virtual Visits
- On-line Payments
- Virtual Triage
- On-line Education
- Portals and Personal Health Records
- Secure Collaboration (e.g., texting)

Side labels: Strategy & Governance | Cognitive & Analytics | Technology Infrastructure & Operability | Workforce Readiness & Engagement | Member Experience & Engagement | Revenue Risk & Progression | Care Model Design | Operations & Workflow Integration

- Salesforce and Omnichannel Outreach
- Wearables, IoT, & Advanced Analytics
- Care Management & Core Applications
- Extensible Infrastructure

Key considerations shaping virtual health strategy

1 How can your organization re-envision how **health is managed and delivered** to achieve the quadruple aim using both **virtual and in-person tools**?

2 Which virtual health services will enable your organization to **optimize value-based arrangements**?

3 How will your organization factor **equity** into your culture, policies, technologies, and operations when **utilizing virtual tools to reduce barriers to care**?

4 How can your organization position virtual health services for patients/members with **varying levels of broadband access**?

5 How can your organization leverage **data interoperability regulations** to drive greater **flexibility in consumer care decisions** and imperatives for collaboration?

How we help our clients

Deloitte has comprehensive advisory services that touch on all the key Virtual Health capabilities. Our competencies include **product and service offerings and ecosystem and alliance relationships** – to provide support across an organization's Virtual Health journey, at any starting point, and enable accessible, extensible, longitudinal care

Your Deloitte team

Dr. Bill Fera
Principal
bfera@deloitte.com

Dr. Ken Abrams
Managing Director
kabrams@deloitte.com

Urvi Shah
Senior Manager
urvishah@deloitte.com