Developing Virtual Care Strategies that Advance the Quadruple Aim

Paul Cohen, VP Strategy, One Medical
William Kimbrough, MD, National Virtual Medical Director, One Medical
Learning Objectives

● Understand the broad spectrum of virtual care/telemedicine opportunities and associated reimbursement models.

● Identify high-potential virtual care initiatives within a variety of strategic contexts.

● Develop an innovative virtual care strategy that takes advantage of consumer trends, meets the needs of multiple stakeholders, and advances organizational growth objectives.
OPENING 2020
Virtual Care Landscape

1. Intros & Context
2. Virtual Care Landscape
3. Virtual Care Opportunities
4. Lessons Learned
5. Q&A
## Virtual Care Matrix

<table>
<thead>
<tr>
<th></th>
<th>Provider to Provider</th>
<th>Patient to Provider</th>
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<tbody>
<tr>
<td><strong>Async</strong></td>
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<td>Remote monitoring</td>
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<td></td>
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<tr>
<td><strong>Sync</strong></td>
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<td>Video visits</td>
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Everyone’s Getting into Virtual

**Incumbents**

Health Systems

Retail

Health Plans

- **Humana** + **dr. on demand**

**New Entrants**

D2C

- **hims**

- **hers**

- **romain Keeps NURX.**

OTC Pharma

- **Mucinex**

- **Airborne**

Tech & AI

- **Walmart**

- **98point6**

- **babylon**

- **buoy**

Confidential Information of 1Life Healthcare, Inc.
Return Policy

Return an item in its original condition and packaging, with receipt, within 90 days of the purchase date to request a refund. Return a defective item within the warranty period to request a refund. AutoZone reserves the right to require a valid government-issued photo ID for all returns. The right to return an item may be denied if the item has been used or installed. If the return is authorized, you will be issued a store credit or refund minus a 10% restocking fee.

Database of customer return data will be recorded at the time of return. Your date of birth, credit card number, credit card expiration date, credit card verified through card issuing bank, and credit card type (Visa, MasterCard, American Express, Discover) may be recorded. A record of your return may be retained for a period of three (3) years after the date of return.

AutoZone reserves the right to limit returns and exchanges regardless of receipt.

24/7/365 ACCESS
HEALTH CARE
ANYWHERE

With Telemedicine from Med Plus
Discounts, physicians are available to you
What’s Driving Growth?

**Tailwinds**

- **Demand for access & convenience**: Most consumers dissatisfied with access
- **Rise in patient responsibility**: 30-40% of commercial market is on HDHP
- **Favorable benefit treatment**: Virtual visit patient cost ≈ office visit copay

**Headwinds**

- **Weak consumer habit**: Not embedded in existing patient flows or mindset
- **Poor integration**: Current approaches fragment in-person care

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1. Kaiser Family Foundation Employer Health Benefits 2018 Annual Survey
2. Direct Path 2018 Medical Plan Trends and Observations Report

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# Reimbursement Landscape: Medicare

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Some Legal Considerations

This is not legal advice. Consult your own counsel.

- Establishing care (face-to-face)
- Patient consent (care, billing)
- Scope of practice (e.g., form-based prescribing)
- Surcharge (FFS vs. cash)
- HDHP/HSAs (first dollar coverage)
- Parity (coverage vs. payment)
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Quadruple Aim

Provider Satisfaction

Patient Experience & Engagement

Total Cost of Care

Quality

Growth
Patient Engagement & Satisfaction

Incumbents struggling to adapt

- Not convenient nor high access today
- Hard to change behavior across locations, departments, service lines
Patient Engagement & Satisfaction
Patient Engagement & Satisfaction

Incumbents struggling to adapt

- Not convenient nor high access today
- Hard to change behavior across locations, departments, service lines

Virtual as a differentiator & bright spot

- People want easy access to high-quality care
- The lowest friction channels will win
- Surprise & delight with experience and access
- “Leapfrog strategy” with brand halo benefits
Patient Engagement & Satisfaction

15x utilization growth in 5 years

Member-initiated virtual interactions, excluding secure messages

- 2014
- 2015
- 2016
- 2017
- 2018
- 2019

Virtual satisfaction rivals in-office

Average post-video rating of 4.9 out of 5 stars

Average time from video request to pickup <2 minutes

Raving fans

@onemedical --> just got an appointment followup task on my iPhone checking in with me about how I'm feeling changinghealthcare thankyou

Being able to FaceTime your doctor is literally the best thing ever. S/O @onemedical

Thank you @onemedical for the easy, efficient #videovisit, I "never" send these kind of tweets... but DAMN.
Cost

- High access to primary care reduces emergency care
  - 8% ER reduction — down to 10.4% avoidable ER visit rate
  - 89% lower urgent care use
  - 26% of ER/admits contact us first
  - 58% of video visits occur outside of traditional office hours

- Avoiding unnecessary/low acuity primary care office visits
  - 80% of virtual interactions for URI symptoms resolved virtually
  - Digital derm feature for simple skin concerns

- Avoiding unnecessary referrals
  - Virtual curbsides: 60% YoY reduction in cardiology referrals with increased acuity of case mix seen by cardiologist
  - 19% lower specialty episode costs compared to other similar practices

Net 5-10% total cost savings, partially driven by virtual care
Quality

- **Leverage virtual care teams for QI**
  - 90th %ile HEDIS scores

- **Tasks system**
  - Engaging over 50% of members every month digitally
  - Use to drive key quality measures: diabetes/A1c (lab tasks), flu vaccine (vaccine reminders), abnormal pap follow-ups (reminder tasks)
  - Proactive depression screening

- **Post-visit follow ups & patient-reported outcomes measures (PROMs)**
  - Proactive check-in pushed to patients after interactions for common concerns (URI, digestive concerns) to allow them to flag whether symptoms have resolved or not
Driving Quality via Virtual

Complete your test by simply walking in to any of our offices during lab hours. There’s rarely a wait time and testing typically takes 15 minutes to complete.

Nearby Walk-In Labs

Complete your test by simply walking in to any of our offices during lab hours. There’s rarely a wait time and testing typically takes 15 minutes to complete.

Special Instructions
- Fasting – Do not eat or drink anything except water for 8 to 10 hours before completing the test.
- Avoid alcohol
- Avoid strenuous exercise

Tests Ordered (7)
- Lipid Panel
- Basic Metabolic Panel
- A1C

Estimated Lab Time
The amount of time users typically spend in the office including wait and visit time, in minutes.
Provider Satisfaction

● **Virtual provider satisfaction**
  - Highest team engagement in company
  - Varied workflows throughout day
  - Wide range of case mixes
  - Schedules allow for part-time clinic job to keep in-person skills current
  - Reduced reliance on urban market hiring

● **In-office provider satisfaction impact**
  - Not on call
  - Smaller backlog of work accumulation when not in office
  - Increased clinical complexity of case mix
  - High provider retention

Drives engagement for both virtual and in-office providers
Growth

1. Unblock Growth
2. Create Capacity
3. Acquire New Patients
Unblock Growth

Clinician hiring or affiliation
• Easier to hire
• Job satisfaction

Capital asset leverage
• Leverage existing offices to serve more patients
• Better IRR, less cash to breakeven, smaller CapEx budget, move faster
Create Capacity

**Office visit capacity**

- Shifting to virtual frees up schedules for more visits
- Shifting 10% to virtual $\approx 4-6\%$ new patient capacity
- Curbside consults can eliminate 20%+ of certain specialty visits

**Acuity improvement**

- Shift low-acuity visits out of office and create room for higher acuity
- Acuity shift $\approx$ revenue shift
Acquire New Patients

New front door for consumers

- Dominant use: virtual urgent care
- High consumer acceptance (80%+)
- Branded experiences with referral to in-office providers
- Segment-specific experiences
## Acquire New Patients

<table>
<thead>
<tr>
<th><strong>New Patients</strong></th>
<th><strong>Existing Patients</strong></th>
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<tr>
<td>• Not a top 3 reason to sign up</td>
<td>• Main benefit? Equally as important availability.</td>
</tr>
<tr>
<td>• Rated as 3-4x more important for working professionals than other segments</td>
<td>• Reason to select a PCP? Mid rating.</td>
</tr>
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Once you try it, you like it, but expect other providers to have it
Acquire New Patients

New front door for consumers

- Dominant use: virtual urgent care
- High consumer acceptance (80%+)
- Branded experiences with referral to in-office providers
- Rural catchment
- Segment-specific experiences

New front door for PCPs

- Curbsides or e-consults as a time saver ± revenue driver
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Lessons Learned

● What makes it work:
  o Integrated (clicks and bricks, unified medical chart, tech/app)
  o Advanced Practice Providers
  o Panel size support
● Seasonality: Demand in-office and virtual goes together
● Combatting misconceptions: patient preferences, liability, reimbursement, limitations
● Phone is still valuable
● Video needs vs. preferences (i.e., even if patient doesn’t need video, they might prefer it)
Common Pitfalls

- Tech stack and integration
- Experienced virtual provider rarity
- Reimbursement issues (contracts, networks, payment)
- Virtual scope clinical alignment (what belongs in office vs. virtual)
- Policy landscape (gray spaces)
- Appropriate routing (patient-initiated vs. provider-initiated)
- Medicare impact
Q&A

Please be sure to complete the session evaluation on the mobile app
Paul Cohen

VP, Strategy, One Medical / pcohen@onemedical.com

Paul is VP of Strategy at One Medical, one of the largest independent primary care delivery systems in the country. He leads the design and commercialization of new products, services, and partnerships, including telemedicine, diagnostics, genomics, and behavioral health.

Paul previously built One Medical’s value-based business and led the organization to generate substantial total cost of care savings. He previously worked in healthcare private equity and covered practice management, telemedicine, telebehavioral health, navigation, and employer-sponsored care.

Paul has a BA, summa cum laude and with distinction, in cognitive science from Yale, and is a published researcher in the field of behavioral economics.
Will Kimbrough, MD

National Virtual Medical Director, One Medical / wkimbrough@onemedical.com

Will is the National Virtual Medical Director and Senior Medical Director of Clinical Services at One Medical. He manages the virtual provider team that is comprised of nearly 150 advanced practice providers and RNs located throughout the US.

Will works with other teams in One Medical to expand the range of services offered both in-person and virtually, while increasing quality and decreasing cost to the healthcare system.

Will earned his MD from Georgetown University, and a Master’s in Public Health from the London School of Hygiene. He completed his residency in Primary Care Internal Medicine at NYU. He worked in public health research and as a doctor in the National Health System in the UK prior to joining One Medical.
References

Kaiser Family Foundation Employer Health Benefits 2018 Annual Survey
Direct Path 2018 Medical Plan Trends and Observations Report