



September 2020

COVID-19 Impact on Utilization and Health Outcomes

LVBCH Webinar





Mary Elizabeth Myers
RN, BSN
Population Health Consultant



A healthcare analytics and services company that focuses on improving systems to support **personalized, patient-centered care.**

We help health plans, hospitals, physician practices and employers **better collaborate and align** to lower cost, improve outcomes and restore the Joy of Medicine.



Geneia's Family of Solutions



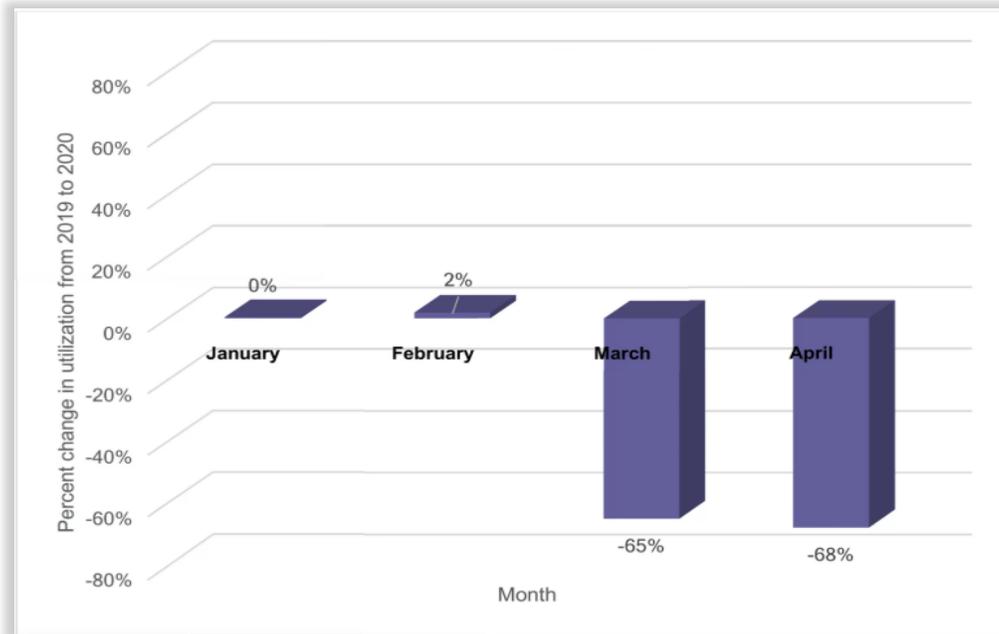
Agenda

- **COVID-19**
 - **Utilization Changes**
 - **Employer Impact - Financial**
 - **Health Outcomes**
 - **Cancer Screenings**
 - **Chronic Conditions**
 - **Employer Considerations**

COVID-19

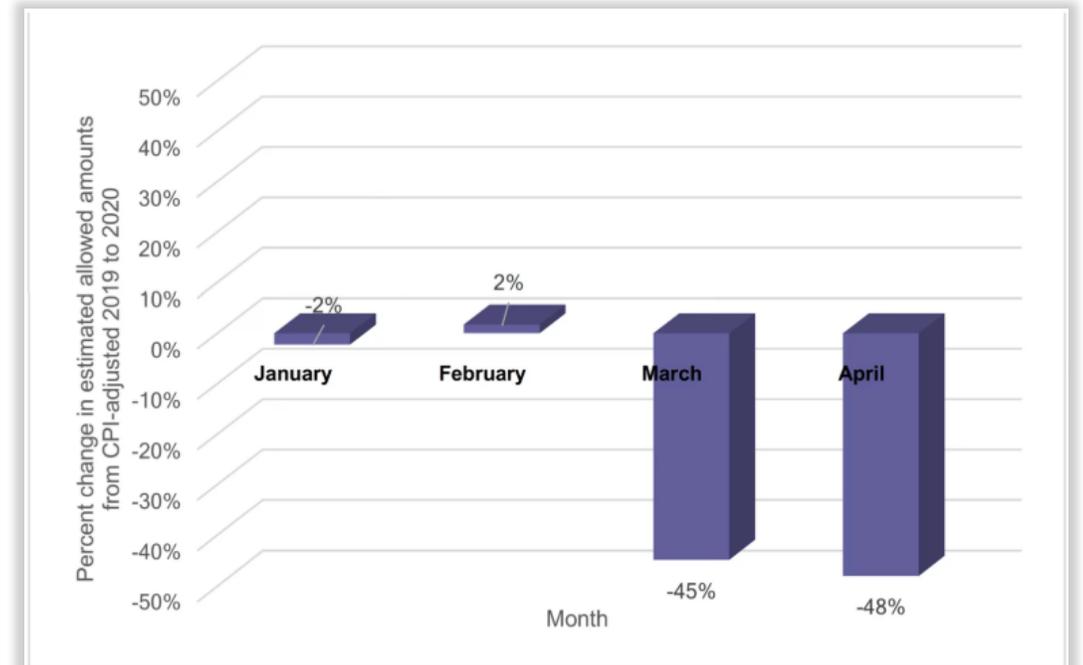
Healthcare Utilization and Revenue Impact: Fair Health

- March 2019 compared to March 2020
 - 65% decrease in utilization
 - 45% decrease in professional revenue



Monthly Percent change in utilization of Professional Services from 2019 to 2020, Nationally (Source: Fair Health)

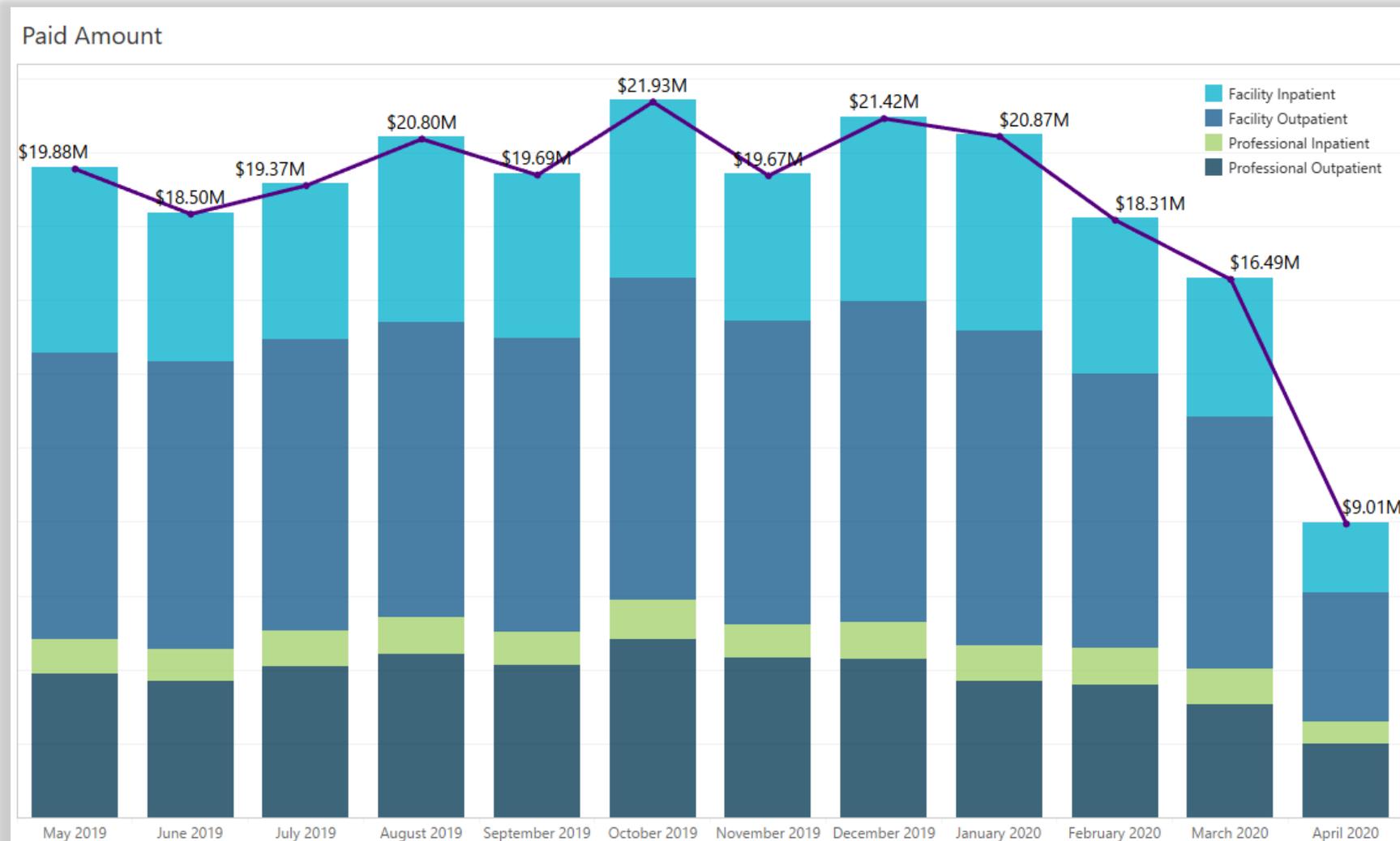
- April 2019 compared to April 2020
 - 68% decrease in utilization
 - 48% decrease in professional revenue



Monthly Percent Change in Professional Revenue Based on Total Estimated Allowed Amounts from CPI-Adjusted 2019 to 2020, Nationally (Source: Fair Health)

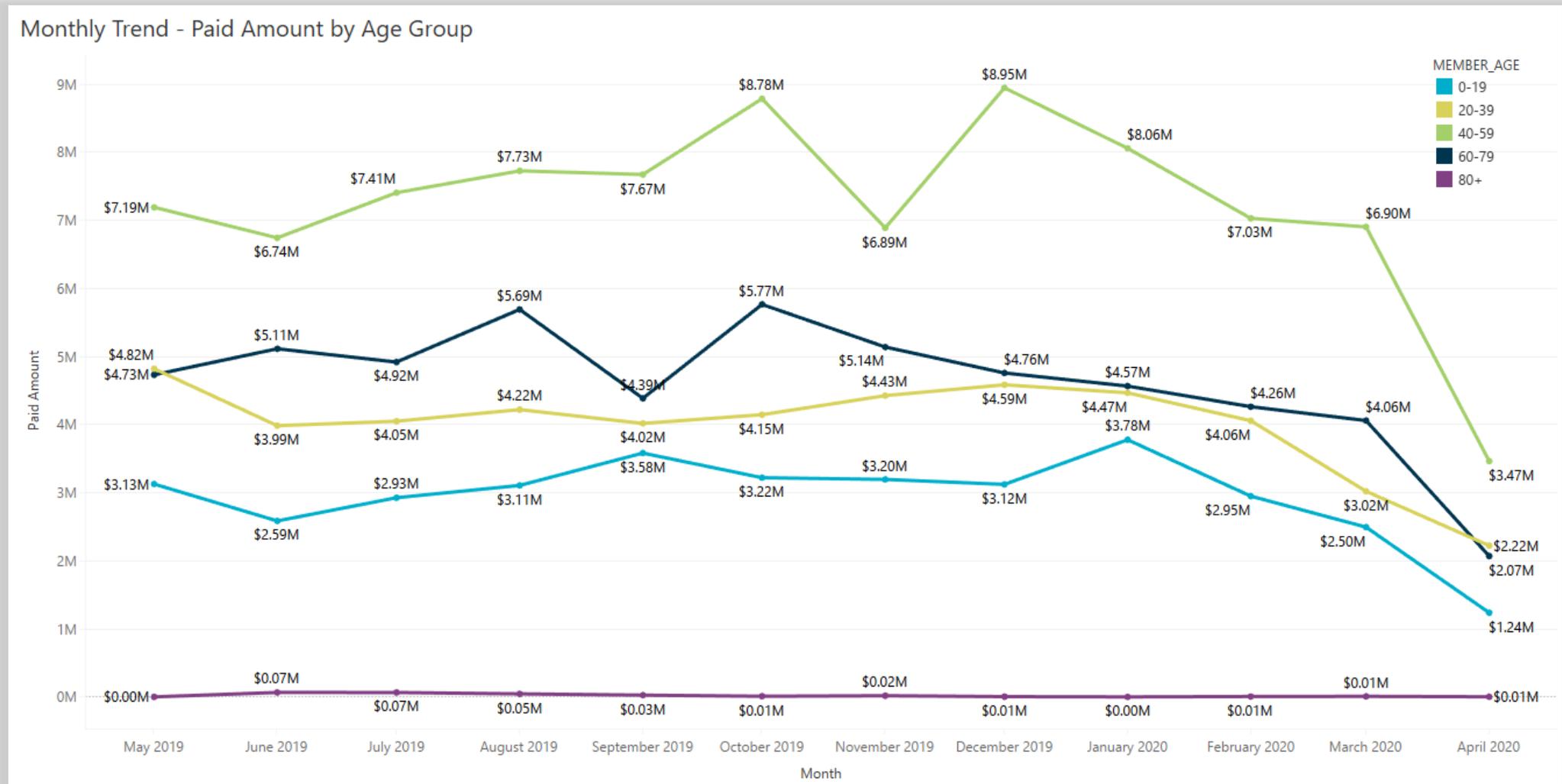
Medical Claims Paid Amount

The Theon® Platform Care Engager® Module: LVBCH Data Group



Medical Claims Paid Amount by Age Group

The Theon® Platform Care Engager® Module: LVBCH Data Group

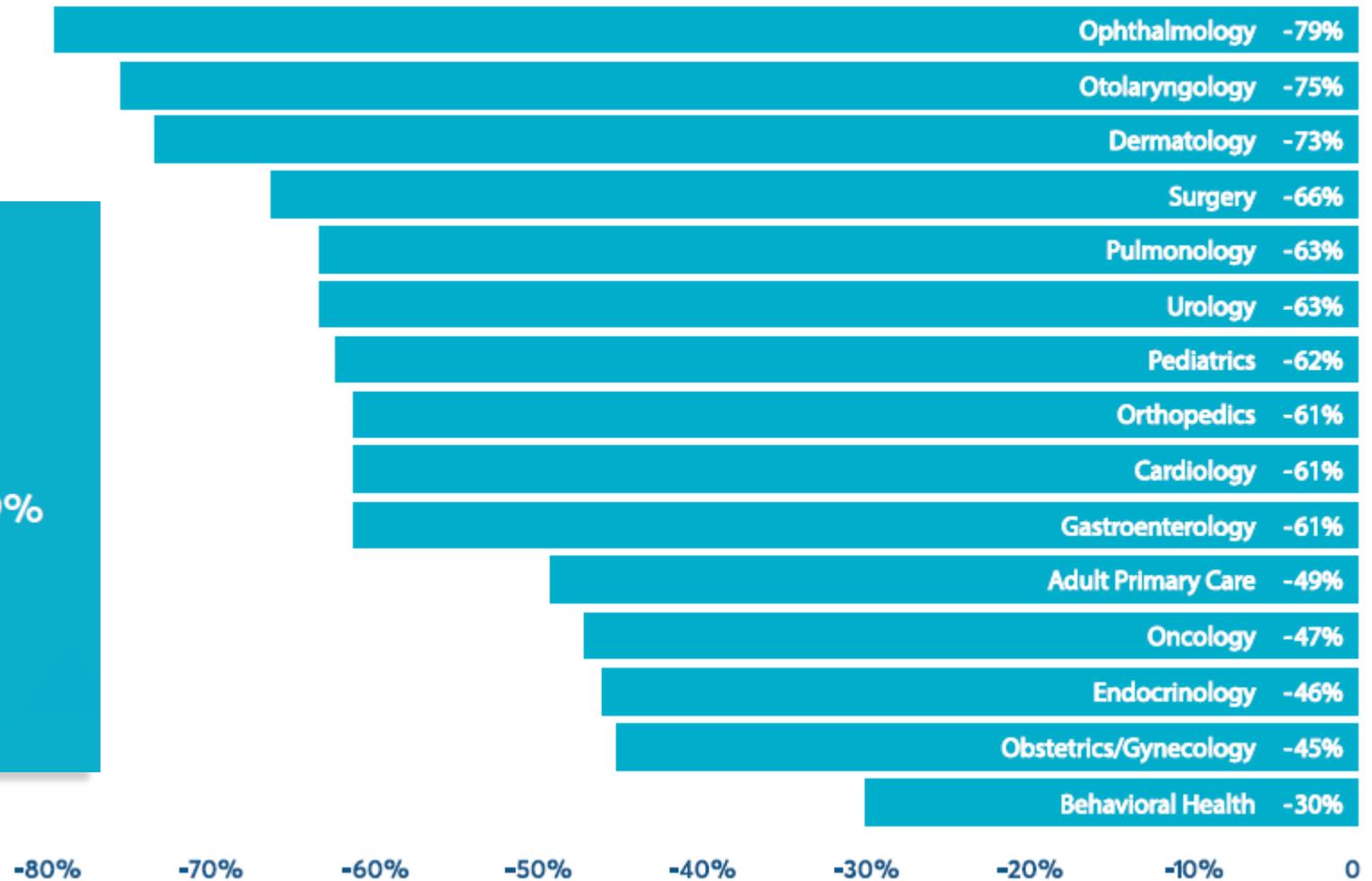


COVID-19

Ambulatory Care Visits: Geneia White Paper

-  Pediatric visits are down 62%
-  Adult primary care declined 49%
-  Oncology has decreased 47%

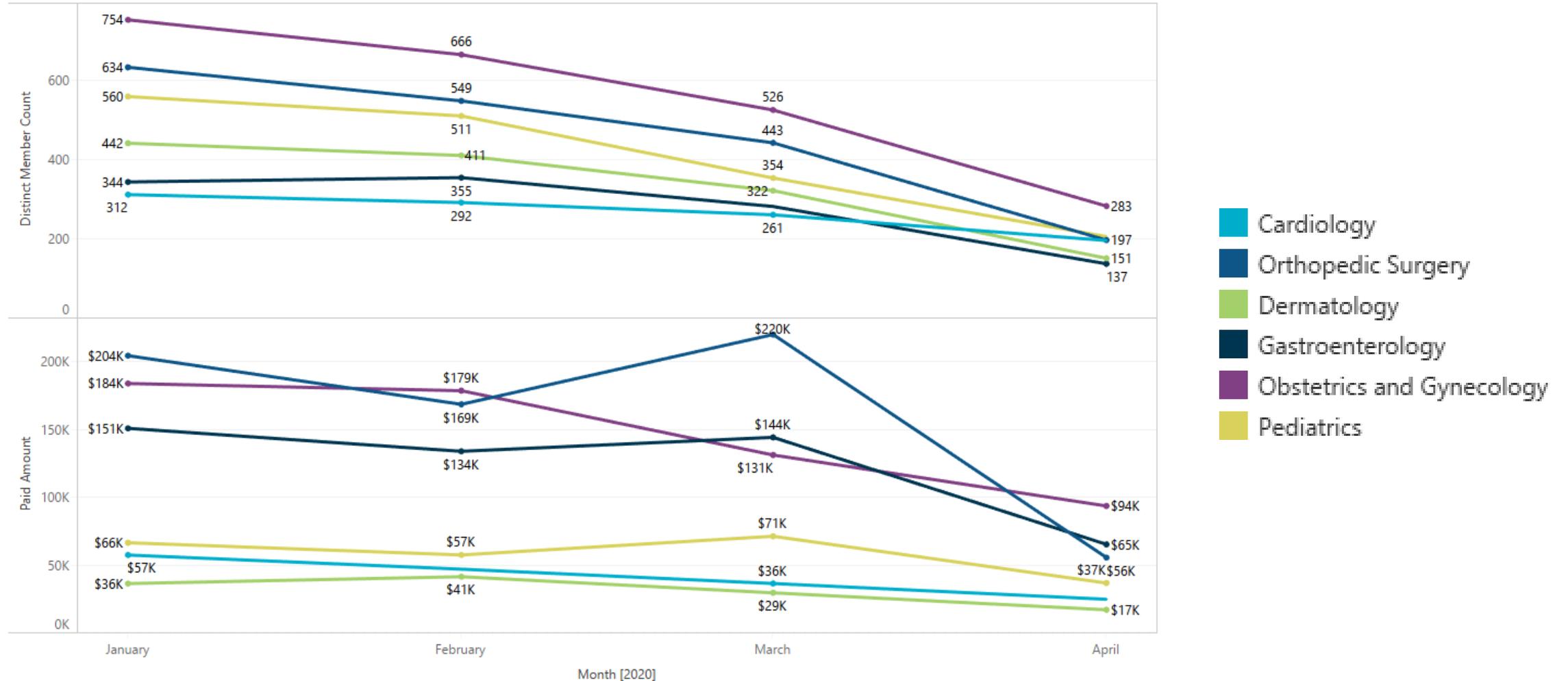
Decline in Visits from Baseline to the Week of April 5th



Specialty Care By Member Count and Paid Amount

The Theon[®] Platform Care Engager[®] Module: LV BCH Data Group

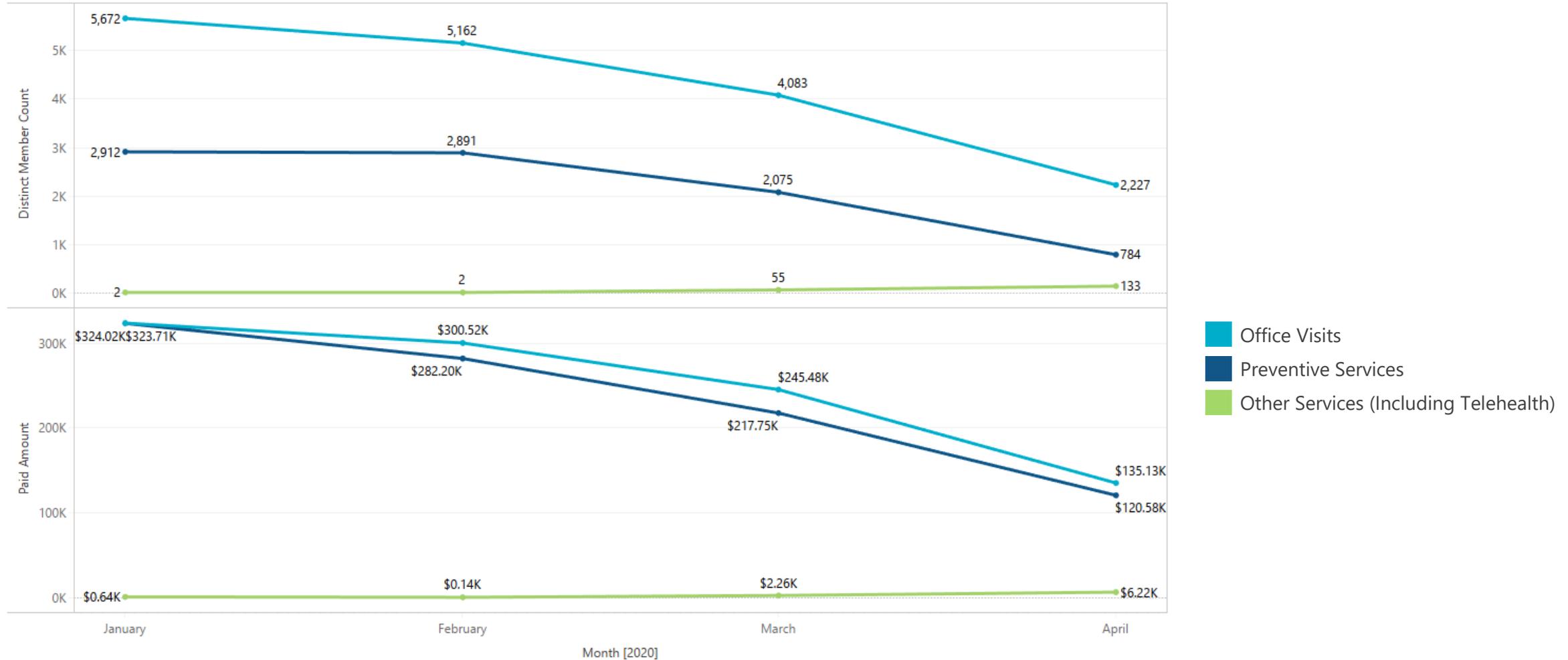
Specialty Care



Primary Care By Member Count and Paid Amount

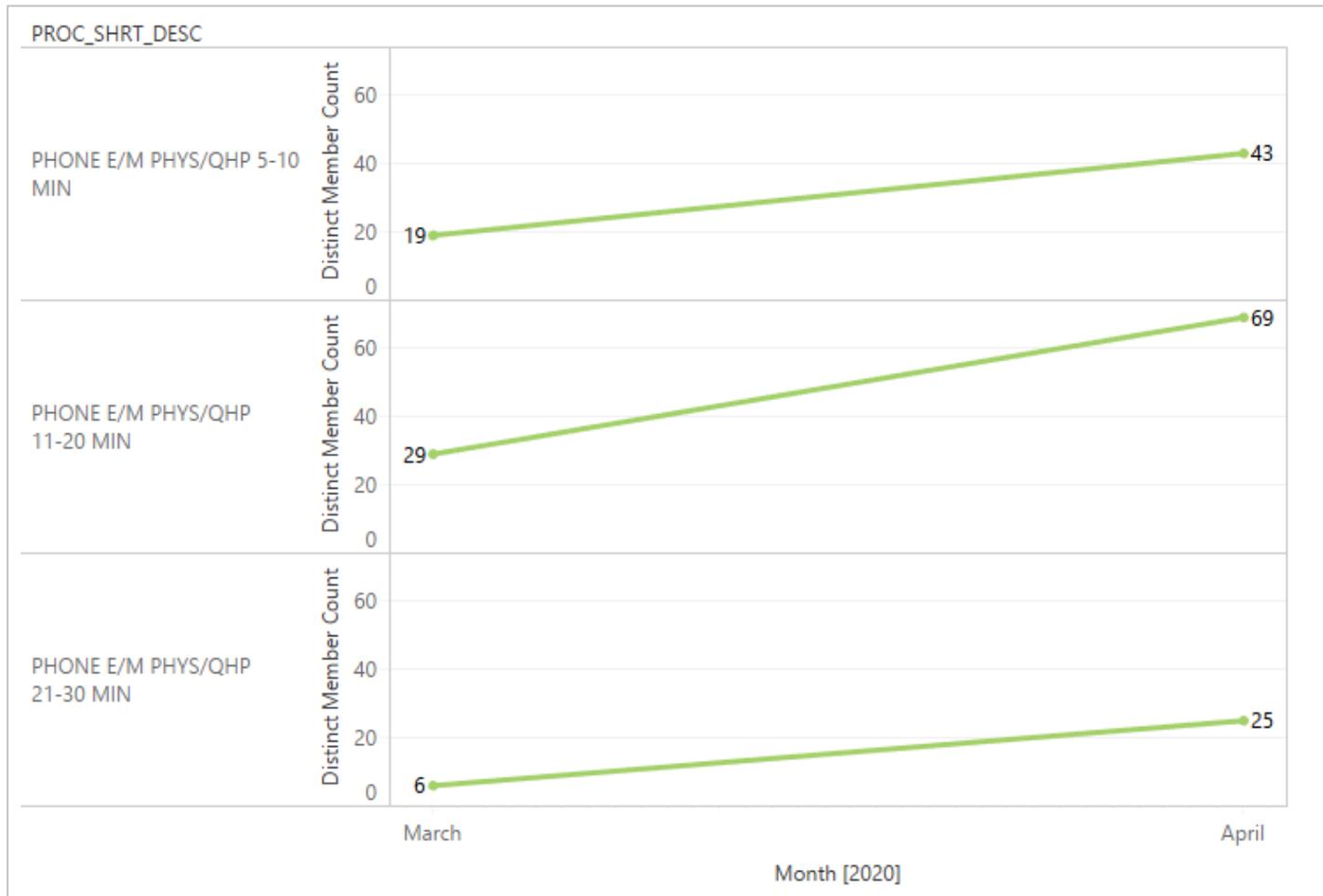
The Theon[®] Platform Care Engager[®] Module: LV BCH Data Group

Primacy Care Visits



Primary Care By Member Count and Paid Amount

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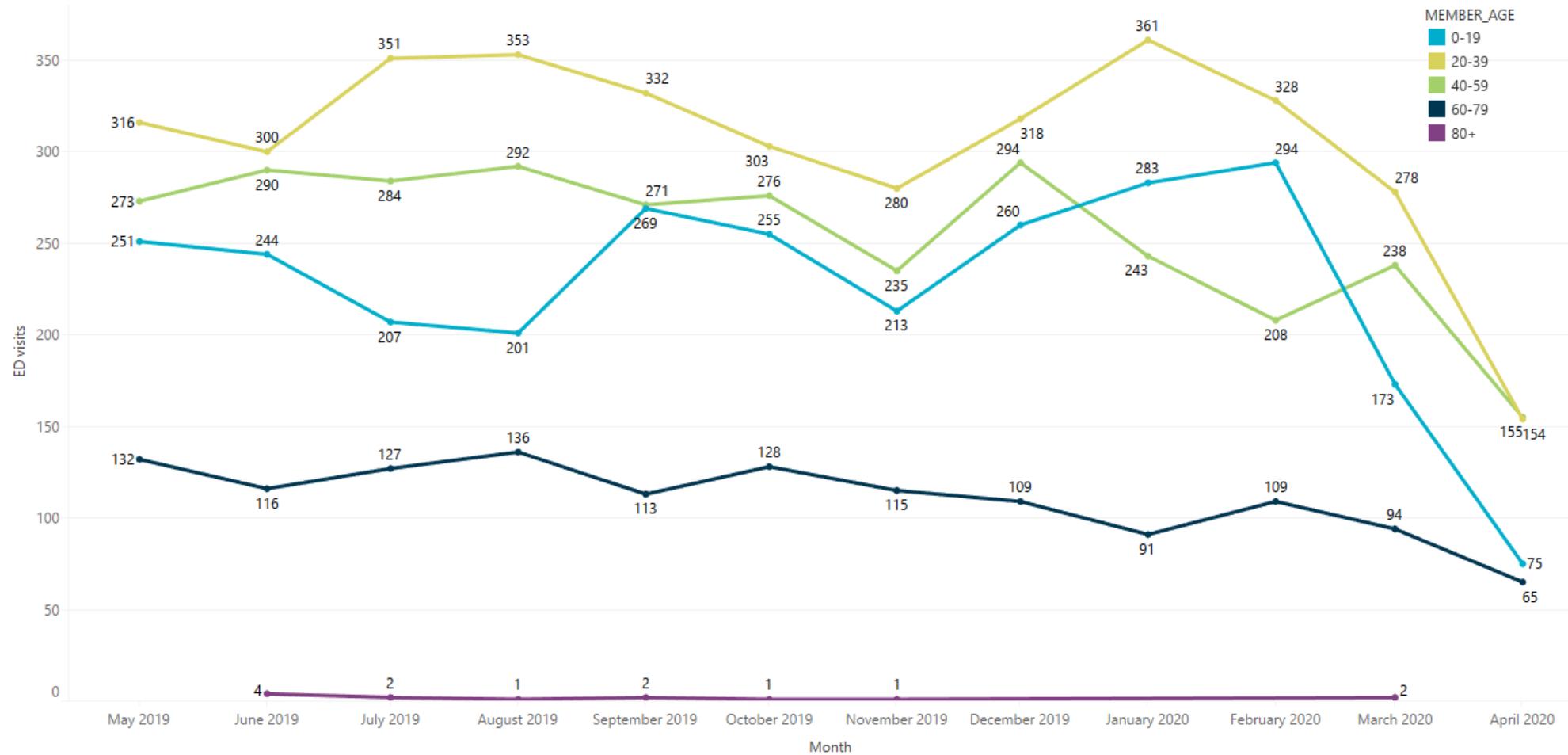


- Office Visits
- Preventive Services
- Other Services (Including Telehealth)

Emergency Department Visits by Age

The Theon® Platform Care Engager® Module: LVBCH Data Group

Monthly Trend - ED Visits



COVID-19

Financial Impact for Employers: Willis Towers Watson

- Initial estimates projected a potential 7% increase in healthcare expenditure
 - Infection level (# of infected individuals, severity of illness)
- Updated analysis indicates employer healthcare costs could decrease by as much as 4% in 2020
 - Infection level updated + Care deferral volume
- Significant volume of care remains deferred
- Monitor and budget for anticipated return of some services

1% Infection Level

Cost Decrease:
1%-4%

15% Infection Level

Cost Variance:
+/- 1%

20% Infection Level

Cost Increase:
1%-3%

COVID-19

Cancer Screening Impact: Epic Health Research Network

- Preventative cancer screenings dropped abruptly initially
 - 86% decline in colon cancer screenings
 - 94% decline in breast and cervical cancer screening
- Recent rise in screenings, but still lower than pre-COVID-19 levels
 - 29% lower for breast cancer screening
 - 36% lower for colon cancer screening
 - 35% lower for cervical cancer screening
- Resulting “missed” screenings
 - 285,000 missed, 63% deficit in breast cancer screening
 - 95,000 missed, 64% deficit in colon cancer screening
 - 40,000 missed, 67% deficit in cervical cancer screening

“Lack of screenings and treatments could result in almost **10,000 excess deaths** from breast and colorectal cancer in the next decade.”

- National Cancer Institute
Director Dr. Norman E.
Sharpless

COVID-19

Chronic Condition Outcomes: Wellframe

- 57% **delayed** receiving services (by choice or doctor discretion)
 - 26% had **trouble accessing** their doctor
 - 52% report **not having an effective plan** for healthcare management
 - 38% are **not fully confident** in their ability to manage their own care
-
- 74% are **motivated** to better manage their chronic condition
 - 68% think virtual access to care support would **increase self-management** of their healthcare plan
 - 66% **would use** virtual care management for mental health difficulties

COVID -19

Geneia Resource: Provider Practice Considerations for Resuming Care

1. Anticipate and acknowledge patient fears
2. Make room for the emotional well-being of patients
3. Use identification and stratification analytics (identification and stratification)
4. Use an analytic model to determine patients at highest risk for severe COVID-19 impacts
5. Use technology to monitor at-risk patients
6. Prioritize patient outreach
7. Engage patients
8. Determine which visits need to be in-person
9. Leverage resources to address social determinants of health

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866.267.9894 | Solutions@Geneia.com



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