

More than convenience: How leaders are leveraging telehealth to achieve their strategic plan

When the COVID-19 pandemic took hold in early 2020, some health systems were forced to dramatically expand their telehealth capabilities in a matter of days. As clinicians and patients alike became more comfortable with virtual care technology, adoption increased exponentially in both outpatient and inpatient settings.

Long after the pandemic surge and even as in-person volumes return to normal, telehealth will clearly remain a significant aspect of care delivery in the U.S. Leaders are ever-aware of telehealth's promise to expand their capabilities, supplement their workforce and ease clinician burden, especially within inpatient settings. As executives consider the future of telehealth beyond the rapid investments they made during COVID-19, they should be viewing it not just as a tool of convenience, but also as a strategic asset that can help grow existing service lines, drive new revenue and more effectively deliver care. Telehealth technology can play a key role in supporting an organization's strategic vision—often at a lower cost than traditional care modalities.

In early 2021, AvaSure partnered with Modern Healthcare Custom Media to survey healthcare leaders about their organizations' use of telehealth technology in acute care and inpatient facilities. The survey contained several questions asked in a similar study in 2018. Responses from 173 executives paint a picture of how telehealth is currently being utilized at health systems, how that compares to the past, and how executives expect to utilize the technology in the years ahead.

In this executive brief, we'll share insights from the survey on telehealth adoption, purchasing and implementation, and analyze how leaders should respond to these trends so that they can leverage telehealth in a strategic manner within their organization.

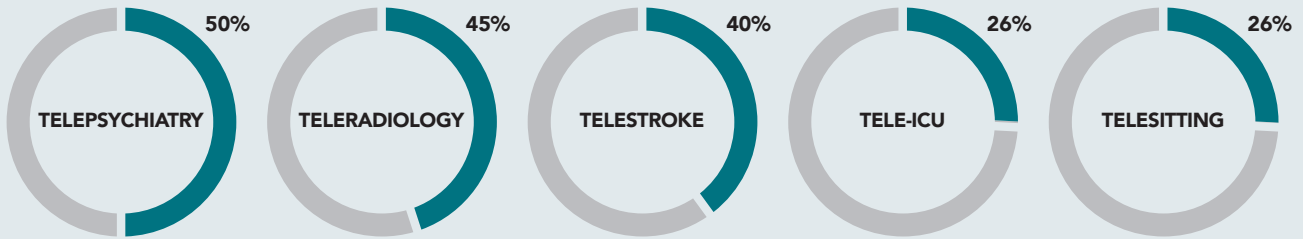
Telehealth is being used to supplement care and support hard-to-recruit specialties

While non-acute virtual visits skyrocketed during the pandemic, our research shows that implementation of the technology has been a relatively consistent priority for providers, who are simply seeing more volume. Nearly all respondents (92 percent) told us they use telehealth for patient care, compared to 89 percent in 2018.

Providers have found telehealth to be particularly helpful to support hard-to-fill acute care specialties. When asked how telehealth is being currently used at their organization, more leaders cited telepsychiatry than any other specialty. Fifty percent of leaders said their organization has a telepsychiatry program—a significant increase from 35 percent in our 2018 survey. This shift is reflective of both a national psychiatrist shortage and a looming behavioral health crisis brought on by the COVID-19 pandemic. Other top telehealth uses cited in our 2021 survey include teleradiology (45 percent), telestroke (40 percent), tele-ICU (26 percent) and TeleSitting (26 percent). TeleSitter®, invented by Belmont, Mich.-based AvaSure in 2008, allows a remote staff member to monitor and interact with multiple patients at once for falls, suicide ideation and other risks. The technology is in use at close to 1,000 hospitals across the country.

Leaders are leveraging telehealth in a variety of acute care settings, but behavioral health units are the most popular area of the hospital where telehealth is being used, noted by over 48 percent of survey respondents. Thirty-seven percent of respondents are using telehealth in the emergency department and medical-surgical units, 34 percent are using it in the ICU and 22 percent make use of telehealth in pediatrics units.

TOP 5 TELEHEALTH USES



Access, safety and workforce are key reasons for telehealth investment

When leaders were asked what telehealth services they plan to add in the next year, more leaders mentioned TeleSitting than any other service, with 19 percent of respondents noting that they are planning to implement the technology. The other top responses for future investment matched the top four uses cited by respondents for current use: telepsychiatry (17 percent), telestroke (16 percent), teleradiology (14 percent) and tele-ICU (14 percent).

When asked about the top drivers of their telehealth purchasing decisions in 2021, leaders' top responses were improving provider-to-patient access (52 percent), patient safety (43 percent), access to specialists (43 percent), workforce efficiencies (30 percent) and the caregiver shortage (26 percent). A majority of respondents said they plan to make some type of telehealth purchase in 2021.

These drivers explain why TeleSitting and continuous patient monitoring is placed at the top of the list of planned investments. The technology is not only being used to monitor for patient harm, but also to connect patients for bedside tele-consults. The ability to remotely monitor multiple patients at once allows providers to reduce the use of one-on-one sitters, easing the burden on nurses and allowing them to spend more time on essential tasks. That's important amid increasing nurse-to-patient-ratios and a nationwide nurse shortage that will be exacerbated by COVID-related burnout.

Leaders who responded to the survey are clearly aware of telehealth's emerging importance in the post-pandemic era as an important workforce tool: 82 percent of leaders said that the COVID-19 has spurred "a lasting investment" in telehealth at their organization, and 74 percent agreed that

it plays an important role in resolving caregiver shortages. Seventy-five percent said they consider telehealth to be a workforce multiplier in its ability to supplement and support clinicians working at the bedside.

Telehealth's emerging role in health system enterprise strategy

Healthcare leaders are ever-focused on the promise of data to help them make strategic, evidence-based decisions for their health system's future. Telehealth visits have the potential to generate a significant amount of insightful data, but not all health systems are collecting that information or analyzing it in an actionable way. This was evident in our survey, as respondents weren't overly pleased with their existing capabilities. When asked whether they agree that they are "pleased with the level of analytics and data [they] have regarding telehealth visits," only 15 percent of respondents strongly agreed, compared to 32 percent who agreed. A notable 37 percent said they neither agree nor disagree with the statement, and 15 percent disagreed or strongly disagreed. Considering the enormous amounts of data that can be generated from virtual visits and the potential to use that data to improve care and operations, healthcare leaders shouldn't settle. Executives should seek out solutions for their own organizations that are robust in their ability to capture and analyze data.

This strategic sentiment also appears to apply to the way that providers are purchasing equipment. When outfitting patient rooms with equipment and technology such as smart beds, patient monitoring devices and nurse call systems, 62 percent of leaders told us they prefer to selectively purchase each component in the room that best meets the need, even if that means purchasing from multiple vendors. Thirty-eight percent said they prefer to use one vendor to

TOP 5 REASONS FOR TELEHEALTH PURCHASES



outfit all of the hardware and equipment needs in a room through a bundled solution—a strategy that can occasionally bring cost-savings but may not appropriately satisfy providers' specific needs.

Another clear signal of telehealth's emerging strategic role is the influence of a widening cast of executives who are now involved in telehealth purchasing decisions. While our 2018 survey found that the majority of telehealth purchases were decided by the CNO (60 percent) and CMO (51 percent), the variety of leaders involved in these decisions has since shifted.

The CEO and CFO went from being telehealth decision-makers at only two to three percent of health systems in 2018 to over 40 percent of health systems in 2021. The top five decisionmakers cited in the 2021 survey included the CMO (55 percent), CNO (53 percent), CEO (45 percent), CFO (43 percent) and CIO (42 percent). The inclusion of more c-level executives in these decisions—especially the CEO and CFO—points to the newfound significance of telehealth to health systems' long-term goals and overall strategies. Health systems are recognizing the need for a hybrid care model that recognizes telehealth not as a disparate business, but rather as an integral part of nearly every service line.

What is needed to evolve telehealth into a strategic asset

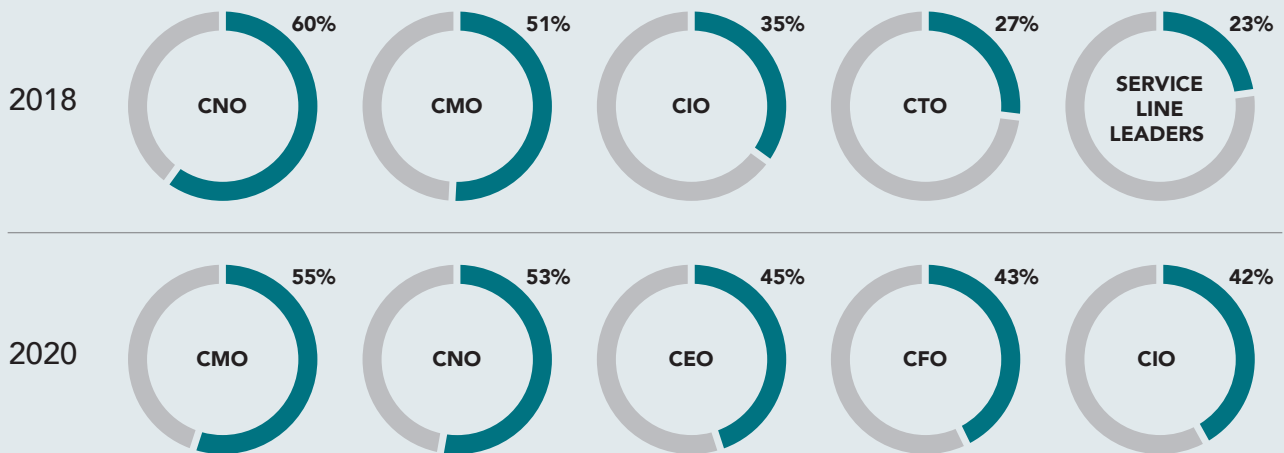
As leaders consider the role of telehealth in the future of their institutions, they should implement the following best practices that can emphasize its role as a long-term strategic asset:

1. Involve the C-suite and make telehealth an enterprise-level priority: As mentioned, an increasing variety of executives are involved in the telehealth purchasing process, and for good reason. If telehealth is the future

of care, then it must have the buy-in and consideration of the highest leaders at hospitals and health systems. Health systems and hospitals should create a high-level executive position that is responsible for virtual care and ensure it reports to the C-suite, if not the CEO.

- 2. Leverage telehealth to tackle the biggest challenges and the most promising opportunities:** Telehealth has significant promise in its ability to both ease the burden on existing providers and support expansion of services that would otherwise be difficult to staff in person. As leaders look to implement telehealth in more acute-care settings, they should consider where clinical staff are most strained, where outcomes can be improved and where opportunity exists for additional revenue. For example, telepsychiatry is a high-demand specialty where hospitals may be able to provide billable services that they otherwise wouldn't be able to offer. TeleSitting, tele-radiology and tele-ICU similarly offer significant opportunity in their ability to improve the quality and productivity of patient care, while allowing bedside clinicians to focus on the most complex cases.
- 3. Don't cut corners in the purchasing process—buy the best-in-class products that fully serve organizational needs:** It can be tempting to seek out an "all-in-one" solution, but bundled systems won't always offer the level of sophistication or support needed. Leaders should seek out products that are customizable and directly solve for their most pressing challenges. There are sophisticated technology and services on the market that can help integrate disparate devices and ensure that they are reliable and fully addressing the needs of patients and clinicians.
- 4. Harness the power of data to improve care efficiency and quality:** Leaders should ensure that their telehealth platforms are collecting and analyzing data regarding

TOP TELEHEALTH DECISIONMAKERS FROM 2020 TO 2018



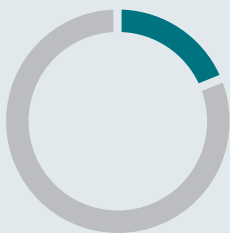
clinical care and operations. Data on indicators such as utilization, productivity and staff responsiveness can support key business decisions that can shape the future of an organization.

AvaSure stands ready to help healthcare organizations leverage telehealth to achieve strategic goals. As the pioneer and expert in inpatient telehealth, AvaSure has provided safer environments for over 1 million patients, with over 50 million live monitoring hours. By continuing to reduce adverse events, and by optimizing workforce efficiencies for the nation’s top health systems, AvaSure has consistently lowered the cost of care while providing

safer, more efficient healthcare for everyone. No other vendor in the virtual monitoring space has anything like AvaSure’s reference list of peer-reviewed journal articles, posters and podium presentations showing its efficacy in preventing harm across the healthcare enterprise.

The company’s Online Reporting of Nurse Analytics (ORNA) platform provides executives and clinicians with the real-time data they need, when they need it, allowing them to gain insights into complex patient populations, communicate program success and identify areas for targeted improvement. Unlike bundled solutions, ORNA offers comparison data to help providers benchmark themselves against similar organizations.

AvaSure has a proven record of scalability and its devices are used by each of the top 10 largest healthcare systems in the U.S. Visit avasure.com to learn more, or contact AvaSure at 1-800-736-1784 or info@avasure.com.



19% of leaders plan to implement TeleSitting capabilities in the next year

SPONSORED BY



ABOUT THE SURVEY:

Modern Healthcare Custom Media, on behalf of AvaSure, commissioned Signet Research, Inc., an independent company, to conduct a survey of healthcare leaders. The objective of this study was to learn about organizations’ use of telehealth technology in acute care and inpatient facilities.

On February 19, 2021, Modern Healthcare Custom Media sent a broadcast email to Modern Healthcare registrants asking them to participate in a survey, followed by five subsequent reminder emails. By the closing date of March 1, 2021, 173 returns had been received. The base used is total answering each question. Survey findings may be considered accurate to a 95 percent confidence level, within a sampling tolerance of approximately +/- 7.5 percent.