



PROVIDER TELEHEALTH USE AND EXPERIENCE SURVEY

Balancing the Benefits and Barriers of Virtual Care



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EXECUTIVE SUMMARY

Once on the fringes of healthcare delivery, telehealth’s ability to bridge patient access to care during challenging times has thrust virtual care onto center stage. An industry analysis by Trillian Health estimates that 38M people generated 96M telehealth visits during the first year of the COVID-19 pandemic.*

Providers have thus adopted telehealth at a massive scale. This surge has shown the value of virtual visits — as well as revealed pain points in the provider experience.

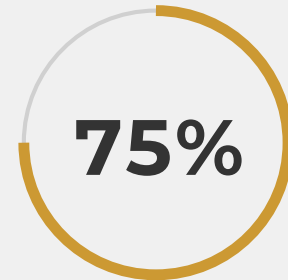
This research conducted on behalf of DocASAP by a Qualtrics, Inc. online research panel sought to understand physicians’ past, current, and predicted use of telehealth, as well as identify the benefits and barriers physicians encounter when using telehealth with their patients. The survey was administered using a non-probability-based sample. All responses were reviewed by researchers for quality control.

We are pleased to offer insights from DocASAP’s first annual “Provider Telehealth Use and Experience Survey.”

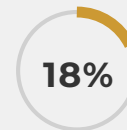
SURVEY DETAILS

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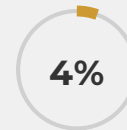
Physicians



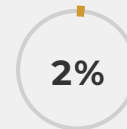
Primary care physicians



Specialty care



Urgent care



Other

Fielded from

October 25 – November 2, 2021

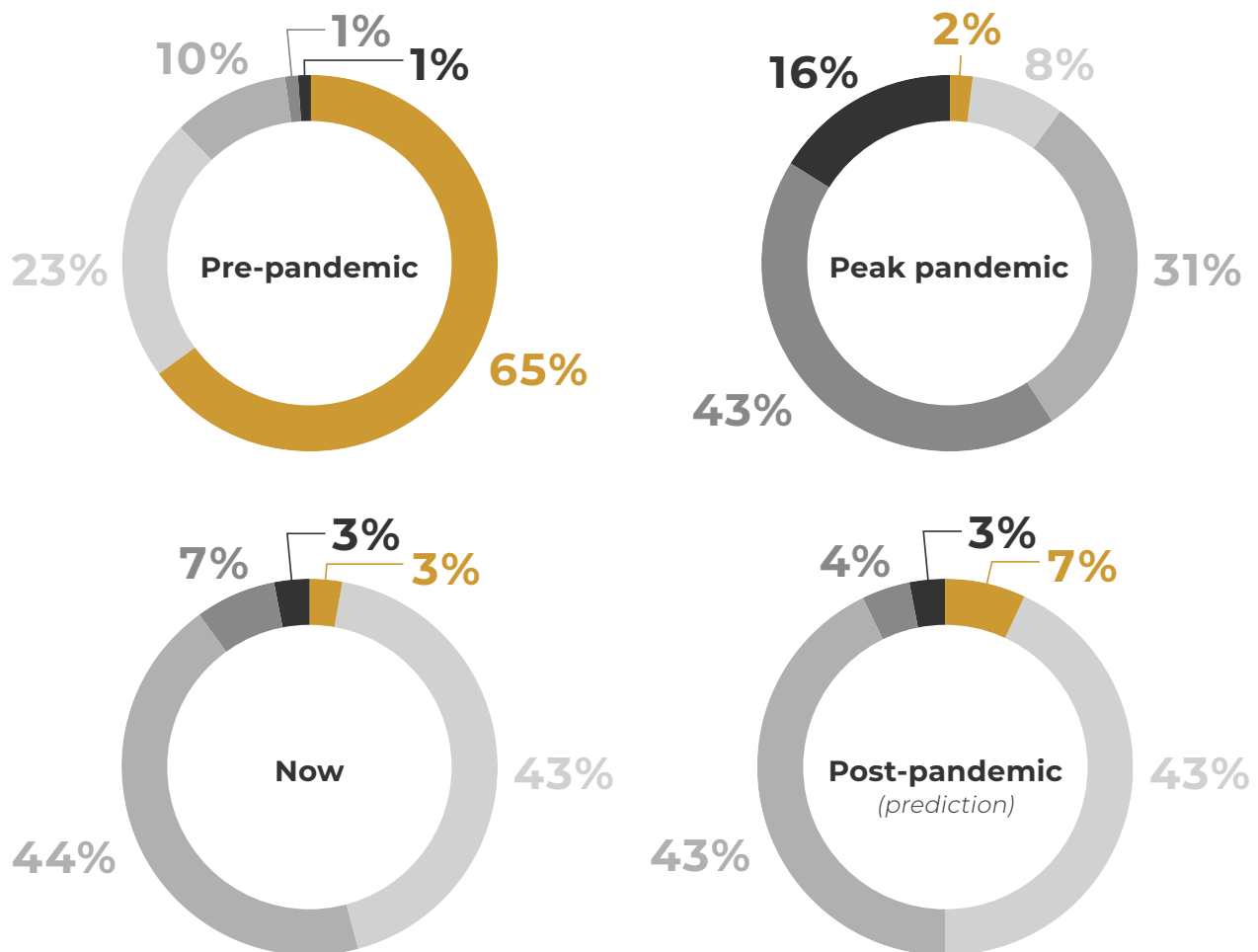
*2021 Trends Shaping the Post-Pandemic Economy, Trillian Health – <https://pages.trillianhealth.com/2021-trends-shaping-the-post-pandemic-health-economy>

PROVIDER USE OF VIRTUAL CARE EXPECTED **TO STAY STEADY**

Provider use of telehealth has skyrocketed — and the trend is expected to continue. According to our survey, **65% of providers had never used telehealth prior to the pandemic. Today, only 3% say they have never used telehealth.**

Looking beyond COVID-19, nearly all physicians expect to continue to use telehealth alongside in-person visits. Ninety-three percent (93%) of providers say they are somewhat or very likely to continue to use telehealth after the pandemic.

PROVIDER TELEHEALTH USAGE

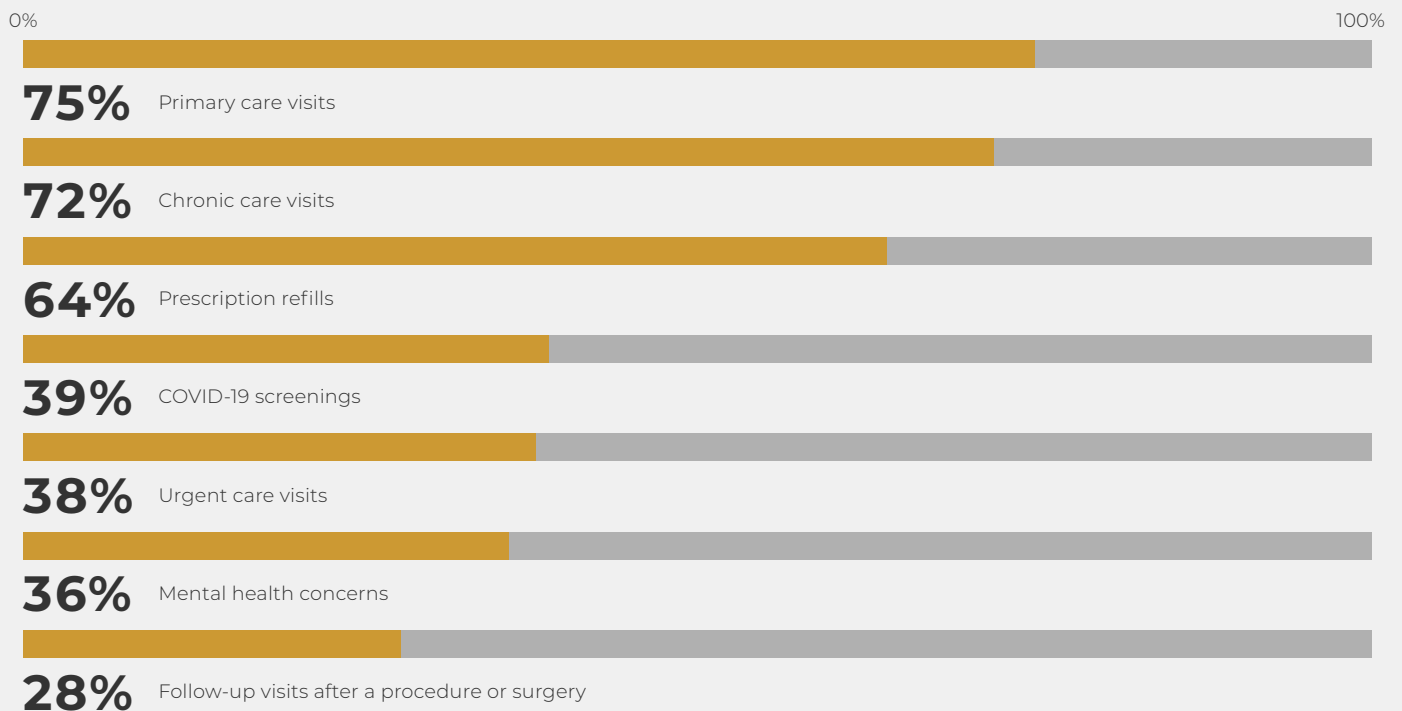


- Exclusively (100%)
- Heavy (>50%)
- Moderate (10-49%)
- Rarely (<10%)
- Did/do not use



Physicians use telehealth for a wide variety of appointment types, from primary care and chronic care to prescription refills and surgery follow-ups.

COMMON TYPES OF TELEHEALTH VISITS



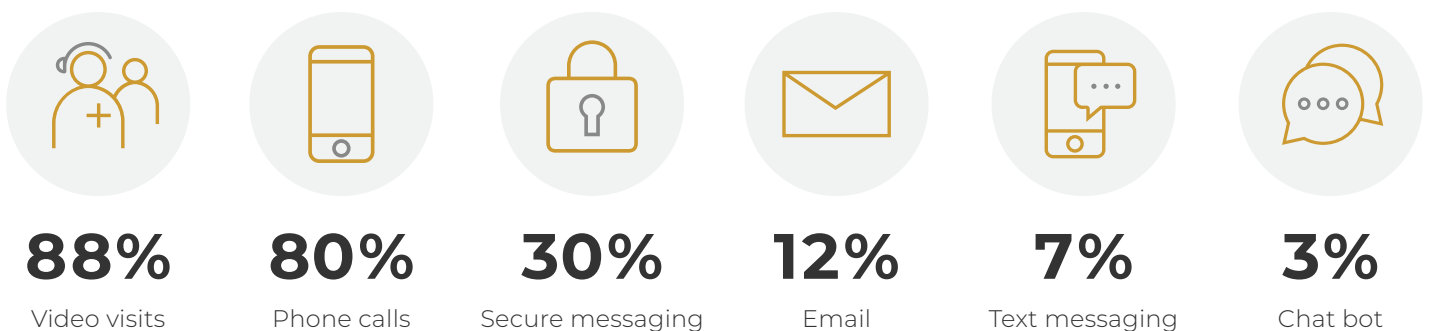
Three quarters of our survey respondents were primary care providers, yet a third (36%) say they used virtual care to provide mental health support. Given that the nation needs nearly 6,500 more mental health clinicians to meet consumer demand, primary care providers may use telehealth to bridge gaps in access to behavioral health services in the years ahead.**

**Mental Health Care Professional Shortage Areas, Kaiser Family Foundation – <https://www.kff.org/other/state-indicator/mental-health-care-health-professional-shortage-areas-hpsas>

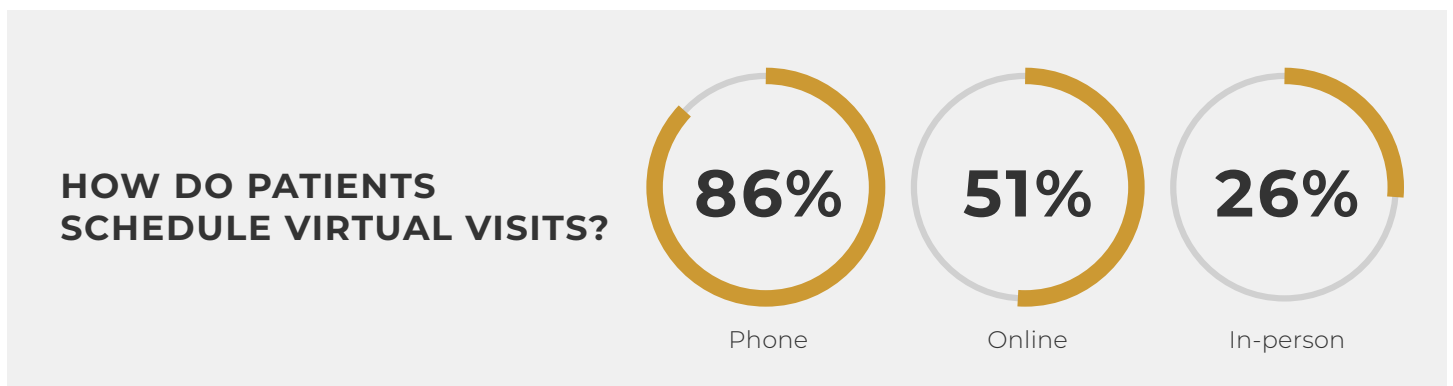
HOW DO PATIENTS ACCESS TELEHEALTH?

Virtual care can be delivered through multiple channels, such as synchronous video visits, phone calls, and online messaging. Providers shared that they use video and phone visits at nearly equal levels. These options grant patients choice and flexibility, especially for those patients with limited access to broadband or computers.

TOP TYPES OF TELEHEALTH VISITS



Providers say that most telehealth patients are scheduling virtual visits over the phone. However, almost half of consumers say they prefer scheduling virtual visits online, according to a DocASAP consumer survey.*** Providers who meet this consumer demand for a seamless digital access experience will earn a competitive advantage.

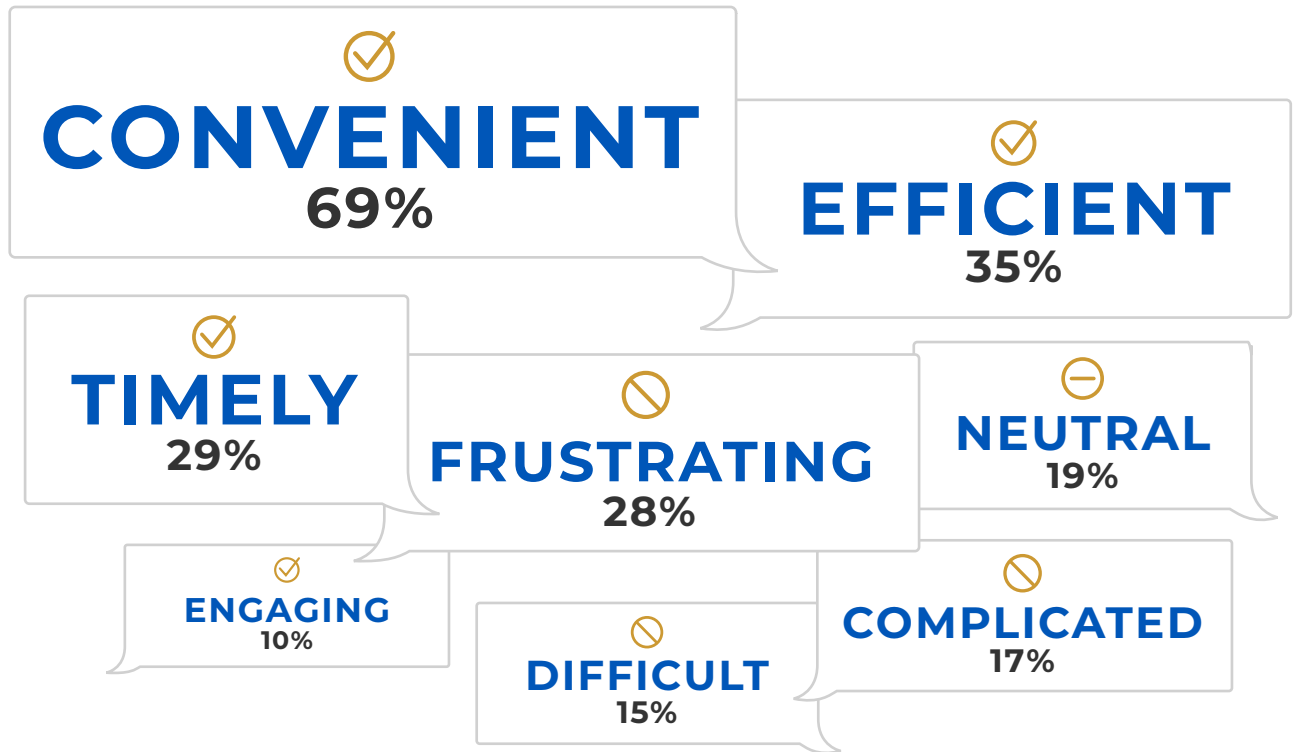


The convenience and ease of access of virtual visits are also reflected in provider no-show rates. A third of providers (34%) say no-shows have decreased with telehealth, while 59% report no change.

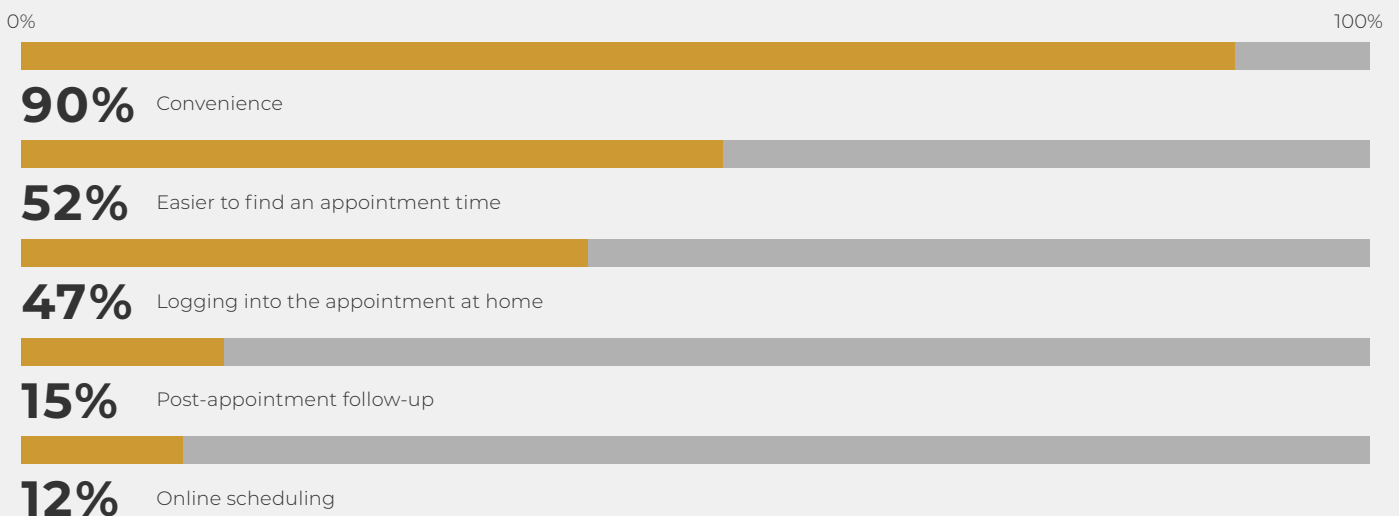
***Telehealth: Taking the Pulse of the Healthcare Consumer, DocASAP, July 2020.

WHAT CAN WE LEARN FROM PROVIDER VIEWPOINTS ON TELEHEALTH?

Many providers sum up telehealth’s perceived value to their patients in a word: convenient. Providers believe improved patient experiences related to finding and scheduling appointments, accessing care from home, and efficient follow-up are the top benefits of telehealth for their patients.



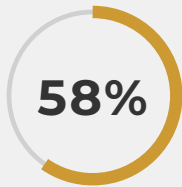
TOP FEATURES OF TELEHEALTH FOR PATIENTS



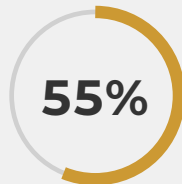


On the other side, one in four providers also describe telehealth as frustrating due to the level of care they can provide. Providers also struggle to manage patient expectations of their virtual visit alongside the technical details of navigating telehealth.

TOP FRUSTRATIONS OF TELEHEALTH FOR PROVIDERS



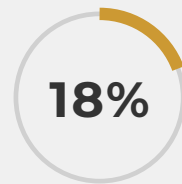
Quality of the care I can provide



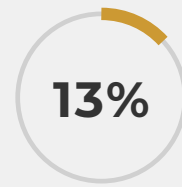
Patients' unrealistic expectations of what can be accomplished virtually



Quality of telemedicine video/audio technology



Logging into an appointment at home or in the office



Billing and coding

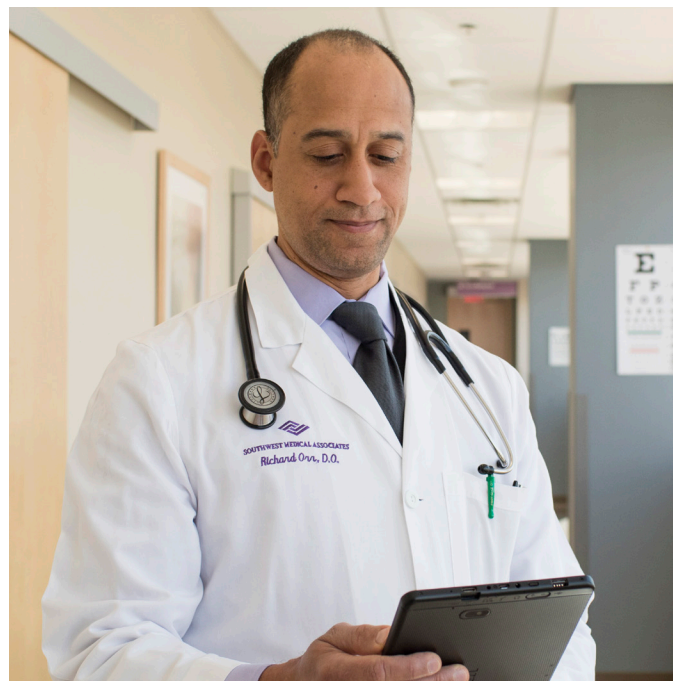
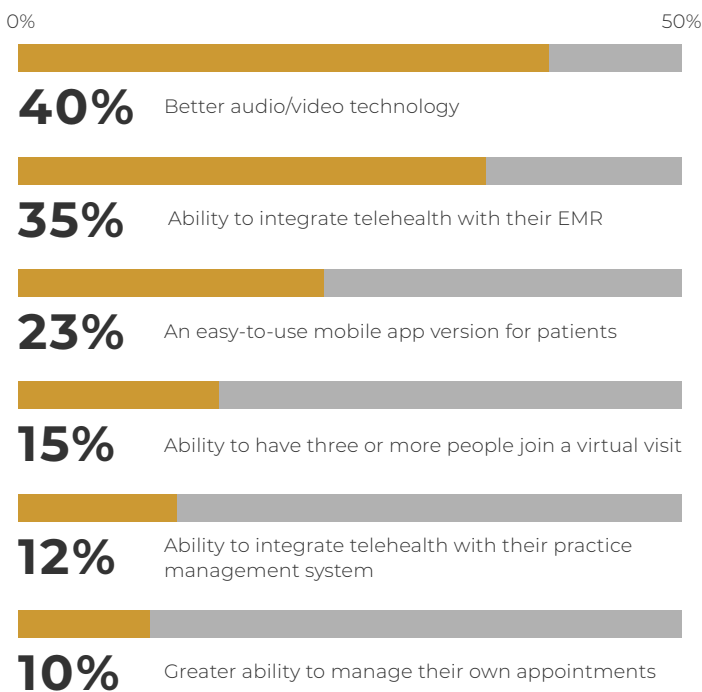
Providers believe in the benefits of telehealth for patients, but they are less confident in their own satisfaction with using virtual care. Only one in four say their job satisfaction (25%) or patient health (23%) has improved as a result of using telehealth. Providers are equally divided in whether telehealth reduces (30%) or increases (30%) their feelings of burnout.

BUILDING A BETTER PROVIDER EXPERIENCE IN VIRTUAL CARE

Healthcare systems and payers can build on provider experiences to scale and improve their telehealth programs.

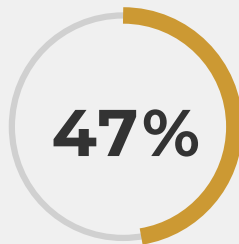
One starting point is optimizing the tech behind telehealth. **More than half of providers (64%) say they are somewhat or extremely satisfied with their telehealth technology**, yet they still identified several improvements that would make their experience better. Among their recommendations is integrating telehealth with their existing systems so they can more easily manage their appointments and record patient information.

TECHNOLOGY ENHANCEMENTS THAT WOULD IMPROVE TELEHEALTH APPOINTMENTS

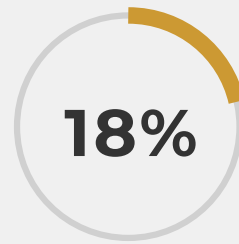




Creating a digital experience that is easy to navigate would also ease provider frustrations with telehealth. Amid the rapid rise of virtual care, it's easy to forget that most people used telehealth for the very first time after March 2020. Telehealth has a high barrier for entry for some consumers and physicians due to its technical requirements creating possible friction in the digital experience. **Our survey found that providers see bridging the digital divide as a top priority in improving telehealth.**



47% of providers say offering telehealth training to patients who are less digitally savvy would improve virtual care.



18% say ongoing telehealth training for themselves and their staff would improve virtual care.

CONCLUSION

Providers strongly agree that the innovations and convenience of telehealth are too great to leave behind. According to providers, their patients' freedom to access virtual visits in the setting, time, and channel best for them are among the greatest benefits of telehealth.

However, provider satisfaction with virtual care lags most when patients and staff experience friction with telehealth technology. To overcome these barriers, healthcare leaders should focus on making their telehealth experiences as intuitive as possible, lowering the barrier for entry, and paving the way for accessible virtual visits.



ABOUT

DOCASAP®

DocASAP provides the leading patient access and engagement platform for health systems, health plans and physician groups. Backed and promoted in the market by Aetna and UnitedHealthcare, DocASAP builds unique payer-provider connections with an eye towards simplified access, increased care compliance and improved population risk management. DocASAP's intelligent patient-provider matching and online appointment scheduling solution enables patients to connect with optimal care providers to enhance access, improve outcomes and reduce costs.



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