

TELEHEALTH FOR HEALTH CARE PRACTITIONERS & CONSUMERS

APRIL 2022

KEY FINDINGS

Health care practitioners and patients overwhelmingly support retaining options for telehealth and cross-state waivers.

- Over the course of the pandemic, telehealth has been a common practice among health care practitioners, especially those providing behavioral health services. Three quarters of our health care provider sample say they have provided care via telehealth at least once since the pandemic began. Accordingly, 91% “strongly agree” or “somewhat agree” that they should continue to have this option post-pandemic.
- Meanwhile, almost 3 in 4 of the general population “strongly agree” or “somewhat agree” that patients should have the option to receive telehealth, even after the pandemic. Among recent telehealth patients, this proportion increases to 84%.
- One in five practitioners say they have provided health care services across state lines under an emergency waiver program since the pandemic began. Health care providers expect that ending the waiver program has had or will have a net negative impact on a variety of indicators, most notably patient access to health care (-34% net negative impact).
- Over 8 in 10 telehealth patients also support the option to receive telehealth services from health care practitioners across state lines, suggesting that those who have received care via telehealth in the past view their experiences favorably.

KEY FINDINGS

Patients and providers alike recognize that these measures enhance flexibility and accessibility without sacrificing outcomes.

- Accessibility stands out as a key driver, with nearly all health care providers agreeing that the continuation of telehealth services “makes health care more accessible for patients.” Six-in-ten also “strongly agree” that it improves flexibility for both patients and providers and is beneficial to vulnerable patients.
- Most of the general population agree that telehealth makes health care safer for patients, increases the likelihood of people seeking necessary care, and is similar to the quality of care received in-person.
- Results among recent telehealth patients indicate that they have benefited from their own personal experiences and that they will seek telehealth care in the future. Among adults who have received telehealth services in the last 6 months, 84% say that they have benefited or would benefit from this option, and 7-in-10 agree that patients are able to receive high-quality, clinically similar care.
- Most (82%) of recent health care patients support allowing nurse practitioners to provide the full extent of care, including through telehealth.

Beyond these benefits, health care providers see virtual care as part of the solution to the widespread stress and burnout suffered by many in the field since the start of COVID-19.

- Data indicate that the flexibility for providers to practice virtually should continue to be one of those tools. Among all health care practitioners, over three quarters (78%) agree that retaining the option to provide virtual care from a location convenient to the practitioner would “significantly reduce the challenges of stress, burnout, or fatigue” facing their profession.
- As a result, 8-in-10 practitioners say that retaining telehealth for health care practitioners would make them, *personally*, more likely to continue working in a role with such flexibility.

AGENDA

TELEHEALTH USAGE

TELEHEALTH SENTIMENT

TELEHEALTH ACROSS STATE LINES

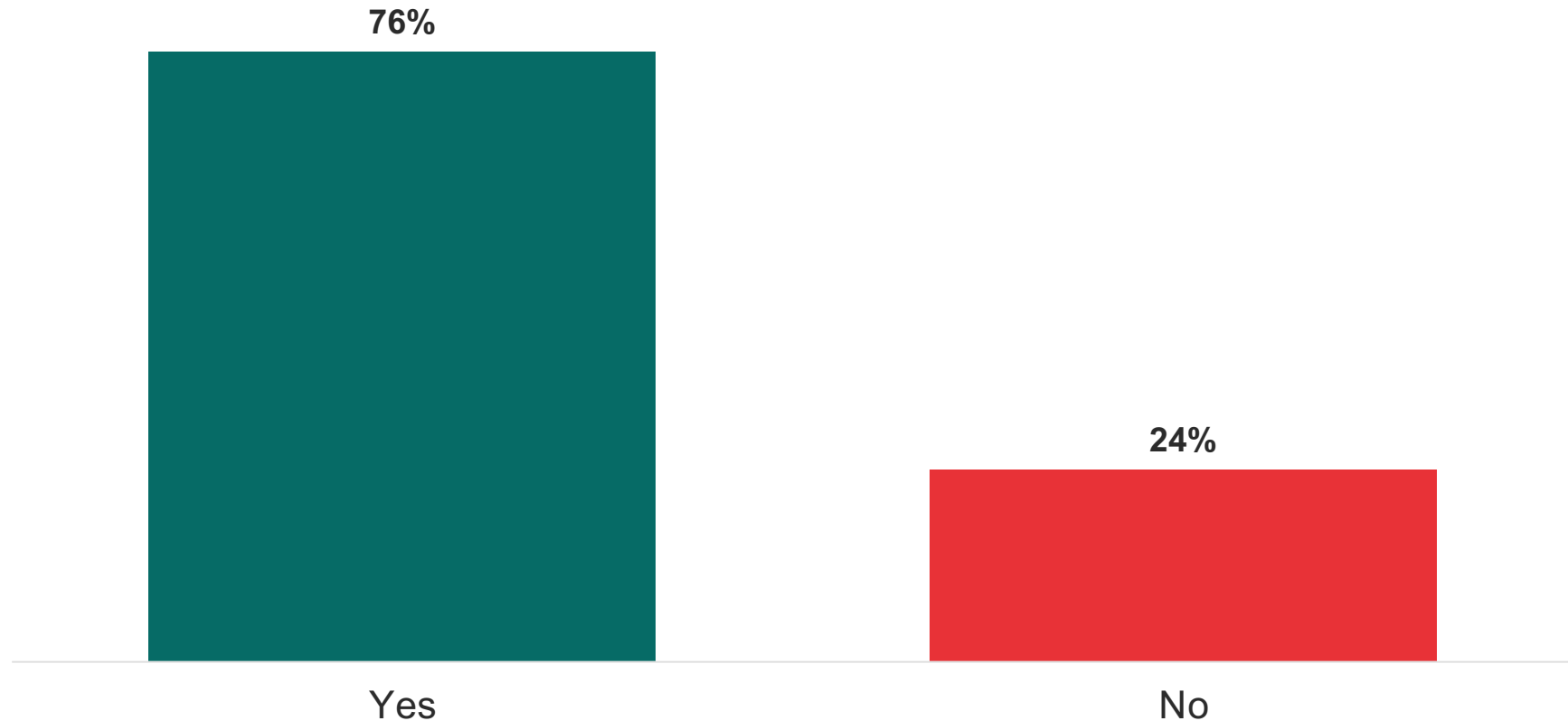
HEALTH CARE PRACTITIONER WORKFORCE



TELEHEALTH: HEALTH CARE PRACTITIONERS

Three quarters of health care practitioners surveyed have provided telehealth services to patients since the pandemic began

During the COVID-19 pandemic, many health care organizations shifted to a greater utilization of telehealth, allowing both patients and sometimes practitioners to give and receive virtual care from their homes or other non-clinical locations. Since the pandemic began, have you, as a practitioner, provided telehealth services to patients? **Shown among all health care practitioners N=320)**



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HEALTH CARE PRACTITIONER WORKFORCE



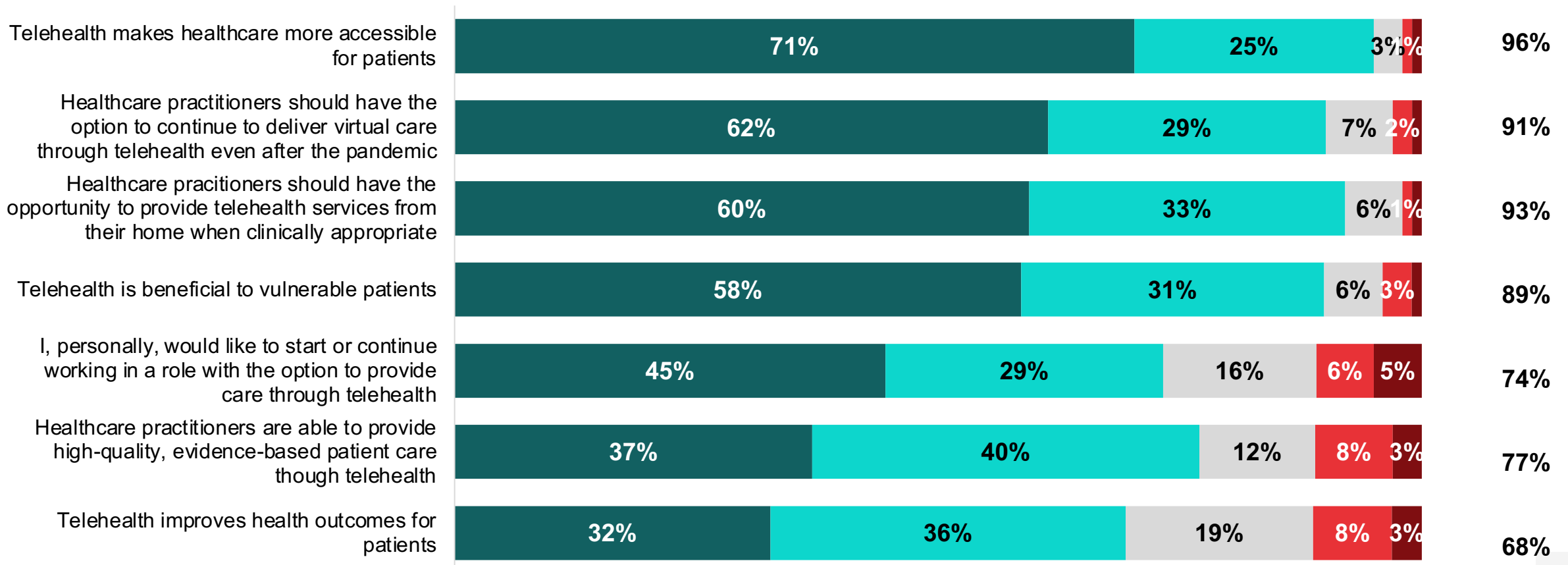
TELEHEALTH: HEALTH CARE PRACTITIONERS

Almost all health care practitioners agree that telehealth improves accessibility for patients – and that the option should continue post-pandemic

Below are some statements and opinions regarding telehealth. Please indicate if you agree or disagree with the following. **Shown among all health care practitioners (N=320)**

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

Strongly + Somewhat agree



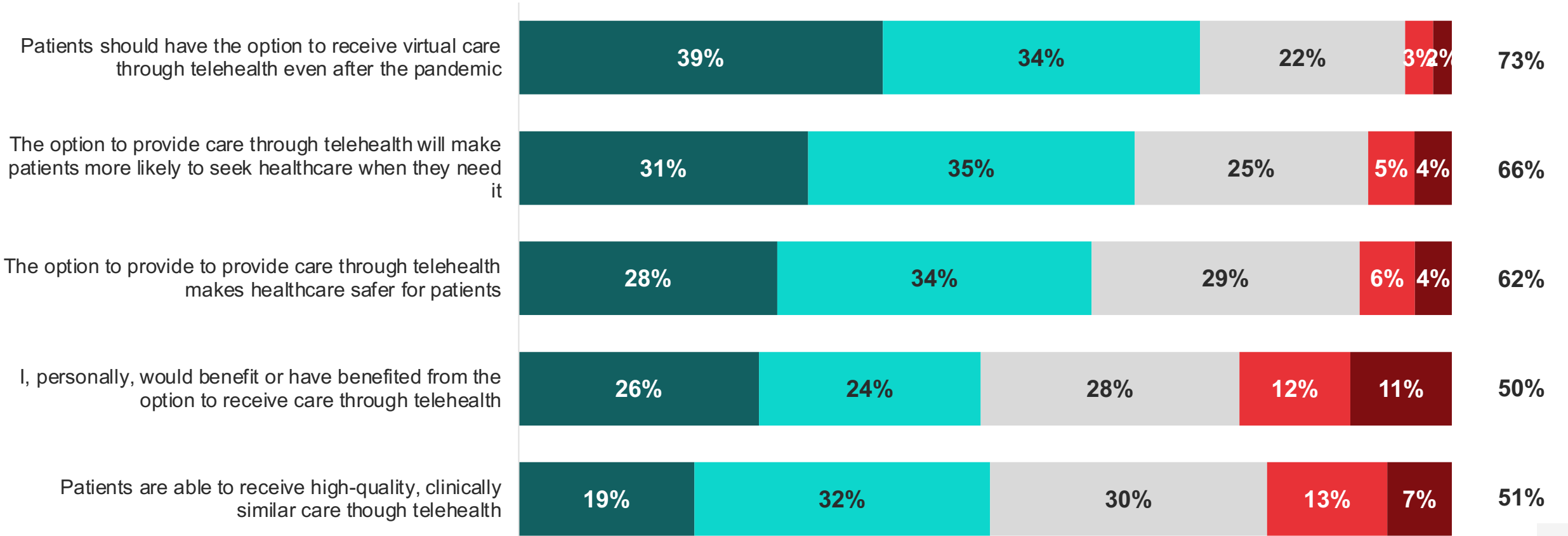
TELEHEALTH: CONSUMERS

Almost 3 in 4 adults agree that patients should have the option to receive virtual care through telehealth even after the pandemic

During the COVID-19 pandemic, many health care organizations shifted to a greater utilization of telehealth, allowing patients to receive virtual care from their homes or other non-clinical locations. Do you agree or disagree with the following statements with regards to telehealth? **Shown among all adults (N=2210)**

**Strongly +
Somewhat
agree**

■ Strongly agree
 ■ Somewhat agree
 ■ Neither agree nor disagree
 ■ Somewhat disagree
 ■ Strongly disagree

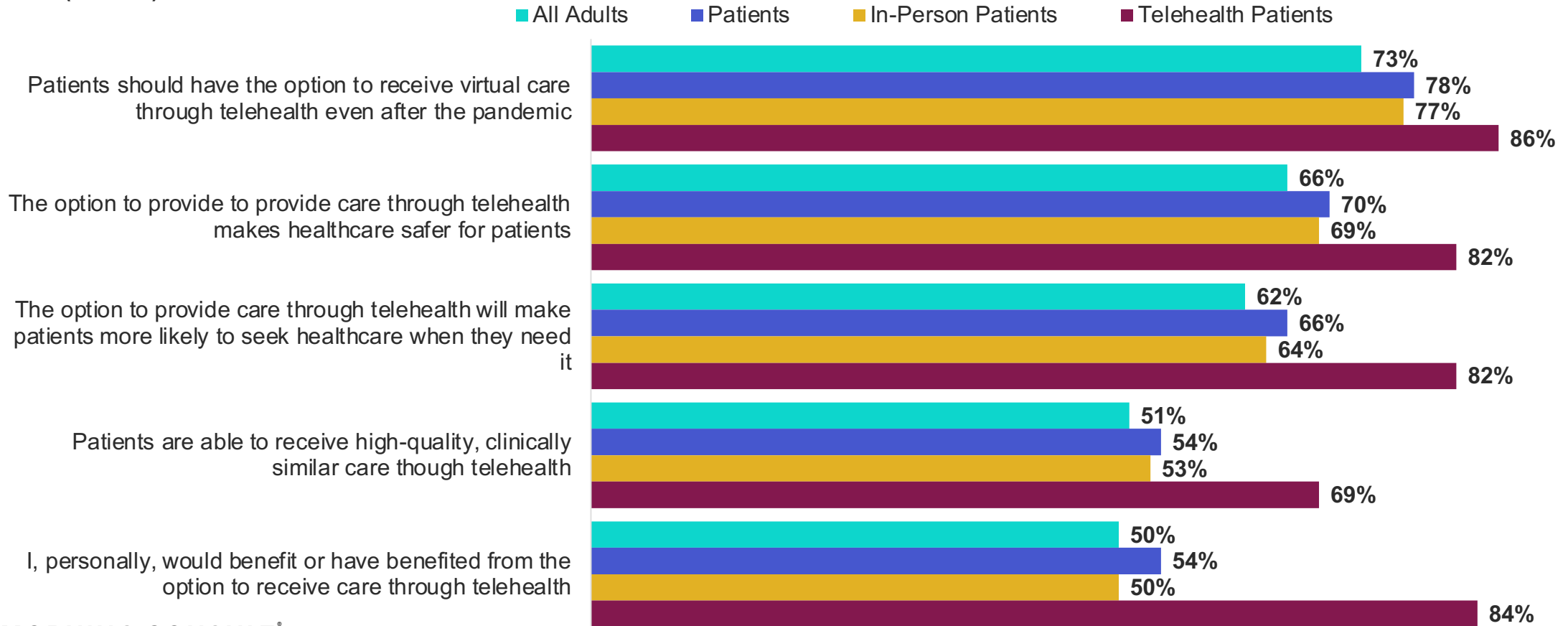


TELEHEALTH: CONSUMERS

Seven-in-ten (69%) recent telehealth patients agree that telehealth enables high-quality, clinically similar care

Showing % strongly + somewhat agree

During the COVID-19 pandemic, many health care organizations shifted to a greater utilization of telehealth, allowing patients to receive virtual care from their homes or other non-clinical locations. Do you agree or disagree with the following statements with regards to telehealth? **Shown among all adults (N=2210)**



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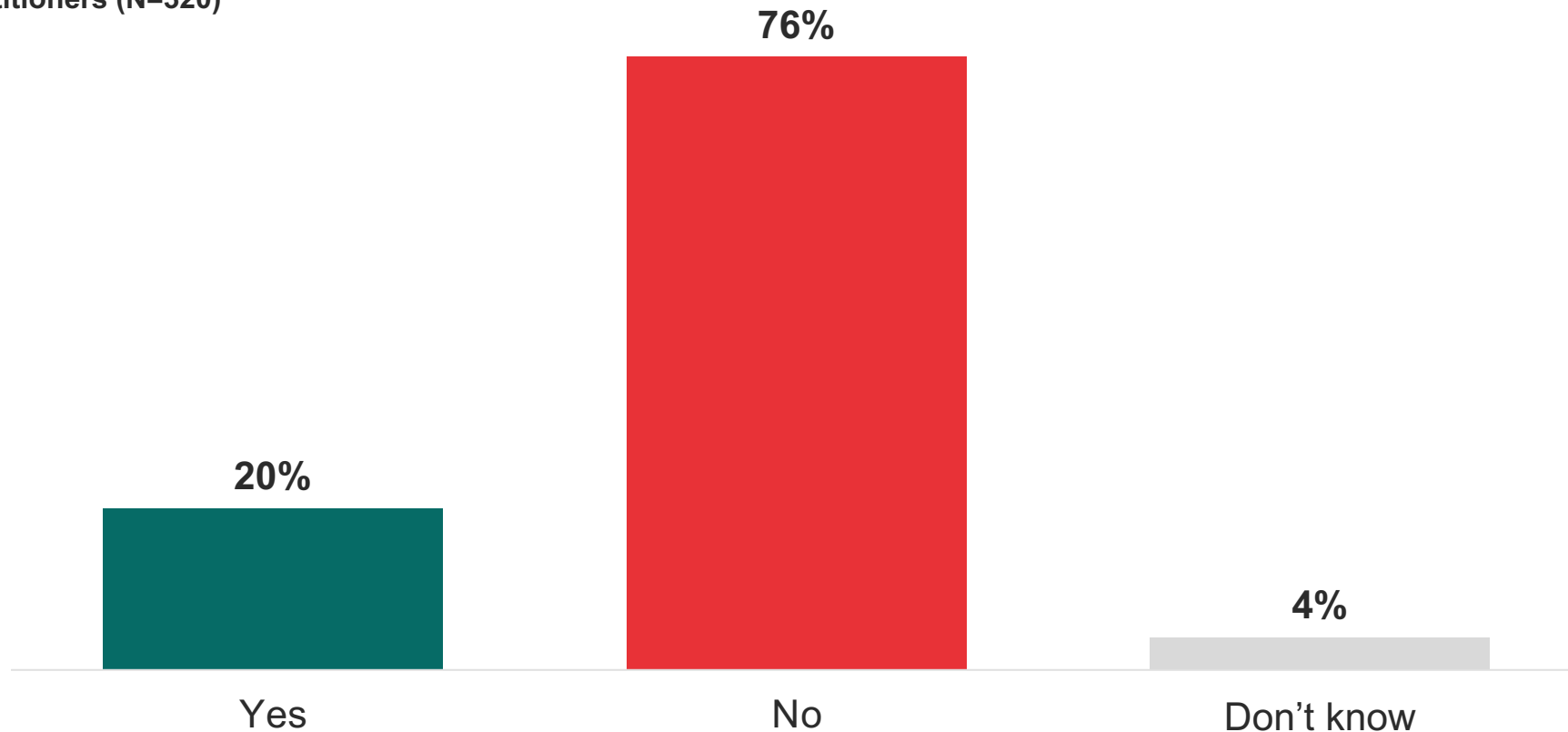
HEALTH CARE PRACTITIONER WORKFORCE



TELEHEALTH: HEALTH CARE PRACTITIONERS

One-in-five health care practitioners surveyed have provided telehealth services to patients in another state under a licensure waiver

During the COVID-19 pandemic, many state governments waived or reduced licensure restrictions preventing the delivery of telehealth to patients in other states, allowing health care professionals to more easily treat patients that are traveling, live in a nearby state, or who need specialized care not available near them. Since the pandemic began, have you, as a practitioner, provided telehealth services to patients in another state under this waiver? **Shown among all health care practitioners (N=320)**



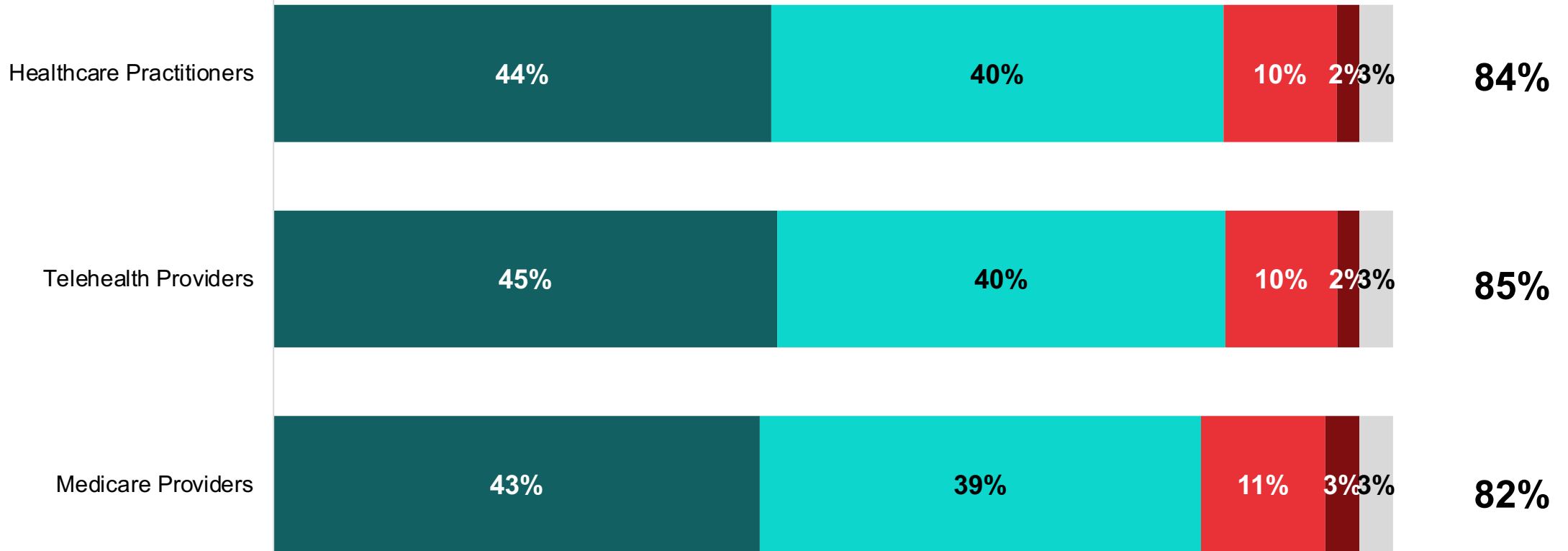
TELEHEALTH: HEALTH CARE PRACTITIONERS

Over eight-in-ten health care practitioners support the option to provide telehealth services across state lines

To what degree do you support, if at all, the option for health care practitioners to provide telehealth services to patients that may be in another state? **Shown among all health care practitioners (N=320)**

■ Strongly support ■ Somewhat support ■ Don't really support ■ Do not support at all ■ Don't know / No opinion

**Strongly +
Somewhat
support**



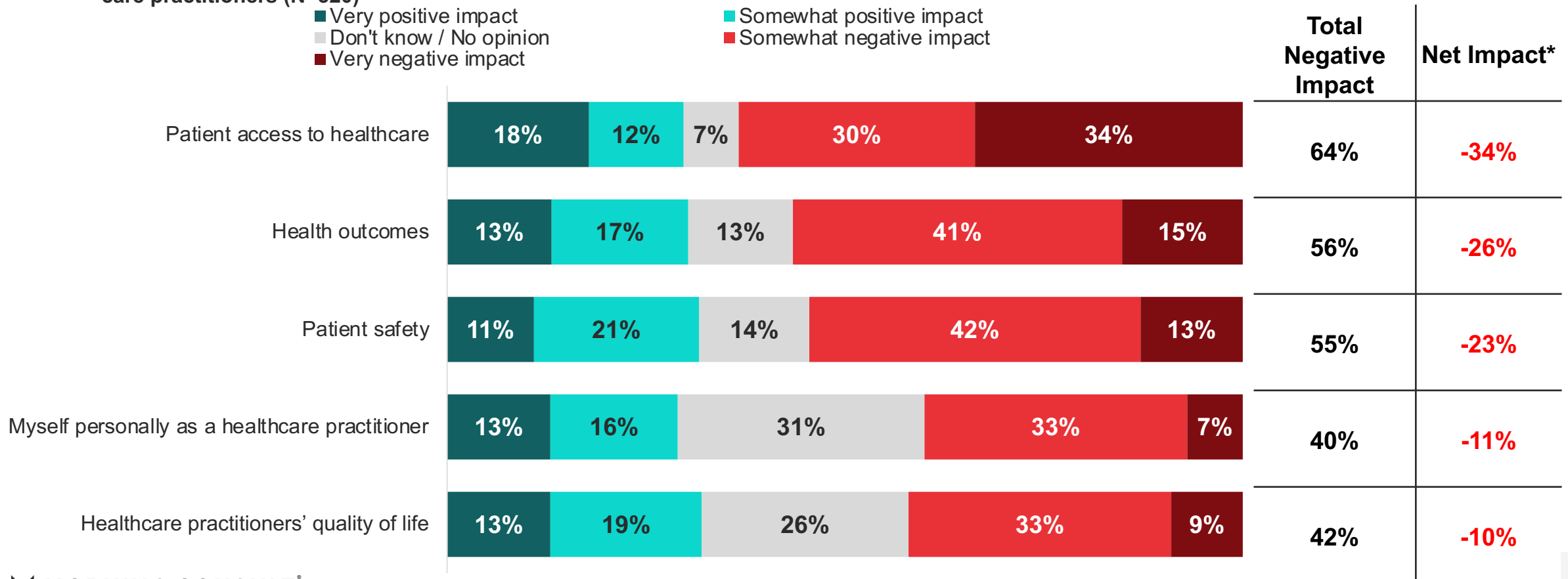
TELEHEALTH: HEALTH CARE PRACTITIONERS

Most providers believe reducing telehealth across state lines will negatively affect health outcomes and access to health care

Showing % very positive + somewhat positive impact

As you may know, many states are ending or have ended waivers that allow health care practitioners to provide care via telehealth to patients in other states. What impact do you think ending these waivers, and thus reducing telehealth access to patients in other states, has on each of the following? **Shown among all health care practitioners (N=320)**

- Very positive impact
- Somewhat positive impact
- Don't know / No opinion
- Somewhat negative impact
- Very negative impact



*Net impact = (Very positive + Somewhat positive impact) – (Very negative + Somewhat negative impact)

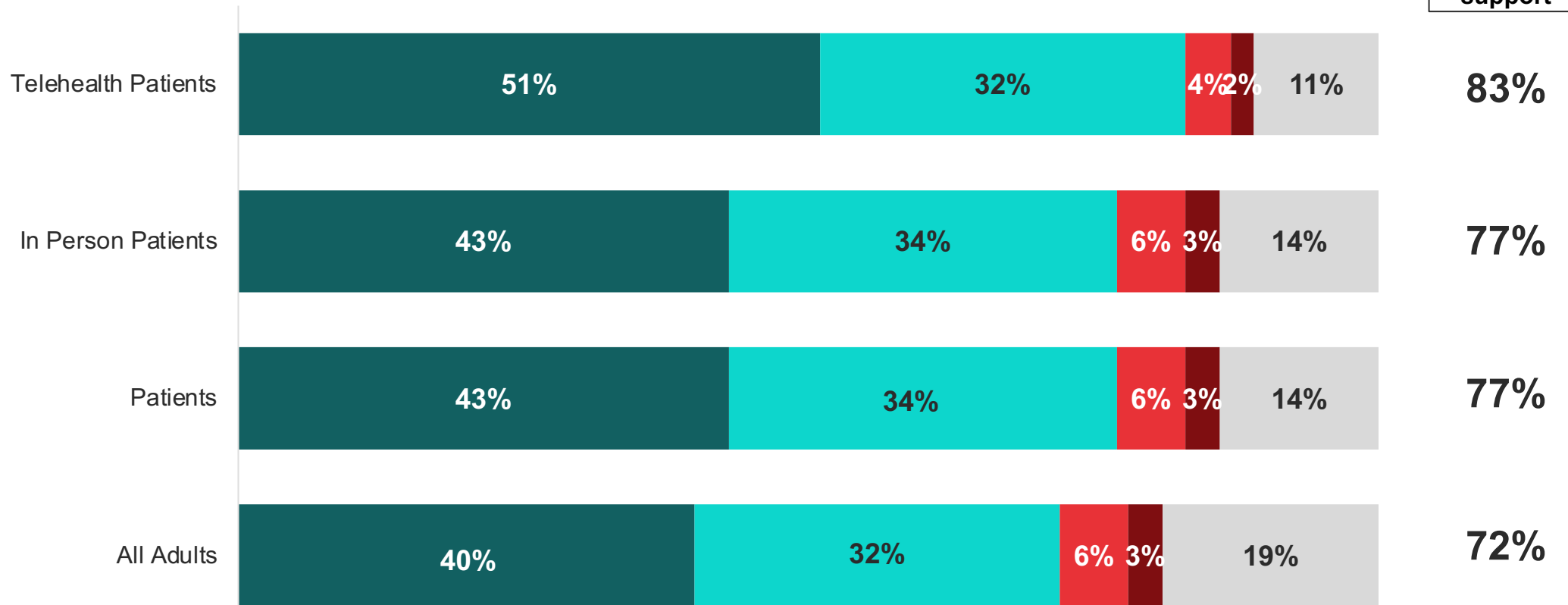
TELEHEALTH: CONSUMERS

Over 75% of recent health care patients support the option for patients to receive telehealth services from practitioners in other states

During the COVID-19 pandemic, many state governments waived restrictions preventing the delivery of telehealth across state lines, expanding care to patients that are traveling, live in a nearby state, or who need specialized care not available near them. To what degree do you support, if at all, the option for patients to receive telehealth services from health care practitioners in other states? **Shown among all adults (N=2210)**

■ Strongly support
■ Somewhat support
■ Don't really support
■ Do not support at all
■ Don't know / No opinion

**Strongly +
Somewhat
support**



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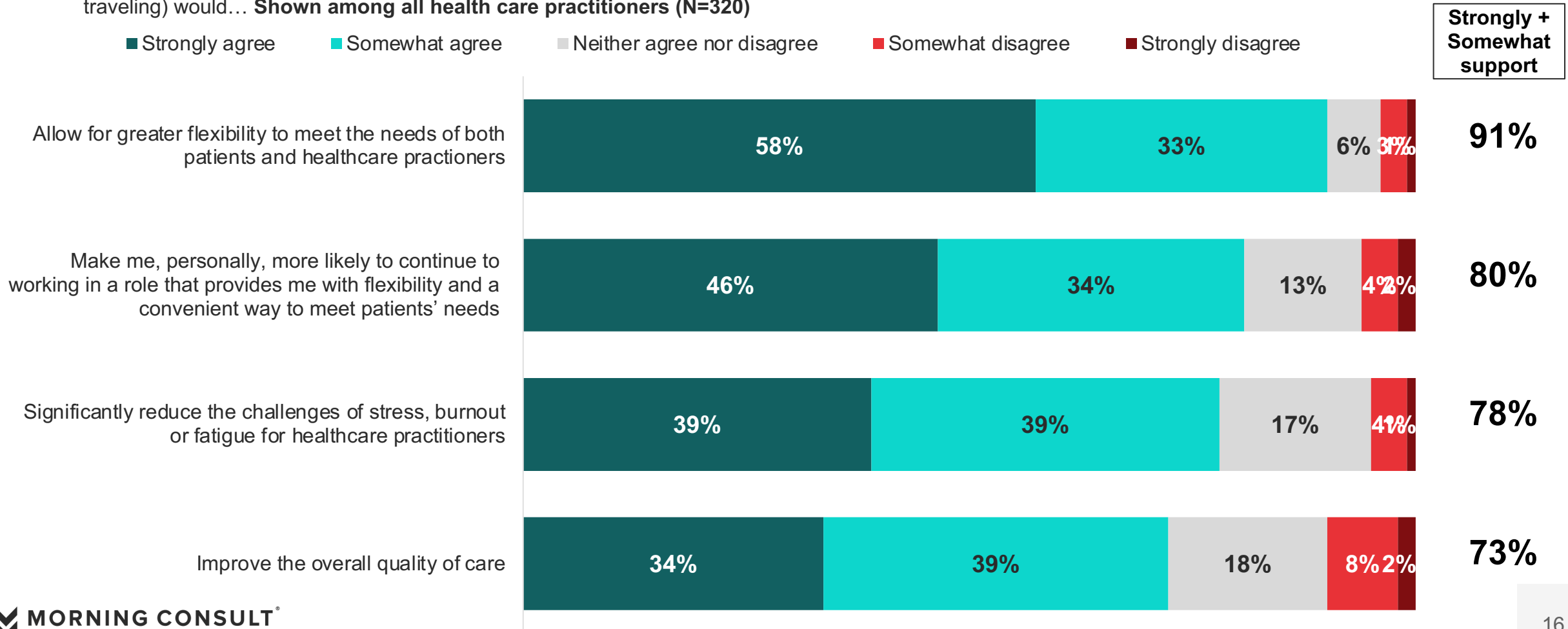
HEALTH CARE PRACTITIONER WORKFORCE



HEALTH CARE PRACTITIONER WORKFORCE: HEALTH CARE PRACTITIONERS

Most health care practitioners agree that telehealth enables the flexibility to meet the needs of their own and their patients, as well as reduces burnout

There has been significant discussion of health care practitioner stress and burnout, particularly during the COVID-19 pandemic. Please indicate whether you agree or disagree with the following. Retaining the ability to provide virtual care from a location convenient to the practitioner (home, work, while traveling) would... **Shown among all health care practitioners (N=320)**

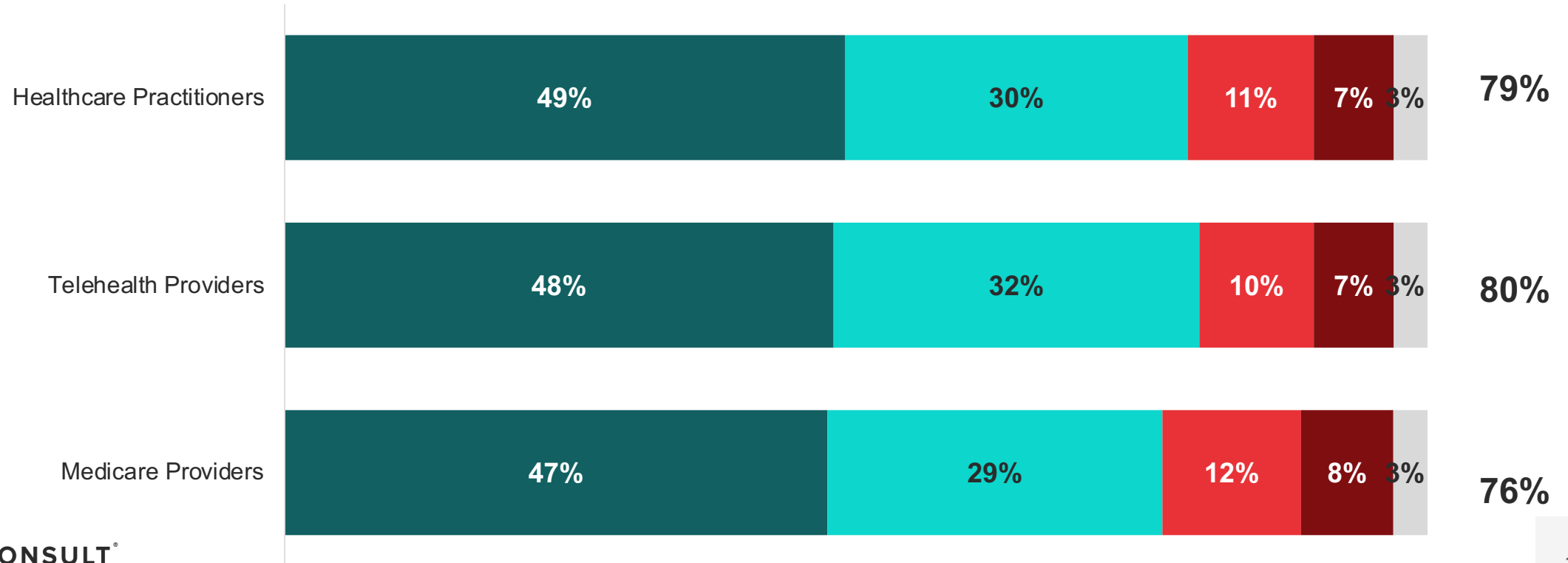


Most health care practitioners support allowing nurse practitioners to provide care through telehealth

During the COVID-19 pandemic many states increased the ability of nurse practitioners to provide care to the full extent of their clinical education and licensure – expanding health care provider capacity and shortening wait times for patients. This included making it easier for nurse practitioners to practice care through telehealth. To what degree do you support, if at all, allowing nurse practitioners to practice to the full extent of their training, including through telehealth? **Shown among all health care practitioners (N=320)**

**Strongly +
Somewhat
support**

■ Strongly support ■ Somewhat support ■ Don't really support ■ Do not support at all ■ Don't know / No opinion



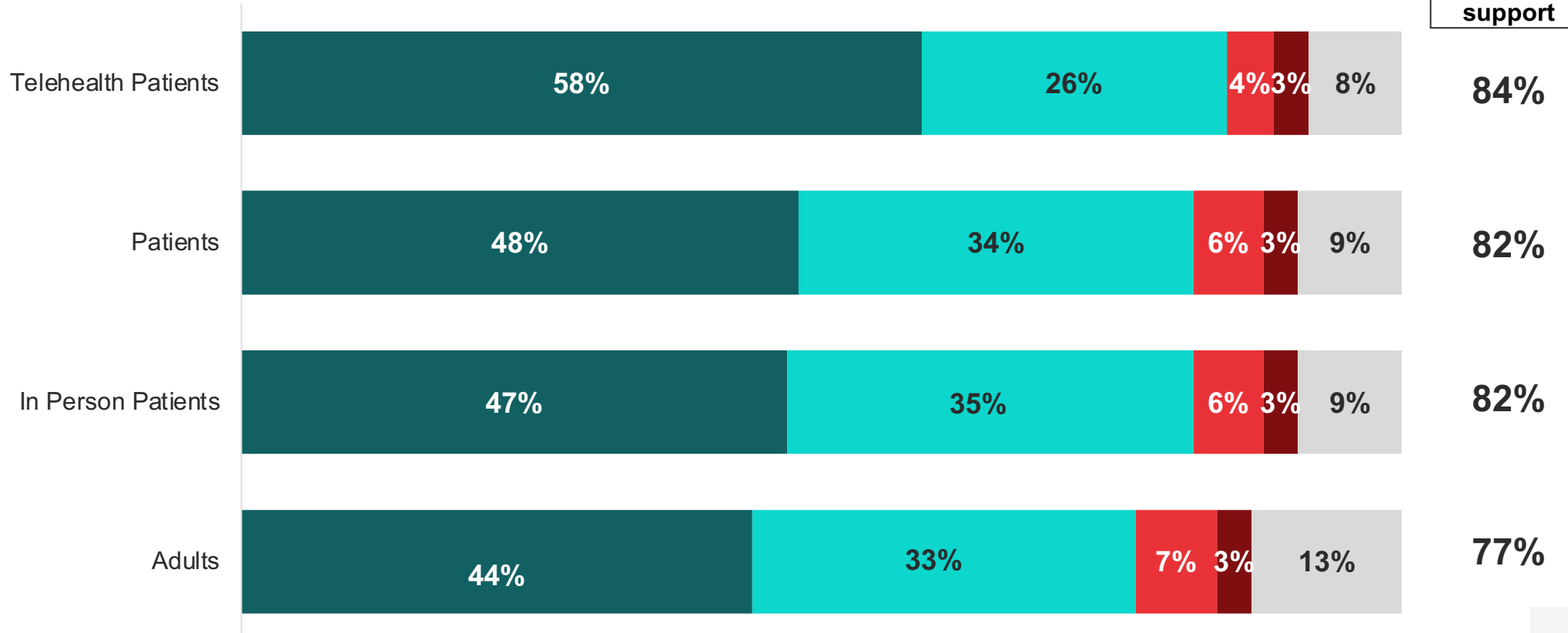
HEALTH CARE PRACTITIONER WORKFORCE: CONSUMERS

Similarly, three quarters (77%) of Americans support expanded capabilities for nurse practitioners

During the COVID-19 pandemic many states increased the ability of nurse practitioners to provide care to the full extent of their clinical education and licensure – expanding health care provider capacity and shortening wait times for patients. This included making it easier for nurse practitioners to practice care through telehealth. To what degree do you support, if at all, allowing nurse practitioners to practice to the full extent of their training, including through telehealth? **Shown among all adults (N=2210)**

■ Strongly support ■ Somewhat support ■ Don't really support ■ Do not support at all ■ Don't know / No opinion

**Strongly +
Somewhat
support**





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Demographics and Methodology

Health care Practitioners

N=320
(MOE = ±5%)
Total number of Physicians, NPs and PAs, Nurses, and Therapists

Physicians

N=80
(MOE = ±11%)
Those who selected “Physician” as their job title

NPs and PAs

N=80
(MOE = ±11%)
Those who selected “Nurse Practitioner” or “Physician’s Assistant” as their job title

Nurses

N=80
(MOE = ±11%)
Those who selected “Registered Nurse” or “Nursing Assistant or Nurse’s Aid” as their job title

Therapists

N=80
(MOE = ±11%)
Those who selected “Licensed Therapist” or “Licensed Mental Health Counselor” as their job title

Telehealth Providers

N=244
(MOE = ±6%)
health care Practitioners who provide telehealth appointments

Medicare Providers

N=268
(MOE = ±6%)
health care Practitioners who accept Medicare

Methodology: This poll was conducted by Morning Consult on behalf of CVS Health between Feb 10th-Feb 28th 2022 among a national sample of 320 Health Care Practitioners. The interviews were conducted online and the data were weighted to approximate a target sample of health care Practitioners based on age, gender, educational attainment, race, and region.

Demographics and Methodology

General Population (Adults)

N=2,210
(MOE = ±2%)

Patients

N=1,656
(MOE = ±2%)
Anyone who has visited a health care practitioner in the last 6 months.

In-Person Patients

N=1,528
(MOE = ±3%)
Anyone who has visited a health care practitioner *in-person* in the last 6 months.

Telehealth Patients

N=295
(MOE = ±6%)
Anyone who has visited a health care practitioner *over telehealth* in the last 6 months.

Methodology: This poll was conducted by Morning Consult on behalf of CVS Health between Feb 10-Feb 12, 2022 among a national sample of 2,210 Adults. The interviews were conducted online and the data were weighted to approximate a target sample of Adults based on age, gender, educational attainment, race, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.