Point of Care Communication Council

What is Happening in Light of COVID-19 in Different Points of Care - Breaking Down the Data

SEPTEMBER 24, 2020

COVID-19's impact on office visits is largely over

In-person visits rebound

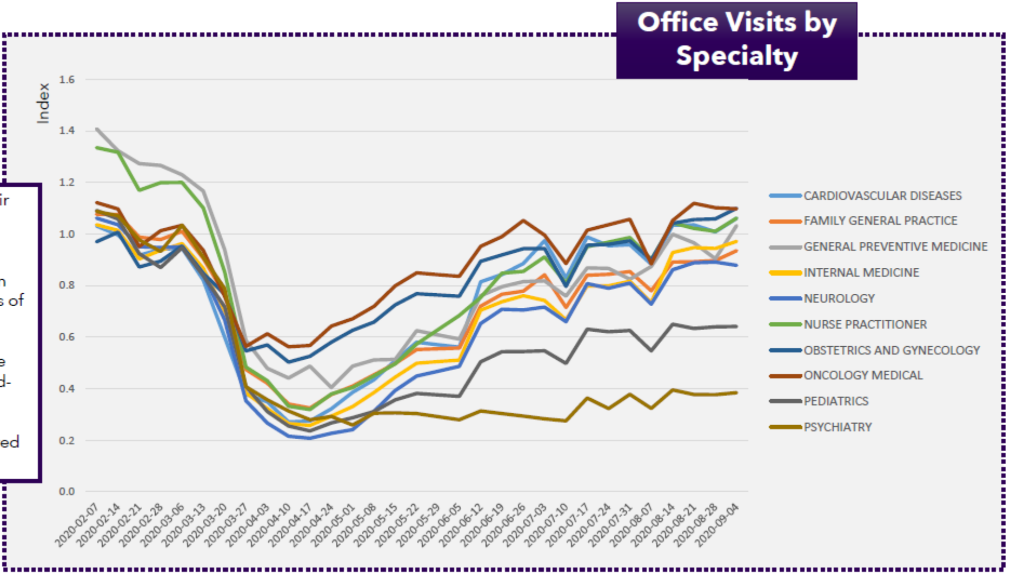
Remote visits level off

New Rx Starts and Switches are on the rise

Data from a variety of sources show the volume office visits rebounding from COVID ...

Office visits by specialty have rebounded

- Office visits continue to increase from their low point in the week of March 27 for all specialties.
- Psychiatry office visits are down more than 60% below 2019 levels and show no signs of improvement.
- All other specialties, except pediatrics, are between 80-100% of 2019 levels as of mid-June.
- Pediatrics remains down by -40% compared to 2019 levels.



Symphony Health
A PRA Health Sciences Company

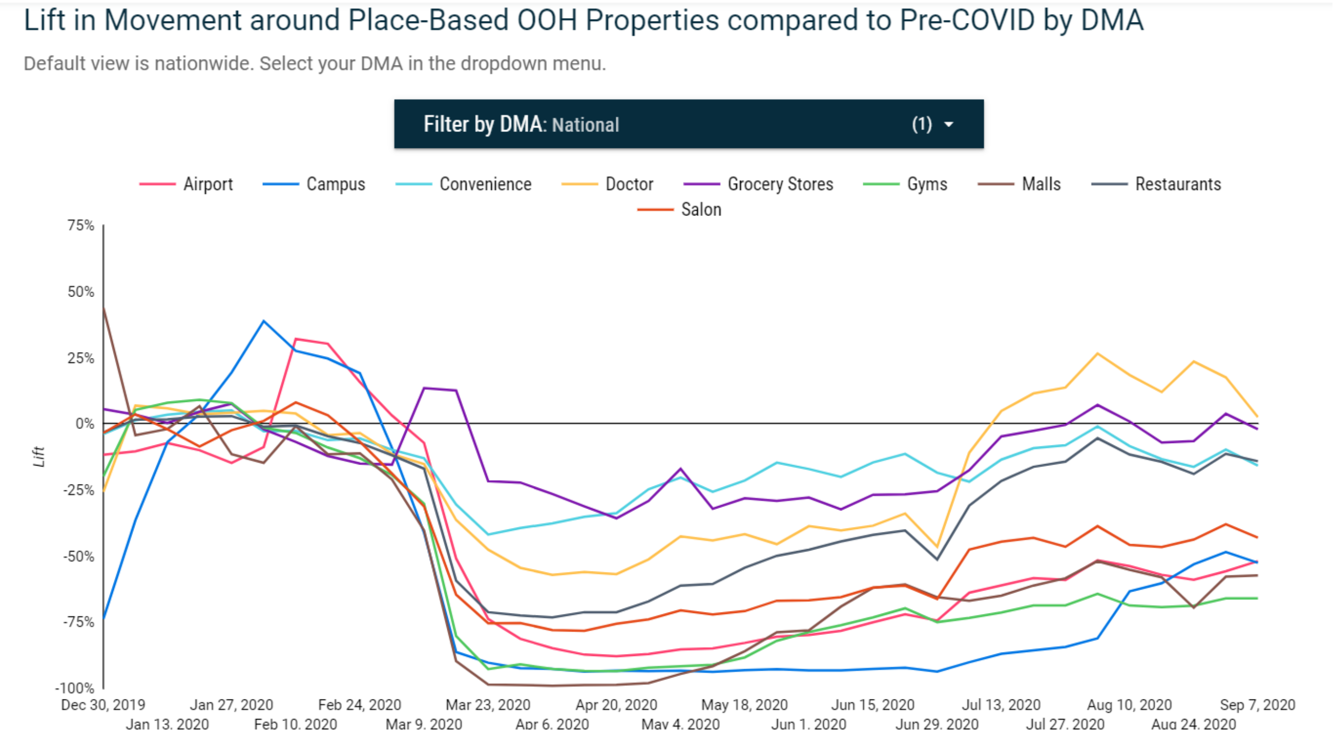
Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

- *An index of 1 means the current week has the same number of claims as the 12 week rolling average from 2019 (100% of 2019 volume).*
- *An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).*
- *An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).*

Confidential 21

Data from a variety of sources show the volume office visits rebounding from COVID…

Foot traffic around doctor’s offices increase

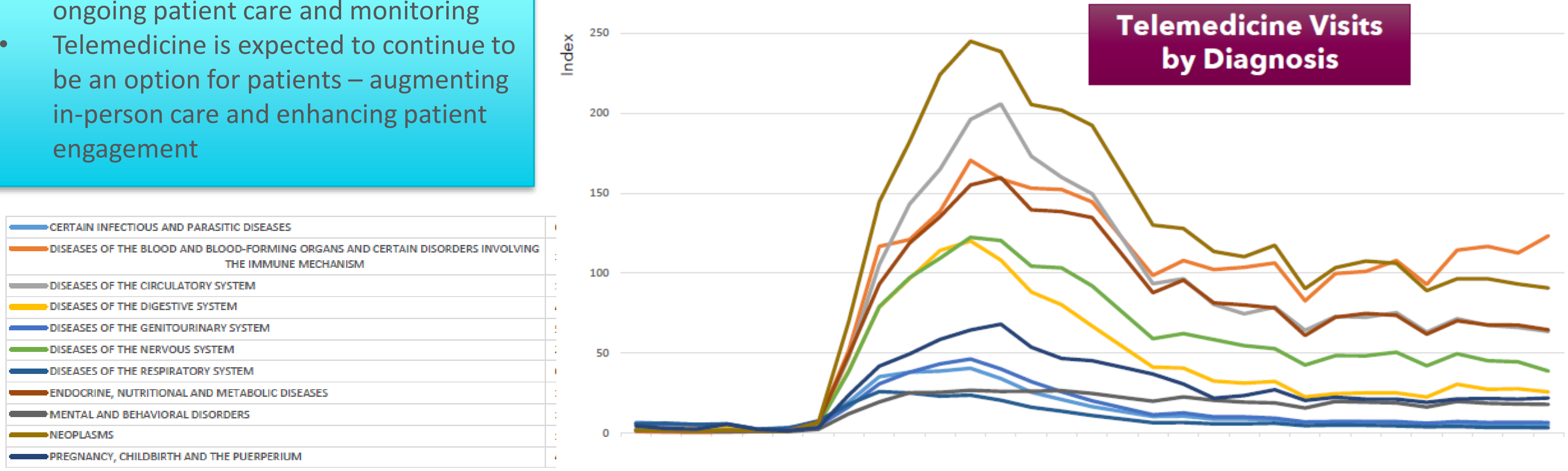


Source: Ubimo

Data from a variety of sources show the volume office visits rebounding from COVID…

Telemedicine continues to level off as in-person visits increase

- Telemedicine continues to play a role in ongoing patient care and monitoring
- Telemedicine is expected to continue to be an option for patients – augmenting in-person care and enhancing patient engagement



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Recently, ZS surveyed over 500 doctors, 500 patients and 30 administrators in the US

Study and Respondent Information

FIELDING DATES

Aug 27 – Sep 4, 2020

RESPONDENTS

569 MDs
548 Patients
30 Hospital administrators

MODE OF DATA COLLECTION

Online Quantitative Survey

SURVEY DURATION

15 Minutes

Specialties surveyed: Primary care, endocrinology, rheumatology, oncology, neurology, cardiology, pulmonology, infectious disease, dermatology, nephrology, urology, psychiatry, OB-Gyn

We continue to see evidence of recovery across all treatment journey stages since start of the pandemic

Anticipated Change to Tx Journey	All specialties April 16-23 (vs. pre-COVID-19)	All specialties Aug 27- Sep 4 (vs. pre-COVID-19)	
Patient visits	▼ 35%	▼ 11%	Patients are **catching up on postponed appointments**; increased in-person visit rates and social distancing needs are creating short-term capacity challenges
New diagnoses	▼ 35%	▼ 11%	New diagnoses have improved as patients come in to the office to talk about their symptoms trending toward a 10% **drop in use of diagnostics** to monitor disease progression compared to pre-COVID-19
New starts	▼ 30%	▼ 9%	**Diagnostic testing** is driving the recovery of new starts as more patients show up for lab work and in-office tests
Switches	▼ 22%	▼ 6%	Physicians are seeing patients, but are being more cautious, with about 24% indicating a **preference for standard of care** vs. newer medication

Worries around contracting and spreading COVID-19 continue to persist, however patients are becoming less concerned about in-person visits

Patient concerns heard by MDs
% of MDs stating each patient concern

1.	Fear of contracting & spreading COVID-19	**87%**	▼6%
2.	Confusion on how COVID-19 could interact with their disease or its treatment	**60%**	▼10%
3.	Ability to receive in-person care	**53%**	▼18%
4.	Concern around surgical delays*	**50%**	*N/A*
5.	Ability to receive medicine	**31%**	▼4%

Patient concerns stated by patients
% of patients stating top 2 concerns

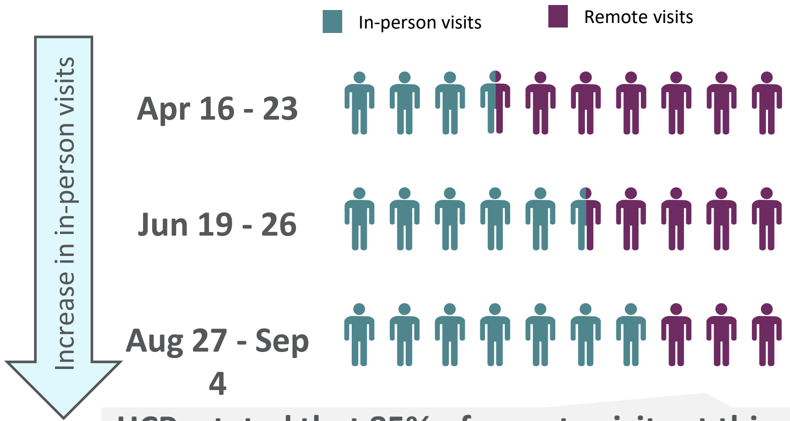
Concerned about contracting COVID-19	**56%**	▼5%
Concerned about the upcoming flu season*	**34%**	*N/A*
Concerns around increasing the chances of contracting COVID-19 due to current med	**21%**	▲1%
Concerned about risks associated with in-person physician visit	**16%**	▼10%
Concerned about availability of my physician to see me in person	**14%**	▼6%

▲ | ▼ - Change compared to June 19-26 Survey | *Option added this wave

~1/3rd of Patients are concerned about the ability to pay for the healthcare they need at this time

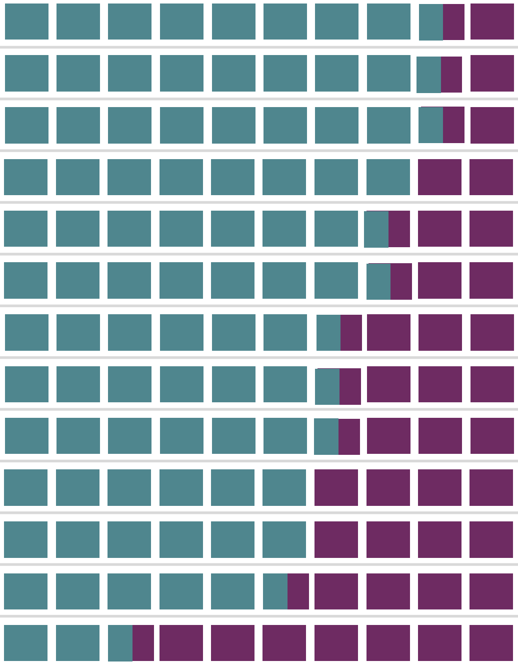
In-person patient visits have increased compared to April across nearly all TAs

Nature of Visits
compared to pre-COVID



HCPs stated that 85% of remote visits at this time are follow-up visits vs first appointments

Nature of Visits By TA (Aug 27 - Sep 4)
compared to pre-COVID

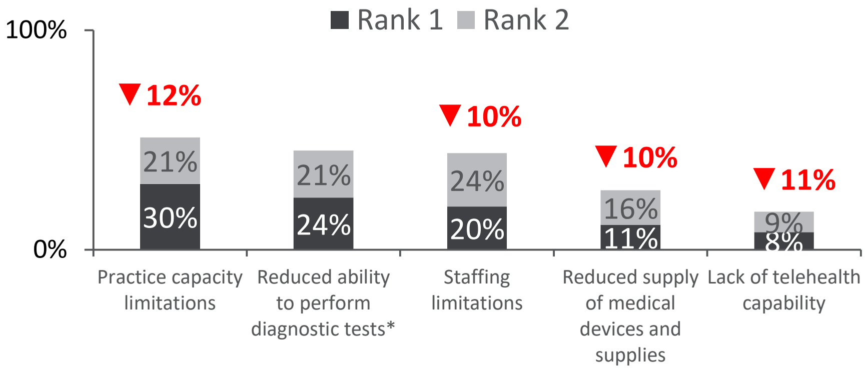


TA	In-person	Remote
Dermatology	87%	13%
OB-GYN	86%	14%
Urology	86%	14%
PCPs	79%	21%
Cardiology	75%	25%
Oncology	73%	27%
Pulmonology	66%	34%
ID Specialist	65%	35%
Rheumatology	65%	35%
Endocrinology	59%	41%
Neurology	58%	42%
Nephrology	56%	44%
Psychiatry	24%	76%

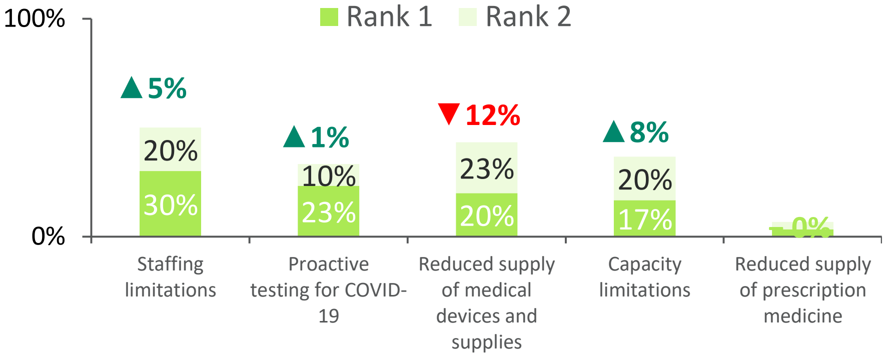
As patients become more willing to see providers in person, practices are most concerned about capacity and staffing limitations

Biggest Challenges in Light of COVID-19

Physicians



Administrators



- **Academic and Private** practices are more concerned about **capacity limitations** than Community practices
- **Staffing limitations** is a the biggest challenge for **community** practices
- **Urologists** are most concerned about **reduced supply of medical devices**
- **Reduced ability to perform diagnostic tests** is the primary concern among Pulmonologists, Cardiologists, Oncologists and Psychiatrists
- The biggest challenge PCPs are facing right now is **Staffing limitation**

▲, ▼ - Change in % ranking in top 2 compared to June 19-26 survey | *Option added this wave

COVID-19 accelerated several PoC trends

Growth of Virtual Care

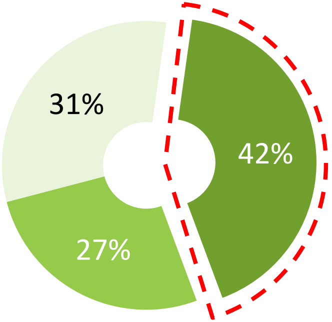
Increased use of alternate PoC sites

Fewer HCP visits with pharma reps

Among patients who have already used telehealth, ~40% indicated that they will continue to use it even after COVID-19 for routine follow-ups to their condition

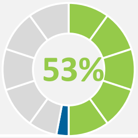
Usage of Telehealth Resources After COVID-19

Likelihood to continue using telehealth after COVID-19



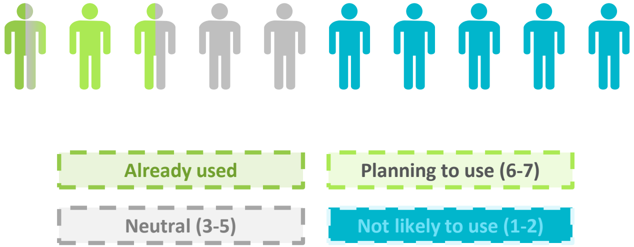
Preferred type of telehealth consultations after COVID-19

among those likely to use telehealth after COVID-19, n = 152 patients

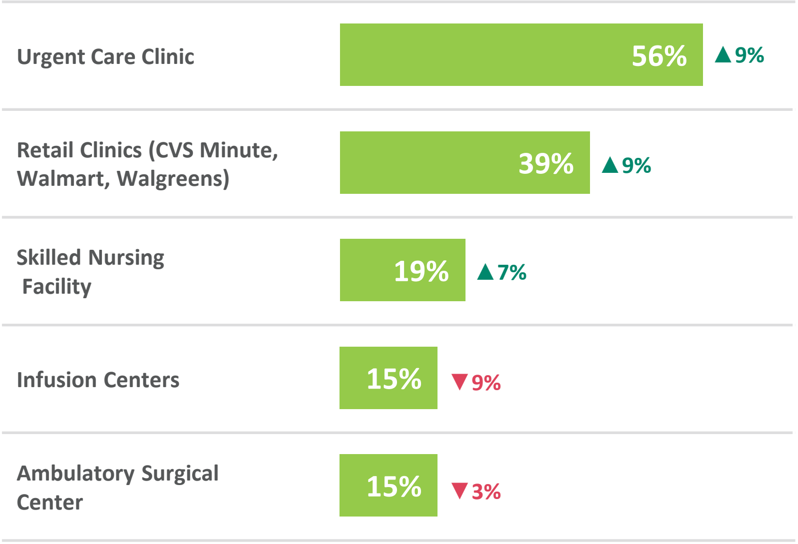
		Highest Among	Lowest Among
Routine **follow-ups** for diagnosed condition		Oncological conditions	Skin Disorders
Routine **check-ups and procedures**		Rheumatic conditions	Nephrological conditions
Consultation of a **new condition**	49%	Lung Disease	Infectious Disease

About a quarter of patients have used or are planning to use alternate sites of care; compared to June, relatively more patients are considering the use of urgent care

Likelihood to use alternate sites of care (On a scale of 1-7)



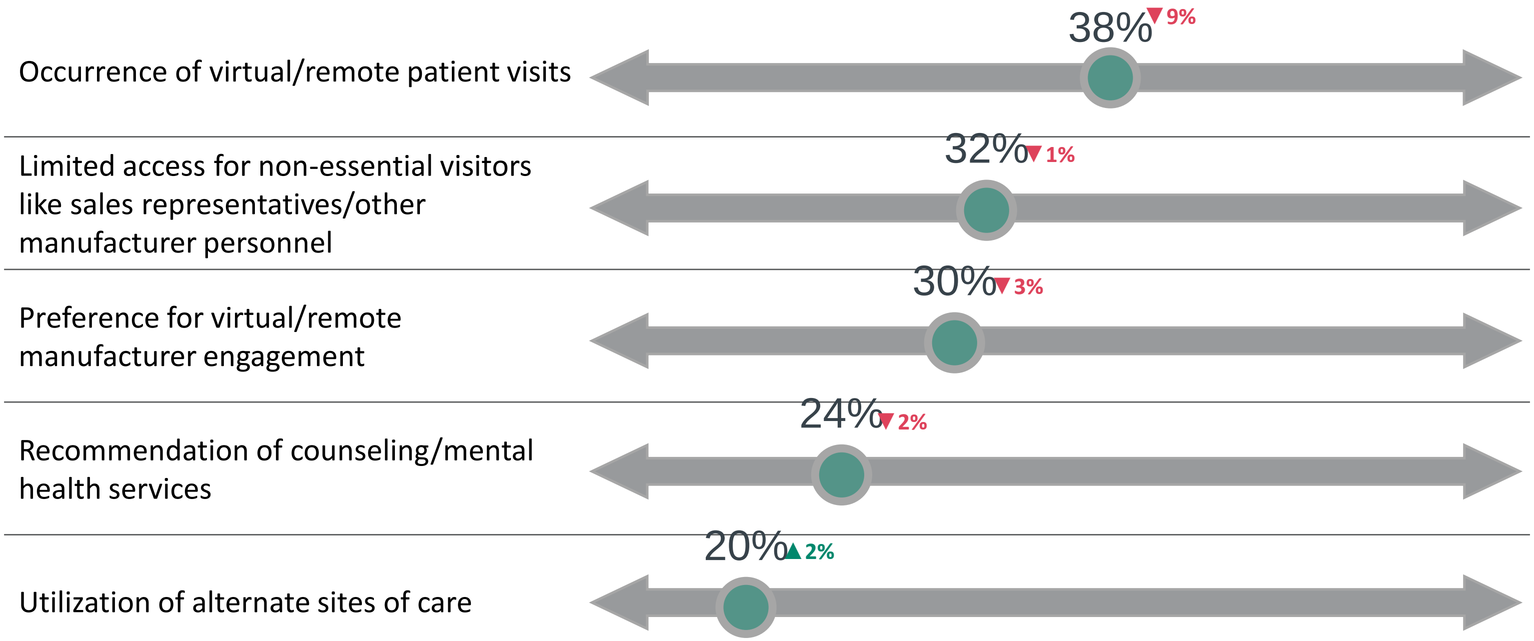
Alternate sites of care visited / considered visiting (Among those who have already visited / likely to visit alternate sites of care)



▲, ▼ - Change in % of patients selecting the option compared to June 19 - 26 Survey

Physicians continue to believe that limited access for sales rep will continue post COVID

% of respondents believing it is highly likely COVID-19 will motivate long-term change to the following components



▲, ▼ - Change in % of respondents compared to June 19 - 26 Survey

Providers and patients are bracing for potential impact of the upcoming flu season

As Providers Brace Themselves for the Flu Season, They Anticipate That it Might…

Augment the risk of the existing pandemic

*"Flu season is going to **greatly compound the COVID situation**. More people will be suffering from respiratory tract infections and there will be a **greater demand for COVID testing** and healthcare. Hospitals and Urgent Care facilities will be stretched to their limits. It will be more difficult to schedule non emergent tests and there will be **longer wait times for lab results**. **Patients will be more apprehensive** to leave their homes."* – Neurologist

Lead to practice capacity and inventory concerns

*"It is going to be a **strain on our supply inventory**. Besides the actual tests, I feel that there is not going to be any way to differentiate between the two, so we will have to **take all the precautions** as if the patient were COVID Positive."*
– Supply Chain Management Administrator

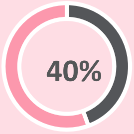
These concerns are echoed among patients as well

Top 2 patient concerns

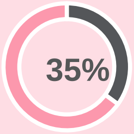
56%
Concerned about contracting COVID-19

34%
Concerned about the upcoming flu season

Resulting in an anticipated increase in vaccination rates for flu



HCPs anticipate an increase in vaccination rates for flu



Patients are more willing to get vaccinated for flu compared to pre-COVID

Meanwhile new challenges and concerns are surfacing as patients and providers prepare for the upcoming flu season…

We will be overwhelmed in testing patients outside for COVID 19 and influenza - PCP

Will need to screen them for COVID

Intensify the impact of COVID-19

Increased challenges in providing Care

Milder season due to social distancing

Delay in diagnosis

Confusion between COVID-19 and flu

Anxiety and Confusion among patients

Limited in-person visits

Higher need for PPE

No impact on my practice

Practice Capacity limitations

Increase in virtual visits

Increased flu vaccinations

Respiratory patient influx

I believe it will complicate an already complicated situation; resurgence of telecare - PCP

I think there will be a large amount of confusion regarding clinic symptoms and whether they represent COVID-19 or influenza (or both) – ID Spec

I think that it might actually be less impactful this year as patients are wearing masks, social distancing, etc. and may, therefore, be less likely to contract the flu - Cardio

Positive Impact Negative Impact Other structural impacts