

Virtual health in the “new reality”

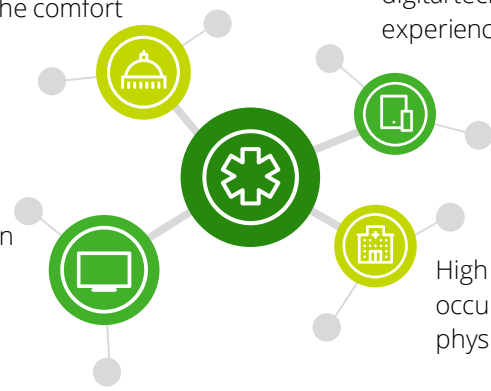
Accelerated by Covid-19, virtual health is defying long-held opinions

The reimbursement environment makes it so health systems cannot care for patients in the comfort of their home

Older patients will struggle with digital technologies and the experience will be diluted

The patient/physician interaction must occur in person to be effective

High quality care will only occur when patients are physically in a health facility



Now freed from these orthodoxies, organizations can embrace virtual technologies to drive toward a new vision for the future

Staying power of virtual health

Reimagine how health is delivered by developing specific virtual use cases in the “new reality”



The exponential increase in usage is mostly attributed to organizations taking **traditional care pathways and virtualizing them** rather than **reimagining delivery models**



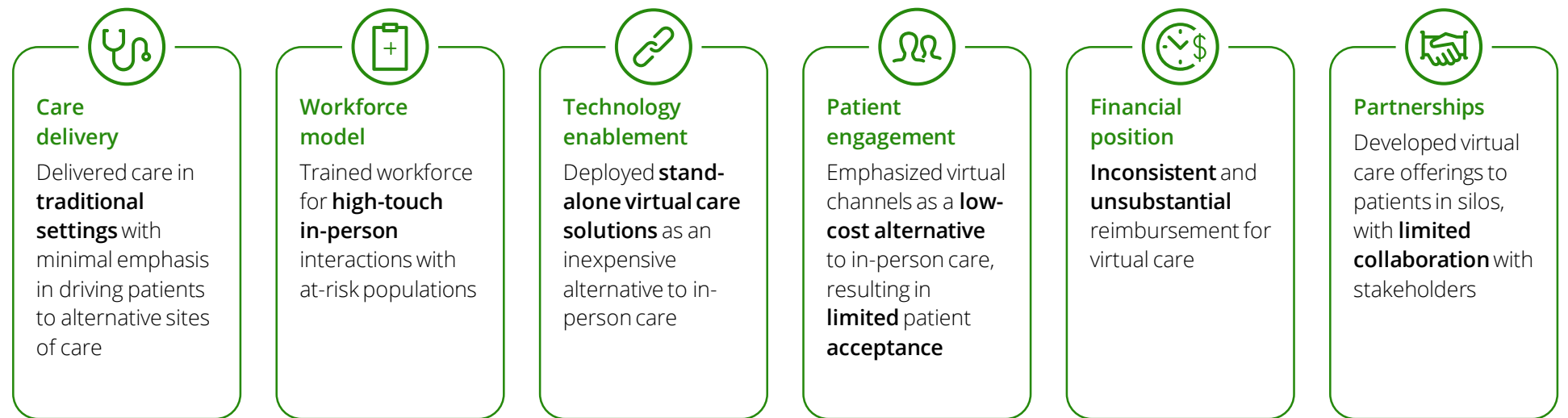
While virtual levels will likely not revert to pre-pandemic rates, current methods of utilizing virtual health as a **stop gap are not sustainable going forward**



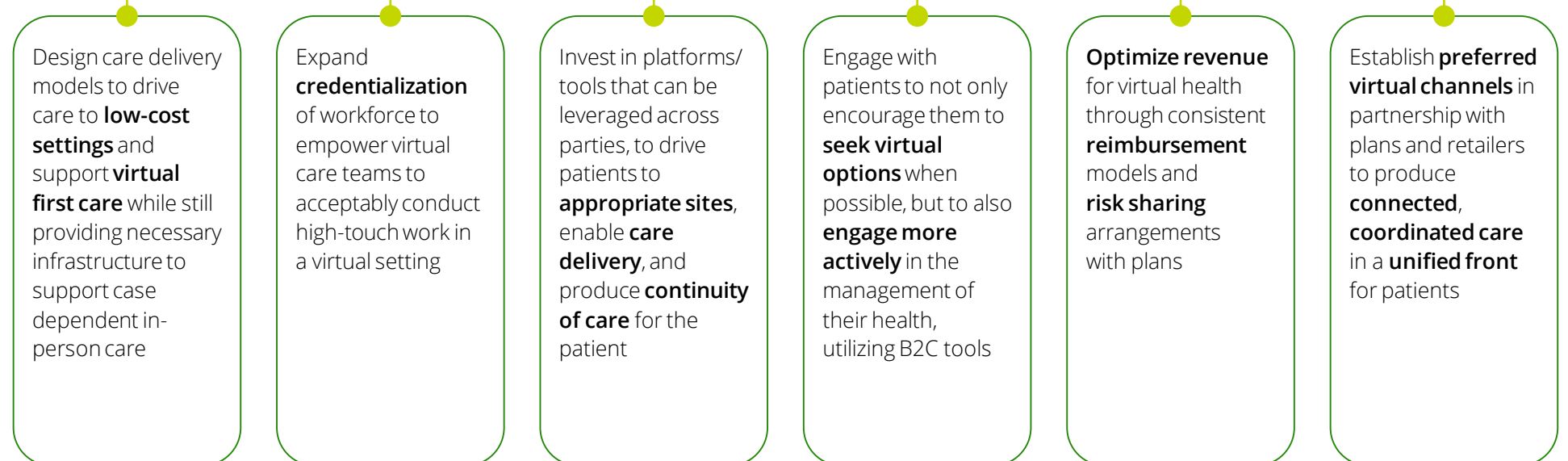
To sustainably transform how care is provided and employ virtual health in meaningful ways, organizations should **reenvision how health is managed and delivered using virtual tools**

Transformation is required for a consumer-centric path forward

Traditionally, health care providers and the health care ecosystem considered Virtual Health as a substitutive channel for care delivery

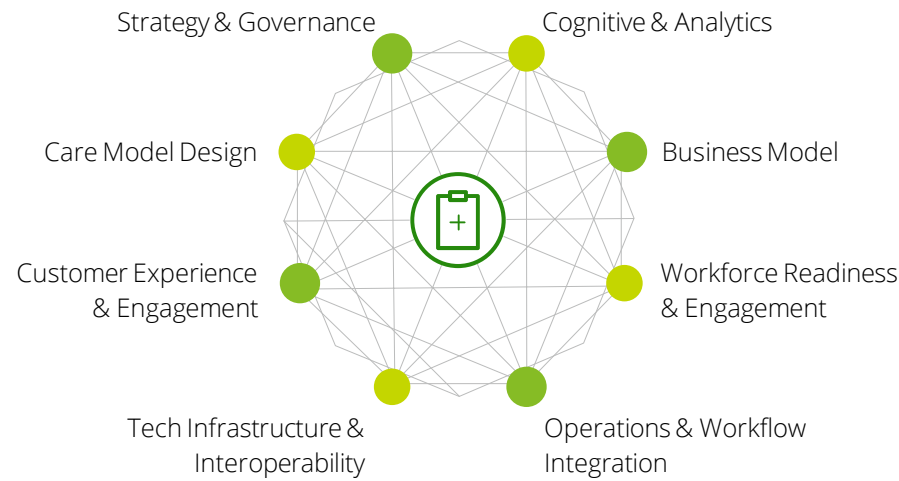


“New reality” transformation requires capabilities to position Virtual Health as an integral channel for care management and drive reduction in total cost of care



Capabilities to establish a virtual health program

Building a successful patient centered virtual health support network requires the alignment and enhancement of core capabilities across the organization

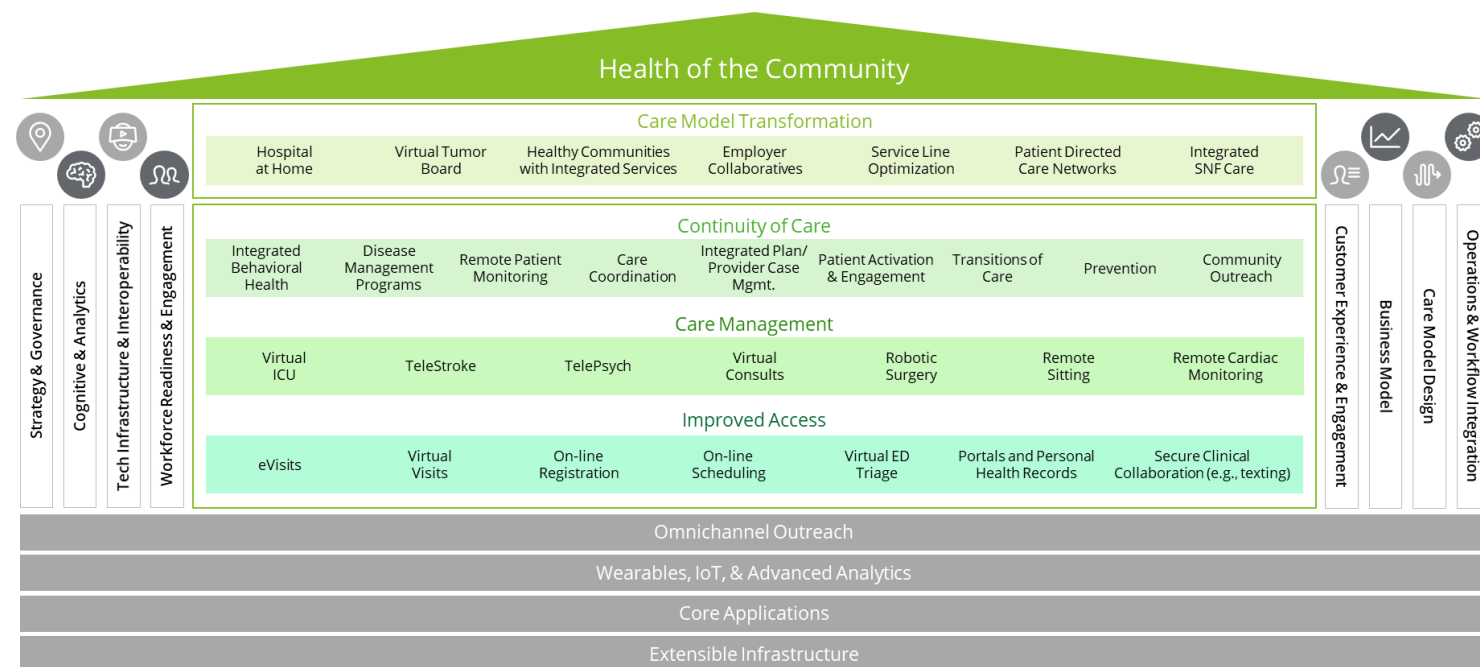


The **Virtual Health Maturity Model** unifies how organizations can compare their capabilities relative to the market and serves as a guide for **assessing current state** capabilities and **desired future state maturity** across the 8 key capabilities for virtual health



Conceptual architecture

Creating a virtual health ecosystem requires moving from point solutions to continuous processes that span all areas of transformation



Key considerations shaping virtual health strategy

- 1 How can your organization use virtual health to **stabilize the supply of providers** and **increase the overall capacity of the health care system** by multiplying the reach of each provider?
- 2 Which virtual health services will enable your organization to **optimize value-based arrangements**?
- 3 How will your organization factor **equity** into your culture, policies, technologies, and operations when **utilizing virtual tools to reduce barriers to care**?
- 4 How can your organization position virtual health services for patients/members with **varying levels of broadband access**?
- 5 How can your organization leverage **data interoperability regulations** to drive greater **flexibility in consumer care decisions** and imperatives for collaboration?

How we help our clients

Deloitte has comprehensive advisory services that touch on all the key Virtual Health capabilities. Our competencies include **product and service offerings and ecosystem and alliance relationships** – to provide support across an organization’s Virtual Health journey, at any starting point, and enable accessible, extensible, longitudinal care

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