



OPPORTUNITIES FOR TELEHEALTH AND PHYSICAL THERAPY

What a New Patient Survey Reveals

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OVERVIEW

The COVID crisis in America has transformed nearly every aspect of our lives, from how we work, to how we shop, to how we learn. The crisis has called upon organizations to innovate new ways of delivering essential goods and services in a manner that ensures the health and safety of their communities. In healthcare, and in physical therapy in particular, one of those innovations has been the rapid adoption of telehealth. Telehealth has allowed millions of physical therapy patients to receive essential care that otherwise would have been inaccessible to them.

As we begin to grapple with the enormous human and economic toll of the COVID pandemic, it is essential that we take this moment to also consider the possible long-term societal benefits of innovations the pandemic has brought with it. Otherwise, possible lessons learned from the crisis will be lost to us. In that spirit, Bay State Physical Therapy has teamed up with Northeastern University's Department of Physical Therapy, Movement and Rehabilitation Sciences to conduct the first of its kind survey on physical therapy and telehealth. This white paper presents the results of the survey, combined with additional practice data and 3rd party research to explore the impact and possible benefits of telehealth and physical therapy.

BACKGROUND

Although the technology that enables telehealth has been widely available for decades, adoption in healthcare up until COVID has been minimal. An analysis of 2019 claims data from FAIR Health, the country's largest database of private insurance claims, reveals that only .17% of medical claims were for telehealth services.¹ Most healthcare providers, trained in clinic or hospital settings, perceive telehealth as a largely irrelevant technology. This is especially true in physical therapy that often requires hands-on treatment and manipulation. "Prior to this whole COVID situation," explains Dr. Steve Windwer, CEO of Bay State Physical Therapy, "if you had asked me 'What is the application for telehealth in physical therapy?' I would have answered, 'It's good in very rural settings for people with limited access. But in the real world, there's no application for a company like mine.'"

Even for providers and patients who might see a benefit to telehealth, Medicare and private insurers rarely covered it because they perceived it as a sub-standard treatment option, fraught with HIPAA privacy concerns. With providers having a dim view of telehealth, and insurers not willing to pay for it, telehealth remained on the margins of care. Then, COVID happened.

COVID CHANGES EVERYTHING

By early March, COVID brought the country to a standstill. However, patients' need for physical therapy never halted. With physical access to clinics becoming increasingly restricted, Medicare and private insurers began covering telehealth for most conditions. Care providers who had been reluctant to adopt telehealth began adopting it at a record pace. Medstar Health, an integrated health system in the Washington D.C. area, went from 10 telehealth visits per week to 4,000 *per day*.² FAIR Health reported that telehealth claims went from their March 2019 base of .17% of all claims to 7.57% by the end of March 2020—a 43-fold increase in the first month of the pandemic alone. In the Northeast where COVID hit especially hard, telehealth visits increased 150 fold.³ (See Chart A)

The experience of Bay State Physical Therapy is emblematic of this increase. "We have seen over 23,000 telehealth visits in the past 14 weeks compared to zero total telehealth visits in the history of our company," says Steve Windwer.

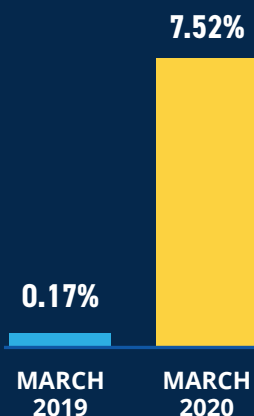
Bay State Physical Therapy, like many practices across the country, went through a crash course in how to deliver care via telehealth. The big

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President & CEO,
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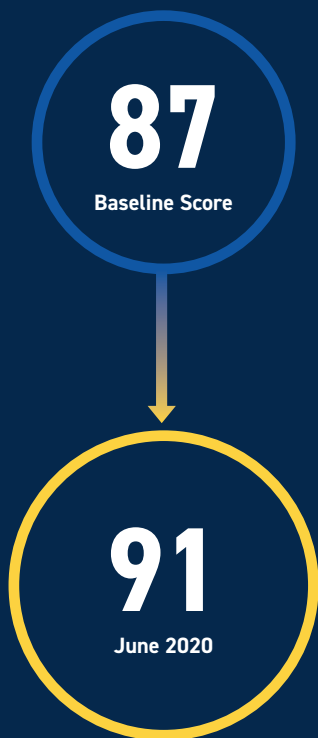
Telehealth Visits as Percentage of Total Claims

Source: FAIR Health



question for Bay State Physical Therapy was whether this treatment option that had been relegated to the margins of healthcare could effectively deliver care. In short, was this bold experiment working? Bay State Physical Therapy teamed up with Northeastern University's Department of Physical Therapy, Movement and Rehabilitation Sciences to assess patients' experiences with telehealth through a survey of 462 patients in 60 clinics. Researchers combined the survey results with quantitative data from the clinics to gain a better understanding of the overall impact of telehealth during COVID, and potential applications moving forward. For a reluctant telehealth adopter like Steve Windwer, the results were "an eye opener."

Bay State Physical Therapy Improvement in NPS Score with Telehealth

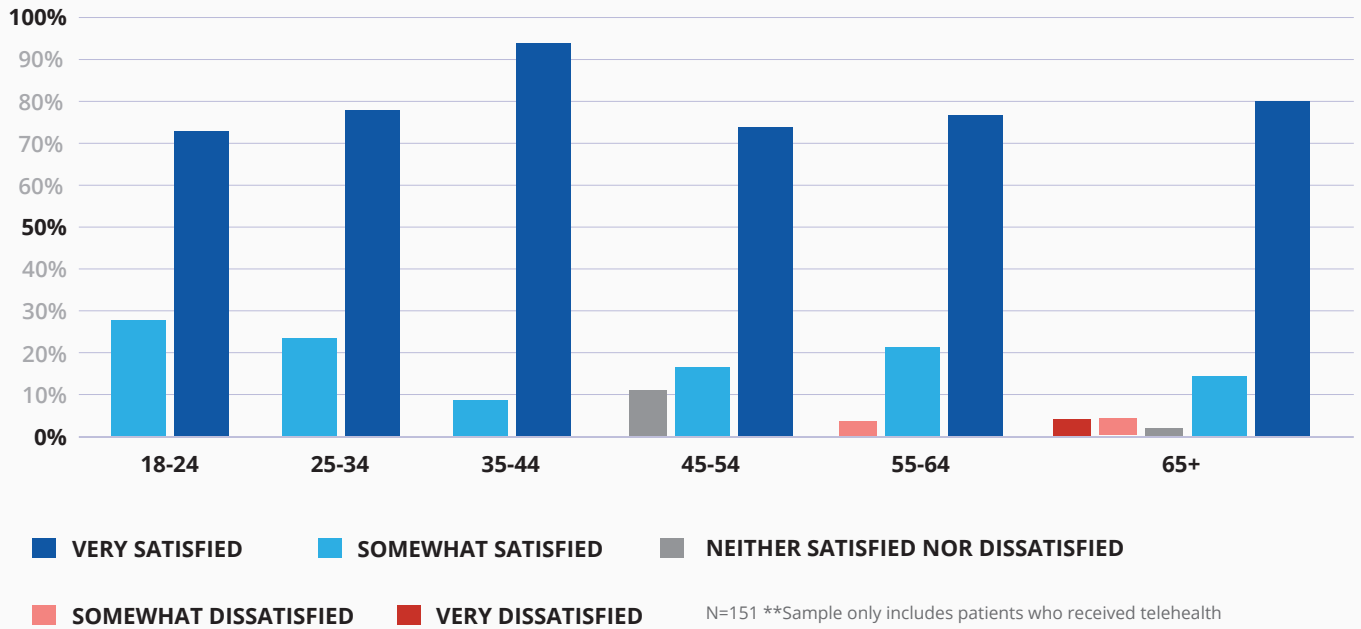


WHAT THE RESEARCH REVEALS: TELEHEALTH DELIVERS

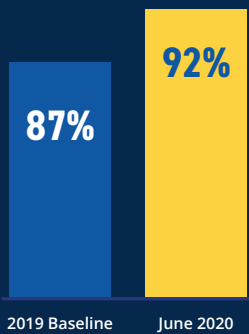
The survey results and clinic data reveal the following about telehealth:

- **Patients like the telehealth experience.** Telehealth patient satisfaction (95%) in the survey is nearly as high as in-clinic patient satisfaction (97%). This translates to **BSPT's Net Promoter Score (NPS) rising from its pre-COVID historic average of 87 to 91 by the middle of June.** Digging into the qualitative results, patients who gave telehealth high ratings liked the convenience, comfort, and safety of receiving treatment in their homes. One typical respondent wrote, "Telehealth is much more convenient for my schedule so I don't have to drive, which is straining on my injury." Some appreciated that the therapists could "come into their homes safely." Virtually of course. One respondent considered telehealth "more private" than in-clinic visits, which runs counter to traditional HIPAA privacy concerns regarding telehealth.
- **Patients are satisfied by the experience, regardless of age.** Although older patients are sometimes considered less tech savvy, the survey results indicate that the oldest age group is just as satisfied with telehealth as other age groups. Specifically, of respondents actively receiving telehealth, 92.5% of patients 65 years and older were satisfied (78.5% very satisfied and 14% somewhat satisfied), which is within the response range of all age groups other than 35-44 year-olds who were 100% satisfied. Interestingly, however, respondents 65 years and older, unlike other groups, did have some strong negative responses (3.1% strongly dissatisfied). Although this number is small, it warrants further analysis.

HOW SATISFIED ARE YOU WITH HOW YOU HAVE MANAGED YOUR PHYSICAL THERAPY NEEDS DURING THE PANDEMIC?



Arrival Rate Increase



- No-shows have decreased.** Prior to COVID, Bay State Physical Therapy’s arrival rate was 87%. With telehealth, that rate has increased to 92%. This clinic data is supported by the survey qualitative data in which many respondents comment on the convenience of receiving care in their homes. “I find it to be a huge value to attend the clinic virtually,” wrote one of the respondents.
- Cost of care decreases.** In Physical Therapy, one of the best proxies for “cost of care” is the average number of visits at discharge or what some call “length of stay for care.” During COVID, the average number of visits at discharge went down by 1 visit. In other words, with telehealth, patients completed their care of plan sooner, suggesting that telehealth helps patients be more adherent to their plans which lowers the overall cost of care.

THE LIMITATIONS OF TELEHEALTH

Although survey respondents show a high degree of satisfaction with telehealth across all demographics, they also report that virtual treatment has significant limitations. Specifically, patients feel that in-clinic treatments remain vital to their treatment for these main reasons:



Hands-on treatment and manipulation

Sample Respondent Quote: *The telehealth experience was great, but the hands-on part of clinic visits is truly helpful in the way that the therapist massages and works the painful area.*



Access to specialized equipment

Sample Respondent Quote: *There are things that I need to do at the clinic that I can't do at home such as aqua therapy leg extensions.*



Physical assessment of improvement

Sample Respondent Quote: *The assessment piece is less accurate, since the therapist is not seeing all exercises as they are done.*

Patients view telehealth as an important alternative to in-clinic treatment when physical access is limited or compromised, but they still want the option of coming to the clinic in person. "I get a lot of value out of seeing my physical therapist in person," writes one of respondent. "But during this time, I find a huge value to being able to attend virtually. I don't think that telehealth is a permanent solution to this type of care - but it is working great right now."

LOOKING FORWARD

Steve Windwer also recognizes that the surge in telehealth visits is temporary, but his experience during COVID has completely transformed how he views virtual treatments. "I thought that PT had to be hands-on, which I still believe. But for many situations, I think telehealth is an unbelievable opportunity to improve access to care. As we look beyond COVID, I think telehealth will account for less than 10% of our care, but for those folks who need the access, those who are traveling, or those too sick or fearful to come in, I think it's a wonderful treatment alternative to get the care you need."

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Survey Respondent

39% percent of survey respondents are still uncomfortable visiting clinics in person.



What's also clear in the survey data is that fears and concerns surrounding COVID will remain with us for some time. 39% percent of survey respondents report that even if they receive assurances from their providers that all COVID safety precautions are being followed, they are still uncomfortable visiting clinics in person. For these patients, access to telehealth is essential for them to continue their treatment plans.

A recent McKinsey report on telehealth predicts that the short term dynamics that have contributed to the widespread adoption of telehealth will be with us into 2022. The report further anticipates that beyond the COVID crisis, adoption will remain widespread because once a technology is successfully introduced to consumers, they continue to seek it out.⁴

But will Medicare and private insurers continue to pay for telehealth after temporary reimbursement measures expire at the “end of applicable emergency declarations?” Fortunately, Dr. Seema Verma, the administrator of the Centers for Medicare & Medicaid Services (CMS) has recently expressed support for permanently expanding access to telehealth services after the COVID public health emergency resolves. Private payers and state regulators usually follow CMS's lead.⁵ If they have any skepticism moving forward, though, they should dig into the data as Bay State Physical Therapy and Northeastern University have. With so many lives lost during COVID, it would be a shame to lose this opportunity to improve access and lower the overall cost of care for physical therapy.

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