Crowe

Emerging Trends in 2020 Healthcare

Sept. 23, 2020

Presented by:

Distinguished Guest Speakers
Dr. Jacqueline Nemer
Barbara Pelletreau
Brittany Komansky
Dane Harris
Cedwyn Bachman

Crowe LLP
Tracey Coyne
Melissa Dill
Colleen Hall
Andrew Holloway
Jay Sutton

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Housekeeping

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What's next?

Wrap up with the Closing Keynote featuring John O'Leary this afternoon, *3:15 p.m. CST*

CPE certificates

NEW this year – download CPE at the conclusion of each session.

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Agenda

- Insights from the frontline

- Virtual care

- Opioid crisis

- Tech Trends

- Intelligent Automation

- Consolidation

- Outsourcing

- Closing

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Distinguished guest speakers

DR. JACQUELINE
NEMER

BARBARA
PELLETREAU

BRITTANY
KOMANSKY

DANE
HARRIS

CEDWYN
BACHMAN

Presenters from Crowe LLP

TRACEY
COYNE

MELISSA
DILL

COLLEEN
HALL

ANDREW
HOLLOWAY

JAY
SUTTON

Covid-19 Impact on & 2020 Healthcare Trends

Andrew Holloway
Managing Director
Crowe LLP

Insights from the frontline

Dr. Jacqueline Nemer University of California, San Francisco Medical Center

Brittany Komansky – WakeMed Health & Hospitals

Insights from the frontline

Dr Nemer Video

- Emergency Medicine Professor at the University of California, San Francisco Medical Center

- Senior Faculty physician, emergency department UCSF Medical Center

- Director of UCSF telemedicine program for value and for clinical documentation integrity.

Insights from the frontline

Brittany Komansky - Video

- Director of Emergency Services at WakeMed Health & Hospitals, Raleigh Campus

- Currently oversees the Adult Emergency Department, Children's Emergency Departments, and Clinical Evaluation Areas

- Brittany holds her Certification in Emergency Nursing, is a member of her local ENA Chapter, and sits on the Fatality Review Committee for Wake County, NC.
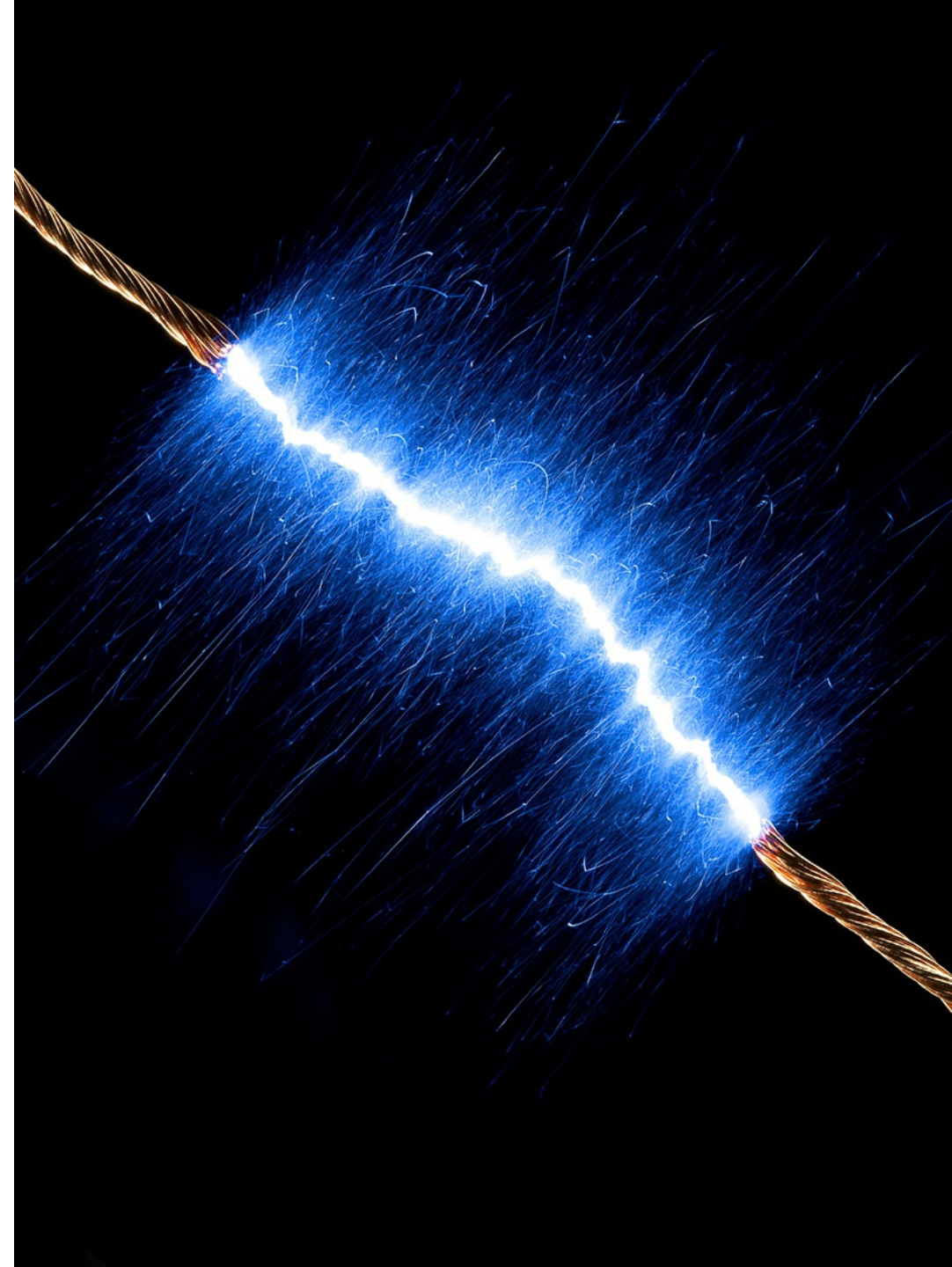
Tech Trends & Virtual Care

Melissa Dill
Crowe LLP

So the big deal is…Telehealth, Virtual Care, Telemedicine, Remote Visits

TECHNOLOGY IS NOT REALLY THE DIFFICULT PART*

(* but patient and physician connectivity is)

What are your tech needs in 3-6 months per healthcare CIOs?

- Enhanced features for virtual visits
- Improved remote patient monitoring
- Infrastructure for remote work & team collaboration
- Increased robotics & virtual communications from within facilities
- Improved pop health analytics to support identifying needs and providing resources to meet those needs
- Advanced clinical data & analytics

Insights from the frontline

Dr Nemer Video

- Emergency Medicine Professor at the University of California, San Francisco Medical Center

- Senior Faculty physician, emergency department at the main campus

- Director for our telemedicine program for value and for clinical documentation integrity.

The Opioid Crisis

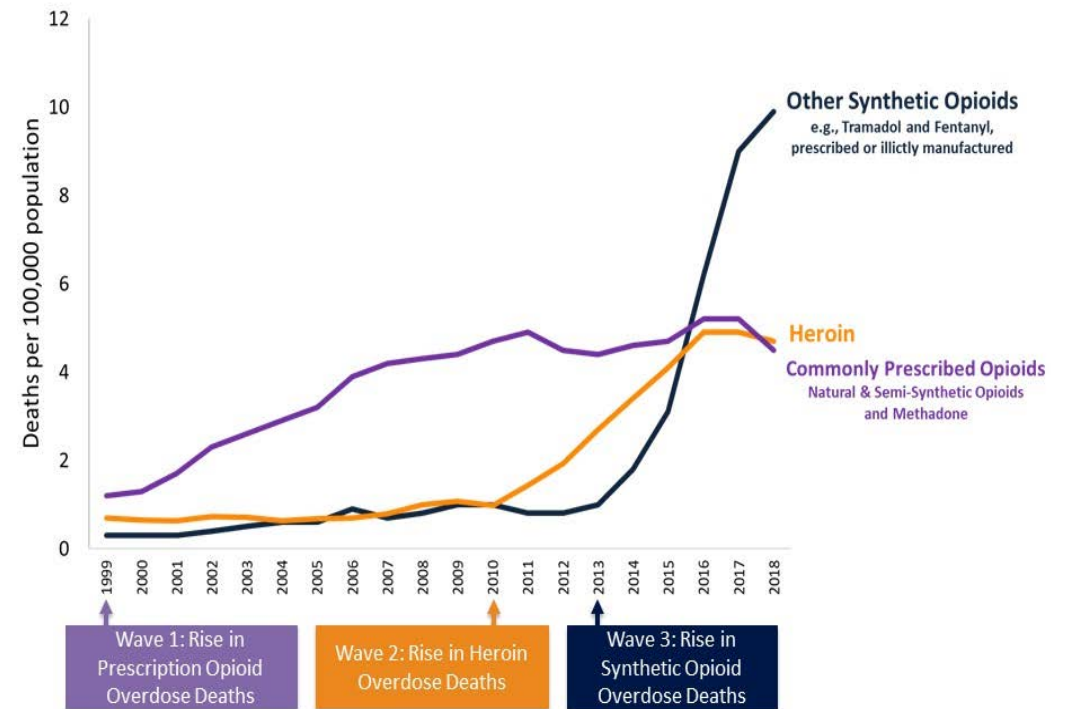**Barbara Pelletreau**

SVP Patient Safety

CommonSpirit Health

Eric Jolly

Internal Audit Practice Leader

Crowe LLP

The opioid crisis, pre-COVID

- *Through 2017, synthetic opioids (including prescribed tramadol and fentanyl) along with commonly prescribed opioids were the leading causes of opioid deaths.*

- *Late in 2017, President Trump declared a State of Emergency related to the opioid opidemic.*

- *The CDC began monitoring opioid trends, advancing research, supporting providers and increasing awareness.*

- *In 2018, the number of overdose deaths from commonly prescribed opioids turned downward and the synthetic opioid curve "bent".*
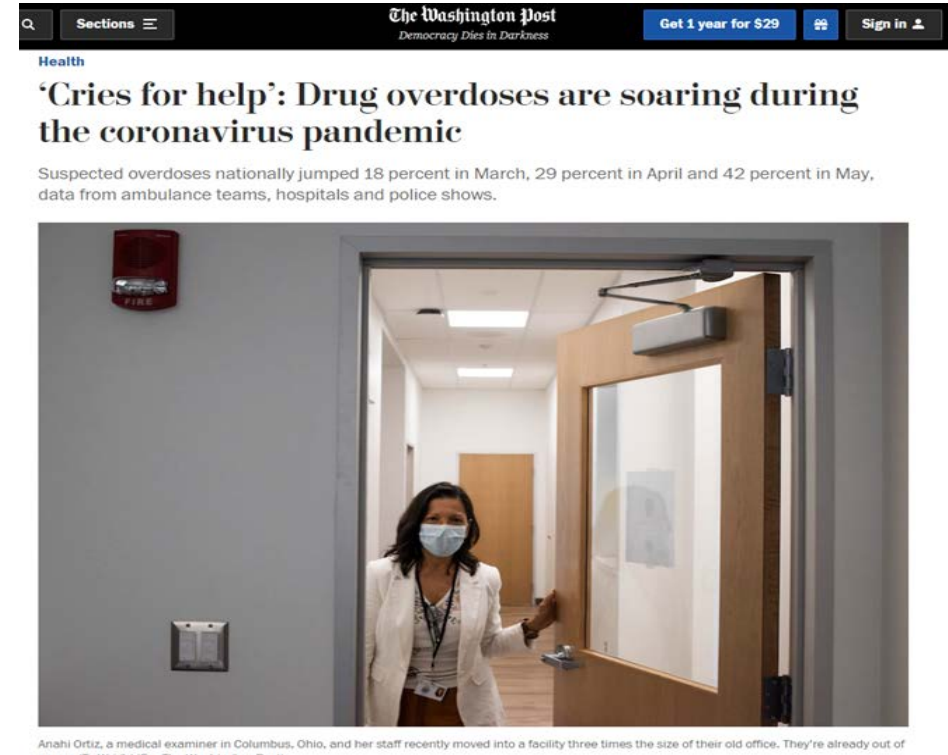

3 Waves of the Rise in Opioid Overdose Deaths

SOURCE: National Vital Statistics System Mortality File.
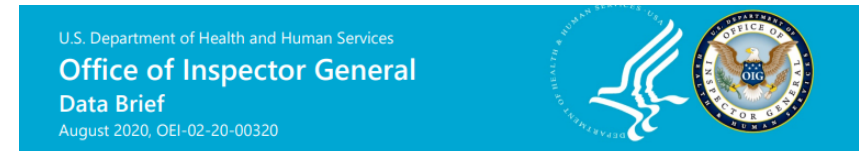
Drug use growing amidst COVID pandemic

- *Washington Post* (7/1/2020) reports that the opioid epidemic is quietly growing during the coronavirus pandemic.
  - Solitude/loneliness
  - Lack of available treatments
- Drug overdoses increasing 18% in March, 29% in April and 42% in May over same month last year.
- Many of the drugs that are abused are prescriptions – and first provided by physicians.
- Top action area when COVID-19 abates.

The Washington Post
Democracy Dies in Darkness

Health

'Cries for help': Drug overdoses are soaring during the coronavirus pandemic

Suspected overdoses nationally jumped 18 percent in March, 29 percent in April and 42 percent in May, data from ambulance teams, hospitals and police shows.

Anahi Ortiz, a medical examiner in Columbus, Ohio, and her staff recently moved into a facility three times the size of their old office. They're already out of

Drug use growing amidst COVID pandemic

- OIG very recently issued a report on opioid abuse with an optimistic tone on positive trends, however, it sounded the alarm related to the vigilance needed as COVID-19 created new concerns:

- Relaxed rules on prescribing of opioids by telehealth to improve access to care

- Evidence of increased doctor shopping by patients

- Those with opioid use disorders are much more likely to have severe symptoms

U.S. Department of Health and Human Services
Office of Inspector General
Data Brief
August 2020, OEI-02-20-00320

Opioid Use in Medicare Part D Continued To Decline in 2019, but Vigilance Is Needed as COVID-19 Raises New Concerns

Key Takeaways
- Medicare Part D has seen a steady decline in opioid use over the past several years along with an increased drugs for medication-assisted treatment of opioid use disorder.

Why OIG Did This Review
The United States has been grappling with the opioid crisis for several years. In 2018, nearly 47,000 opioid-related overdose deaths occurred in the United States.[1] The Office of Inspector General (OIG)

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The Jolly Healthcare Advisor - Eric Jolly, CPA

OIG Announces Results of 2019 Medicare Part D Opioid Use Study

Published on August 17, 2020   Edit article   View stats
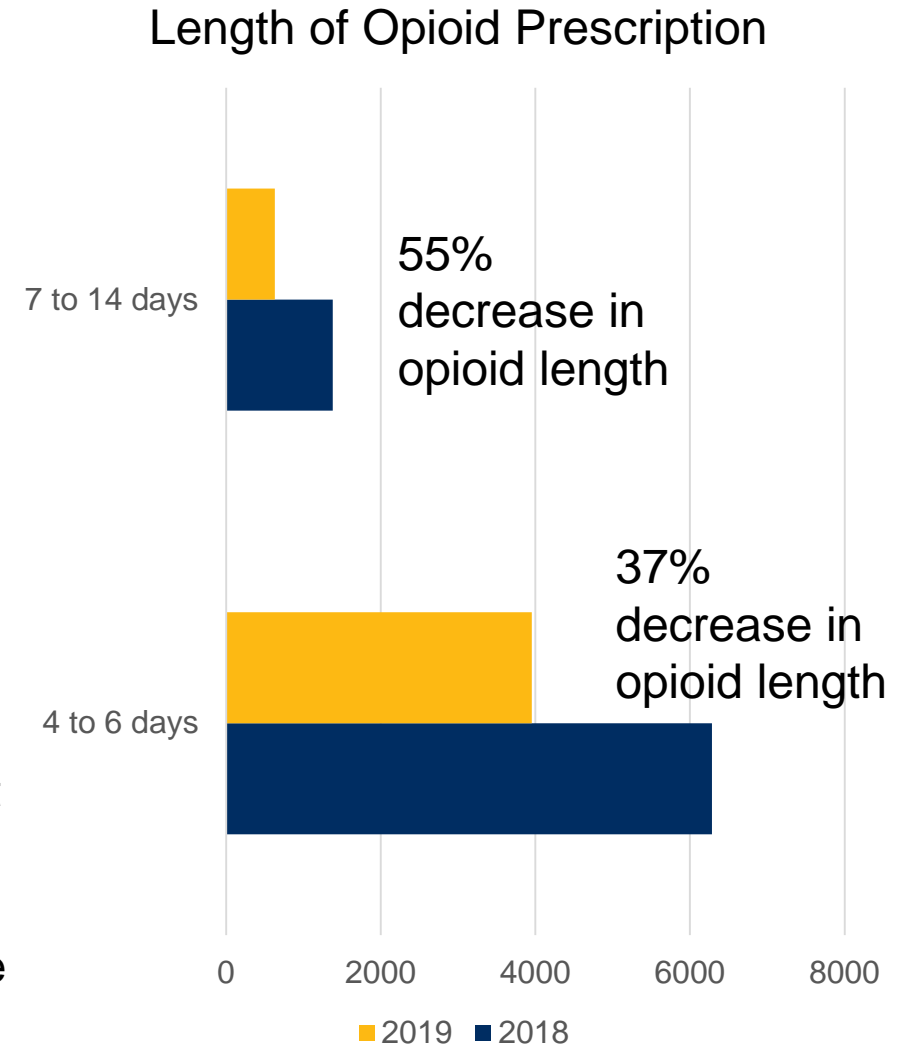
Eric Jolly
Vice President Internal Audit at Crowe Healthcare | Healthcare Consulting Expert | Writer | Speaker   3 articles

The Department of Health and Human Services Office of Inspector General (OIG) recently released results of its 2019 study of opioid use based on Medicare Part D Prescription Drug data. The OIG took an optimistic tone related to its study related to historic trends demonstrating decreases in opioid use and a corresponding increase in medication assisted treatment (MAT). In addition, access to Naloxone, an opioid overdose reversal drug, has increased, indicating improved access to overdose treatment.

A big idea: using data to increase opioid prescription stewardship

- Crowe came to CommonSpirit Health (CSH) with an innovative idea: monitoring and trending prescriptions across System based on information in EHR.
- No other company was able to uniquely develop deep programming routines to read physician prescription instructions to patients.
- No other company was able to calculate days of opioid prescriptions, concurrent opioid and benzodiazepines concurrently and clinicians prescribing against their peers by specialty and with great accuracy.
- Provided insights into data that CSH "knew" but couldn't quantify.
- With data, Crowe and CSH collaborated on programs to designed to decrease addiction and overdose: decrease length of opioid prescriptions, eliminate extended release opioids and dangerous drug combinations.

Length of Opioid Prescription

55% decrease in opioid length

37% decrease in opioid length

7 to 14 days

4 to 6 days

0   2000   4000   6000   8000

■ 2019 ■ 2018

More Tech Trends…

Melissa Dill
Crowe LLP

What else is being said about healthcare technology?

- Lots of dollars invested in primary systems – focus on optimizing current vs spending on new

- Regulatory requirements take time and energy

- Healthcare tends to take forever to act on innovation

- Patient portals simply do not meet the need

- Cloud is old news

"Walmart can see you when you pull up & walk out with your order. Healthcare still has people checking in at the front desk" – Randy Davis, CIO, CGH Medical Center, Sterling. IL

"I believe that health systems will be forced to rethink their approach to employee engagement & create virtual programs that support not only their remote but their workforce that remain on site"- John Hendersen, VP & CIO, Children's Hospital of Orange County, Orange, CA

What are more innovative areas of healthcare technology?

Meet patients where they are

- Virtual care/telemedicine/telehealth
- Mobile, pocket size interactions
- Technology, innovation, regulations and culture has pushed this over the edge
- '"Friction free" access & patient self service 24/7

Interoperability – Cures Act

- Patients expect access to their records including not only EHR access but also to their "bills"
- FHIR based access to records must be provided by 1/1/2021 (Fast Healthcare Interoperability Resources)
- This is a technology BIG DARN DEAL

Automation by any other name

- RPA, Intelligent Automation, Machine Learning, Advanced Analytics
- Revenue Cycle and Finance opportunities with RPA

Other cool stuff…

- Virtual experiences
- 5G Networks
- Computing on "The Edge"

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Polling Question

What technology trends are most greatly impacting your daily work life?

A Telehealth

B Robotic Process Automation (RPA)

C Advanced Analytics

D Interoperability

E 5G Networks

F Other

F None

The Path to Intelligent Automation for Finance

Jay Sutton, Tracey Coyne
Dane Harris, & Cedwyn Bachman
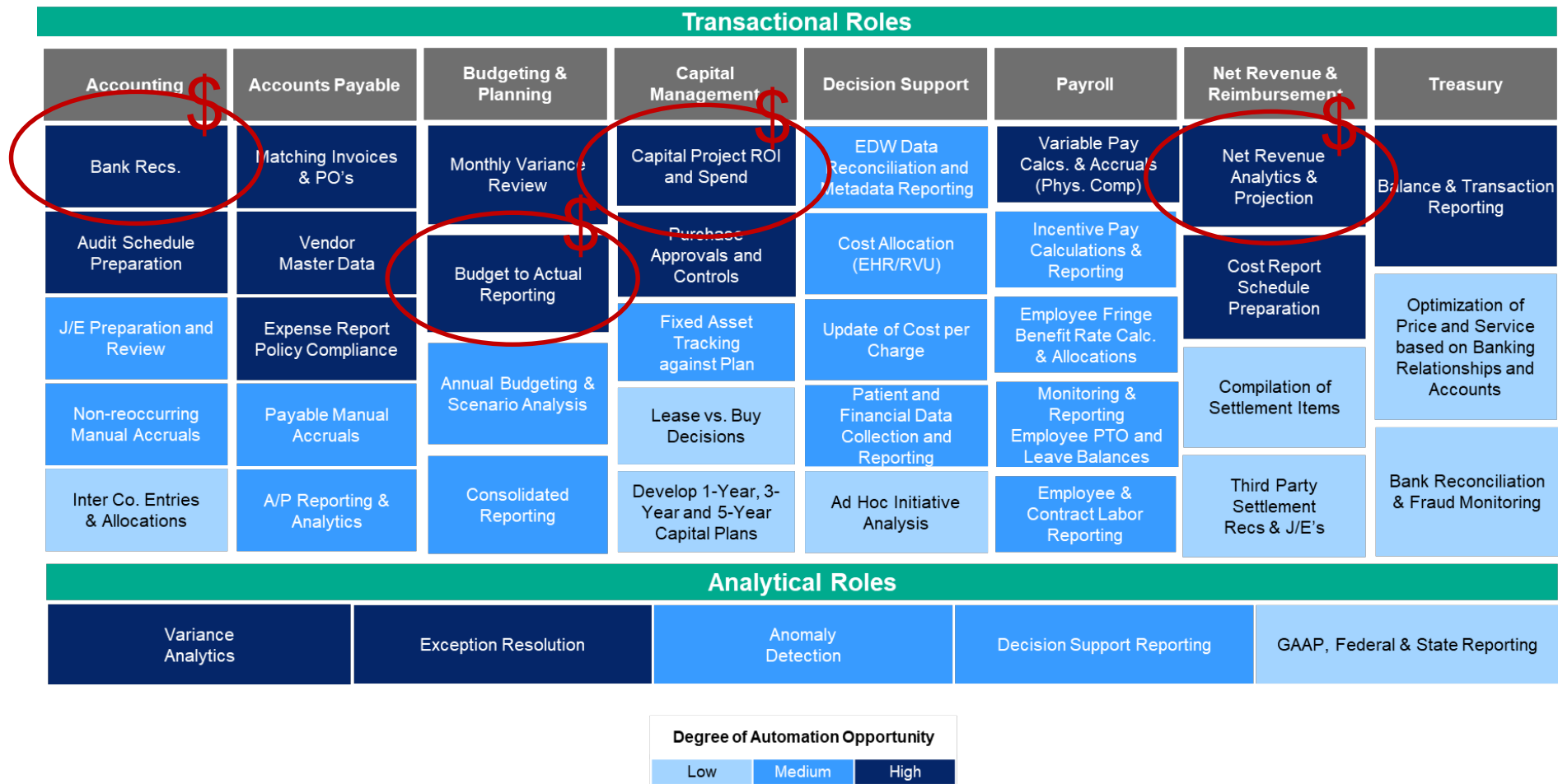
Trends & Opportunity

- Impact of COVID

- Uninsured care
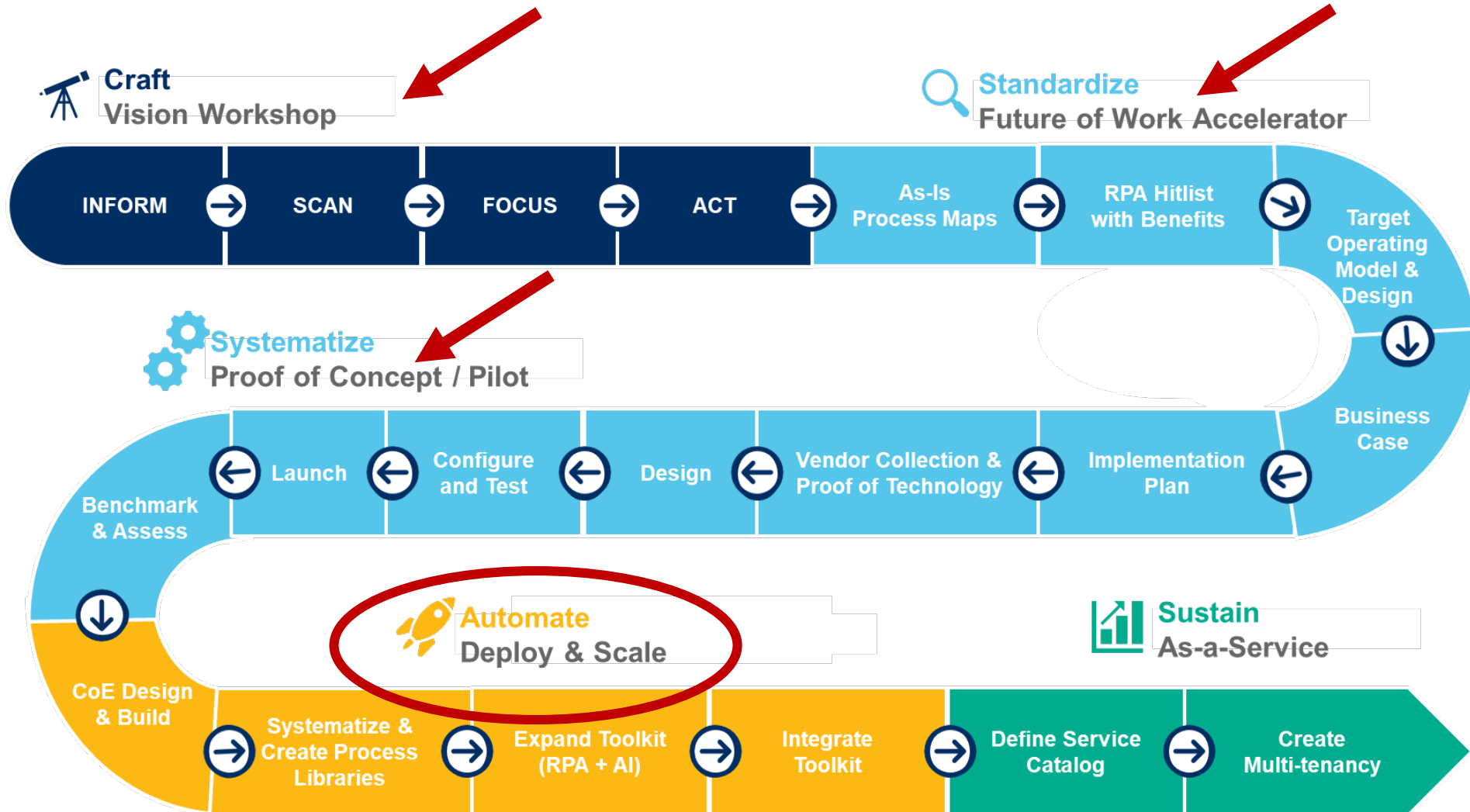
- Introduce automation to scale

- Optimize resources

Dark blue + high costs = "START HERE"

One size and approach doesn't fit all

Our recommended path to follow

Craft
Vision Workshop

Standardize
Future of Work Accelerator

INFORM → SCAN → FOCUS → ACT → As-Is Process Maps → RPA Hitlist with Benefits → Target Operating Model & Design

Systematize
Proof of Concept / Pilot

Business Case

Benchmark & Assess ← Launch ← Configure and Test ← Design ← Vendor Collection & Proof of Technology ← Implementation Plan ←

Automate
Deploy & Scale

Sustain
As-a-Service

CoE Design & Build → Systematize & Create Process Libraries → Expand Toolkit (RPA + AI) → Integrate Toolkit → Define Service Catalog → Create Multi-tenancy

Polling Question

Where do you see the greatest opportunities for intelligent automation?

A Accounting

B Accounts Payable

C Budgeting & Planning
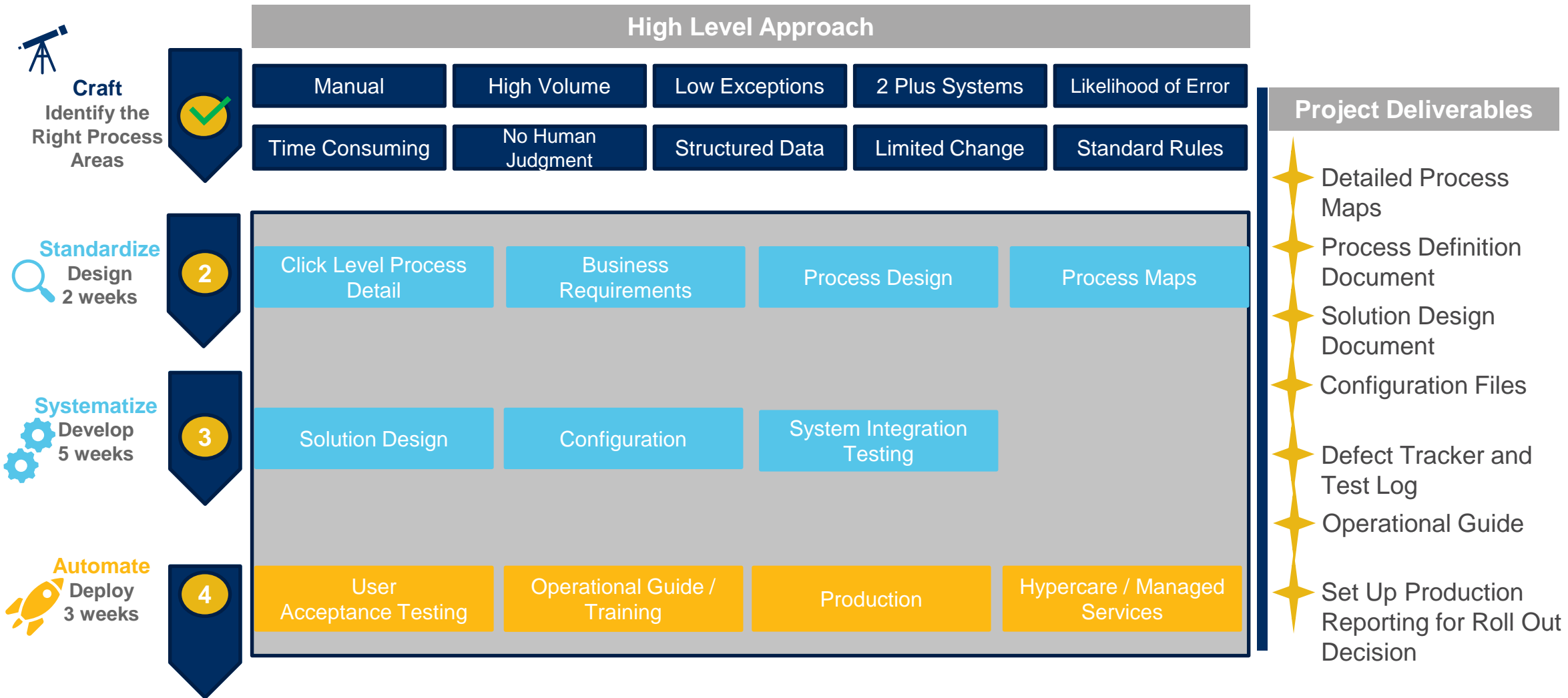
D Net Revenue & Reimbursement

E Payroll

F Treasury

G Revenue Cycle

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How this path "feels"

Craft
Identify the Right Process Areas

Standardize
Design
2 weeks

Systematize
Develop
5 weeks

Automate
Deploy
3 weeks

High Level Approach

Manual	High Volume	Low Exceptions	2 Plus Systems	Likelihood of Error
Time Consuming	No Human Judgment	Structured Data	Limited Change	Standard Rules

2

Click Level Process Detail	Business Requirements	Process Design	Process Maps

3

Solution Design	Configuration	System Integration Testing

4

User Acceptance Testing	Operational Guide / Training	Production	Hypercare / Managed Services

Project Deliverables

- Detailed Process Maps
- Process Definition Document
- Solution Design Document
- Configuration Files
- Defect Tracker and Test Log
- Operational Guide
- Set Up Production Reporting for Roll Out Decision

Random acts of automation

Consolidation & Outsourcing

Colleen Hall

Pre-Covid

Trends in Outsourcing

Nearly 98% of healthcare executives are considering outsourcing strategy.

Source: BlackBook Market Research

Only 2% of healthcare executives don't think outsourcing is an option.

Source: BlackBook Market Research

By 2022, Hospitals must reduce costs by 24% in order to break even.

Source: BlackBook Market Research

Pre-Covid

Trends in Consolidation

In 2018, there were 803 mergers and 858 additional affiliation and partnerships and announcements..

Source: Definitive Healthcare

More than 1,500 in 2019...

Source: Definitive Healthcare

COVID-19 caused healthcare entities to reevaluate their growth and financial strategies.

Be on the Look Out For….

Consolidation nearly always leads to higher prices paid by private payers

Better, more creative partnerships that could cut costs and improve the heath of Americans

The pandemic has created a buyers market related to consolidation. Organizations in a good position to buy will have more inventory to choose from at lower prices

Increased scrutiny on the CARES Act dollars to ensure that there was no spend on consolidation activities

Outsourcing may increase temporarily as a way to combat costs but long term, if the consolidation in healthcare continues, there may be a trend to return to insourcing

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Polling Question

Which of Colleen's five bold predictions are likely to have the most widespread impact on the market?

A
Consolidation will lead to higher prices paid by private payors.

B
Stronger partnerships (outsourcing & consolidation) will be formed.

C
It's a buyer's market for financially sound healthcare providers.

D
Increased scrutiny on CARES dollars to ensure not used as part of consolidation activities

E
Consolidation will lead to outsourcing in short term, insourcing overtime.

Closing Recording

Polling Question

According to the Centers for Disease Control & Prevention, why cover your mouth and nose with a mask when around others?

A

You could spread COVID-19 to others even if you do not feel sick.

B

The mask is meant to protect other people in case you are infected

C

Everyone should wear a mask in public settings and when around people who don't live in your household.

D

Continue to keep about 6 feet between yourself and others. The mask is not a substitute for social distancing.

E

All of the above

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Thank you

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