Moderators & participating panelists

Michael Thompson
President & CEO
National Alliance of Healthcare Purchaser Coalitions

Mark St George, FSA, MAAA
Principal
PriceWaterhouseCoopers

Panelists

- Al Charbonneau, Rhode Island Business Group on Health
- Jerry Frye, BSG Analytics
- Brian Gifford, Integrated Benefits Institute
- Ann Greiner, Primary Care Collaborative
- Lynn Quincy, Altarum Healthcare Value Hub
- Lauren Vela, Pacific Business Group on Health
- Greger Vigen, FSA, MAAA, Consulting Health Actuary
New hospitalizations and the impact on direct COVID-19 utilization

**Hospitalizations**
Data as of May 4

**Key Takeaways:**
- At least 5,413 people have been hospitalized since 3/18
- 93 new hospitalizations as of 5/4 (1.7% increase)

**A Regional Phenomenon**

**Recent Past**
"Constrain The Virus"

**Near Future**
“Phased Reopening”

- $R > 1.0$
- $R = 1.0$
- $R < 1.0$

Sources:
- City of Los Angeles
- *Public test registration. It does not include registration of critical city employees, first responders, and health care providers.


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COVID-19 Indirect Cost Offsets – Short Run & Long Run

Short Run
• Elective Surgery – Down
• Primary Care Visits - Down
• Specialty Care Visits – Down
• Onsite Clinics – temporary closures
• Medications - ?
• Virtual Visits – Up, Up, Up

What are the impacts on healthcare stakeholders?

What are the likely longer term impacts on healthcare costs?

Any broader strategic implications?
What is impact of Coverage? What is impact on Consumers?

- Great majority waiving cost sharing for the testing of COVID-19
- Roughly half of employers are waiving cost sharing for:
  - Healthcare visits associated with the testing
  - COVID-19 related telemedicine visits
- A minority are waiving cost sharing for the actual treatment of conditions related to COVID-19
- Few employers are currently offering COVID-19 testing at onsite/near site clinics (where applicable)

Source: Pulse of the Purchaser Survey March 18-23, 2020
Foot print of Pandemic

1st Wave
Immediate mortality and morbidity of COVID-19

2nd Wave
Impact of resource restriction on urgent non-COVID conditions

3rd Wave
Impact of interrupted care on chronic conditions

1st Wave Tail
Post-ICU recovery

4th Wave
- Psychic trauma
- Mental illness
- Economic injury
- Burnout

Economics of Stress

- Demands & Pressures are “Additive & Cumulative”
- Coping Skills (resilience) predict 16% of outcomes
- Demands & pressures predict 60% of outcomes

Source:
Lyle Miller, PhD
BioBehavioral Institute of Boston

Source: Merck Inventing for Life Graphic
Emotional & Population Health

- Mental health - the next wave of COVID-19
  - Consider all the elements of wellbeing – social, sleep, connectivity, etc.
  - Direct and indirect impact of social isolation
  - Growing impact on substance use disorder

- Special populations
  - Cultural and ethnic differences
  - High risk populations – Age, Chronic Disease, Minorities, Social Determinants
  - Others – eg Those who are pregnant

- Impact of virtual health support

- Re-engaging on-site/near-site clinics

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Economic Stress
Worrying about (or losing) their jobs or income

Fear of COVID-19
Especially those working at workplace

Social Isolation
Especially for those working from home

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Costs of Mental Health Co-Morbidity

Source – PwC Total Cost of Brain Disease - 2012

Direct Medical Care Costs 17%
Long Term Care Costs 8%
Higher Costs of Co-Morbidities 30%
Non-Medical Costs (eg lost productivity) 45%

Costs of person with a chronic disease only 2.5x
Cost of person with a chronic disease and behavioral health 9.4x

Will we experience this? Better or worse?

Source: Livongo 2019
The COVID-19 Era – Accentuating Forces related to Population Health

First Wave
COVID-19

Second Wave
Mental Health

Third Wave
Total Person Health

Fitness for Duty

Higher Risk for those with Chronic Disease

Work at Worksite
Work at Home
Furloughed

Fitness for Life

Mental Health Impact on Co-morbidities

Social Determinants & Health Equity

COVID-19 Era Impact on Risk Factors?

- Addiction
- Diet
- Cardio Fitness
- Ergonomics
- Obesity
- Sleep
- Stress
- Other

Fitness

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Upcoming Events & Contact Information

Next COVID-19 Employer Town Hall (at 5 PM ET):
5/26 Rethinking Care Delivery in light of COVID-19

Past National COVID-19 Employer Town Halls
• Clinical and business impact of COVID-19
• Benefits and policy issues of COVID-19
• Addressing Mental Health and Wellbeing in COVID-19
• Considering Social Determinants in the light of COVID-19
• Planning for a Pivot to Back to Work
• Population Health Strategy during COVID-19 Era

For more information on our COVID-19 Employer resources, including prior webinars and Employer town halls, visit our resources page.
https://www.nationalalliancehealth.org/wwww/resources-new/employer-resources-covid-19

Leadership Summits (June 15-16) - Register today:
https://nationalalliancehealth.swoogo.com/2020leadershipsummits/begin