

Telehealth's Trajectory: Assessing Adoption, Policy Impact, and Accessibility from Pandemic Response to Future Healthcare Integration (2020-2023)

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Overview

Background: Due to the COVID-19 pandemic, telehealth adoption has drastically increased, aided by federal policies and over 20 states legislation changes. Certain provisions have been extended until December 31, 2024.

Method: This study investigated the CMS Doctors and Clinicians national data¹, along with CMS Medicare Telehealth Trends², to examine Telehealth expansion, comparing rural and urban areas. The study assessed the adoption of Telehealth by the top five medical specialties, provider proportions, and Medicare acceptance rates. It also explored Medicare beneficiaries' Telehealth usage from 2020 to 2023, tracking quarterly and state-level trends over four years.

Findings

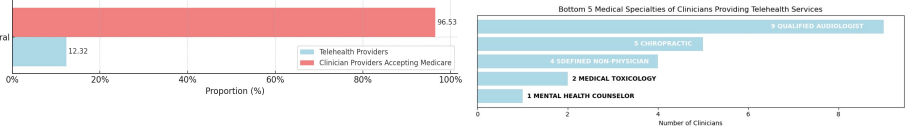
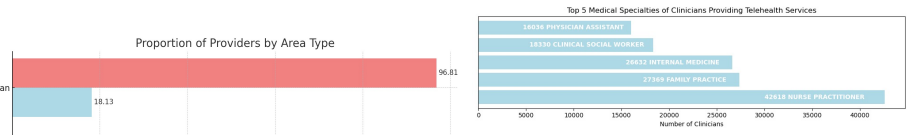
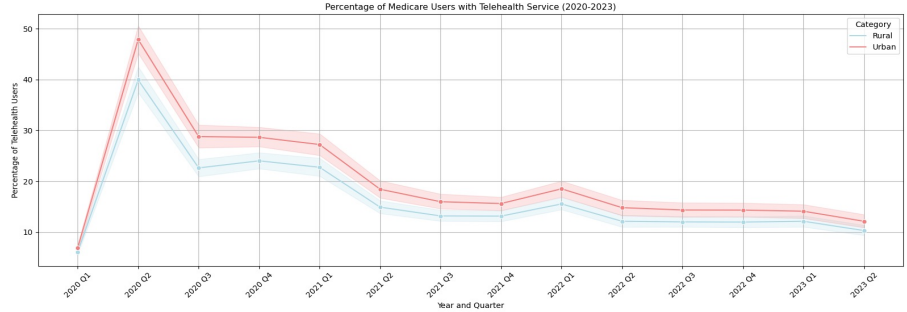
- A significant peak in Telehealth use occurred in Q2 2020, coinciding with the COVID-19 crisis peak, indicating a shift towards remote healthcare, especially in urban regions.

- Urban settings show higher provider participation in Telehealth compared to rural areas. Medicare acceptance rates reveal a slight but consistent preference for urban providers.

- Nurse Practitioners and Physician Assistants have significantly adopted Telehealth in both rural and urban areas. Specialties like Medical Toxicology and Mental Health Counseling have lower levels of Telehealth engagement.

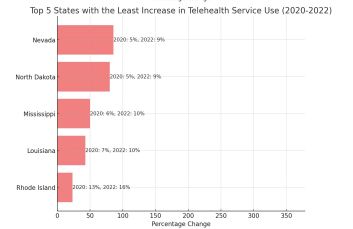
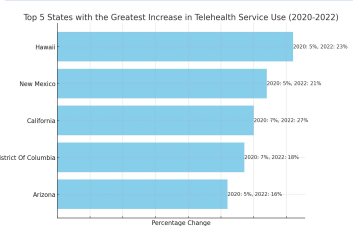
- States such as Hawaii, New Mexico, and California experienced substantial Telehealth growth among Medicare users, some seeing up to a 300% increase over two years.

Telehealth Trends / Adoption Rate / Medicare Coverage / Policy Change



Regulations Comparison	Before Covid 19	During Covid 19
Billing	Only certain licensed providers	Any type of clinician can bill for Medicare services
Patients Type	Preexisting Patients	No preexisting relationship will be required
Originating Sites	Only at authorized originating sites	No geographic restrictions, including a person's home (Through Dec 31, 2024)
Across States Services	May not cross state lines	Across states services may allowable (state-specific restrictions may apply)
Technology	Audio-visual only on approved technology platform	Audio-visual OR audio-only with more diverse platform (e.g. Zoom, Skype, etc)
Reimbursements	Lower than for in-person services	Same with in-person services

Geo. Comparison



Future Healthcare Integration

Normalization Post-Peak: After an initial surge, Telehealth usage is stabilizing as a regular part of healthcare. Providers and policymakers need to ensure it remains a sustainable and integral part of standard care.

Sustained Growth in Specific Specialties: Policies should support specialties with high Telehealth adoption and identify barriers in areas like mental health, where provider numbers remain unexpectedly low despite high demand.

Reference:
 1. CMS Doctors and Clinicians national data. <https://data.cms.gov/provider-data/topics/doctors-clinicians>
 2. CMS Medicare Telehealth Trends. <https://data.cms.gov/summary-statistics/on-use-and-payments/medicare-service-type-reports/medicare-telehealth-trends/data>