A New Paradigm For Virtual Healthcare Delivery
As advancements in digital technology, a focus on patient centered care, and a necessity to improve population health converge, there are tremendous opportunities for telehealth to take center stage and provide convenient, cost effective care with quality outcomes. For employees, this means becoming empowered to make smarter decisions and get the care they need to feel better and be both present and productive. And, telehealth not only provides access, but does so through an experience that is perfectly aligned with employees’ lifestyles and expectations.

While there is significant value today in services like general medical and behavioral health visits, even greater value is possible. To realize the fullest impact, telehealth must evolve beyond its mainstay of acute/episodic care to a broader suite of virtual care delivery services that address care needs across the spectrum – including chronic and complex health issues. Doing so will enable delivery improvements and drive better outcomes, with the ability, for instance, to address comorbidities.

At Teladoc, we’re proud to be the first to bring this to life. With the addition of the Best Doctors services to our product portfolio we address a broad spectrum of care - from everyday issues to the most costly and complex conditions. This creates a simplified, patient-centric way to resolve healthcare issues, improve outcomes, and reduce costs.

Peter McClennen
Teladoc President
76% of employers indicate that offering services to lower the costs of claimants is the most important feature to add to provide more value to virtual care.

Creating real results with employers

Our clients are more engaged in understanding performance: 90% of Teladoc clients monitor utilization - 2X the industry average.

Digital channels, direct mail and word-of-mouth are viewed as the most effective communication channels for driving benefit awareness.

Controlling healthcare costs and reducing absenteeism/presenteeism are two main reasons employers are offering telehealth services.
Teladoc sees significant advancement toward the future of integrated virtual healthcare delivery that enables consumers to find resolution to the broadest array of healthcare needs, on their terms.

We're optimistic about this progress and enthusiastic to support these emerging trends:
Telehealth grows up. And it’s powerful. The new paradigm, virtual care delivery, not only challenges the status quo, but brings an entirely new way to improve outcomes while containing costs.

Payers raise expectations, unlocking the full value of virtual healthcare delivery. Employers and health plans will raise their expectations of vendors to achieve even greater savings, satisfaction, and outcomes.

Utilization takes center stage as digital health adoption approaches mainstream. Consumers are increasingly equipped and expectant of on-demand access to high-quality, convenient resolution to their healthcare needs.

Virtual healthcare delivery tackles the largest cost drivers, finally. Diagnosis and treatment of chronic conditions and complex cases is aided by analytics, AI, and on-demand access to leading specialists across the globe.

Mental health is part of the conversation. Organizations take action. With continued advances in the virtual delivery of behavioral healthcare, access to care has never been better for millions of Americans.

Health systems embrace telehealth, at scale. Consumer telehealth becomes an imperative for health systems, as they redefine consumer experience and adapt to value-based care.

Connected care accelerates. And data security is high on everyone’s radar. As connected devices increasingly make healthcare data portable, data security and integration have never been more important.

Artificial intelligence + medical excellence = high-quality care. With exciting potential for AI in healthcare comes a caution: cognitive computing is only as good as the data that goes in and the experts who interpret what comes out.

Learn more at: teladoc.com/predictions
During my 25 years as an internist, an educator and a healthcare executive, I’ve regularly heard the same question being asked around the world: What can we do to contain the biggest drivers of healthcare costs?

Diagnosing and treating chronic conditions and complex cases consumes roughly 84 percent of healthcare dollars spent in the U.S. alone. To make matters worse, the number of people living with multiple chronic illnesses is expected to double by 2050. With preventable medical errors and their subsequent care requirements estimated to cost between $17 billion and $29 billion each year, what can we do to contain costs? We can start by getting it right.

The Best Doctors solutions have a proven track record in helping get diagnoses and treatments right. Our network of 53,000 experts, rated as the top 5% of physicians in over 450 subspecialties of medicine, review each case, in its entirety, from every possible angle. By using a strong combination of analytics to pinpoint care, tools like IBM Watson to ensure accuracy, and a single point of convenient access to leading specialists across the globe, Best Doctors provides a real solution to the costly impact of chronic conditions and complex cases, which are so often misdiagnosed or mistreated.

Here’s why so many are turning to the Best Doctors solution to combat high costs:

- An expert second opinion from Best Doctors produces measurable differences including an alteration or clarification of a diagnosis in 44% of cases and a change in treatment in 75% of cases. Each correction results in once-wasted dollars being redirected toward a resolution.
- Best Doctors has completed more than 100,000 expert medical reviews with an average cost savings of $36,000 per case.

Dr. Lewis Levy serves as Chief Medical Officer of Teladoc, Inc. In addition to over 25 years of clinical and executive experience, Dr. Levy also has an extensive teaching career as an instructor at Harvard Medical School.
The Plan was established to give high-quality benefits to their members at the lowest possible cost. They provide benefits to over 80,000 lives under nearly 500 employers. The Plan partnered with Best Doctors to reduce spending on inappropriate medical tests and procedures and ensure their members had confidence in their medical diagnoses and treatments.

Key Objectives

- Solve medical uncertainty for members and increasing confidence in medical decisions.
- Reduce unnecessary medical spending by ensuring the correct diagnoses and treatments.
- Increase employee productivity by helping employees address medical concerns.

Impact

Best Doctors gave members of this Plan access to expert second opinions by connecting them to leading medical specialists. While Best Doctors saw all types of cases, members were mainly concerned about orthopedic and gastrointestinal conditions because their symptoms weren’t improving or they needed help deciding between treatment options.

First year impact

$207K+ total savings

75% change in diagnosis

100% change in treatment
Teladoc utilization outpaces the industry average

Value is realized when your employees and covered dependents have a visit and receive care, not just when they sign up for the service. Teladoc clients see utilization accelerate year-over-year through our targeted, surround-sound marketing approach. Positive initial visits and word-of-mouth drive repeat use of our services.

Guaranteed results

5% utilization in the first twelve months

For any employer with at least 1,000 enrolled employees, Teladoc guarantees that the number of visits divided by non-HSA/HRA employees will be at least 5%.

Learn more at: teladoc.com/businesses/utilizationguarantee
Line Construction Benefit Fund, commonly known as LINECo, is a multi-employer welfare fund that provides medical, dental, prescription drug, vision, disability, assistance programs, and life insurance to over 100,000 Americans in all 50 states.

**Challenges**

Since many members live in rural areas, LINECo partnered with Teladoc to provide a convenient, cost-effective option to in-person visits for routine medical conditions. LINECo also wanted to reduce unnecessary ER usage while still offering the right care at the right time.

**Key Objectives**

- Provide 24/7 access to board-certified physicians for remote employees.
- Increase employee productivity by providing help to a safer and quicker return to work.
- Reduce unnecessary spending by redirecting costs away from ER and Urgent Care visits.

2017

$3.3M total savings

16.6% utilization
“We are transforming how people access healthcare – of all kinds.”

Jason Gorevic, Teladoc CEO
Simple, intuitive, patient-centric. With one central point of entry, members can easily get resolution to a broad array of healthcare needs from pink eye and skin rashes to mental health issues and cancer. Wherever, whenever.

One single platform spanning 450+ specialties

<table>
<thead>
<tr>
<th>% of cost</th>
<th>% of population</th>
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<tbody>
<tr>
<td>Critical Care</td>
<td>3%</td>
</tr>
<tr>
<td>Complex Care</td>
<td>20%</td>
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<tr>
<td>Episodic Care</td>
<td>77%</td>
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Suite of Clinical Services

- Complex Case Consults
- Critical Care
- Oncology Insight With Watson
- Script Analytics
- Find a Best Doctor
- Ask the Expert
- Treatment Decision Support
- Expert Second Opinion
- Behavioral Health Navigator
- General Medical
- Pediatrics
- Dermatology
- Caregiving
- Behavioral Health

Critical Care
- 3%
- 37%

Complex Care
- 20%
- 40%

Episodic Care
- 77%
- 23%