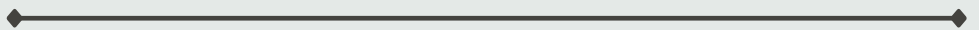


COVID-19 PAYER SURVEY

December 2020 COVID-19 Payer Survey
Key Findings



April 2021
Multipayer Primary Care Network

SURVEY DESIGN

Survey purpose

Understand payer policies and strategies that influence primary care practices during the COVID-19 pandemic

- Determine how payers strengthen and sustain primary care given the challenges of COVID-19
- Disseminate insights to inform current and future efforts

Follow up on Milbank's early 2020 Payer COVID-19 survey targeting payers participating in Comprehensive Primary Care Plus (CPC+), completed by 43 payers

Survey administration and analysis

Distributed by Milbank to its Multipayer Primary Care Network, which features payers across varying geographies, profit statuses, and lines of business.

Responses aggregated by Milbank and analyzed by Mathematica

- Collected 37 responses through SurveyMonkey and email in December 2020 and January 2021
- Descriptive analyses of structured responses using SAS
- Manual content analysis of open-ended responses

37

Payers responses

.....

27

CPC+ Only

6

CPC+ & PCF

1

PCF Only

3

Neither CPC+ nor PCF

ANALYSIS HIGHLIGHTS

Key Findings

Most payers reimburse primary care providers on par with in-person visits for telehealth services.

- Visit length is the most common driver of payment amount
- Payers encourage use of telehealth through member engagement, updates to attribution approaches, and adjustments in quality measurement methodologies
- Telehealth policies and supports often vary across lines of business, and their permanency is unclear

Most payers are also offering primary care practices:

- Advanced or accelerated payments
- Increased opportunity to participate in alternative payment models
- Modifications to quality reporting requirements
- Other supports, such as reduced administrative or documentation requirements

95%

Payers covering telehealth services (video, audio)

73%

Payers reporting full payment parity for telehealth

Nearly two-thirds of payers encountered COVID-19 response difficulties related to:

Securing required time and resources



Ever-changing environments, including regulatory landscape



Need to respond to changes quickly



Financial and other long-term impacts



Payers' ability to support primary care practices during the COVID-19 pandemic was influenced by:

- External factors (actions by regulators)
- Internal factors (organizational characteristics, leadership, and investments)

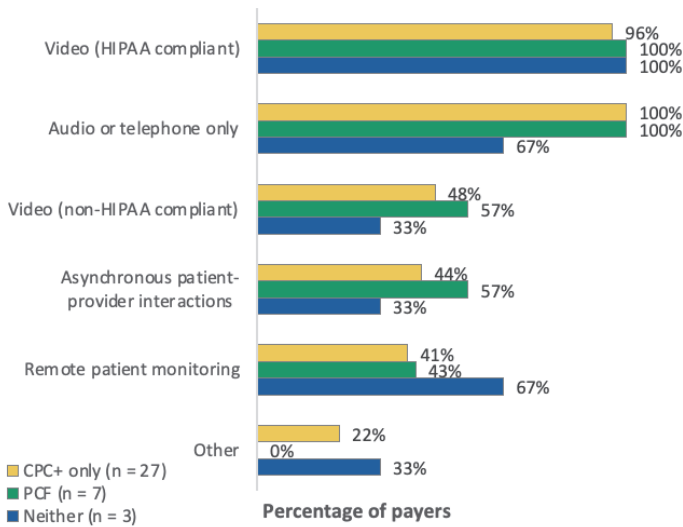
There are signs payers protected the providers and practices from further financial losses and expanded the use of telehealth.

The complete survey analysis can be found at www.milbank.org

SELECTED VISUALS

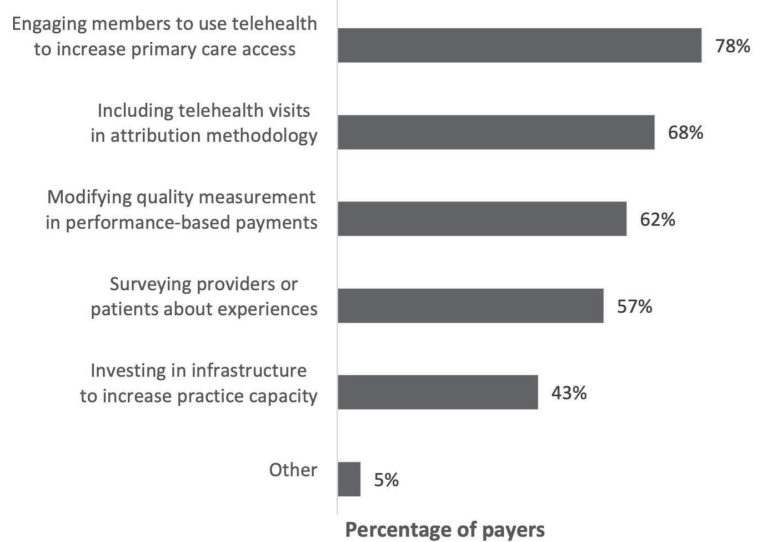
Payers cover many telehealth services, especially HIPAA-compliant video and audio or telephone

Telehealth service



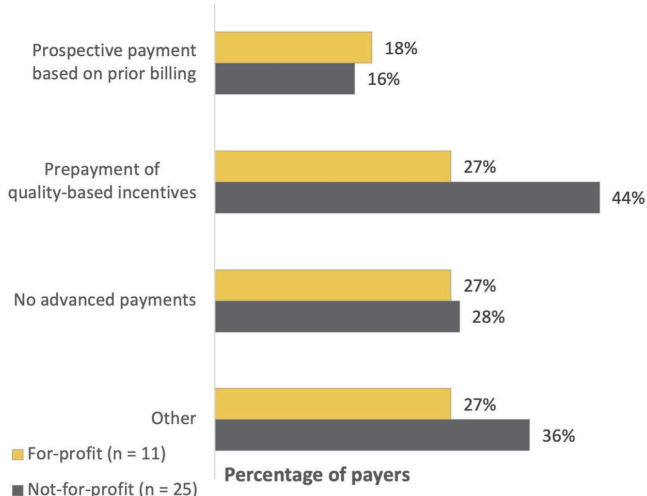
Most payers use multiple mechanisms to support the use of telehealth

Mechanism



More not-for-profit payers than for-profit payers prepay primary care practices for quality-based incentives

Types of payments



Advanced and accelerated payments and quality reporting modifications are likely temporary

Status

