

# Virtual Specialty Care

## The Next Frontier in Healthcare Delivery

**Authors:**

Julian Flannery  
*Co-founder & CEO, Summus*

Mary Mulcare, MD  
*Chief Medical Officer, Summus*





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Co-founder & CEO,  
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*Not only is virtual healthcare here to stay, recent clinical and digital innovations are powering an exciting new category in healthcare delivery: virtual specialty care.*

Healthcare is continually evolving to meet patients' needs and preferences; whatever, whenever, and wherever they are. Thanks to innovation in virtual health technology, time and geographic restrictions are no longer a barrier to high-quality, personalized guidance across a wide range of diagnoses, conditions, and actions—from non-urgent medical concerns such as allergies and infections to medication compliance and monitoring post-surgical recovery in the patient's home.

Virtual healthcare comprises a range of solutions for delivering provider-patient interactions at a distance using digital and telecommunications technologies—telephone, videoconferencing, email, online chat, remote monitoring, and others. For more than a decade, it has been lauded as a game changer in care delivery;<sup>1</sup> yet, despite substantial interest and investment, widespread adoption

<sup>1</sup> [Virtual health: The next frontier of care delivery | McKinsey](#), June 11, 2020.



remained modest—until the COVID-19 pandemic caused a dramatic shift in healthcare delivery from in-person visits to virtual care and, in a watershed moment, tipped providers, consumers, and payers into widespread use.<sup>2</sup>

Between March and April 2020 — as concern about COVID-19 grew — demand for virtual care skyrocketed, with some organizations seeing up to 40x increases in volume.<sup>3</sup> Responding to a University of Michigan poll, one in four Americans over 50 said they had a virtual care visit during the first three months of the pandemic, up from four percent in 2019.<sup>4</sup> While dropping slightly from a spring 2020 peak, provider and consumer usage of telehealth and other forms of virtual healthcare has stabilized<sup>5</sup> at a sustainable level where many are envisioning — and preparing for — its future as more than a proxy for in-person visits.<sup>6</sup>

- ▶ One in two clinical leaders responding to a recent Deloitte survey said the pandemic led to significant shifts in their health system’s virtual health strategy, with continued investments into virtual health and enterprise-wide virtual health strategies among the top initiatives being pursued.<sup>7</sup>
- ▶ A Mercer survey of over 14,000 employees around the globe showed that eight out of 10 people intend to use virtual health care services and digital well-being solutions, such as video calls to their doctor and well-being apps to help them find healthcare support and self-manage conditions, at the same or higher rates than they did during the pandemic.<sup>8,9</sup>

<sup>2</sup> [Virtual care still has a place in post-pandemic health care \(theconversation.com\)](#), December 6, 2021.

<sup>3</sup> [Virtual Health Replaced Some In-Person Visits During the Pandemic, but can it Transform Health Care? | Deloitte US, 2021](#); citing NYU Langone Health news release, [Telemedicine Transforms Response to COVID-19 Pandemic in Disease Epicenter \(prnewswire.com\)](#), April 30, 2020.

<sup>4</sup> Ibid.

<sup>5</sup> [Telehealth: A post-COVID-19 reality? | McKinsey](#), July 9, 2021.

<sup>6</sup> [Virtual Health Replaced Some In-Person Visits During the Pandemic, but can it Transform Health Care? | Deloitte US, March 16, 2021](#).

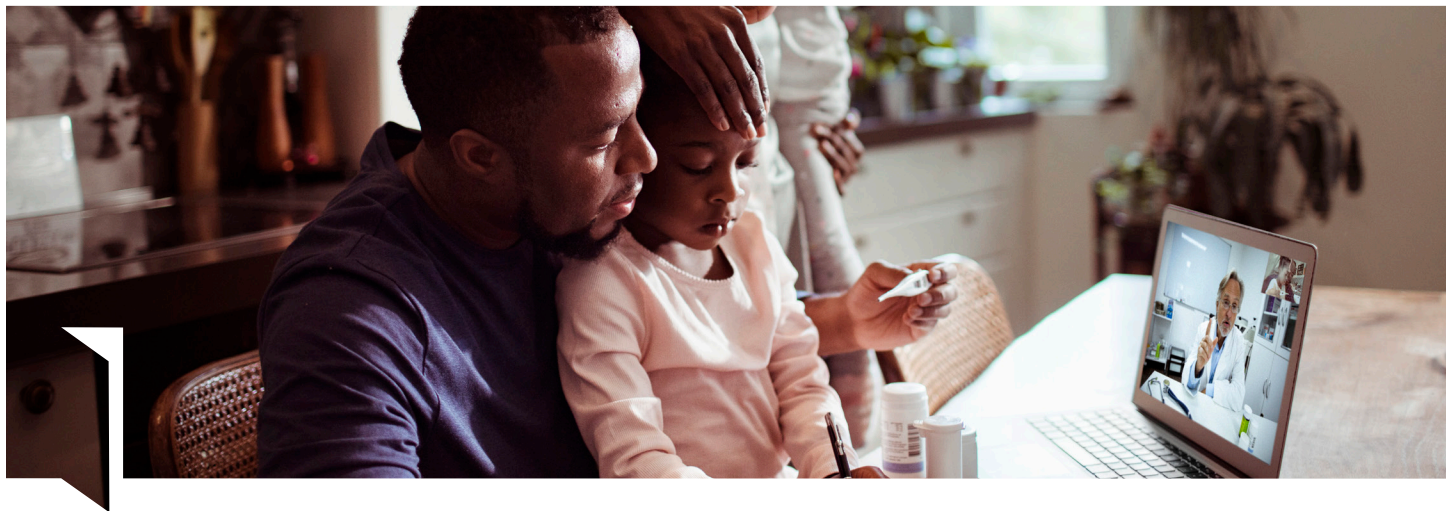
<sup>7</sup> [Virtual Health Replaced Some In-Person Visits During the Pandemic, but can it Transform Health Care? | Deloitte US, March 16, 2021](#).

<sup>8</sup> <https://www.mercer.com/newsroom/2021-health-on-demand-survey-released.html>, 2021.

<sup>9</sup> <https://www.healthleadersmedia.com/telehealth/survey-workers-embrace-telehealth>.

- ▶ Results from the 2022 Virtual Healthcare Survey conducted by HR.com Research Institute in partnership with Summus Global show that virtual care has become a standard offering, with 93% of employers offering their employees access to virtual care.<sup>10</sup>
- ▶ The Centers for Medicare and Medicaid Services (CMS) has increased reimbursement parity (at least temporarily,) for certain virtual health care services, and some commercial health plans have updated their reimbursement policies to ensure physicians are paid the same whether a visit is virtual or in-person.<sup>11</sup>
- ▶ The US Department of Health and Human Services (HHS) recently awarded nearly \$55 million in total to 29 health centers to increase healthcare access for underserved populations through virtual care.<sup>12</sup>

Virtual care can act as a complement to or even a replacement for in-person health care based on patient needs, provider organization capabilities, and resource availability. Of the \$1.2 trillion spent on U.S. outpatient, office, and home healthcare as of 2020, it is estimated that approximately \$246 billion could be virtualized.<sup>13</sup>



<sup>10</sup> [Virtual Care Research — HR.com](#), January 2022.

<sup>11</sup> [Virtual Health Replaced Some In-Person Visits During the Pandemic, but can it Transform Health Care? | Deloitte US](#), March 16, 2021.

<sup>12</sup> [https://www.beckershospitalreview.com/healthcare-information-technology/hhs-awards-55m-to-increase-virtual-care-access.html?origin=BHRE&utm\\_source=BHRE&utm\\_medium=email&utm\\_content=newsletter&oly\\_enc\\_id=8153J6917723BIC](https://www.beckershospitalreview.com/healthcare-information-technology/hhs-awards-55m-to-increase-virtual-care-access.html?origin=BHRE&utm_source=BHRE&utm_medium=email&utm_content=newsletter&oly_enc_id=8153J6917723BIC), February 14, 2022.

<sup>13</sup> Potential virtualization of outpatient and office visits U.S. by spend 2020 | Statista, September 3, 2020.

Convenience is a top motivator for today’s busy consumers to use virtual healthcare; they increasingly expect their health care experiences to be as flexible, customizable, and seamless as other products and services they use in their daily lives. Efficiency and clinician satisfaction are strong incentives for healthcare providers to increase adoption.<sup>14</sup> Virtual care allows health systems to better allocate provider time—for example, adapting physician schedules to utilize unfilled time for virtual coverage.<sup>15</sup> It can also improve the physician experience, an important consideration when, in a 2021 survey of more than 13,000 physicians across 29 specialties, 47% reported feeling burned out last year.<sup>16</sup> Finally, employers and health plans increasingly view virtual care as a way to broaden benefit offerings across the care continuum, reduce healthcare costs, and optimize health outcomes for employees/members and their families. Both the HR.com Research/Summus and Mercer surveys noted a sharp increase in employees’ interest in virtual care since the pandemic began.<sup>17,18</sup> Employers also acknowledge virtual care’s role as an effective recruitment and retention tool: 64% of respondents to the HR.com/Summus survey say virtual care is somewhat important to employee retention; 37% say it is important or extremely important.<sup>19</sup>



<sup>14</sup> [Virtual health accelerated | Deloitte Insights.](#)

<sup>15</sup> [Virtual health: The next frontier of care delivery | McKinsey](#), June 11, 2020.

<sup>16</sup> [https://www.beckershospitalreview.com/hospital-physician-relationships/29-physician-specialties-ranked-by-2021-burnout-rates.html?origin=BHRE&utm\\_source=BHRE&utm\\_medium=email&utm\\_content=newsletter&oly\\_enc\\_id=8153J6917723B1C](https://www.beckershospitalreview.com/hospital-physician-relationships/29-physician-specialties-ranked-by-2021-burnout-rates.html?origin=BHRE&utm_source=BHRE&utm_medium=email&utm_content=newsletter&oly_enc_id=8153J6917723B1C), February 21, 2022.

<sup>17</sup> [Virtual Care Research - HR.com](#), January 2022.

<sup>18</sup> <https://www.mercer.com/newsroom/2021-health-on-demand-survey-released.html>.

<sup>19</sup> [Virtual Care Research - HR.com](#), January 2022.

# Virtual Specialty Care: Transforming Speed and Access



Virtual healthcare is transforming the speed and access to specialist expertise and proving to be a much needed bridge to high quality, cost effective, patient centered care delivery. Virtual specialty care is the next big advancement in virtual health. It enables providers, employers, and health plans to manage the cost and complexity of health care delivery and empowers consumers, in partnership with their primary care physician (PCP), to make more informed medical decisions that lead to better outcomes.

## Why it's important

**Specialty care is a key driver of healthcare costs and accessing high-quality specialists isn't easy.** Data show that speed and access to high quality specialized care will drive better, more cost-efficient decisions in care. The good news is a well thought out virtual specialty care platform connecting PCPs and patients to high-quality specialist expertise can produce employer and health plan savings in total cost of care arrangements through optimizing decision making, treatment paths and enabling access to Centers of Excellence across the country to drive better outcomes. In practice at Summus, we have quantified average employer savings of \$8,172 per engagement across disease categories through a longitudinal approach to virtual specialty care and virtual access to Centers of Excellence across the United States.

**Virtual specialty care can also be applied across the patient journey.** From initial diagnosis, to surgical or treatment path considerations, or to bringing multiple specialists at different inflection points across complex diagnoses like cancer. Not all interactions in specialized care need to be in person. Virtual care can play a big role across the patient journey.

**Virtual access to specialty care can also be part of the solution to the problem of delayed care.** One study found that 67 percent of consumers have delayed seeing a provider because they're too busy and it took too long to get an appointment.<sup>20</sup> The majority of respondents to the HR.com/Summus survey said that some or most employees/dependents have suffered negative impacts from delayed care in five areas due to COVID-19: untreated chronic illness, untreated acute illness, increased medical costs, hospitalization due to lack of treatment, and misdiagnosis.<sup>21</sup>

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<sup>20</sup>—[The virtual health evolution \(cerner.com\)](#), November 6, 2019; citing [https://static.americanwell.com/app/uploads/2018/03/American\\_Well\\_Telehealth\\_Index\\_2017\\_Consumer\\_Survey.pdf](https://static.americanwell.com/app/uploads/2018/03/American_Well_Telehealth_Index_2017_Consumer_Survey.pdf).

<sup>21</sup> Ibid.



**Better physician and patient experiences are possible with virtual specialty care.**

Physician-patient encounters often disappoint, with the latter likely to spend more time in the waiting room and billing office than speaking with the doctor. Increasingly frustrated consumers are expecting and demanding more from their healthcare experience: they want prompt, convenient access to high-quality clinicians who can educate them about their condition so they can actively participate in and contribute to their own care.<sup>22</sup> For specialists, virtual care provides a more efficient way to see patients across a care journey and allows them to scale their expertise across geographic boundaries.

A virtual specialty care platform can streamline the complex and frustrating health care process by providing fast, virtual access to leading specialists across the U.S. healthcare system — across the continuum of care, within hours — meeting consumers where they are from anywhere in the world.

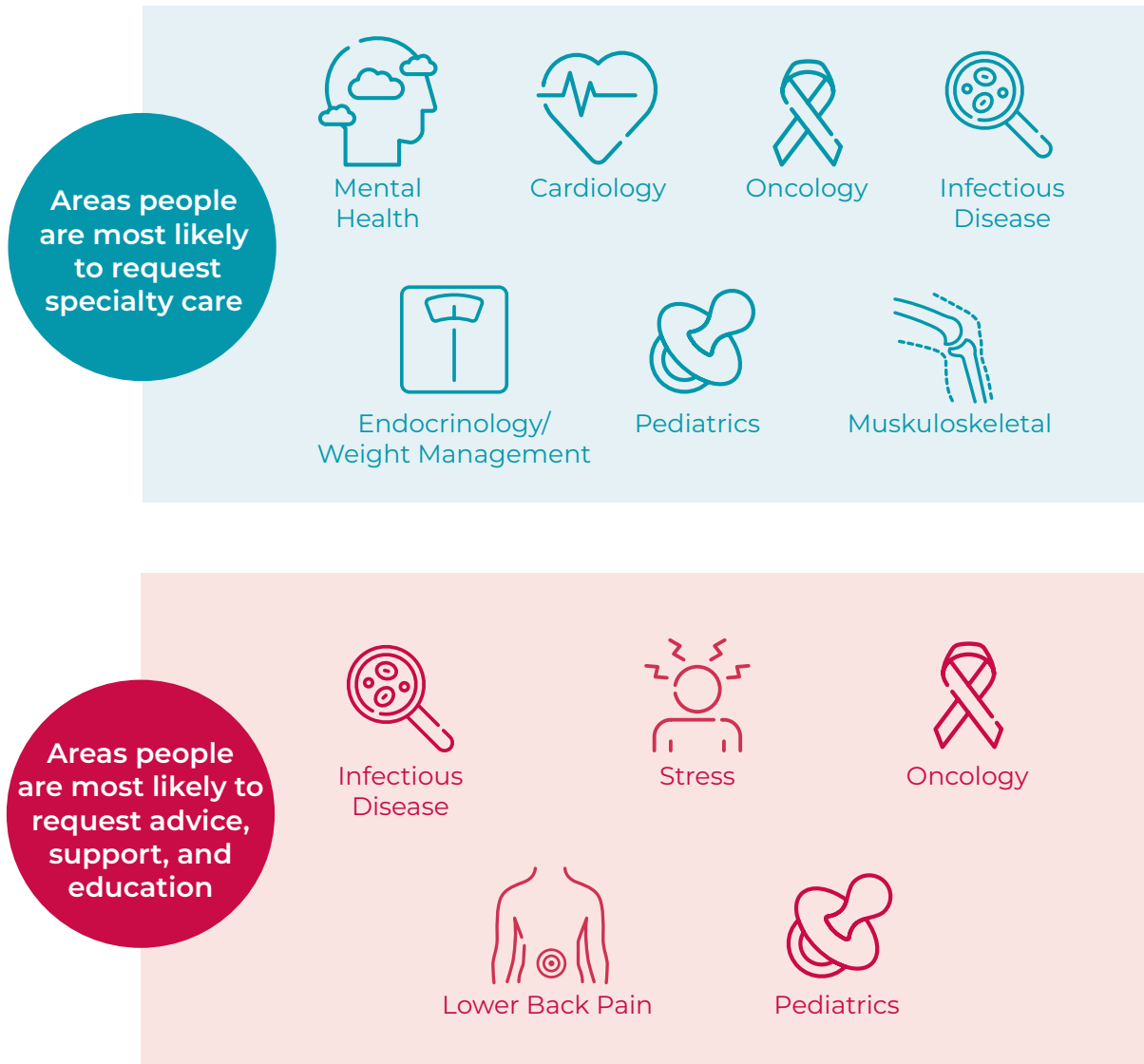


<sup>22</sup> [How Patients Are Making U.S. Healthcare Better And What This Means For HR \(forbes.com\)](https://www.forbes.com/sites/summus/2022/01/26/how-patients-are-making-u-s-healthcare-better-and-what-this-means-for-hr/), January 26, 2022.

## Why it works

Virtual specialty care can rapidly support key points of the patient journey across the continuum of care. With its ability to address employees' and dependents' wide-ranging needs for specialty care (Figure 1) and to cost-effectively and quickly connect patients and specialists, virtual specialty care puts critical information to work immediately to support and advance the patient journey.

**Figure 1** The Wide Range of Specialty Care Needs



**Virtual specialty care allows patients to access a network of leading doctors on these and other topics across the care continuum (Figure 2).**

Geography is no hindrance to PCP-specialist collaboration and for providing education and guidance to patients, as technology and new operational models have combined to enable cross-border interactions. With the Summus virtual platform, response times are much more rapid than in the traditional in-person healthcare model:



- ▶ Asynchronous, text-based interactions between a PCP and specialist for streamlined questions: 6–12 hours
- ▶ Synchronous or asynchronous curbside video interactions between a PCP and specialist: 24–48 hours
- ▶ Synchronous video consultation for a patient and family with a leading sub-specialist who has reviewed their medical records: 24–72 hours
- ▶ Asynchronous remote written opinion with a leading sub-specialist with review of medical records delivered to the patient and treating physician: 24–72 hours
- ▶ Vetted referral to the leading sub-specialist in close proximity to the patient for in-person visits: 12–36 hours.
- ▶ Emergent guidance for acute situations when a patient prefers to avoid an ER visit: 1–6 hours.

**Virtual specialty care is convenient.** PCPs and specialists can collaborate and consult from their individual offices and patients can access high-quality care from their home, meeting in person with a physician only when necessary. With convenient access to expert information, patients are more informed and educated, and better able to ask questions.

## Figure 2 Virtual Specialty Care Platform

Access high-quality specialist expertise across the continuum of care — from streamlined questions to complex cases.

Health Navigation	Preventive & Chronic Health	Complex & Serious
<ul style="list-style-type: none"> <li>➤ Finding the right in-plan specialist</li> <li>➤ Taking the best approach for an upcoming specialist visit</li> <li>➤ Prioritizing health issues</li> <li>➤ Exploring clinical trials</li> </ul>	<ul style="list-style-type: none"> <li>➤ Wellbeing</li> <li>➤ Sleep disorders</li> <li>➤ Pediatric development</li> <li>➤ Reproductive health</li> <li>➤ Weight management</li> <li>➤ Thyroid conditions</li> </ul>	<ul style="list-style-type: none"> <li>➤ COVID-19</li> <li>➤ Cancer</li> <li>➤ Autoimmune disorders</li> <li>➤ Spine conditions</li> <li>➤ Neurologic disorders</li> <li>➤ Heart Disease</li> <li>➤ Alzheimer's &amp; Dementia</li> </ul>

**Virtual specialty care is personalized, an essential component of patient-centered healthcare.** Consumers expect and deserve care that incorporates a deep understanding of their medical history, preferences and fears into a condition-specific diagnostic, treatment, and care regimen. Virtual specialty care can help patients navigate the healthcare system and get the personalized care they need.

**Virtual specialty care improves the physician experience.** Overwork and increased stress levels are contributing to physician burnout, early retirement, and a looming physician shortage. The most recent projections (June 2020) from the American Association of Medical Colleges (AAMC) indicate that the United States could have a shortage of between 54,100 and 139,000 physicians by 2033, with deficits in both primary and specialty care.<sup>23</sup> The result is likely to be care delivery gaps in certain locations and medical specialties. Virtual specialty care improves the physician experience and closes care delivery gaps by curating a geographically diverse network of medical specialists and providing fast access to high-quality care, as well as allowing physicians to share their experience and knowledge more broadly.

<sup>23</sup> [Physician Shortages in Medical Specialties in 2021 | Merritt Hawkins](#), March 16, 2021.

It also removes the complicated administrative overlay that comes with each appointment, making it a more rewarding experience and reminding physicians why they entered the practice of medicine — to care for patients.

**Virtual specialty care can drive better outcomes.** Feedback, outcomes and reporting metrics show why virtual specialty care is having an impact: connecting with high-quality doctors through a scalable platform that has aggregated high quality specialists across the country and across all conditions drives better clinical and patient engagement outcomes at reduced cost for employers and health plans.

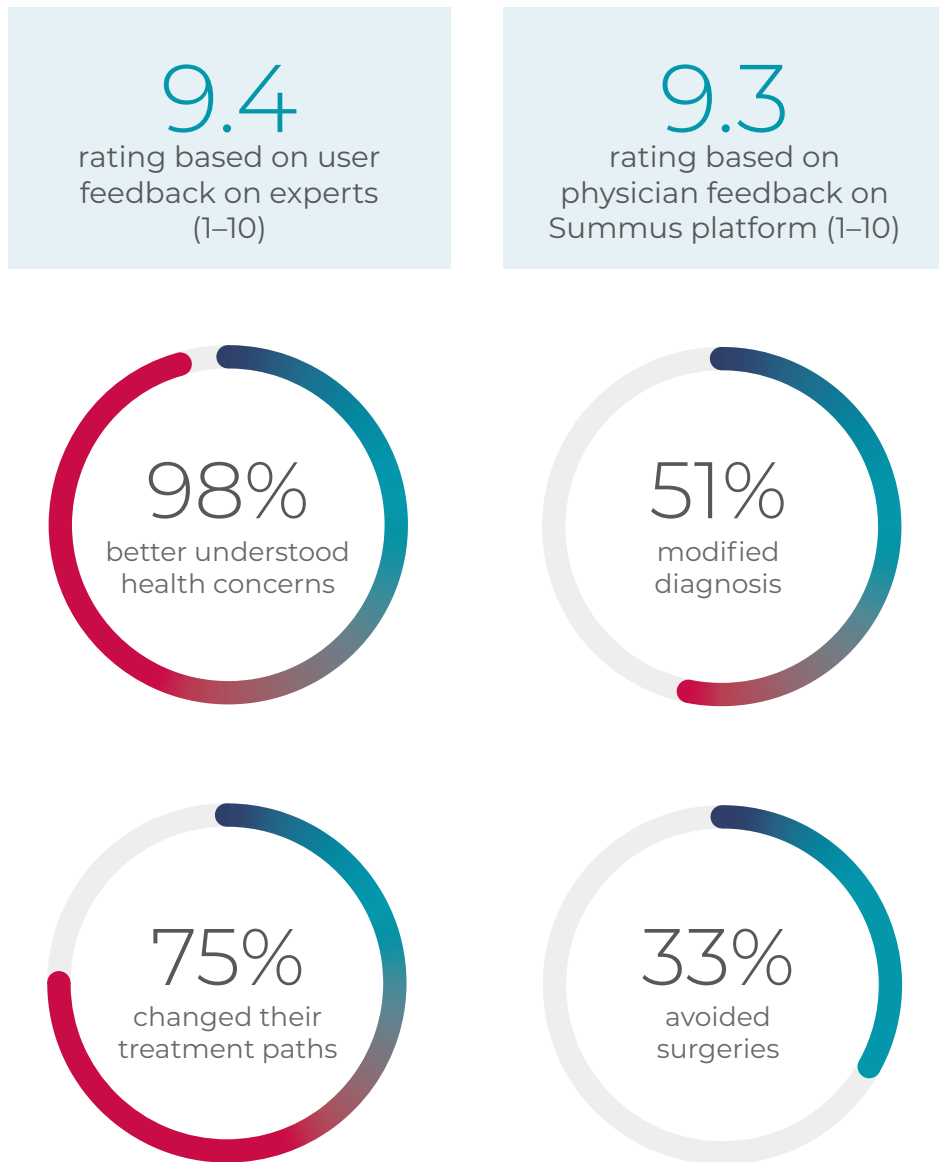


There’s a lot of learning, stress and “unknown unknowns” that accompany a patient’s journey across the continuum of care. A critical need is to be educated about and understand their condition, therapeutic options, and available resources — a process that takes time. By providing convenient access to expert information, a virtual clinical model can help patients navigate the complexity of health care. Specialists’ expertise can be used to interpret treatment recommendations and guide the patient’s next steps in their care journey, increasing the likelihood of a successful outcome.

Our research shows that the combination of personalized virtual specialty care and high-quality physicians supporting medical decision-making can drive 5-10x higher utilization than other solutions.

Ninety-eight percent of our surveyed users report that a consultation with a Summus physician helps them better understand their health concerns. Additionally, across our book of business we have seen a significant number of members reporting a modified diagnosis, a change in treatment paths or medications, and avoided surgeries (**Figure 3**). The process promotes and reinforces the value of shared decision-making versus the traditional pedagogical approach to medicine.

**Figure 3** Virtual Specialty Care Drives Better Outcomes



## Why you need to know about it

Virtual specialty care benefits everyone in the care continuum. Patients get the medical information they need faster and more conveniently and use that information to drive health outcomes. Employers and health plans reduce health care costs, boost productivity, and improve employee satisfaction. PCPs gain prompt access to practitioners with specialized expertise and are able to maintain their role as the patient's medical home by keeping care directly with them but using the guidance of specialists in helping diagnostic workups and therapeutic plans. Specialists expand their services to more patients on a platform that accommodates their schedules and workflows.

Virtual specialty care restores and strengthens human connection in health care. Employers can be instrumental in enabling this process by including virtual specialty care in employee benefits packages and creating a virtual clinical front door to high quality care.



Organization leaders looking to establish or enhance virtual health care capabilities and ecosystem relationships to prepare for a future of virtual specialty care should begin the process by considering the following questions:

1. Are we currently empowering employees to take charge of their health care journey by offering virtual care as a benefit?
2. Are we enabling employee access to specialized medical expertise across all health concerns?
3. Are we making that access to high-quality virtual care easy, fast, and cost-effective?







Leaders should also seek employee input by asking:

1. Do you or a family member have acute or chronic health conditions that require specialist health care?
2. Are you responsible for making healthcare decisions for your family members?
3. How important is it to you to have access to the best specialist doctors available?
4. How satisfied are you with the specialist care you are receiving today?
5. How important is it to you to have access to virtual health care as a supplement/alternative to in-person care?

Virtual health's critical role and exceptional performance during the COVID-19 pandemic has solidified its place in the health care value chain. As we look to the next evolution of virtual healthcare, virtual specialty care is staking its claim as a groundbreaking new category that will further improve clinical and cost outcomes for physicians, patients, employers, and health plans.

Please contact us at [info@summusglobal.com](mailto:info@summusglobal.com) for additional information on virtual specialty care and the latest trends and results from our studies, or visit our website [www.summusglobal.com](http://www.summusglobal.com).



## About Summus

Summus is the leading virtual specialty care company, founded with a mission to restore human connection in healthcare. Our proprietary marketplace model attracts leading specialists who support better insights and decision making across all health questions. With a curated network of more than 5,100 renowned specialists from top academic medical centers, and more than 2.1 million members around the world, Summus serves as the clinical front door to access trusted, high quality healthcare expertise, and to support people at the moments that matter most.