



COVID-19 USHERS IN PATIENT-FIRST CARE MODEL

Pandemic Fast Tracks Healthcare Innovation,
Forever Changes How Care is Delivered

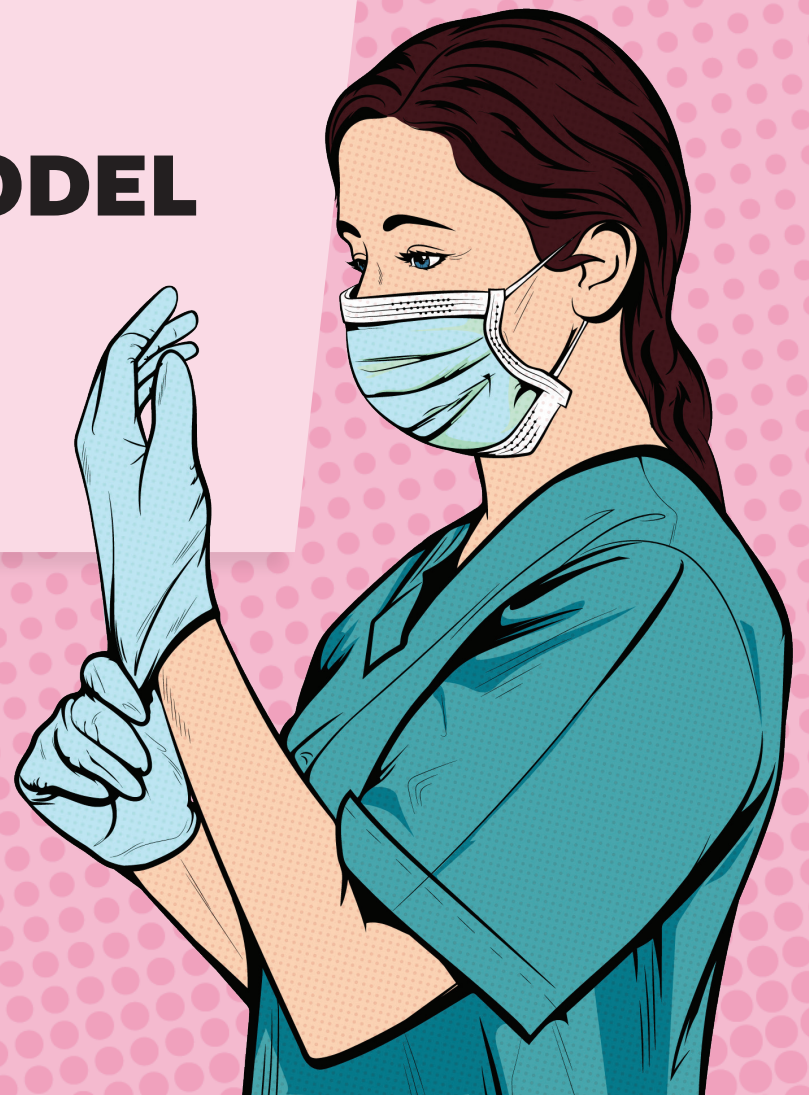


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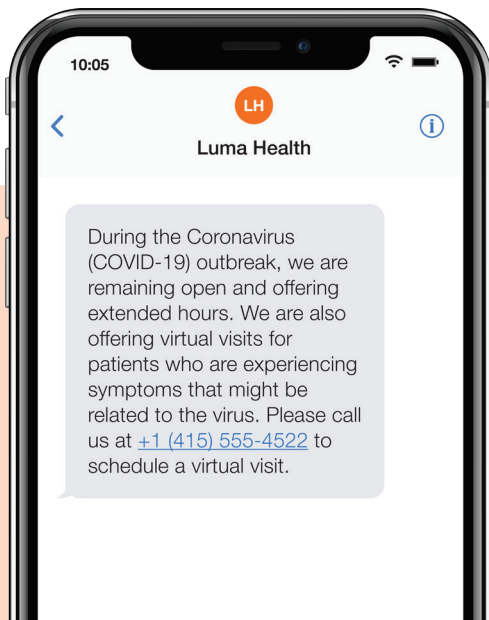
**COVID-19 IS CHANGING
PATIENT BEHAVIORS**

PATIENT COMMUNICATION SURGES IN MIDST OF OUTBREAK

The spread of COVID-19 in the U.S. creates an immediate need for rapid patient engagement across the country. Providers need to quickly share information, manage canceled appointments, screen patients, schedule virtual visits, and find ways to ensure the accessibility of care, despite overwhelming new challenges.

To determine the true impact on healthcare providers across the nation, Luma Health analyzed roughly 5.7 million patient data interactions from its platform that 300,000 healthcare professionals use to connect with more than 12 million patients.

This report highlights how the novel coronavirus is changing the way patients access healthcare services and how providers communicate and engage with patients.

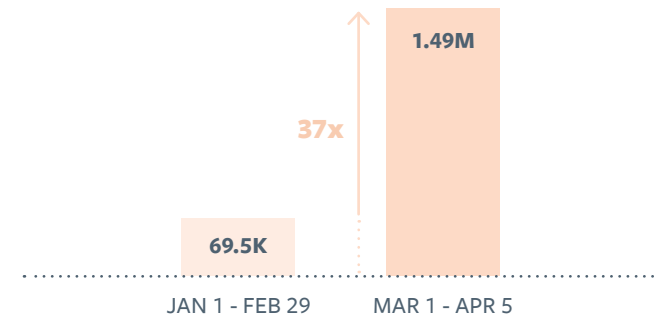


1.56M Messages Broadcast to Patients During Outbreak

Healthcare providers engaged millions of patients using the Luma Health Total Patient Engagement Platform™ to broadcast 1.56M messages from January 1 - April 5, 2020, with 1.49M messages delivered between March 1 - April 5 to combat the coronavirus.

BROADCAST MESSAGE VOLUME

January 1 - April 5, 2020



Healthcare Providers Increase Patient Communications 37x

As the coronavirus spread across the nation, healthcare providers increased patient communication via broadcast messages 37 times over, broadcasting more than a million messages to patients.¹

¹ Using the Luma Health platform

COMMUNICATING HEALTH AND SAFETY INFORMATION

PROVIDERS' RELIANCE ON BROADCAST MESSAGING INCREASED 37X DURING PANDEMIC

As the coronavirus sweeps across the U.S., clinics are changing the way they communicate with patients. They are educating patients about what precautions to take to stay healthy and safe, updating them about clinic policies and screening procedures, introducing new telehealth services, and explaining other changes that impact patients' ability to access care.

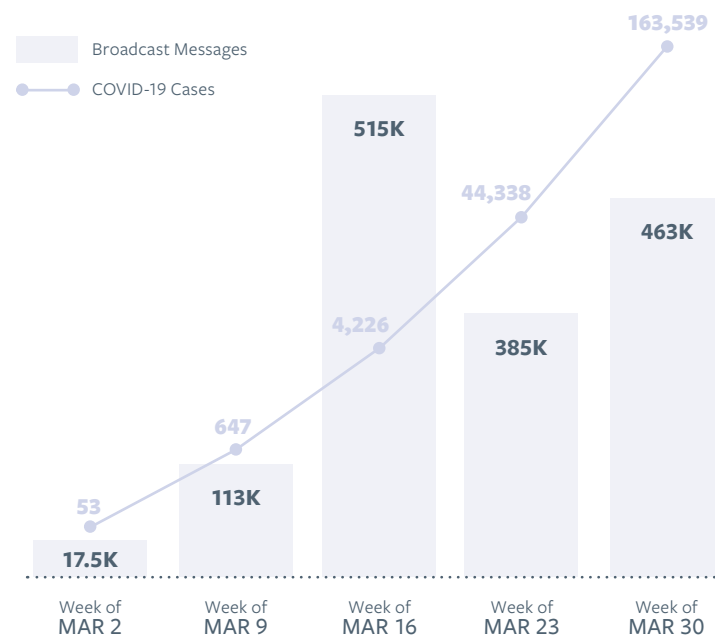
PROVIDERS ARE DISSEMINATING CRITICAL INFORMATION ACROSS LARGE PATIENT POPULATIONS VIA **MASS TEXTING, EMAILING, AND AUTOMATED VOICE CALLS.**

Healthcare Providers Increase Patient Communications as Coronavirus Cases Rise

As the number of COVID-19 cases in the U.S. spiked dramatically, healthcare providers are broadcasting messages to patients at unprecedented volumes to quickly and effectively reach large portions of their patient population.²

INCREASE IN DAILY BROADCAST MESSAGES

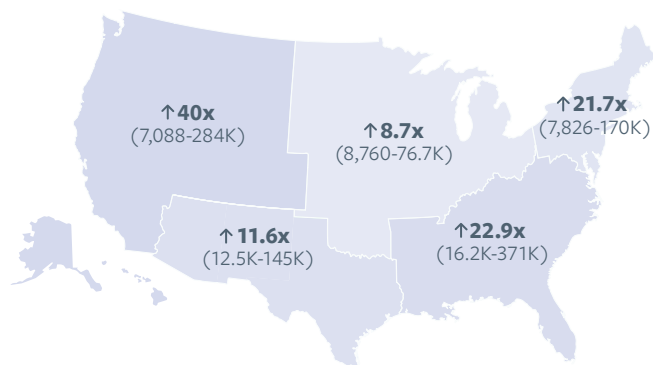
In the U.S., March 2 - April 5, 2020



² Using the Luma Health platform

INCREASE IN MESSAGES SENT BY REGION

From late-January to the end of March 2020



Healthcare Providers in Western States Respond to Crisis with Most Patient Communication

Healthcare providers across the U.S. are increasing patient communications during the pandemic.³ The Western U.S. led with a 40x increase in broadcast messages to patients, followed by the Southeastern region with a 22.9x increase. The Northeast U.S. followed close behind with a 21.7x increase in messages broadcast to patients during the outbreak in the U.S.

California, one of the states hit early and hard by COVID-19, increased patient communications more than 91 times over, with 206,000 messages broadcast during this timeframe.

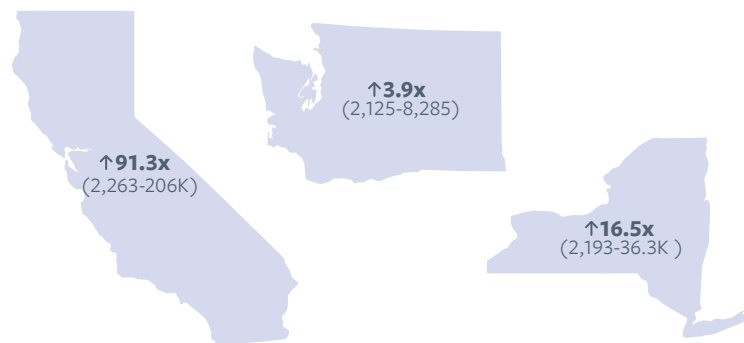
³ Using the Luma Health platform

Healthcare Providers in California Increase Broadcast Messages to Patients 91.3x

New York, California and Washington were hit early and hard by COVID-19. The first coronavirus death in the U.S. happened in Washington state and was announced Saturday, February 29. California and New York — the nation's hardest hit states — had approximately the same number of COVID-19 cases in early March.^{xiv} California took quick and decisive action to stem the outbreak. Within weeks, California's governor issued the first statewide mandatory restrictions in the nation, ordering California's nearly 40 million residents to stay home to help combat the outbreak. Healthcare providers across the state responded in kind with a 91.3x increase in broadcast messages delivered to patients to slow the spread of COVID-19 (late-January through the end of March 2020).

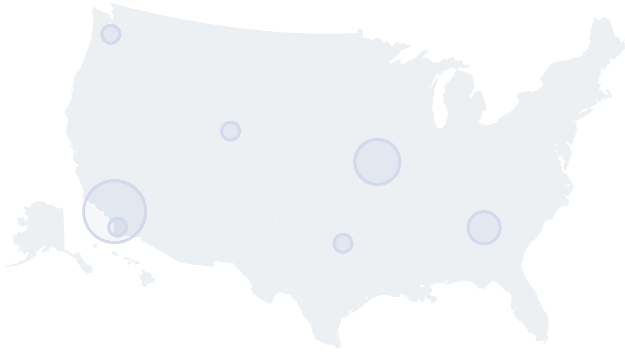
INCREASE IN MESSAGES SENT IN STATES HIT EARLY AND HARD BY COVID-19

From late-January to the end of March 2020



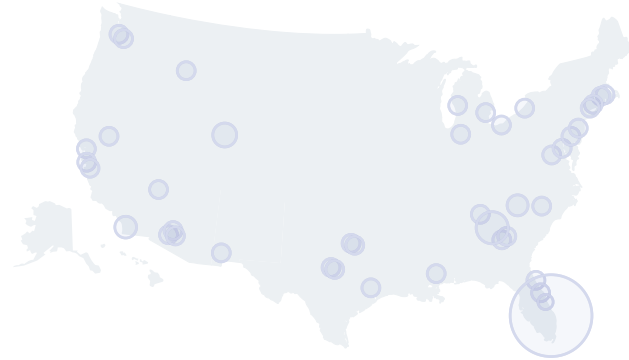
MARCH: WEEK 1

Growth of Outbreak-Specific Message Volume



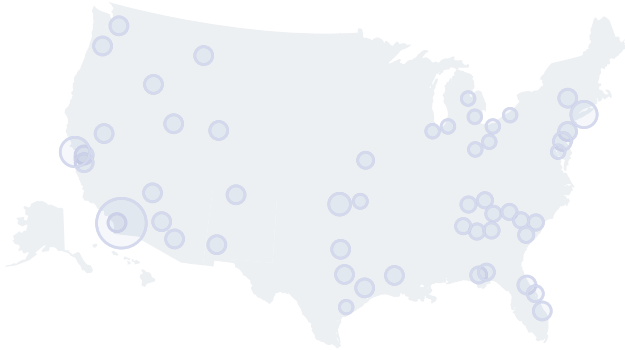
MARCH: WEEK 2

Growth of Outbreak-Specific Message Volume



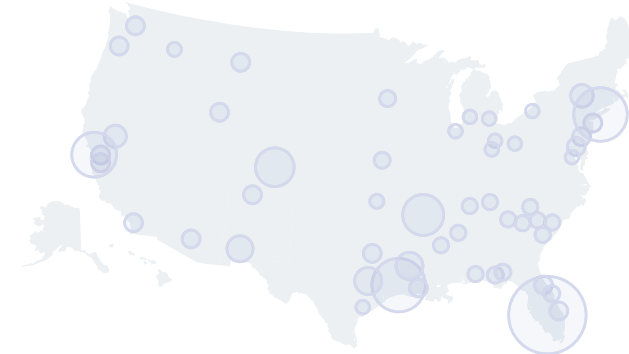
MARCH: WEEK 3

Growth of Outbreak-Specific Message Volume



MARCH: WEEK 4

Growth of Outbreak-Specific Message Volume



COVID-Specific Messages the Focus for Providers

During the month of March, the U.S. went from less than 53 cases of COVID-19 to more than 185,000 cases. A pandemic was declared worldwide and 32 states issued stay-at-home orders. As the coronavirus spread across the country, healthcare providers dramatically increased communication with their patients to provide critical information about COVID-19 in an effort to help stem the outbreak.

APPOINTMENT CANCELLATIONS

DEFERRAL OF NONESSENTIAL APPOINTMENTS CONTRIBUTES TO OVERALL INCREASE IN CANCELLATIONS

Across the U.S., appointments for non-urgent care — such as wellness visits, preventive screenings, and elective surgeries are being deferred. Concerns about exposure risks in healthcare settings, along with the need to reserve resources for patients with COVID-19 or other serious medical issues, are driving appointment cancellations. Telehealth is now essential to ensure patients can gain access to needed care and providers can generate necessary revenue to stay afloat.

COVID-19 DRIVES 108% INCREASE IN APPOINTMENT CANCELLATIONS ACROSS 12 MILLION PATIENT DATABASE.



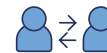
Appointment Cancellations Increase

Clinics are facing greatly reduced appointment volumes, which directly impacts revenue. In March, healthcare providers saw a 108% increase in appointment cancellations.



Confirmations Decrease

During the same timeframe, patients confirmed significantly less appointments, with appointment confirmation rates falling by 43%.



Patient Engagement Rates Double

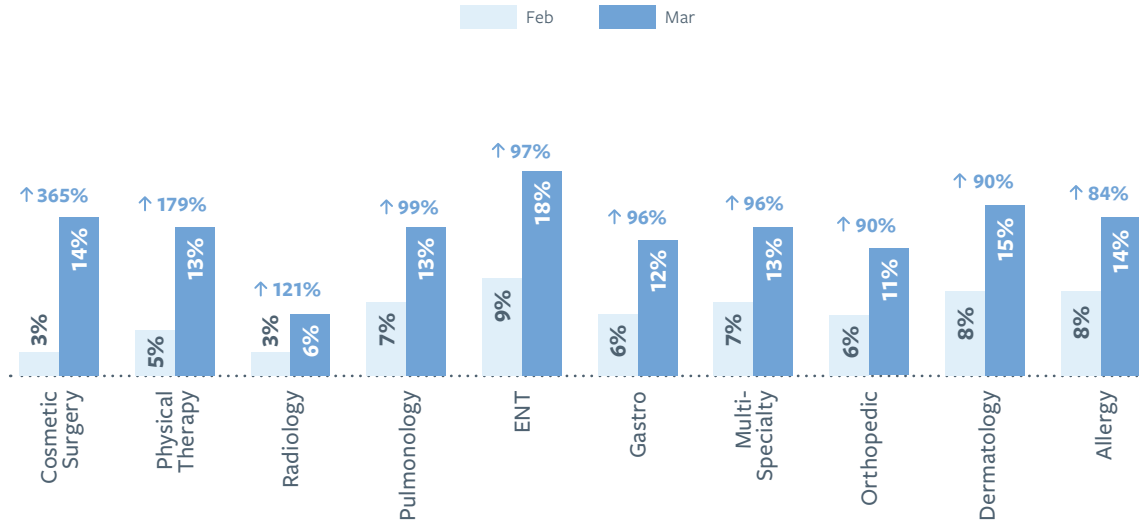
Throughout March 2020 patients engaged with their healthcare providers at higher than average rates to make scheduling changes.



Reduced Appointment Volumes Hurt Clinics

52% of primary care practices report a severe or near severe impact on their practice.¹

10 SPECIALTIES MOST IMPACTED BY CANCELLATIONS



Cancellations Severely Impact Specialty Clinics

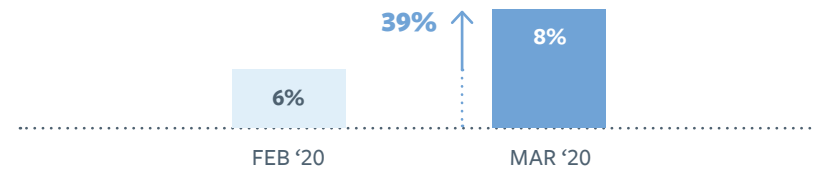
Cosmetic surgery, physical therapy, radiology, and pulmonology clinics experience the highest increase in appointment cancellations.⁴

FQHCs See Cancellations Rates Rise Alongside Spread

As COVID-19 spreads across the country, community health centers experience a 39% increase in appointment cancellation rates.⁴

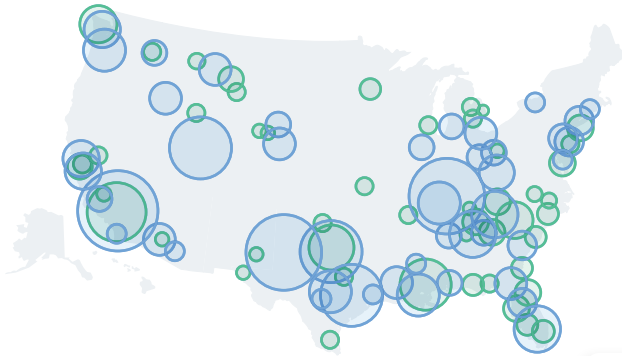
⁴ Cancellation rate comparison: last two weeks in February vs. last two weeks in March 2020, using the Luma Health platform

CANCELLATION IMPACT ON COMMUNITY HEALTH CENTERS



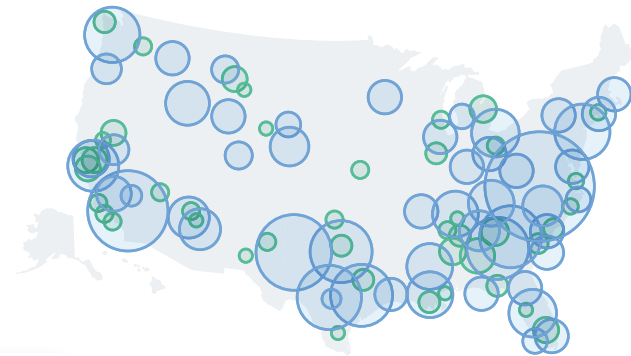
MARCH: WEEK 1

Impact of COVID-19 on Clinic Capacity Utilization Rates



MARCH: WEEK 2

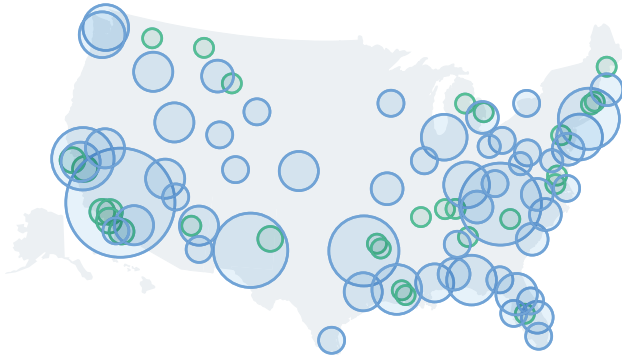
Impact of COVID-19 on Clinic Capacity Utilization Rates



- Decreased Capacity Utilization Rate
- Increased Capacity Utilization Rate

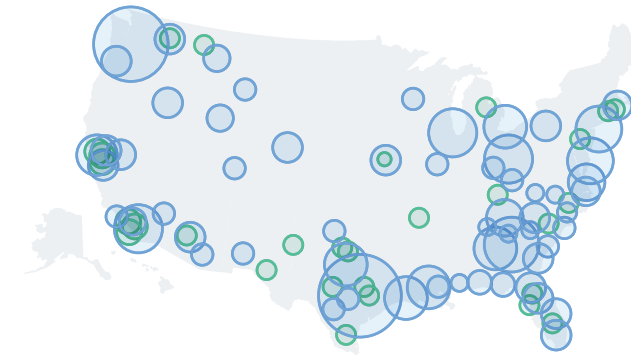
MARCH: WEEK 3

Impact of COVID-19 on Clinic Capacity Utilization Rates



MARCH: WEEK 4

Impact of COVID-19 on Clinic Capacity Utilization Rates



Clinic Capacity Utilization Rates Impacted by COVID-19

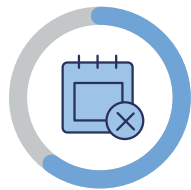
Clinics are filling fewer appointments as a result of regional mandates to cancel non-critical care and patient reluctance to enter potentially contagious healthcare facilities. Throughout the month of March 2020, clinic capacity utilization decreased dramatically, reducing necessary appointment revenue for clinics. As a result, clinics are looking to telehealth to deliver needed care via virtual visits.

PROVIDER-INITIATED CANCELLATIONS

Provider-Initiated Cancellations Create Backlog of Patients in Need of Routine and Chronic Care

COVID-19 is creating new access and revenue challenges, which is why many clinics are rushing to reschedule in-person appointments as telehealth virtual visits. By offering virtual visits, providers can continue to capture revenue and deliver routine and chronic care to those who need it. With automated messages and online scheduling, providers can simplify scheduling of virtual visits and remove stress on staff members who are flooded with calls from concerned patients.

PRIMARY CARE CLINICS



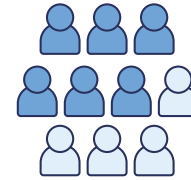
58% are cancelling routine visits



83% have capacity for telehealth

As Cancellations Rise, Telehealth Emerges

More than half (58%) of primary care clinics have canceled well and chronic care visits to accommodate need. Yet, there is room for telehealth — 83% of primary care providers have appointments available.ⁱⁱ



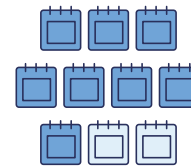
Chronic Care Still Important During Pandemic

6 in 10 Americans live with at least one chronic disease.ⁱⁱⁱ



Provider Phone Lines Flooded

74% of primary care providers report phone lines are flooded with calls from concerned patients.^{iv}



Patients Demand Self-Service Scheduling

8 in 10 patients want to reschedule or schedule appointments online.^{xv}



Self-Scheduling Proves Effective

More than 1 in 3 patients self-schedule appointments online after receiving automated prompts from providers.

PATIENT-INITIATED CANCELLATIONS

Wary Patients Are Cancelling Appointments En Masse

Due to the COVID-19 outbreak, many patients are worried that visiting a healthcare clinic will increase their risk of becoming sick. Additionally, patients across the country are heeding warnings to stay home whenever possible. As a result, patients are cancelling appointments to minimize their risk of exposure and comply with health expert recommendations and new laws.

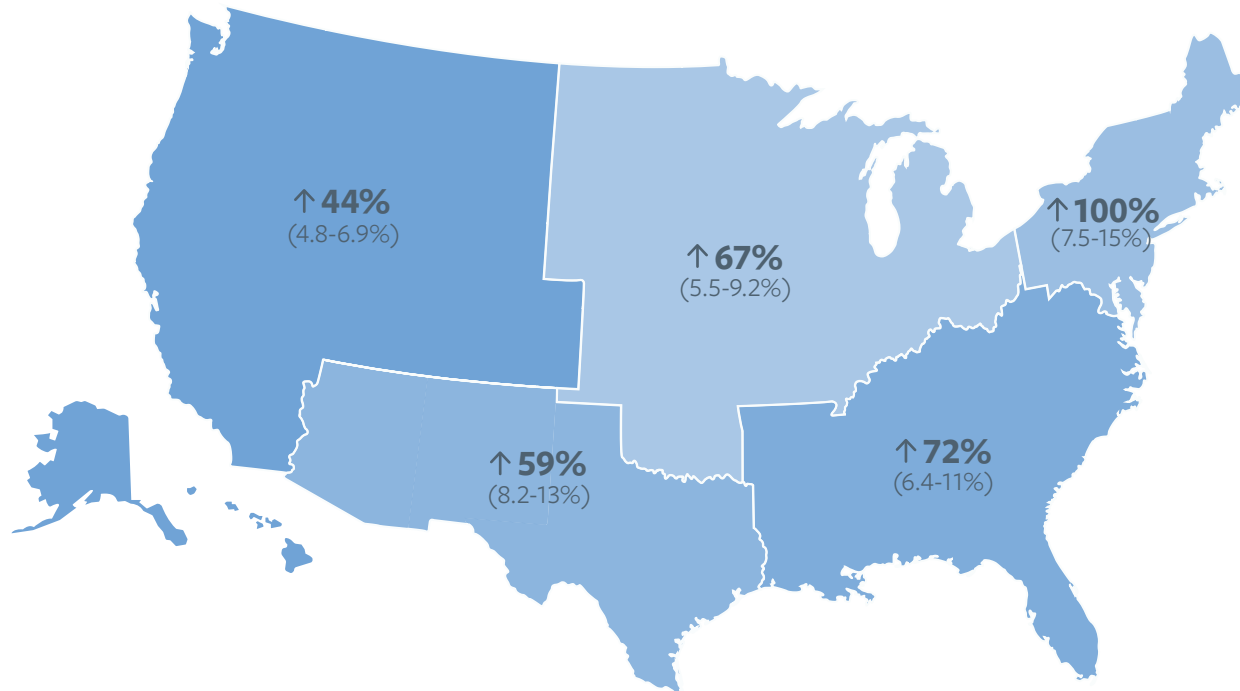
Cancellations Increase as Coronavirus Spreads

Healthcare providers in the Northeastern states are experiencing the highest increase in cancellation rates (100%) during the outbreak. Providers located in the Southeast are a close second with a 72% increase in appointment cancellation rates.⁵

⁵ Using the Luma Health platform

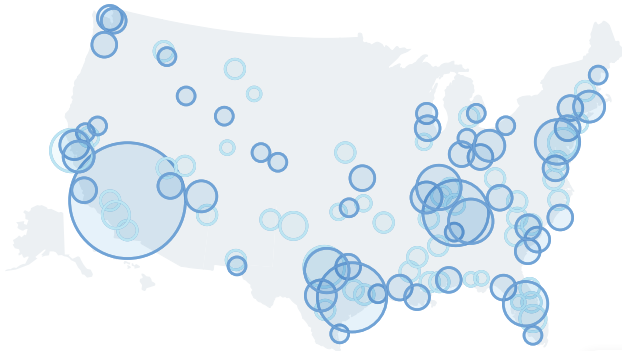
INCREASE IN CANCELLATION RATES BY REGION

From the last two weeks of February to the last two weeks of March 2020



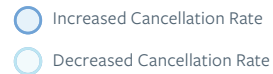
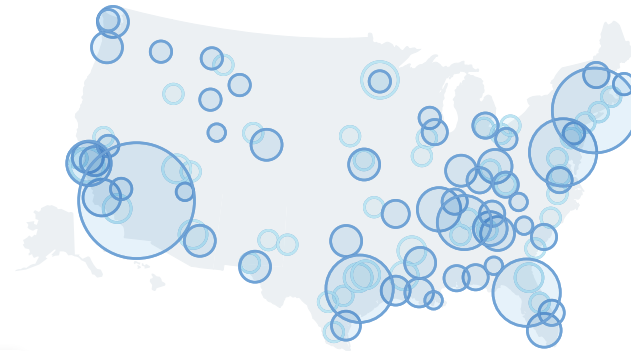
MARCH: WEEK 1

Impact of COVID-19 on Appointment Cancellation Rates



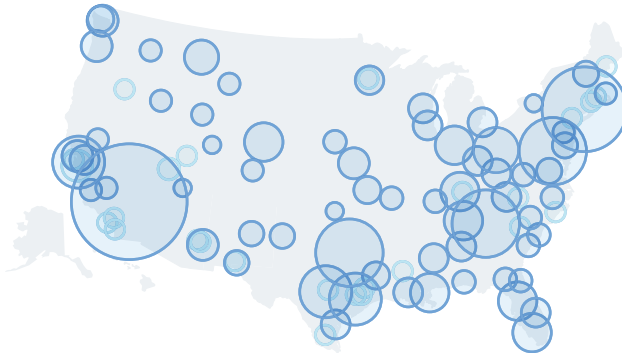
MARCH: WEEK 2

Impact of COVID-19 on Appointment Cancellation Rates



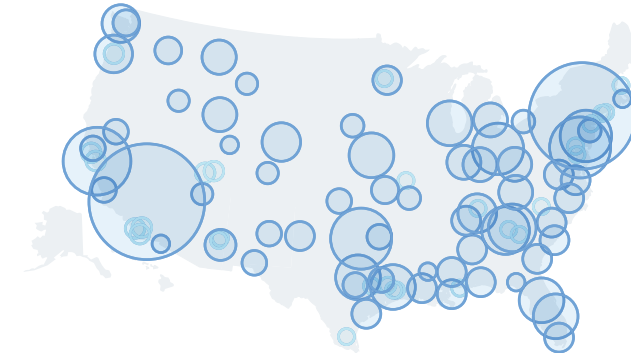
MARCH: WEEK 3

Impact of COVID-19 on Appointment Cancellation Rates



MARCH: WEEK 4

Impact of COVID-19 on Appointment Cancellation Rates



Appointment Cancellations Increase as Coronavirus Spreads

As COVID-19 spreads across the nation during the month of March, healthcare providers experience increasingly more appointment cancellations. Week over week appointment cancellation rates increased dramatically.

SCREENING AND TRIAGING PATIENTS

AUTOMATED SURVEYS ENABLE PROVIDERS TO SCREEN MILLIONS OF HIGH-RISK PATIENTS

Identifying and screening patients who are most at risk of contracting the new coronavirus is a priority. Using simple text messages to deliver automated surveys and digitize screenings has proven effective for providers — particularly among at-risk populations or those in areas with community spread of COVID-19.

PROVIDERS ARE PULLING DATA FROM THEIR EHR SYSTEMS TO IDENTIFY HIGH-RISK PATIENTS AND DIGITIZE SCREENING.

HIGH-RISK PATIENTS REQUIRE EARLY SCREENING

The CDC identifies some of the most at-risk populations as:



52 million

Americans who are 65 or older^v



37 million

People with chronic lung disease^{vi}



30.3 million

People who have serious heart conditions^{vii}



1.8 million new diagnoses per year

Cancer patients undergoing treatment^{viii}



1.1 million

Patients with HIV^{ix}



Nearly 1 in 10 Americans

People of any age with severe obesity^x

SCHEDULING TELEHEALTH APPOINTMENTS

PROVIDERS SCHEDULE VIRTUAL VISITS TO SAFELY CONTINUE DELIVERING PATIENT CARE

The CDC recommends clinics provide more telehealth appointments. By offering virtual visits, providers are continuing to deliver care to patients in need, including those who:

- Have had non-urgent appointments canceled
- May be infected with COVID-19
- Are considered high-risk and are sheltering in place
- Are worried about being infected at a clinic

Not only does telehealth help maintain access to care, it also allows providers to refill schedule openings caused by cancellations. Medicaid already provides a great deal of flexibility to states that wish to use telehealth services in their programs. And, Medicare coverage has been expanded to pay providers for virtual appointments during the COVID-19 crisis, ensuring providers can leverage telehealth to make needed care accessible to patients.

AS THE CORONAVIRUS SPREADS ACROSS THE U.S, HEALTHCARE PROVIDERS RACE TO ADOPT TELEHEALTH SOLUTIONS AND SCHEDULE VIRTUAL APPOINTMENTS.

Patients Are Telehealth-Ready

As Americans adjust to COVID-19 disruptions, they're becoming more experienced at using two-way video communication for work, school, and even healthcare.



During the first week of March 2020, **6.7 million new users** downloaded business teleconference apps — an increase from 1.4 million during the first week of January 2020.^{xi}



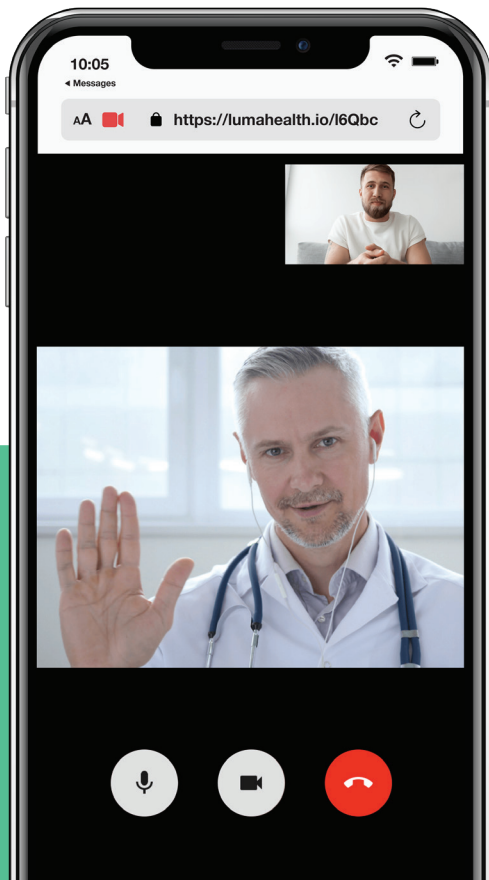
Virtual learning has been adopted in many areas of the U.S. now that school closures have impacted at least 124,000 U.S. public and private schools and affected **more than 55 million students**.



Within the first week of introducing a telehealth offering into the market, over **50 providers** adopted Luma Health's telehealth solution to immediately book virtual visits and continue delivering needed patient care.

SIMPLICITY IS VITAL TO TELEHEALTH'S SUCCESS

The demand for telehealth and the benefits of rapid deployment are clear. But, for telehealth to effectively replace in-person visits during the COVID-19 crisis, it must be simple for patients and providers to use. Ensuring that every patient can easily participate in a virtual visit without needing a special app, portal, login, or other technology they're unfamiliar with is essential for telehealth adoption.

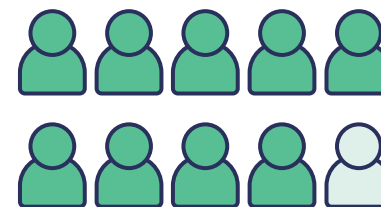


SIMPLE TECHNOLOGY REQUIRED TO MAKE TELEHEALTH MORE ACCESSIBLE



More than **1 in 3 surveyed providers** (36%) cited patients' access to technology as a barrier to telehealth.^{xii}

PATIENTS LOOK TO TELEHEALTH FOR CONVENIENCE



Nine out of 10 patients who participated in a virtual visit said it was more convenient than other ways of getting care.^{xiii}

ABOUT LUMA HEALTH

Luma Health's easy-to-use patient messaging and telehealth solutions help clinics and healthcare practitioners rapidly deploy patient engagement communications and deliver needed care. By utilizing the Luma Health Total Patient Engagement Platform™, specialty clinics, FQHCs, primary care physicians and large health systems can send patient messaging via text, email and phone to share essential information and maximize access to care. Providers across the U.S. are using Luma Health's Total Patient Engagement Platform™ to manage schedules, screen patients and deliver care to patients via virtual visits.

SCHEDULE A DEMO

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(415) 741-3377 | demo@lumahealth.io



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