



# What Recent Business Relationships Tell Us About The Future Of Telehealth

2020



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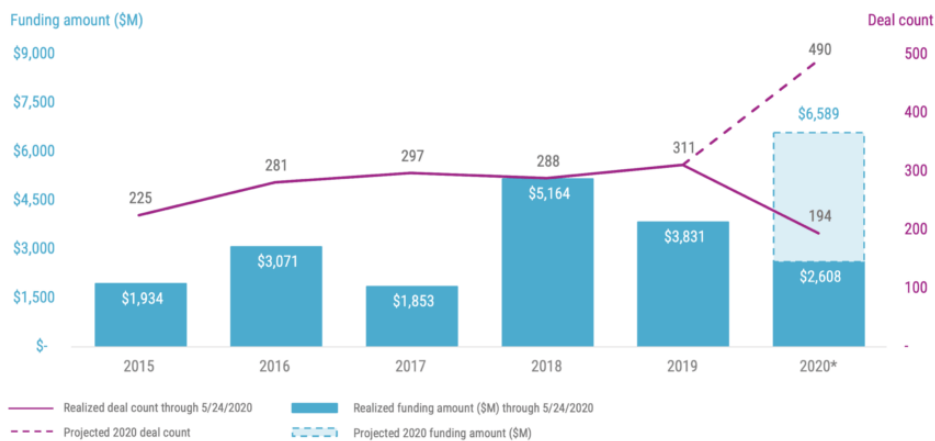
# An array of healthcare stakeholders – from payers to providers to drug developers – are increasingly joining forces with telehealth companies to expand access to “socially distant” care.

Covid-19 has drawn an unprecedented amount of attention to telehealth.

Between February and April, monthly telehealth news mentions tripled. Meanwhile, investor interest in the space is picking up. Telehealth startups have already raised \$2.6B across 194 deals – on pace to set new funding and deal activity records in 2020 (\$6.6B across 490 deals).

## Telehealth deals and dollars are rising at record-setting paces

Telehealth deals and funding amount (\$M), 2015 – 2020\*



Source: cbinsights.com \*2020 projected values are based on annualized YTD data (5/24/2020)

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At the same time, a wide range of healthcare stakeholders are forging business relationships with telehealth companies to bridge gaps in a challenging healthcare landscape and to minimize opportunities for viral transmission.

More than 80 companies have established relationships with telehealth companies so far in 2020. These relationships demonstrate the expanding breadth of services that telehealth technology can provide.

### Telehealth business relationships ramp up in 2020

Telehealth business relationships, 2020 YTD (6/2/20)



Source: cbinsights.com

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Below, we look at some of these newly formed relationships – from strategic partnerships to license agreements – and consider what they could mean for telehealth going forward.

The highlighted business relationships are categorized by telehealth use case.

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## Care Navigation and Triage

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Providers and payers have increasingly sought out digital solutions to better engage and guide patients through the path of care. The global health crisis brought on by Covid-19 has only accelerated that trend.

By using automated triaging and care navigation tools, providers can achieve more efficient care prioritization (e.g. based on patient risk level) and optimize clinical workflows to relieve capacity constraints in the overburdened healthcare system.

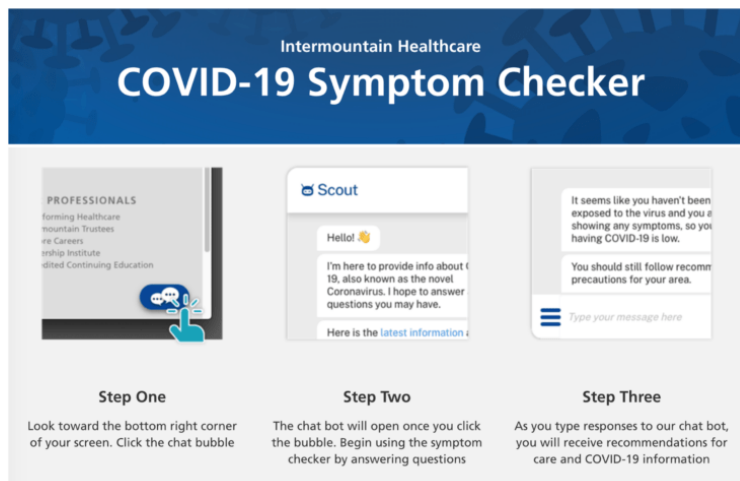
These solutions also allow patients to initiate care on their own terms – using their own devices – from the comfort and safety of their homes. In the context of infectious diseases like Covid-19, this helps contain transmission by reducing unnecessary points of contact between patients and providers.

### PROVIDERS

One recent business relationship here is Intermountain Healthcare’s partnership with “digital front door” startup [GYANT](#). In April, the companies co-developed and deployed a Covid-19 “Screener and Emergency Response Assistant” (SERA) branded as Scout.

Scout, accessed through the health system’s homepage, offers automated chat-based screening and care navigation support to Intermountain’s patients. The solution has been especially useful during the Covid-19 pandemic as it allows patients to check their symptoms quickly from home – making it easier to follow social distance guidelines and improving the accessibility of healthcare resources to those at higher risk.

Less than 3 weeks following its launch, Intermountain says it saw more than 157,000 users with Scout. Over the same period, the health system reported a 30% decrease in call center volume, freeing up lines of communication for the highest priority cases.



GYANT has also partnered with patient-provider matching startup [Kyruus](#) to offer chat-based care navigation and triage tools to their health system customers.

GYANT has raised \$7M in total disclosed funding to date from investors including Grazia Equity and Polytech Ecosystem Ventures and accelerator programs like those offered through Cedars-Sinai and Mayo Clinic.

## INSURANCE AND BENEFITS

Payers are pursuing similar strategies. For example, Cigna and its wholly-owned subsidiary Express Scripts joined forces with [Buoy Health](#) to create an early intervention screening tool for members concerned about potential Covid-19 symptoms. Cigna and Express Scripts are currently offering the tool to their members for free.

The digital tool incorporates guidance from the CDC to help categorize individual risk levels, triage symptoms, and recommend next steps for care. By connecting with individuals before they seek care and helping to triage them appropriately, Buoy's app aims to ease capacity strains while also improving the patient experience.



## Primary Care

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Health systems, payers, and healthcare IT companies continue to forge relationships with telehealth companies operating in the primary care arena.

By leveraging their partners' proven telehealth models, health systems can improve the primary care experience of patients without having to make significant investments in capital, technology, or managerial resources. At the same time, they can reduce administrative burden and cost by helping to integrate care coordination processes.

Payers have increasingly expanded their telehealth offerings in an attempt to expand access, make care more convenient, improve health outcomes, and reduce costs. Payers hope that these virtual care benefits will help gradually shift consumer behavior away from reactive care toward a more proactive, predictive health management approach.

In response to payers' and providers' growing interest, healthcare IT companies serving those end markets are developing relationships with telehealth platforms and providers to facilitate vendor/partner selection and to streamline implementation.

### **PROVIDERS**

Health systems have increasingly turned to telehealth companies to help them modernize and expand their reach within primary care.

Some health systems — like UCSF Health and Partners HealthCare — have prioritized relationships with end-to-end primary care providers that adopt flexible models of care delivery (e.g. both in-person and virtual).

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In January 2020, UCSF Health signed an affiliation agreement with [Circle Medical](#) to improve its patients' access to, outcomes from, and experience with primary care. The affiliation plans to launch two clinics in the Bay Area, which will accommodate same- or next-day appointments, accept most insurance plans, and not require any membership fees.

Circle Medical treats patients both virtually and in person at its network of clinics. Through a dedicated mobile app, patients can communicate with providers between visits, manage medical records, and receive personalized preventive care recommendations. The streamlined offering is meant to provide a “modern and digital experience” that better meets consumers' evolving expectations.

Circle Medical has raised \$6.5M in total funding to date from investors including Tencent Holdings, WELL Health Technologies, and Y Combinator.



Boston-based health system Partners HealthCare recently announced a similar arrangement with primary care platform [One Medical](#). One Medical's offering is akin to Circle Medical's though access is membership-based.

In late January 2020 – roughly 2 weeks following the partnership announcement – One Medical completed a \$245M initial public offering (IPO) at a \$1.7B valuation.

## INSURANCE AND BENEFITS

Employee health benefits platform Accolade recently introduced a new virtual primary care option with [PlushCare](#) that aims to provide employees with clinical solutions at home while also easing overburdened healthcare facilities and supporting social distancing requirements.

The combined Accolade and PlushCare Covid-19 rapid response platform brings together care navigation and triage with primary care assessment and referral. In addition to Covid-19-related care, the solution also allows members to access virtual urgent, preventative, and chronic care in accordance with CDC social distancing guidelines.

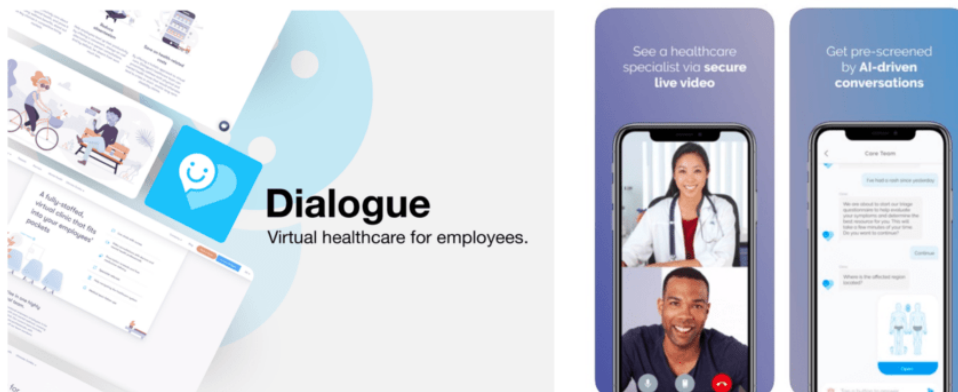


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In Canada, telehealth startup [Dialogue](#) recently partnered with two major insurers: Canada Life and Sun Life.

Dialogue's platform allows employees to access on-demand care through chat or video. Through their partnership with the startup, Canada Life and Sun Life have moved to make virtual care a standard benefit for employers with group benefits plans.

Sun Life is making its telehealth services available for free during the Covid-19 crisis.



The state of Massachusetts is also temporarily waiving telemedicine costs. Through partnerships with [Doctor on Demand](#), [Maven](#), and [Galileo Health](#), state-run MassHealth will cover 100% of the costs related to Covid-19 virtual care for its 1.8M+ members.

These arrangements were designed to take some pressure off front-line providers while also expanding access to first-line care – two critical components in the state's efforts to combat Covid-19.

Compared to a year ago, Doctor on Demand has reportedly seen a 200%+ uptick in usage in the state.

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## HEALTHCARE IT

Healthcare IT giant Cerner recently announced a collaboration with virtual care provider [HealthTap](#) to expand and modernize its workforce benefit solutions for self-funded employers.

Cerner already offers a suite of solutions and services, including employee health portals, customized on-site and near-site health centers, and personalized wellness coaching, but the incorporation of HealthTap allows it to better address the growing demand for more cost-effective, flexible, and user-friendly care options.

The on-demand virtual care provided by HealthTap could be especially helpful for employees traveling to or working in remote locations.



## HealthTap

HealthTap works for people with or without traditional healthcare benefits and provides high-quality, convenient access to board-certified doctors and reliable information when they're sick. Members get the peace-of-mind and comfort of getting care, avoiding unnecessary urgent care and ER visits.

HealthTap is available 24/7, from any digital device.

## Diagnostic Testing

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By integrating easy-to-perform, at-home diagnostics with proven models of remote care, healthcare stakeholders are aiming to make diagnostics more discreet, convenient, efficient, and affordable.

These types of solutions provide a host of other benefits in the context of Covid-19: first by reducing opportunities for transmission and secondly by reducing triage to diagnosis turnaround time.

### CLINICAL LABORATORIES

Telehealth companies are joining forces with diagnostic labs to expand access to at-home diagnostic tests.

For example, Sweden-based telehealth startup [KRY](#) is working with ABC Labs to enable patients to take Covid-19 tests from home. KRY performs all of the patient-facing services like prescription writing, interpreting the test results, and providing follow-up care, while ABC provides the mail-in test kit and performs the laboratory analysis.

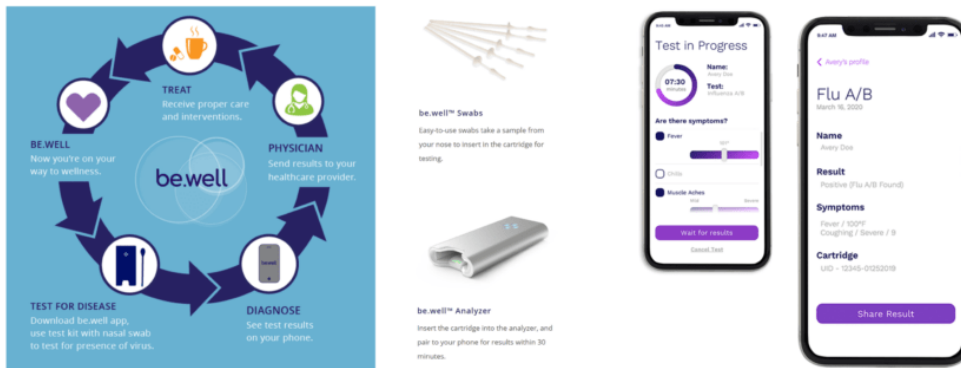
While these types of mail-in arrangements facilitate “socially distant” care delivery, they can take some time to complete.

### DEVICE MANUFACTURERS

Other solutions are being developed to rapidly process results on-site in patients’ homes. For example, [Alveo Technologies](#) is working on an at-home, smartphone-connected, infectious disease test system that it says can deliver results in 30 minutes and allows patients to share those results with remote providers.

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To advance its be.well platform of analyzers, nasal swabs, and cartridges, Alveo has enlisted the technical and regulatory expertise of its partner Johnson & Johnson. According to the company, Alveo plans to use a phased approach to first gain Emergency Use Authorization (EUA) for its Covid-19 test, followed by a multiplex assay that can test for a variety of infectious diseases.



## Acute Care

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Telehealth technologies are also being explored to help on-site care teams deliver more advanced care. These types of solutions have been especially critical amid the current crisis, as hospitals with full-scale ICUs struggle with bed shortages and smaller hospitals lack acute care expertise. By connecting on-site care teams with remote specialists, more patients should have access to the high-quality, acute care they need.

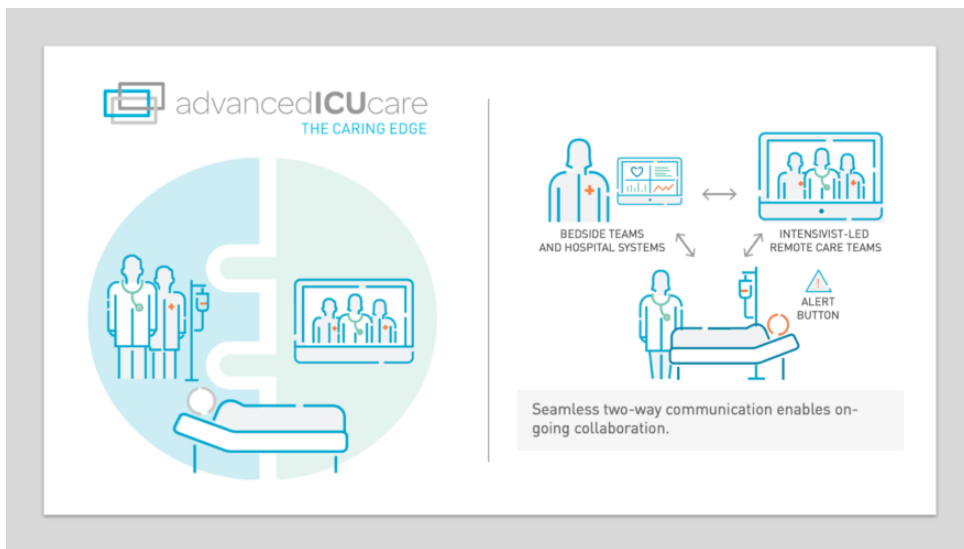
### PROVIDERS

Since the start of the year, [Advanced ICU Care](#) has launched high-acuity tele-ICU services with both HSHS St. Mary's Hospital (Illinois) and MUSC Health – Lancaster Medical Center (South Carolina).

The company leverages US board-certified clinicians and a proprietary telemedicine system to deliver high-acuity clinical expertise to on-site, bedside care teams.

The extra layer of support provided by the tele-ICU service allows smaller medical centers to treat more patients within their communities without having to transfer them to larger facilities. This, in turn, can facilitate greater comfort during treatment and better overall experiences and outcomes for critically-ill patients.

According to the company, Advanced ICU Care now serves roughly 100 hospitals and health systems across the US, caring for 95,000+ patients each year. It has raised \$25.9M in total disclosed funding to date from investors like Versant Ventures and Arboretum Ventures.



Competitor [SOC Telemed](#) partnered with SCP Health to rapidly staff and deploy on-demand, emergency telemedicine services across hospitals embattled with Covid-19.

According to SOC, the startup's telemedicine platform Telemed IQ is currently being used in more than 550 hospitals nationwide with plans to expand to more of SCP's programs – which span 400 healthcare facilities across 30 states – soon.

SOC Telemed has raised \$154.5M in total disclosed funding (including a \$50M line of credit) to date.

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## HEALTHCARE IT

Another type of relationship spawned from Covid-19 can be illustrated by [DrFirst's](#) partnership with the documentation software provider T-System.

T-System's customers account for more than 25% of US-based hospital emergency departments, freestanding emergency centers, and urgent care centers.

With the new partnership, clients using T-System's Emergency Department Information System can deploy telehealth services through DrFirst's Backline platform. In doing so, they hope to protect patients and medical staff from unnecessary exposure.

According to DrFirst, physicians using Backline can initiate secure video consults with patients without making them download any apps, access any portals, or undergo a registration process.

## Follow-Up Care

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Telehealth solutions are also being used to extend patient-provider lines of communication following discharge. By implementing these systems, providers are looking to make it safer to discharge patients earlier than may otherwise be the case, freeing up beds for those in more critical health conditions. Additionally, by continuing to engage patients, these services may help improve patient satisfaction, health outcomes, and retention.

### PROVIDERS

Hospitals are also turning to telehealth solutions to maintain connectivity with patients after they've been discharged from acute care.

For example, 10 Cleveland Clinic hospitals are now using GYANT's chat-based patient engagement platform to facilitate ongoing care with the aim of preventing future hospitalizations.

Integrated with patients' health records, GYANT's system can detect why patients were admitted and when patients are discharged. Upon discharge, GYANT initiates context-specific text chats, informing patients about their symptoms and how they should be progressing. For a more detailed follow-up, GYANT can also connect patients virtually to their care providers.

A similar system – designed by [Twistle](#) and deployed by [Xealth](#) – was rapidly rolled out across Providence St. Joseph's (PSJH).

To free up hospital beds for high-risk Covid-19 patients, PSJH has given relatively lower-risk patients a thermometer and pulse oximeter and asked them to check-in using Twistle's patient engagement platform 3 times per day.

The system – which relies on patient self-monitoring surveys – texts patients reminders and nudges them until a response is collected. It automatically scores the survey responses (based on risk) and triggers alerts to the care team if it decides a follow-up is required.

Backed in part by PSJH, Twistle has raised close to \$21M in total disclosed funding.



FIGURE 2. The Twistle Patient Status Tracker provides an easy to read graphical summary of every patient's current status, and together with flexible alerts, keeps the care team focused on who need attention now. For illustrative purposes only. (No PHI)



Home care providers like CareCentrix and Visiting Nurse Association of Omaha have also turned to telehealth to augment post-acute Covid-19 recovery. The 2 organizations have partnered with Florida-based patient engagement startup Synzi toward these efforts.



SECURE MESSAGING VIRTUAL VISITS CONDITION MANAGEMENT



"After an acute episode patients just want to go home. Our goal is to help people return home and heal. With new digital tools, we can speed long term recovery. Synzi empowers our national network to – in real time – address patient needs, whether virtual or in-person. Their applications support multiple languages which helps engage the ten million Medicare and Medicaid recipients for whom English is not their first language."

John Driscoll – CEO, CareCentrix

# Remote Monitoring

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Relationships in the remote monitoring space have primarily revolved around startups offering connected health devices. Ranging from wearables to handheld tools to completely contactless devices, these remote monitoring technologies could be important in [the care and containment of infectious diseases like Covid-19](#).

First, since they're used at home, these devices reduce the degree of contact between care providers and patients, which can help to contain infections.

Second, due to the robust set of real-time data they generate, connected devices can be a valuable resource for predictive modeling applications. In the case of infectious disease, more accurate predictions could enable faster outbreak response measures.

Remote monitoring can also improve resource utilization and, in some cases, can help reduce the strain on other healthcare resources.

## PROVIDERS

Indiana-based Deaconess Health System recently partnered with [TytoCare](#) to seamlessly integrate the startup's connected exam tools with Deaconess Clinic LIVE, the health system's proprietary virtual care platform.



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Tyto's device and its accompanying smartphone app allow quarantined patients to carry out their own exams – capturing data from the heart, lungs, throat, ears, skin, and abdomen – and share their results in real-time with remote physicians.

Since 2012, TytoCare has raised more than \$100M in total disclosed funding and built a robust network of relationships, including partnerships with EHR giant Epic and retail giant Best Buy.

## **HEALTHCARE IT**

In March, remote monitoring startup [BioIntelliSense](#) signed a distribution deal with healthcare IT company Tabula Rasa HealthCare (TRHC).

Under the agreement, TRHC will distribute BioIntelliSense's 30-day, continuous vital sign monitor ("BioSticker") to its payer, provider, and other healthcare clients along with TRHC's medication management software.

According to TRHC, BioSticker data will populate TRHC's medication safety platforms, which board-certified pharmacists can use to alert clinicians to timely medication-related issues, enabling more proactive intervention and safer medication use.

While the partnership will target a variety of healthcare clients, the companies expect their integrated solution to be received particularly well by PACE organizations (i.e. federal programs providing comprehensive medical and social services to nursing home-eligible 55+ year-olds).

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Another remote monitoring startup, [Somatix](#), recently announced an integration with PointClickCare's core EHR platform, which is predominantly used by skilled nursing facilities and senior living communities.

Somatix's device uses gesture detection technology and machine learning analytics to monitor patients' daily activities (e.g. walking, sleeping, drinking, falling, and smoking).

By monitoring these activities in real-time, healthcare providers are looking to detect potentially troublesome changes in behavior and intervene in a timelier manner.



Real-time, gesture-driven  
non-invasive remote patient monitoring platform  
Remote Patient Monitoring Reimagined



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## DEVICE MANUFACTURERS

Device manufacturers are partnering with remote monitoring startups to help advance device development, facilitate distribution, and provide more comprehensive connected health offerings.

In April, OMRON announced a global strategic alliance with device startup [AliveCor](#) to integrate the latter's ECG technology with OMRON's blood pressure devices.

Together, the companies plan to develop a line of first-in-class integrated ECG and blood pressure devices that may better serve customer needs and make remote care more accessible.

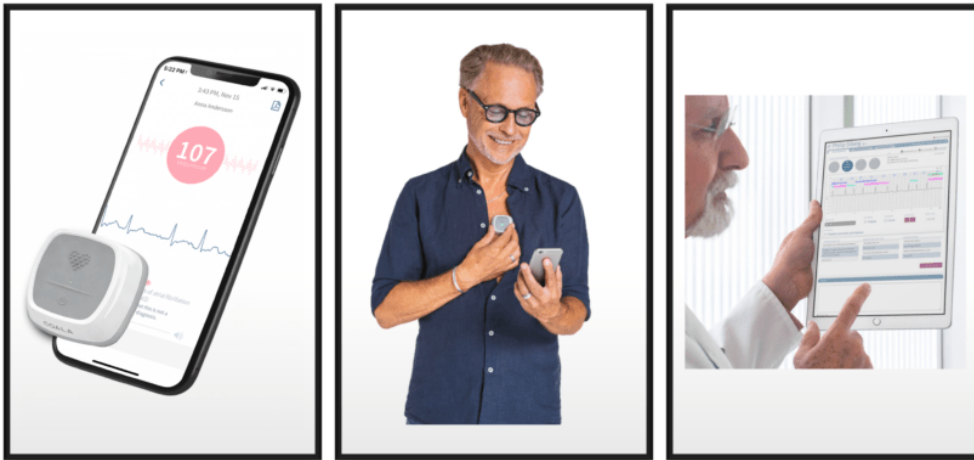
AliveCor has raised \$69.3M in total disclosed funding from investors like Khosla Ventures, Qualcomm Ventures, and Mayo Clinic Ventures (in addition to OMRON).



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Competing startup [Coala Life](#) is working with Japan-based device maker Asahi Kasei to use its smartphone-based ECG to develop and evaluate novel digital biomarkers of heart failure.

Sweden-based Coala Life has raised \$23.1M in total disclosed funding.



# Chronic Care Management

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Despite the overwhelming focus on Covid-19, many of the telehealth relationships formed year-to-date have centered around chronic health conditions.

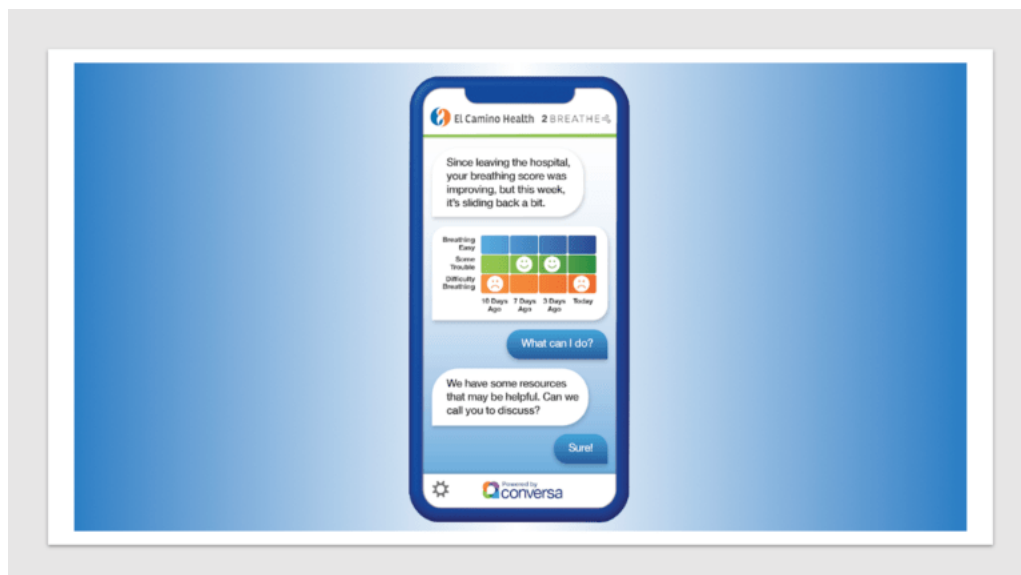
The reason is likely two-fold.

First is the recognition that those with chronic conditions are at higher risk of contracting and experiencing complications from Covid-19. By facilitating 24/7 chronic care management in a completely remote environment, providers can more reliably and continually assess deviations in patient health that may warrant urgent interventions.

Second, the influx of Covid-19 patients and the associated precautions have made it more challenging for chronic disease patients to see their physicians in-person – increasing the impetus to offer remote connection options.

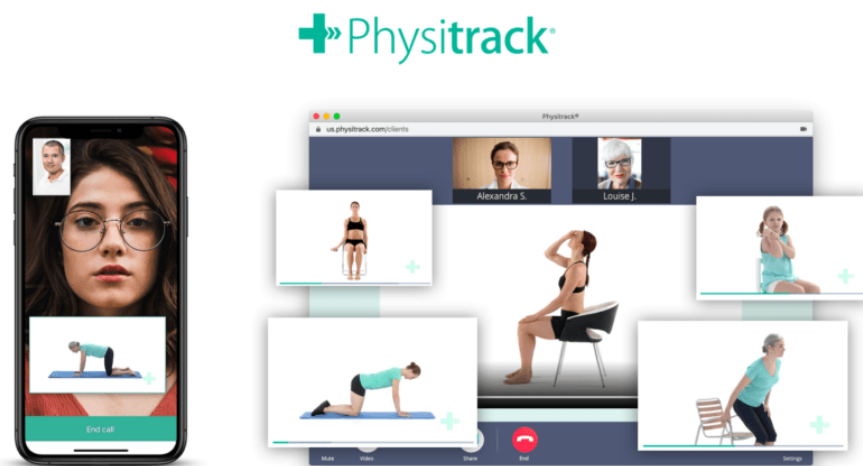
## PROVIDERS

California-based El Camino Health recently expanded its partnership with [Conversa Health](#) to extend its chronic obstructive pulmonary disease care management capabilities virtually.



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Meanwhile, physical therapy provider Professional Physical Therapy and provider network Ivy Rehab Network both recently partnered with tele-rehab startup [Physitrack](#) to support quarantined patients and reduce appointment cancellations.



## INSURANCE AND BENEFITS

Diabetes-focused [Livongo Health](#) solidified major partnerships with the state of Connecticut and Horizon Blue Cross Blue Shield of New Jersey.

Connecticut's state health plan expects Livongo's Diabetes Management Program to deliver approximately \$3M in cost savings per year by providing patients with comprehensive, 24/7, live health coaching. The health plan said that more than 500 patients signed up for the program within the first 2 weeks of its soft launch.

After raising \$232M in private capital, Livongo completed a \$355M IPO (at a \$2.5B valuation) in July 2019.

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The company recently reported strong Q1'20 financial results, including a 115% increase in revenue and a doubling in users year-over-year. Through its agreement with Horizon Blue Cross Blue Shield of New Jersey, Livongo expects to add another 5,000 patients to its diabetes program before the end of the year.



## HEALTHCARE IT

Livongo competitor DarioHealth announced a partnership with value-based telemedicine startup [MediOrbis](#) to create what it calls a “social distancing-compliant, complete care solution” for its 50,000 active users.

The new telemedicine service allows Dario users to access a range of physician-directed patient care from their homes.

According to the company, the remote care partnership is intended to help reduce the risk from Covid-19 for people with chronic conditions.

# Mental Health Support

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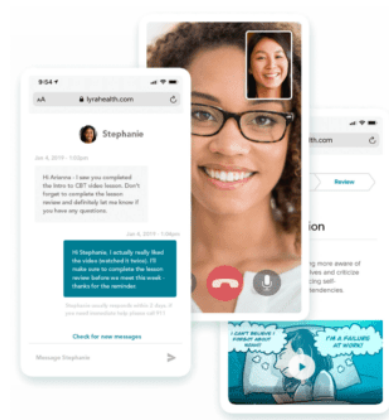
Mental health and wellness are being emphasized as people transition to remote lifestyles and rely on virtual methods to socially engage with others.

To address these issues, teletherapy companies are making mental healthcare more accessible, flexible, and personalized than ever before. Corporate mental health offerings are also becoming an area of focus as companies look to support their employees in crisis situations.

## INSURANCE AND BENEFITS

Employers like Starbucks are expanding employee benefits to include mental health care services like those provided by [Lyra Health](#).

Under the company's amended benefits program, Starbucks employees and eligible family members now have access to 20 sessions a year with Lyra's mental health coaches. The sessions, which can be booked in advance or on the spot, can take place either in-person or by video.



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Other companies like Alignment Healthcare have been exploring ways to tackle to challenge of social isolation among older adults. As part of that effort, Alignment partnered with Florida-based startup [Papa](#) to provide Medicare Advantage members with “Grandkids On-Demand.”

Though Papa initially focused only on connecting seniors with in-person care and companions, it recently launched a “Virtual Companionship” service to accommodate Covid-19-related social distancing guidelines.