

Key Learnings from the Employer Health Center Audit Trail

2018 Indiana Health and Wellness Summit

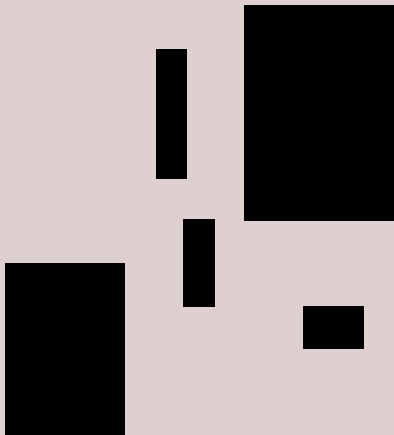
September 6, 2018



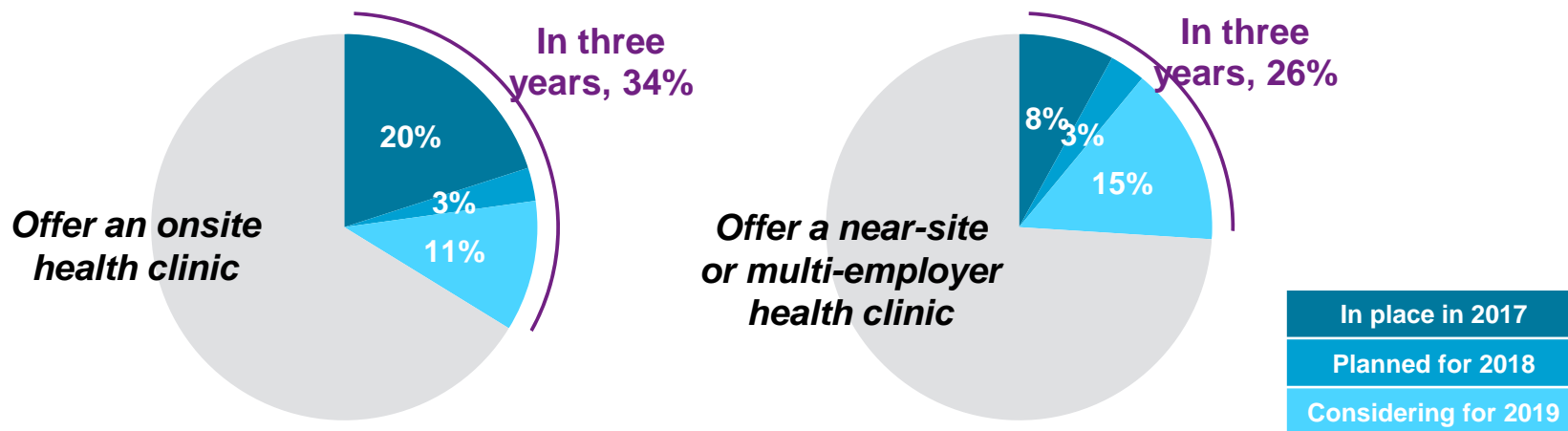
Discussion Topics

- Trends in onsite and near-site health
- Health center considerations
- Key findings from the audit trail (not available for posting)

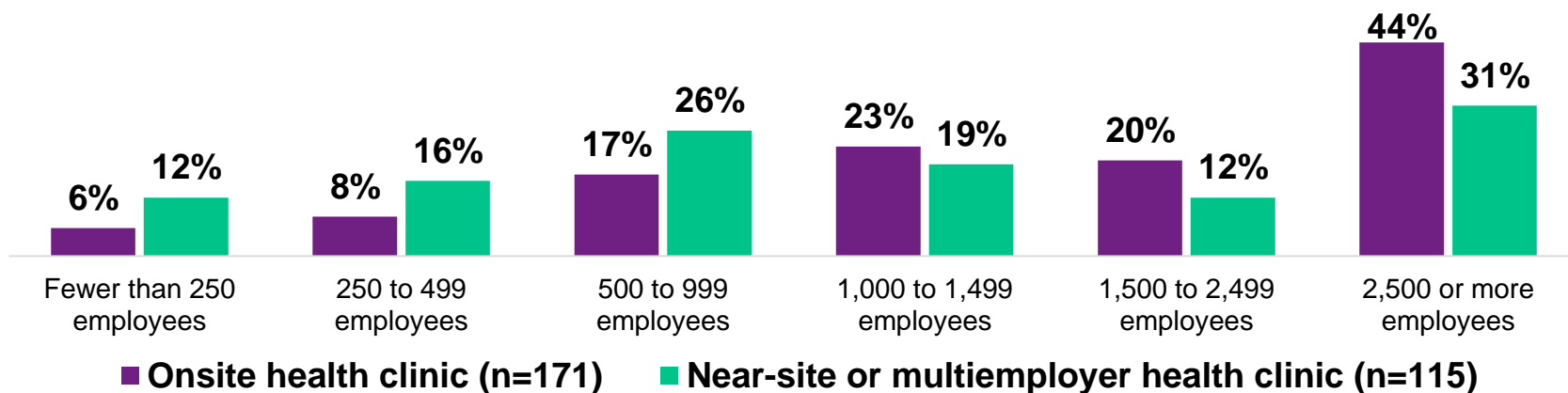
Market Trends



Use of Onsite or Near-site Health Clinics



How many employees are based in locations where your organization currently offers or plans to offer an onsite or near-site health clinic?



Note: Based on currently, planned or considering offering an OHC or NHC.

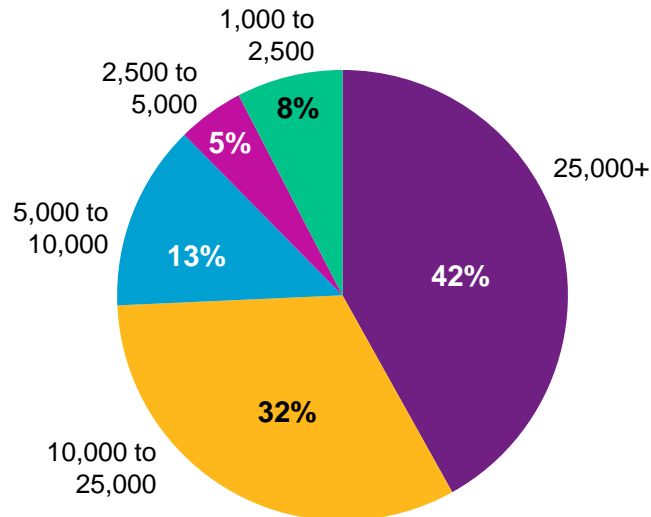
Sample: Companies with at least 1,000 employees.

Source: 2017 Willis Towers Watson Best Practices in Health Care Employer Survey.

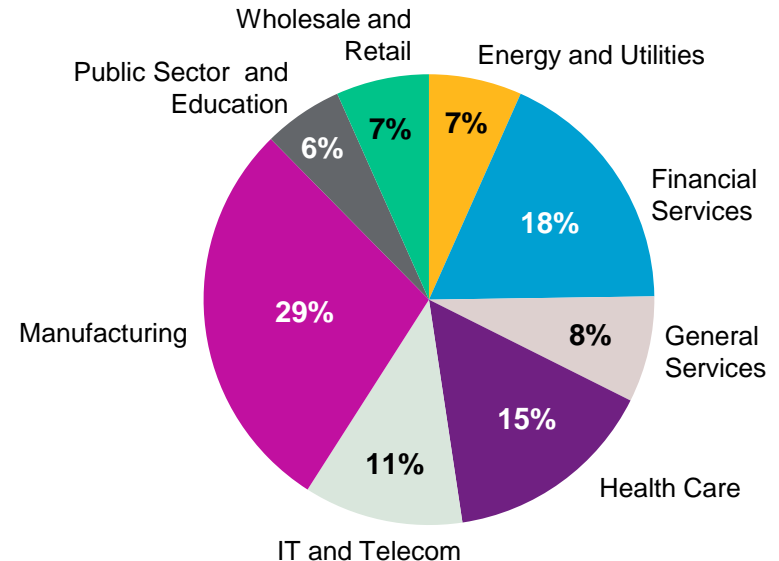
2015 Willis Towers Watson Employer Sponsored Health Center Survey

- Snapshot of 2015 and beyond to gain insight into the operations of onsite health centers
- 137 respondents, 105 currently offer employer-sponsored health centers (ESHCs); collectively, those respondents offering ESHCs employ 4.6 million employees
- Survey conducted in February-March 2015 and completed by mid- to senior-level benefits professionals in the U.S.

Employee Size Groups



Industry Groups



Note: Based on respondents who offer employer-sponsored health centers.
 Source: 2015 Employer-Sponsored Health Centers Survey.

Onsite Services are Expanding to Enhance Medical Savings and Employee Productivity

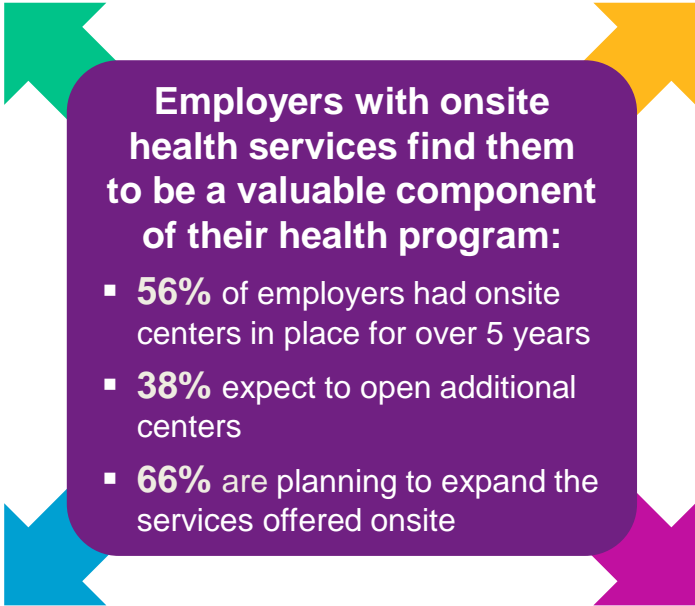
Employer Objectives

(% of respondents)

- Enhancing productivity (75%)
- Reducing medical spend (74%)
- Improving access (66%)

Eligibility

- 62% of employers allow active benefits-eligible employees who waive coverage to access the center
- 46% allow non-benefits eligible employees to access the center
- 46% allow dependent adults to access the center



Employers with onsite health services find them to be a valuable component of their health program:

- 56% of employers had onsite centers in place for over 5 years
- 38% expect to open additional centers
- 66% are planning to expand the services offered onsite

Service Offerings

- 50% offer pharmacy services
- 63% offer onsite lifestyle coaching
- ESHCs offer a broad range of services including expanded primary care, physical therapy, condition management and behavioral health

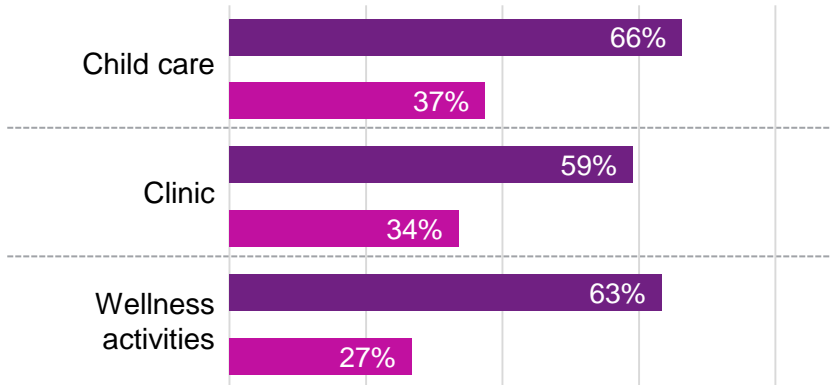
ESHC Management

- 64% of employers use a commercial vendor to operate their center(s)
- 18% use a local or regional health system or provider group
- 23% manage their center(s) directly or in-house

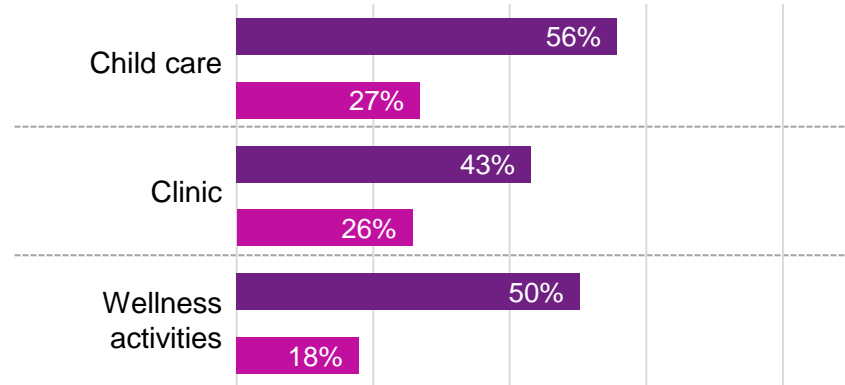
Note: Based on respondents who offer employer-sponsored health centers.
Source: 2015 Employer-Sponsored Health Centers Survey.

Offering Onsite and Near-site Programs Enhances Perceptions of Employer Well-being Initiatives

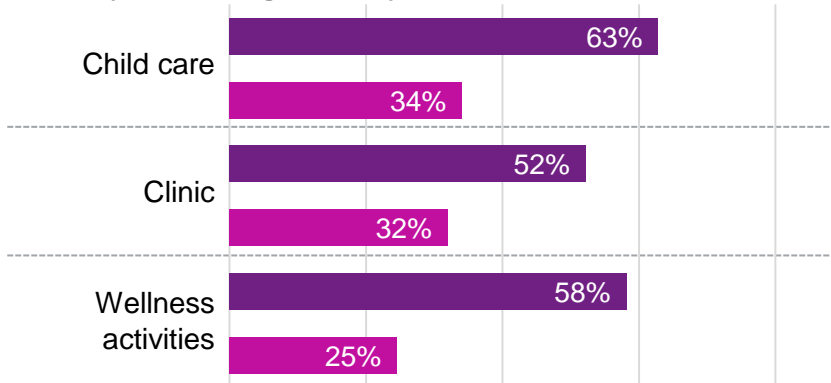
My employer promotes a healthy work environment



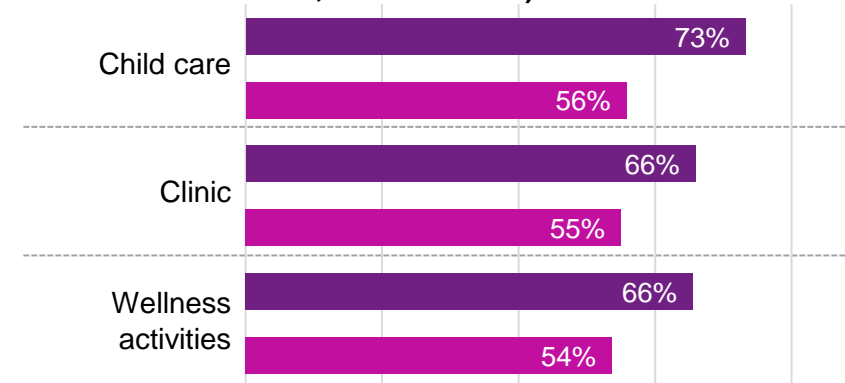
The initiatives offered by my employer have encouraged me to live a healthier lifestyle



Overall, the initiatives offered by my employer to support my well-being meet my needs



High users of well-being apps (e.g., fitness, track diet, monitor condition, online forums)



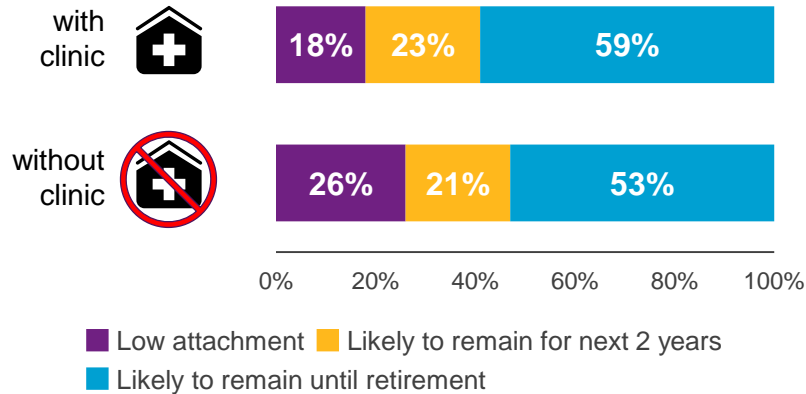
■ With onsite / near site ■ Without onsite / near site

Note: Percentages indicate 'Strongly agree' or 'Agree'.
Source: 2017 Global Benefits Attitudes Survey, United States

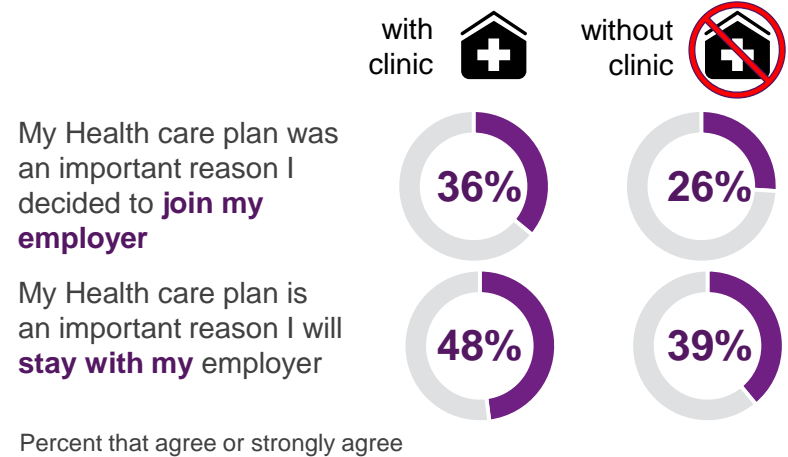
The Impact of Company-sponsored Medical Clinic

Links to attachment and engagement

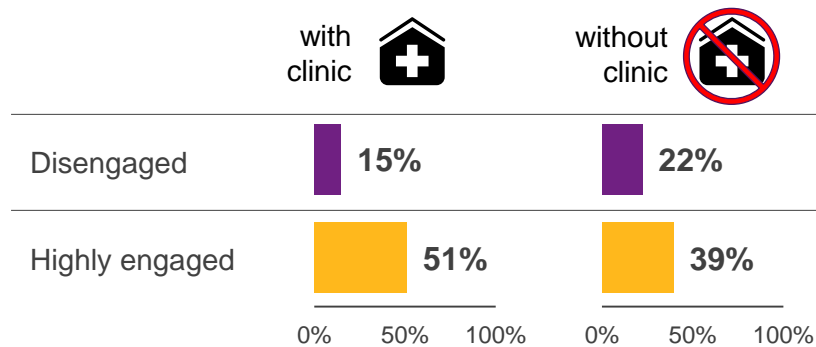
Attachment to employer



Health care plan as a reason to join or stay

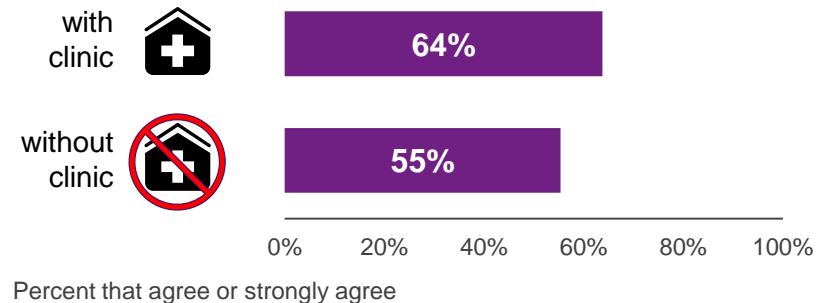


Sustainable engagement



Health care plan meets employees' needs

Overall, my health care plan meets my needs



Source: 2015/2016 Global Benefits Attitudes Survey, U.S.
 Sample: Full-time employees with a health care plan

Emerging Trends for Employer Sponsored Health Centers

Focus on patient experience and employment value proposition

- Onsite health center service expansion
- Increased interest in ancillary services and alternative modalities
- Positioned as hub for well-being, and physical presence of the corporate culture of health

Providing integration and cross-referrals with other programs and community-based providers

- Tighter steerage and referrals to preferred providers
- Financial PGs tied to referrals and proactive identification/referral of at-risk members
- After hours access to health center practitioners or covering providers
- Incorporation of telehealth with health center

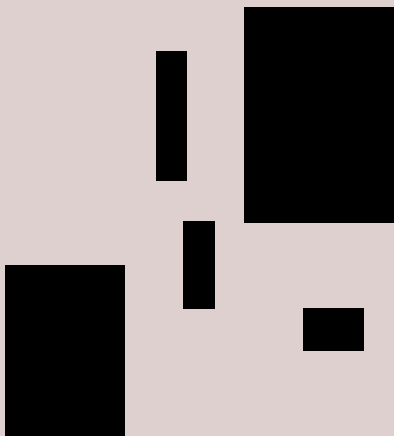
Alternative models (e.g., near-site facilities, dedicated or shared multi-employer health centers)

- Concierge-level service, with broader scope of service
- Greater convenience for non-employees (dependents, retirees, etc.)
- Eliminate upfront investment to enable smaller and other groups to participate

Re-emergence of local and regional health systems as employer health center partners

- Advantages include: integration, flexibility and perceptions of quality and trust
- Concerns about the onsite center becoming a vehicle for self-referral and legacy provider-centric delivery model

Health Center Considerations



Goals and Objectives for Investing in Employer Health Centers Vary

Reduce lost time and absence from work

Improve productivity

Improve access and convenience

Offer primary care

Save money

Reduce trend, lower total benefit spend and deliver ROI

Improve health outcomes

Manage worksite injuries and illnesses

Lower workers' compensation costs

Boost employee value proposition

Reduce employee out of pocket in HDHPs

Lower family expenses

Drive greater engagement in health coaching and care management

Add important touch points

Offer higher quality and consistency of care than what is currently delivered in the community

Based on individual community medical system performance

Today's Speaker



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