



WHITE PAPER

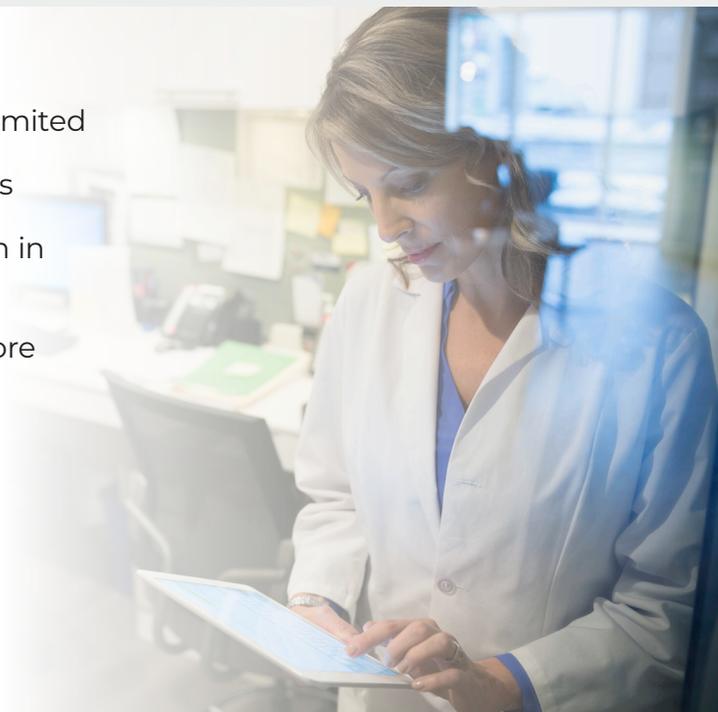
Expanding access to quality care across Canada with a virtual care solution

Overcoming the long wait times and limited access to Canadian healthcare



The key tenets of the Canada Health Act serve to make comprehensive healthcare universally accessible, yet the demands on the system are making it increasingly difficult for Canadians to get timely care. Limited physician availability and legal restrictions make it difficult for Canadians to schedule appointments with their primary care physicians within 48 hours,¹ and nearly impossible on weekends and holidays.

- Timely access to healthcare in Canada is extremely limited
- Wait times are increasing in emergency departments
- Emergency department use is higher in Canada than in other countries
- More than half of Canadians struggle with one or more chronic conditions
- Absenteeism has a significant impact on Canadian employers
- Virtual care has the potential to offset demands and complement Canadian healthcare



Demand for care is exceeding Canadian capacity

While the quality of Canadian healthcare is widely regarded as amongst the best in the world, accessing care in a timely manner is a challenge for many Canadians and their employers. The provincial and territorial systems of publicly funded healthcare can be restrictive on primary and family care availability. The stresses on the healthcare system such as caps on the number of patients a doctor can treat coupled with a nation-wide shortage of available doctors is compounded by the increased demands of the Canadian population. Long wait times are having an adverse effect on Canadian companies as well. An estimated \$16.6 billion in productivity is lost each year due to absenteeism.² With over half of Canadian adults suffering from a chronic condition such as heart disease or diabetes, increasing demands on primary care remains a growing concern.

53%

of Canadians have chronic conditions such as heart disease, arthritis, or diabetes³

25%

of Canadian adults are obese⁴

4.5M

Canadians report not having a primary care physician⁵



The challenges facing Canadian healthcare

A survey conducted by The Commonwealth Fund, a New York-based private foundation, asked residents of 11 countries to rate their healthcare. While Canada ranked high regarding quality of care, they tied for last when it came to accessibility of same- or next-day doctor's appointments. Fifty-seven per cent of Canadians claimed they could not schedule an appointment with their doctor within 48 hours. The survey also found that 76 per cent of Canadians found it difficult to secure care on evenings, weekends, and holidays.

Without access to primary or family care, many Canadians turn to the emergency department—whether their condition warrants an emergency or not. The same survey by The Commonwealth Fund reported an estimated 41 per cent of Canadian adults had used the emergency department in the past two years—over 51 per cent more than The Commonwealth Fund average.

Canadians who opt for the emergency department are being greeted with longer wait times. Data from the Canadian Institute for Health Information (CIHI) shows the time it took patients to receive care from the emergency department was up an average of 11 per cent in 2016-2017⁶ from the year before. That number swells when you consider patients who were seeking care during off hours. While patients who registered between 9 and 10 a.m. only saw a 4.3 per cent increase in length of wait times from last year, patients who registered between 9 and 10 p.m. saw a 43 per cent increase. The Commonwealth Fund study found that 29 per cent of Canadians reported waiting more than four hours in the emergency department—over 163 per cent more than The Commonwealth Fund average.

Limited access to care and long wait times is having an impact on Canadian companies as well. Based on the 2013 Canadian Conference Board report, full-time Canadian workers took an average of 9.3 sick days in 2012. This loss in productivity is estimated to cost employers over \$16 billion dollars a year. And although the Canadian healthcare system guarantees medically necessary and hospital physician services at no cost to all Canadians, approximately two-thirds of Canadians take out private, supplemental insurance policies or have an employer-sponsored plan. Based on the 2016 Sun Life Canadian Health Index, 84 per cent of Canadians believe their employers have a responsibility to support employee health.⁷

41%

of Canadian adults have used ED in the last 2 years

43%

increase in wait time at ED between 9 and 10 p.m.

57%

of Canadians could not secure appointment within 48 hours with PCP

84%

of Canadians believe their employers should support employee health

Current

57% of Canadians cannot secure an appointment with primary care physicians **within 48 hours**

Average length of stay in the emergency department for patients not admitted to hospital is **7.8 hours**

VS.

Future

Reduce wait times and visit lengths:

Teladoc Health provides appointments to speak with a doctor within one hour and the average length of a visit is **15 minutes**

Decrease demands on primary and emergency care services:

Teladoc Health resolves **92%** of cases on the first visit

Adopting a virtual care complement to Canadian healthcare

Employers that adopt and provide virtual care alternatives to their employees that complement the existing healthcare system, such as virtual care, offer a solution to the challenges facing the Canadian healthcare system.

Comprehensive virtual care provides an alternative entry point to healthcare. An integrated virtual care solution can reduce the demand on doctors' offices and emergency departments while offering patients 24/7 access to licenced physicians locally or while travelling in Canada or the United States.

While telehealth has been used to help triage cases in Canada, many virtual care offerings fall short when it comes to helping patients receive treatment. Employers must weigh the needs of their employees with the capabilities of the solution. In seeking a provider, employers should consider clinical quality and the network and credentials of physicians who deliver care. They should also assess operating scale and the engagement capabilities that are in place to promote health benefits to a diverse population.

Because virtual care delivers quality healthcare in a convenient way, employees do not need to sacrifice their personal time to be treated. Employers benefit from a decrease in absenteeism and an increase in productivity and employee satisfaction. By investing in a virtual care solution for their employees, employers can recapture some of the \$2.7 billion lost annually to family health issues. The investment can also satisfy the demands of the 84 per cent of employees who agree that employers should be responsible for supporting the health of their workforce.

Multistep change recommendation

1

Employers recognise the impact limited access to quality healthcare has on their workforce and on productivity. By investing in employees, employers can reduce absenteeism and lost costs associated with family health issues.

3

An integrated system brings together primary care and virtual care providers to deliver a seamless, fully-integrated patient experience focused on quality care and convenient accessibility.

5

Employees gain access to 24/7 care from licenced physicians from anywhere across Canada and while travelling in the United States. They can receive a diagnosis and treatment recommendations conveniently from the phone or web.

2

Employers take an active role in adopting a comprehensive virtual care solution by considering providers based on delivery of clinical quality, operating scale, and engagement capabilities.

4

Employers build awareness of available services by working with their virtual care provider. Together, they implement engagement strategies that educate employees with memorable messaging that can be recalled in their time of need.

6

Alternative access to non-urgent care reduces demands on primary care and emergency departments, reduces wait times, and helps complement the existing healthcare system—helping deliver on the promises of the Canada Health Act.



“Many patients in our offices for primary care could be seen virtually to accommodate requests for sick notes, prescription refills, or assessments for simple medical problems such as upper respiratory infections or advice for pre-existing conditions. Downloading these visits to employer-insured virtual care is a win-win; employers save for patients’ lost time, and the public system saves by reducing office visits billed to provincial plans.”

Dr. Keith Thompson, CCFP, FCFP

Clinical Adjunct Professor
Schulich School of Medicine & Dentistry, Department of Family Medicine
Western University of Canada

“I have patients who will drive five hours for a five-minute consult. It is so crystal clear that we need a different way of practicing medicine. Telemedicine offers an alternative path to dealing with acute and sub-acute conditions—one that could free up emergency departments for more severe conditions.”

Dr. William Stanish, FRCS(C),FACS,FAOA

Professor Emeritus of Surgery at Dalhousie University
Founder and Director of the Orthopaedic and Sport Clinic of Nova Scotia

Conclusion

The overwhelming demands on the Canadian healthcare system are an impediment to patients’ ability to receive timely care—not fully realizing the tenets of the Canada Health Act. Physician shortages have an impact in both rural and urban communities. Canadians are facing longer wait times and delays in getting necessary tests or specialty consults. The pressures on the healthcare system have a direct impact on employee productivity and costs employers billions of dollars in absenteeism from family-related health issues.

By investing in employee benefits and adopting a comprehensive virtual care solution, employers can reduce absenteeism and increase productivity while providing employees with convenient access to quality healthcare.

How Teladoc Health can help

Teladoc Health is the global leader in virtual care and leverages a network of physicians licenced and certified in both the United States and Canada. With Teladoc Health, members can receive a diagnosis and treatment recommendation, to include prescribed medications if necessary, for a broad array of healthcare issues right from their phone or the web. Our comprehensive virtual care solution provides a new front door to the healthcare system—one that is open 24/7 and can be accessed from anywhere.

Scale and success

Teladoc Health's unmatched global scale enables them to serve millions of people in more than 130 countries and in more than 30 languages—more than any other virtual care delivery provider. In 2018, Teladoc Health completed more than 2.6 million virtual care visits and on our busiest day, completed more than 9,000 visits. Teladoc Health is helping people access high-quality care when they need it most. Over 90 per cent of virtual care cases are resolved on their first visit, and across services we deliver 90 per cent member satisfaction. By providing virtual access to licenced physicians, Teladoc Health is helping patients get resolution to their healthcare needs without redirecting patients from unnecessary emergency department visits and the long wait times of doctors' offices.

By leveraging Teladoc Health's robust network of physicians on a convenient virtual platform, more patients can speak with doctors in their time of need. Patients are paired with doctors licensed in their home province, and many patients can receive a diagnosis and prescription for treatment on their first visit. Telehealth services fill a crucial need for on-demand care and serve as a complement to the existing healthcare systems.

¹ The Commonwealth Fund. 2016, "International Health Care System Profiles" <https://international.commonwealthfund.org/data/2016/>

² The Conference Board of Canada. 2013, "Absent Workers Cost the Canadian Economy Billions" https://www.conferenceboard.ca/press/newsrelease/13-09-23/absent_workers_cost_the_canadian_economy_billions.aspx

³ McGill HCIC. 2016, "Chronic Disease—Burden Management" https://www.mcgill.ca/hcic-sssc/files/hcic-sssc/hcic_2016_results_05-chronic_disease_-_burden_management.pdf

⁴ Canadian Institute of Health Information. 2011, "Obesity in Canada" https://secure.cihi.ca/free_products/Obesity_in_canada_2011_en.pdf

⁵ Statistics Canada. 2014, "Access to a regular medical doctor" <https://www150.statcan.gc.ca/n1/pub/92-625-x/2015001/article/14177-eng.htm>

⁶ Canadian Institute for Health Information. 2017, "Benchmarks for treatment and wait time trending across Canada" <http://waittimes.cihi.ca/>

⁷ Sun Life. 2015, "Sun Life Canadian Health Index" https://cdn.sunlife.com/static/ca/Learn%20and%20Plan/Market%20insights/Canadian%20Health%20index/M15-009-%20Canadian%20Health%20Index%20Report_English_R4_2015.pdf

Learn more by contacting your Chambers Plan advisor and visiting www.chamberplan.ca



About Teladoc Health

Teladoc Health is the global virtual care leader, helping millions of people resolve their healthcare needs with confidence. Together with our clients and partners, we are continually modernizing the healthcare experience and making high-quality healthcare a reality for more people and organizations around the world.

