
Post-Pandemic Planning for Life Sciences Companies

Avalere Health | An Inovalon Company



Today's Speakers

Moderator



Elizabeth Carpenter
Head of Advisory Services

ecarpenter@avalere.com

Speaker



Lance Grady
Practice Director

lgrady@avalere.com

Speaker



Nathan Markward
Managing Director

nmarkward@avalere.com

Speaker



Jeffrey F. Patton, MD
Chief Executive Officer

OneOncology

Objectives

1

Demonstrate how the patient journey has been impacted due to the COVID-19 pandemic

2

Identify opportunities to use data to inform customer and patient engagement

3

Expand role of advocacy by embracing community relationships and local market solutions to reduce healthcare disparities and improve access

Did You Know?

Oncology service utilization and patient flow has increased in early 2021, relative to 2020 which was impacted by the public health emergency (PHE.)

90% ▲

Colorectal cancer-related evaluation and management (E/M) visits were 90% greater in April 2021 compared to April 2020

How does the number of colorectal cancer-related E/M visits in April 2021 compare to April 2019?

- a. About the same
- b. 25% greater than April 2019
- c. 15% lower than April 2019
- d. 40% lower than April 2019
- e. 55% lower than April 2019

Did You Know?

Oncology service utilization and patient flow has increased in early 2021, relative to 2020, but has not returned to pre-pandemic levels.

90% ▲

Colorectal cancer-related E/M visits were 90% greater in April 2021 compared to April 2020

40% ▼

Colorectal cancer-related E/M visits were 40% lower in April 2021 compared to April 2019

COVID Introduced Uncertainty to Cancer Care Landscape

Disruption to Patient Journey

Progression of Disease Severity

Challenges in Predicting Total Cost of Care (TCOC)

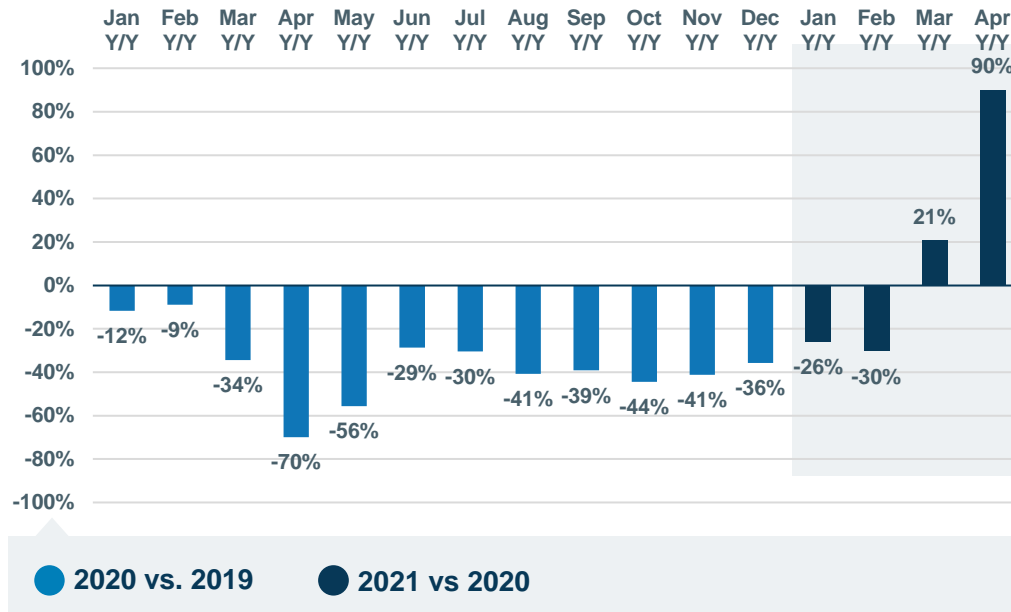
Evolution of Care Delivery and Network/Provider Affiliations

Need to Engage in Initiatives to Decrease Health Disparities

Cancer-Related E/Ms in March/April 2021 Have Not Yet Returned to Pre-Pandemic Levels

Relative Change in Colorectal Cancer-Related E/M Claims, Year-Over-Year (Y/Y) /

January-December 2019 vs. January-December 2020 and January-April 2020 versus January-April 2021



-40%
April 2021 vs. 2019

CRC-related E/M claims were 40% lower in April 2021 than April 2019

Discussion /

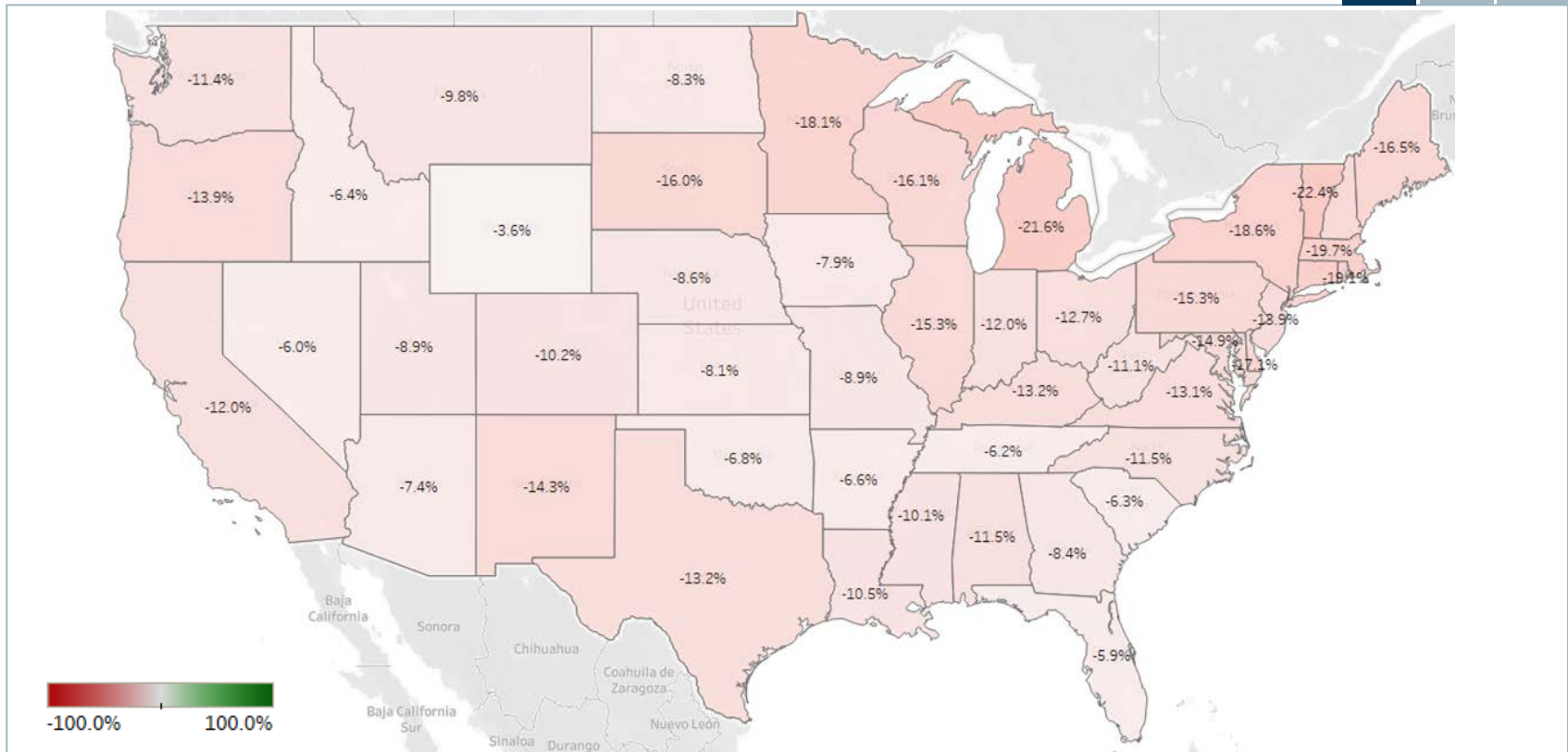
- As screenings rebound in 2021, how are providers managing the rapid return of patients?
- How can other stakeholders balance the rapid return of patients?

Source: Avalere Health analysis of Inovalon Provider Clearinghouse data

COVID-19 Caused Care Disruptions Which Resulted in Decreased Cancer-Related E/M Services in 2020

Relative Change in Cancer-Related E/M Claims, Year-Over-Year (Y/Y) January-September 2019 vs. January-September 2020

1 2 3



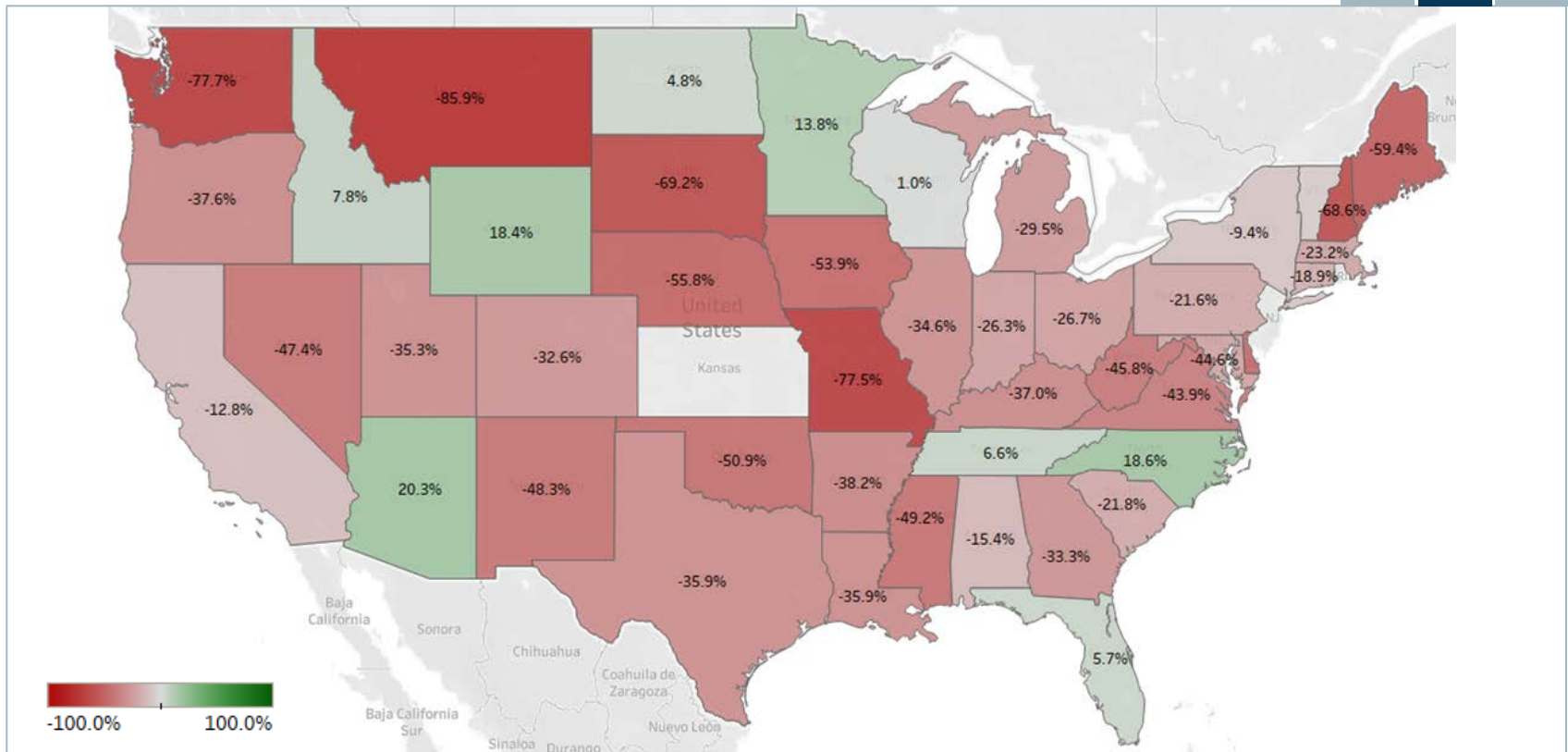
Source: Avalere Health analysis of 100% Medicare Fee-for-Service data

Cancer-Related E/M Services Began to Rebound in Early 2021, Relative to 2020

Relative Change in Cancer-Related E/M Claims, Year-Over-Year (Y/Y)

January-April 2020 vs. January-April 2021

1 2 3

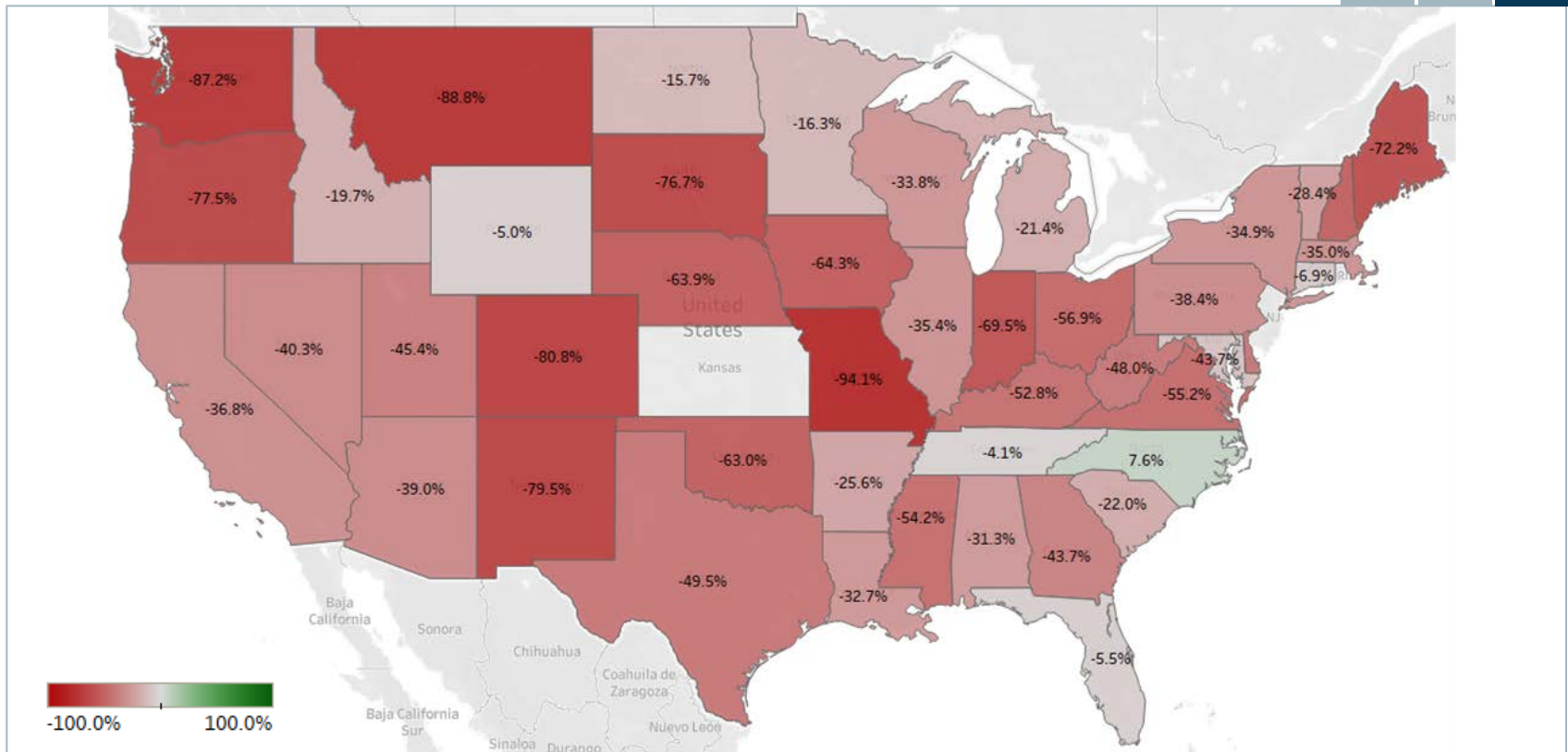


Source: Avalere Health analysis of Inovalon Provider Clearinghouse data

Although E/M Visits Have Rebounded in 2021, They Remain Below the Pre-Pandemic Baseline

Relative Change in Cancer-Related E/M Claims, Year-Over-Year (Y/Y) January-April 2021 vs. January-April 2019

1 2 3

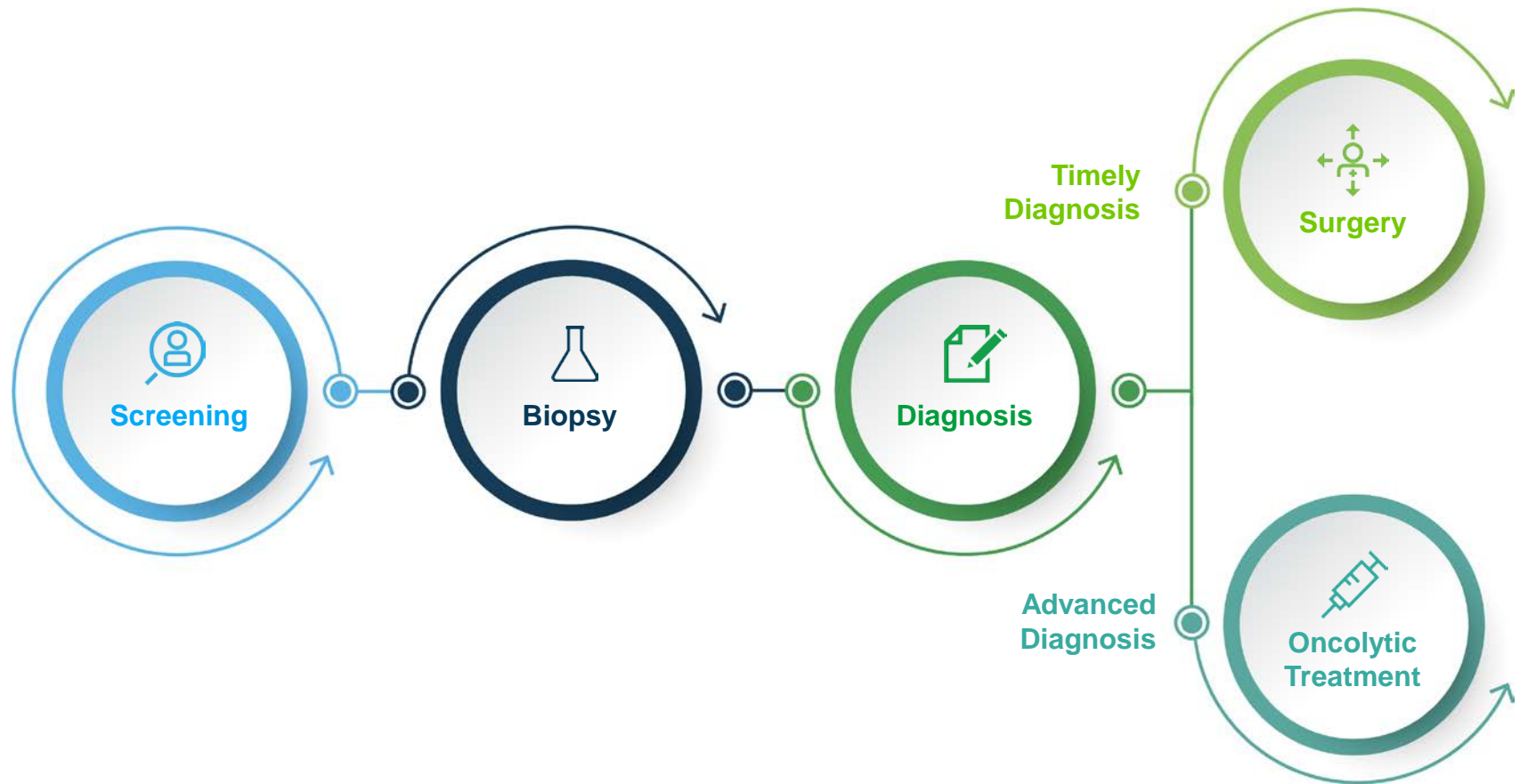


Source: Avalere Health analysis of Inovalon Provider Clearinghouse data



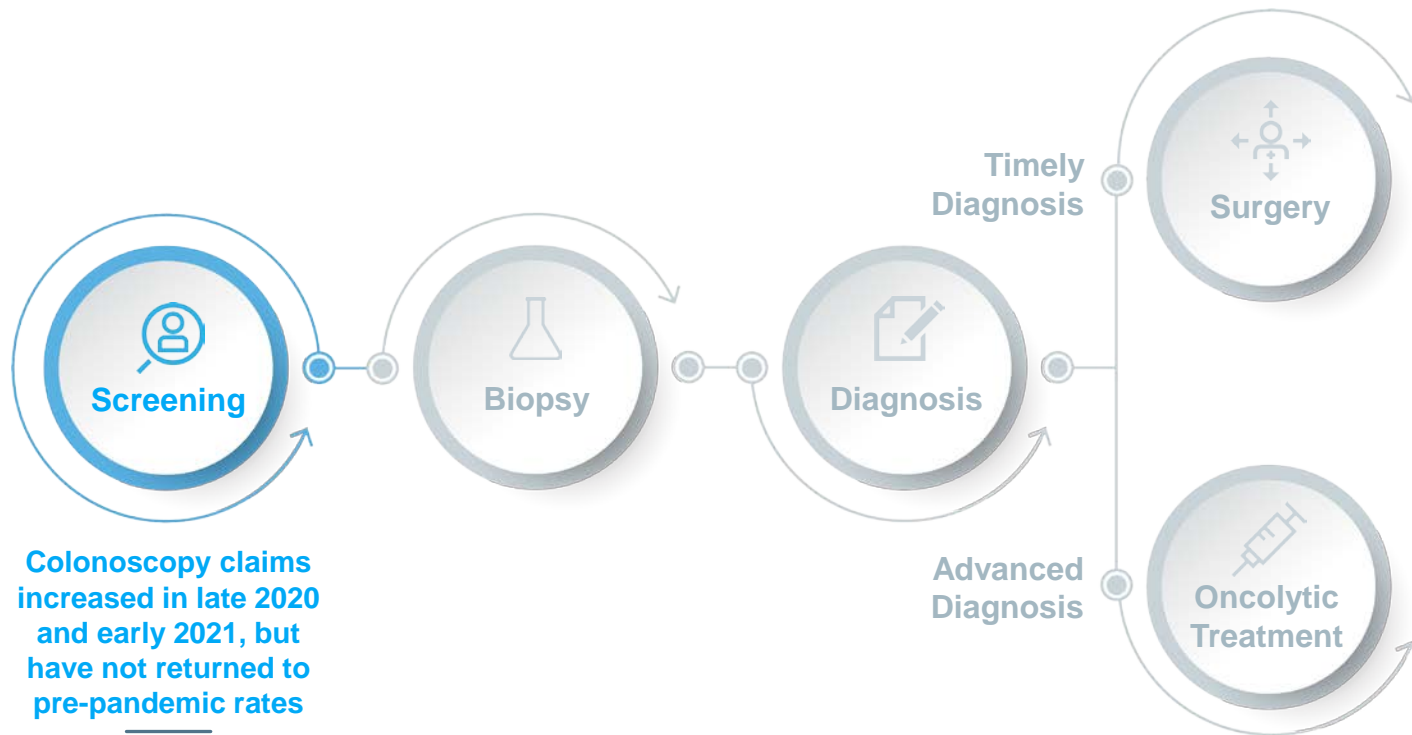
The Patient Journey Is Impacted by COVID-19 Disruptions

Colorectal Cancer Patient Journey / Screening to Treatment



The Patient Journey Is Impacted by COVID-19 Disruptions

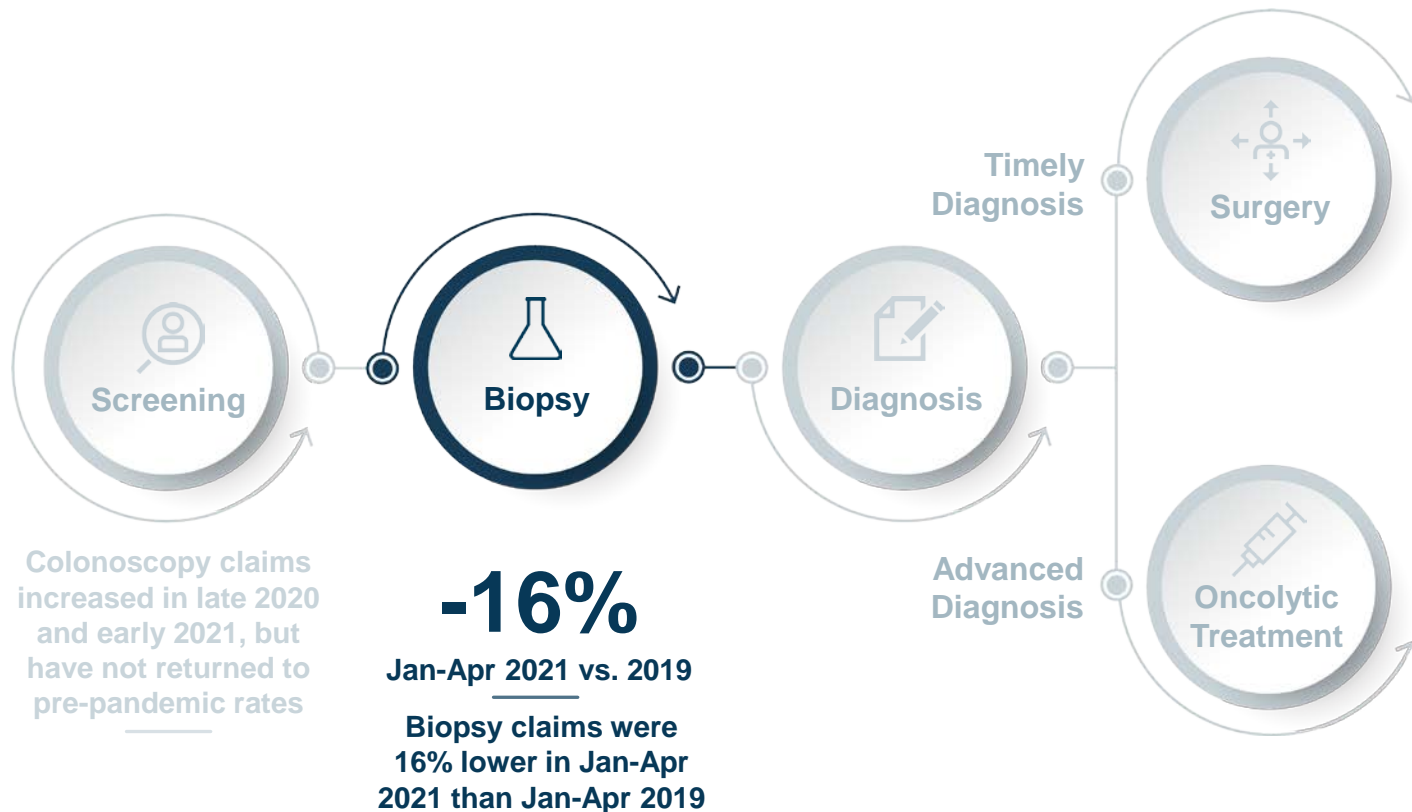
Colorectal Cancer Patient Journey / Screening to Treatment



Source: Avalere Health analysis of Inovalon Provider Clearinghouse data

The Patient Journey Is Impacted by COVID-19 Disruptions

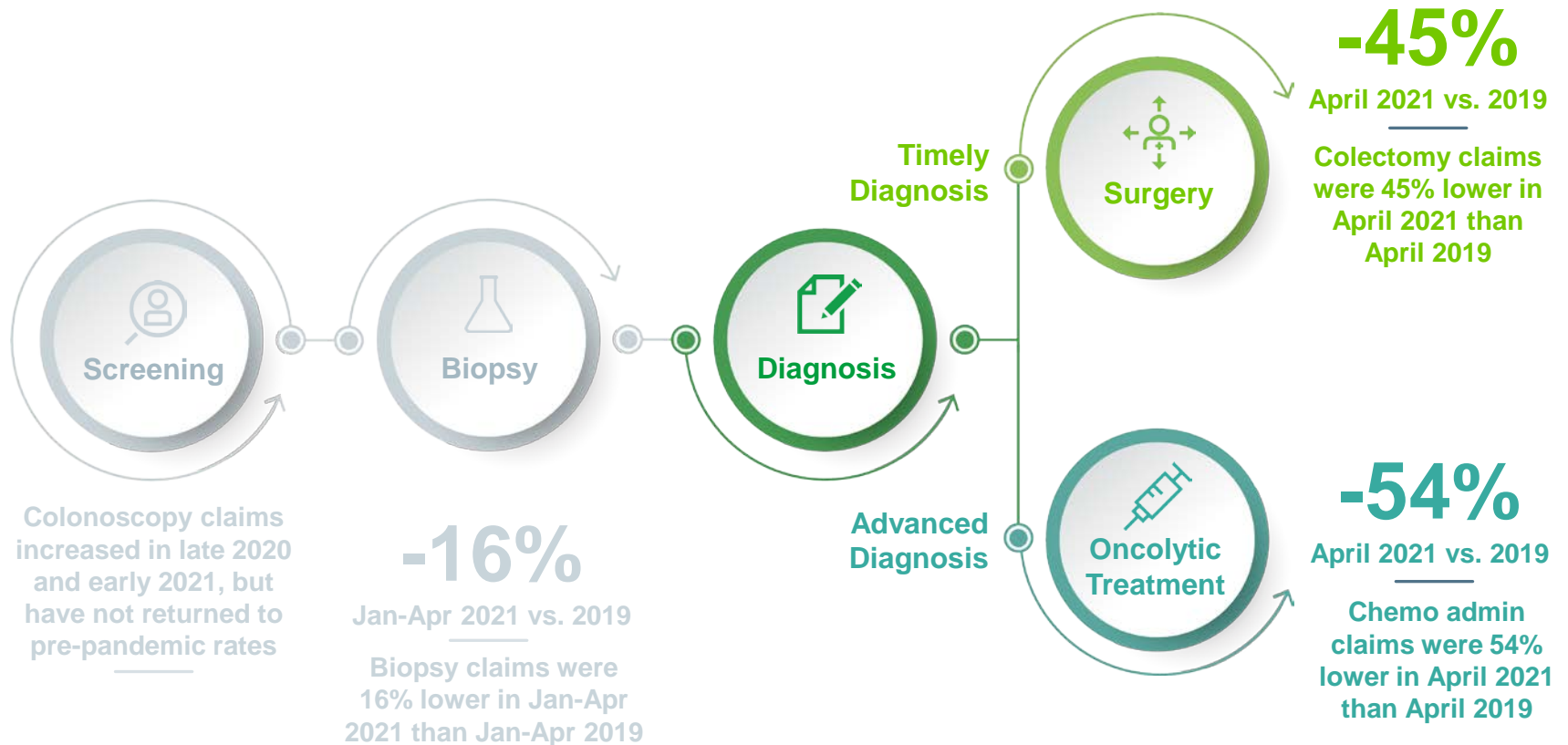
Colorectal Cancer Patient Journey / Screening to Treatment



Source: Avalere Health analysis of Inovalon Provider Clearinghouse data

The Patient Journey Is Impacted by COVID-19 Disruptions

Colorectal Cancer Patient Journey / Screening to Treatment

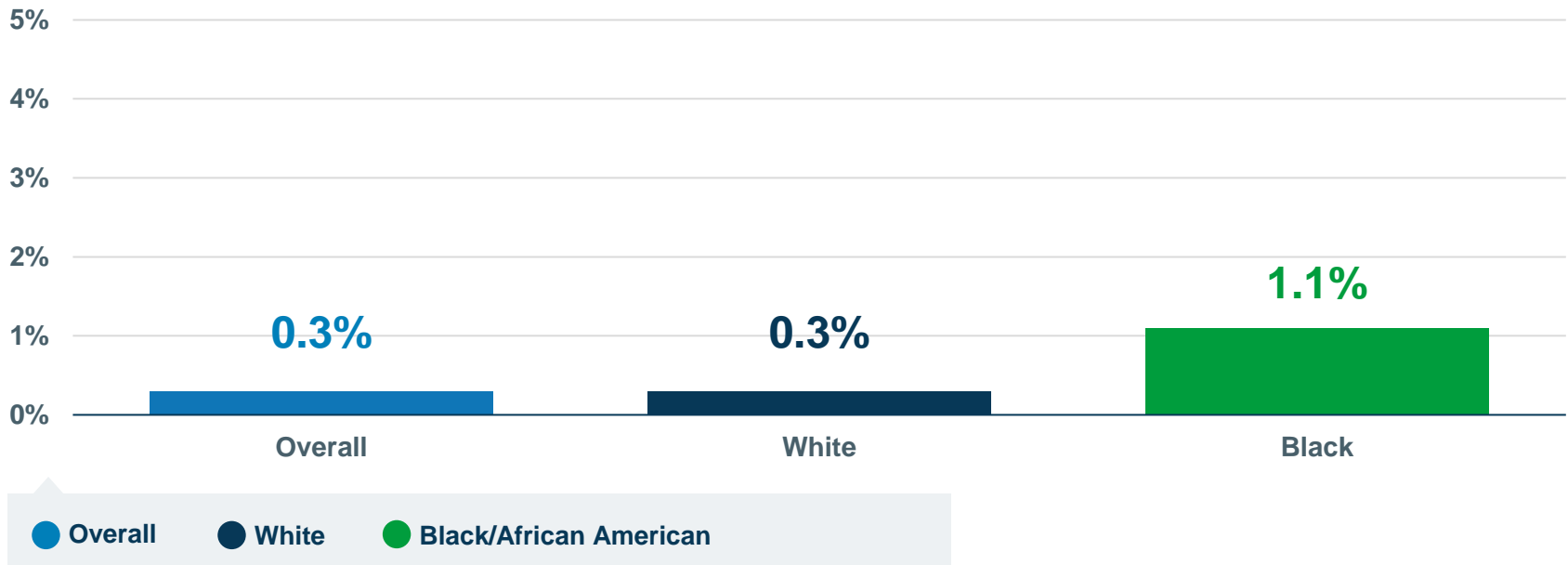


Source: Avalere Health analysis of Inovalon Provider Clearinghouse data

African American Beneficiaries Presented with Advanced Disease at Nearly 4x the Rate of White Beneficiaries in 2020

Relative Change in Initiation of Advanced Oncolytic Regimen as First Line Treatment, Year-Over-Year (Y/Y)

January-August 2019 vs. January-August 2020



Discussion /

- How can life science companies address social disparities of health to improve clinical outcomes?

Source: Avalere Health analysis of 100% Medicare Fee-for-Service data

Closing – Audience Poll



At what point do you feel cancer care management in the US will return to patterns or rates seen pre-pandemic?

Post-Pandemic Planning for Life Sciences Companies



Contact Ken Stokes, kstokes@avalere.com

Avalere Health | avalere.com | An Inovalon Company

