



COVID-19 in the Commonwealth

Virginia Hospital and Health System
Perspective

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Virginia Hospitals at a Glance

26 Health
Systems

110 community,
psychiatric,
specialty, and
rehab hospitals

More than
132,000 jobs

\$8.5 billion in
payroll

Top 5 employer
in 44% of
Virginia cities
and counties

1 of 9 Virginia
jobs tied to
health care

Support \$40
billion in
economic
activity

\$1.7 billion in
IRS-defined
community
benefit

\$3.2 billion in
total benefit to
Virginia
communities

~18,000 hospital
beds

More than 3.6
million ED visits

More than
860,000
admissions

More than
90,000 births

~450,000 adults
enrolled in
Medicaid
expansion

More than \$400
million in
contributions to
fund ME

Hospitals' Response to COVID-19



Virginia hospitals and health systems and VHHA played and continue to play a prominent role in leading the Commonwealth's response to COVID-19.

Hospitals took early and aggressive action to prepare for COVID-19.

- Voluntary shut down of non-urgent scheduled procedures (affirmed by Order of Public Health Emergency Two)
- Expanding surge capacity
- Ramping up testing and developing in-house capacity
- Clinical trials of potential treatments
- Navigating supply chain and workforce challenges while providing a safe care environment
- Partnering with LTC and other congregate care settings

VHHA and its members are chairing, co-chairing, and/or participating in more than 25 committees, task forces, and work groups and coordinating with the Administration and unified command daily.

Hospitals' Response to COVID-19



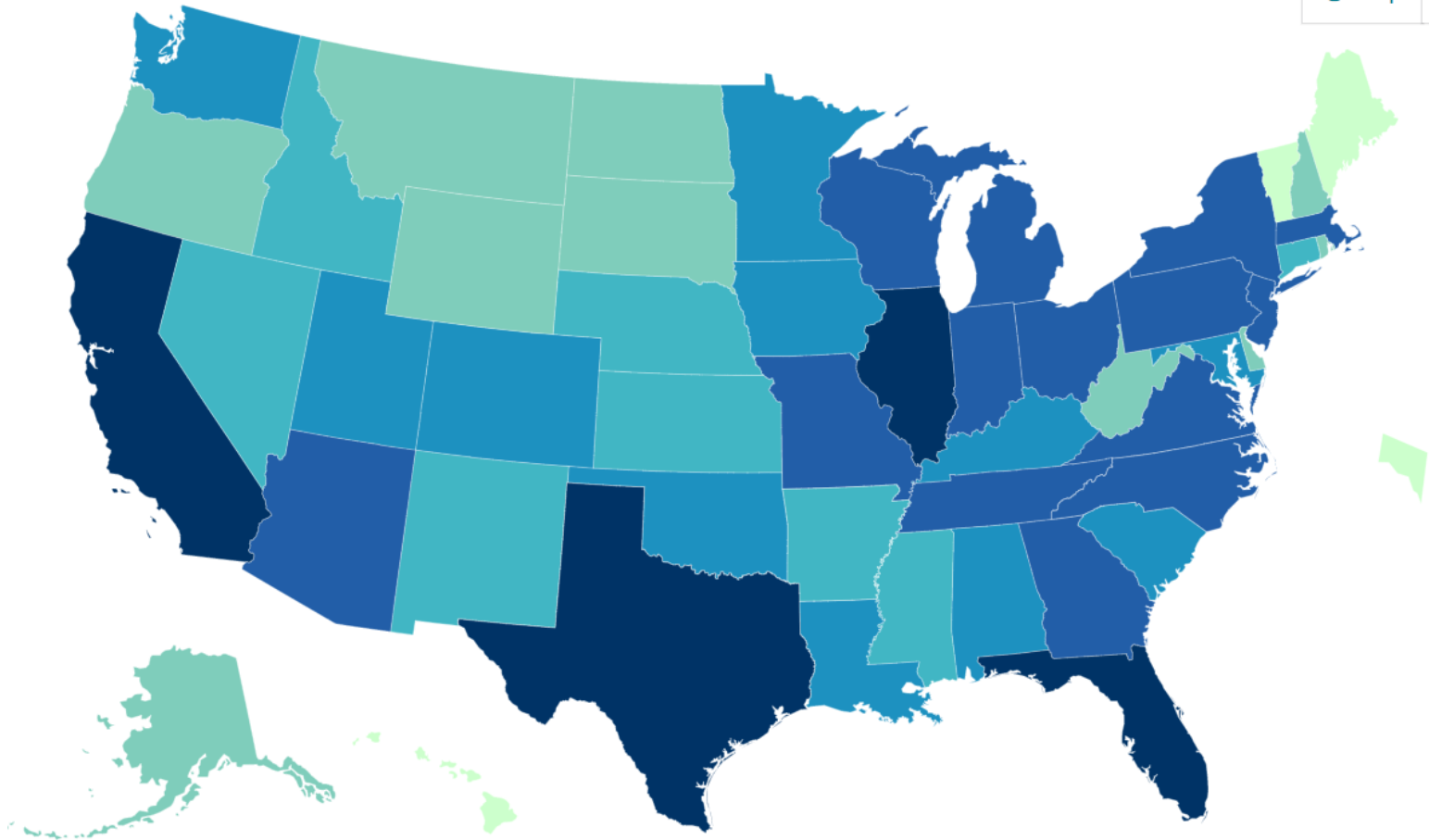
- Virginia hospitals have also been on the forefront of efforts to vaccinate Virginians against COVID-19.
- Hospitals stepped up in Phase 1a to vaccinate ALL healthcare workers across Virginia, not just their employees.
- Many hospitals set up community vaccination clinics and are working with their local health departments to vaccinate Virginians in Phases 1b and 1c.
- Virginia hospitals have administered more than 900,000 vaccines over the past three months and are expected to administer many more as the supply increases over the next several weeks.



COVID-19 National Snapshot

Total Number of COVID-19 Cases in the US Reported to the CDC, by State/Territory

Map



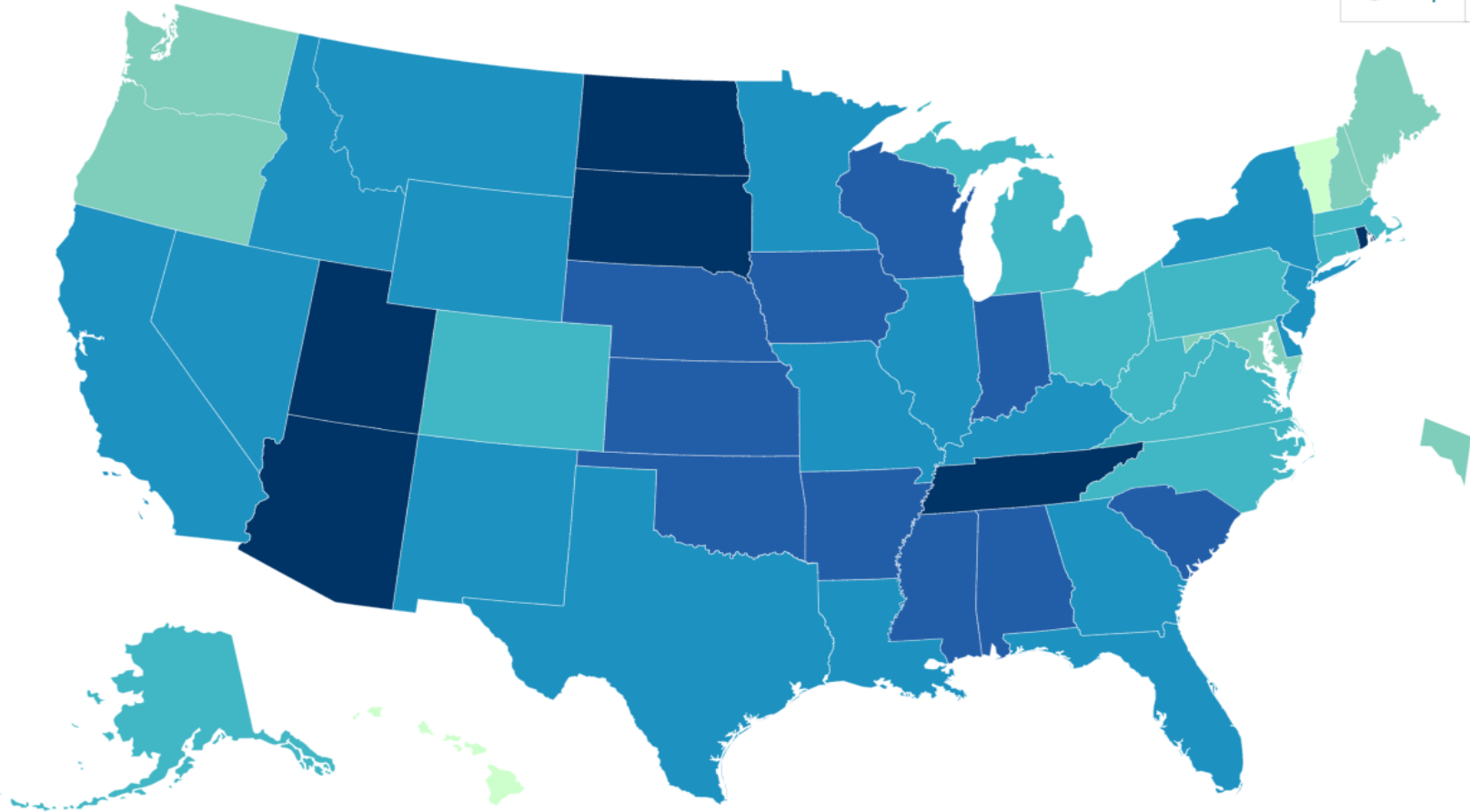
COVID-19 National Snapshot



COVID-19 Case Rate in the US Reported to the CDC, by State/Territory (cases per 100,000)

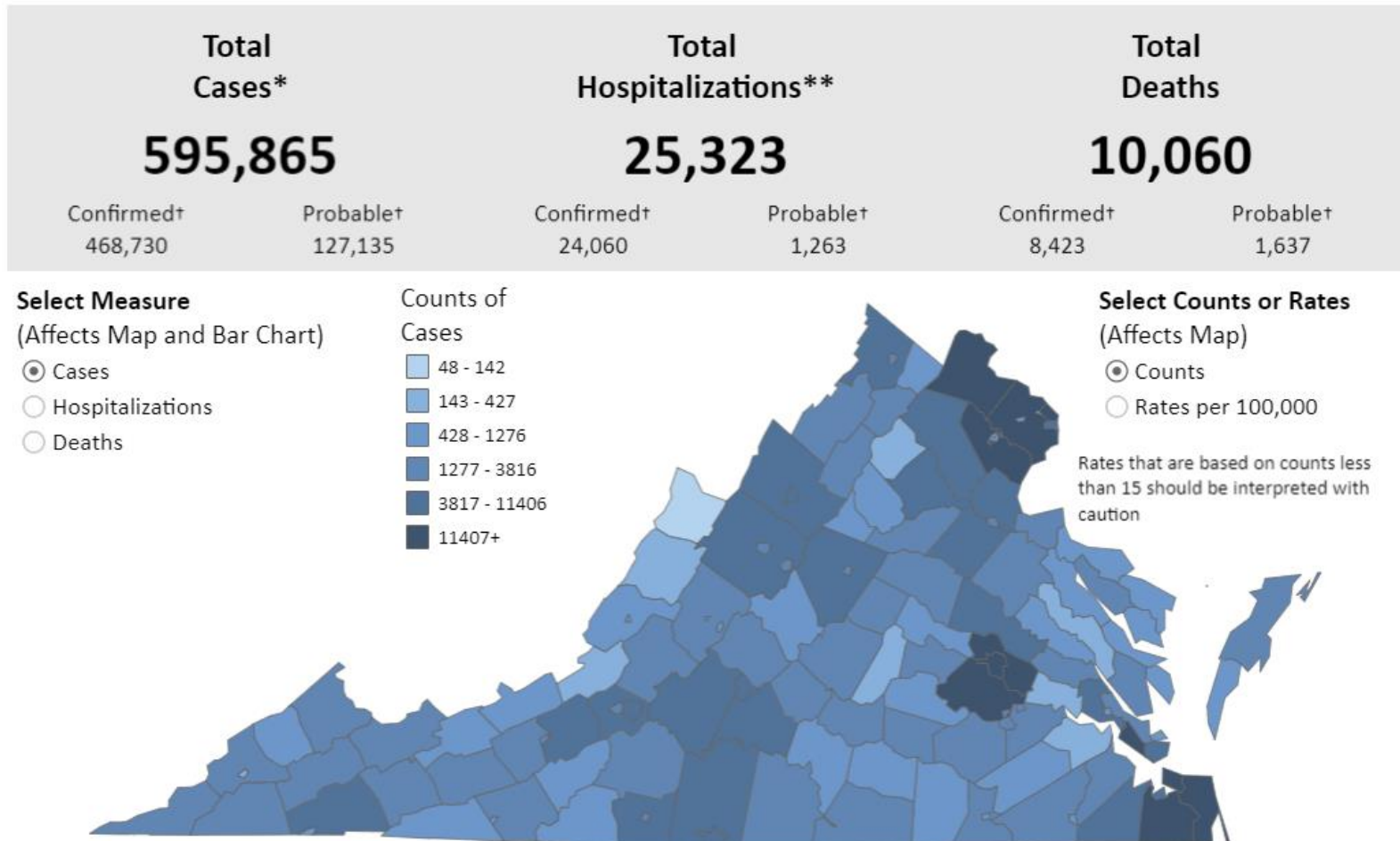
 Map

 Chart

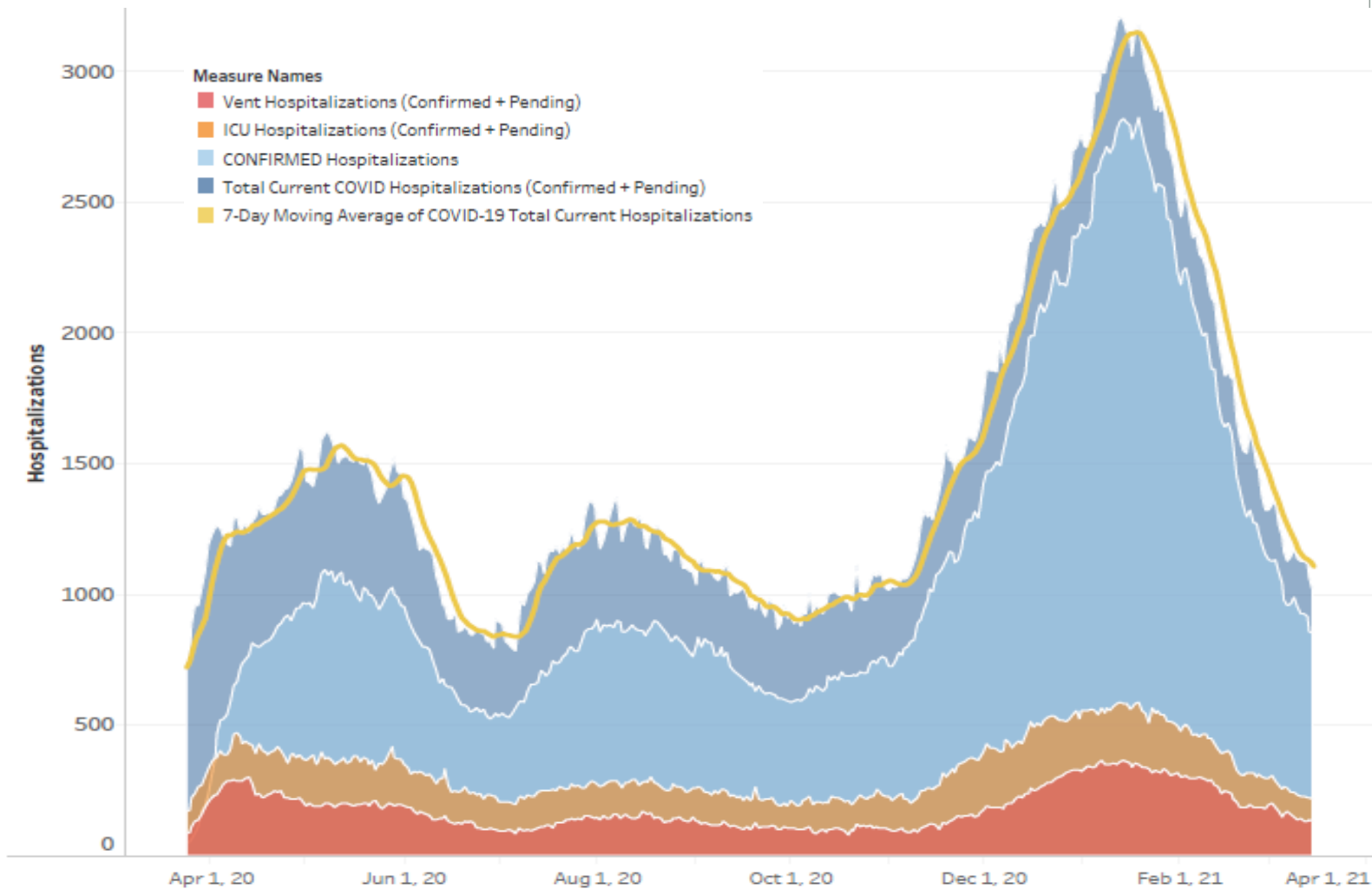




COVID-19 Virginia Snapshot



COVID-19 Hospitalization Trends





VHHA COVID-19 Dashboard

As of: March 15, 2021

Hospitalizations

Combined number of **confirmed** positive COVID-19 patients who are currently hospitalized, and hospitalized patients whose COVID-19 test results are **pending**.

1,013

The total number of confirmed COVID-19 patients who have been hospitalized and **discharged**.

49,126

Total number of currently hospitalized patients **confirmed** positive for COVID-19.

852

Total number of people currently receiving inpatient hospital care whose COVID-19 test results are **pending**.

161

Combined number of confirmed positive COVID-19 patients, and those whose COVID-19 test results are pending, currently **hospitalized in the ICU**.

217

Combined number of hospital patients, both confirmed for COVID-19, and those with test results pending, currently on a **ventilator**.

131



VHHA COVID-19 Dashboard

Ventilators

Total ventilators on-hand in hospitals.

2,926

Total ventilators in use at hospitals.

877

Share of total ventilators in use.

30%

Beds Available

Inpatient Bed Availability



3,776

Beds Added under EO52



3,695

ICU Occupancy

Current total ICU bed occupancy in Virginia hospitals, including COVID-19 and non-COVID patients. Pre-COVID average ICU occupancy rates were approximately 67 percent.

ICU Occupancy

75%

ICU Surge Beds

981

ICU Occupancy including Surge Beds

48%

COVID-19 Vaccines Administered by Hospitals

Weekly tally of COVID-19 vaccine doses administered by Virginia hospitals and health systems. The number below reflects doses administered as of **March 6, 2021**.

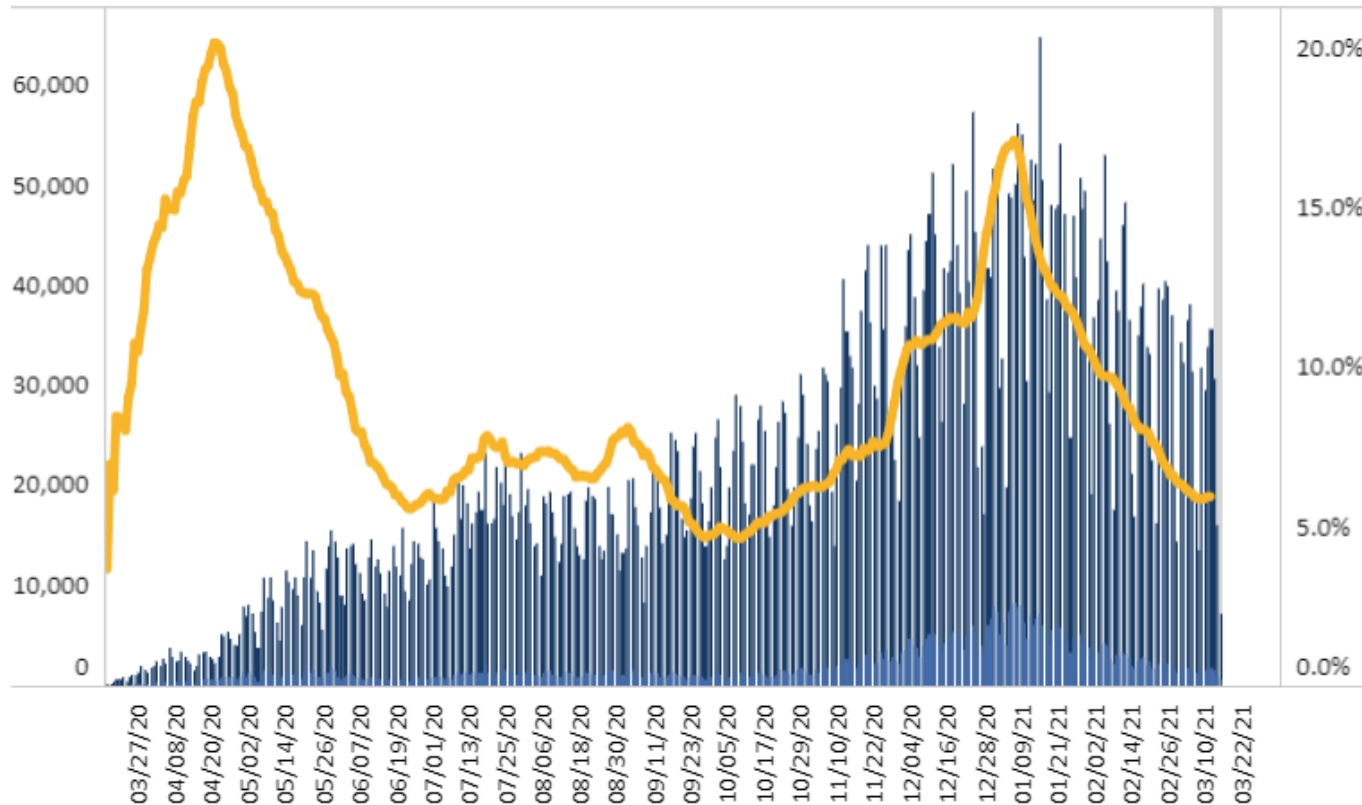
930,000



COVID-19 Testing

Number of Testing Encounters, Number of Positive Testing Encounters, and Percent Positivity** by Lab Report Date - All Health Districts, Total

■ Percent Positivity, 7-Day Moving Average
■ Positive Testing Encounters
■ Number of Testing Encounters



National COVID-19 Vaccination Progress



COVID-19: Metrics by State

Cases and Deaths Data Updated as of 3/12/2021, 2:24 PM Test and Hospitalization Data Updated as of 03/12 at 03:59PM ET.

Overview

Vaccines

Trends

Data Tables

Selected State:
United States

Select Metric:
Share of Population Vacci...

Administered
Vaccines
101,128,005

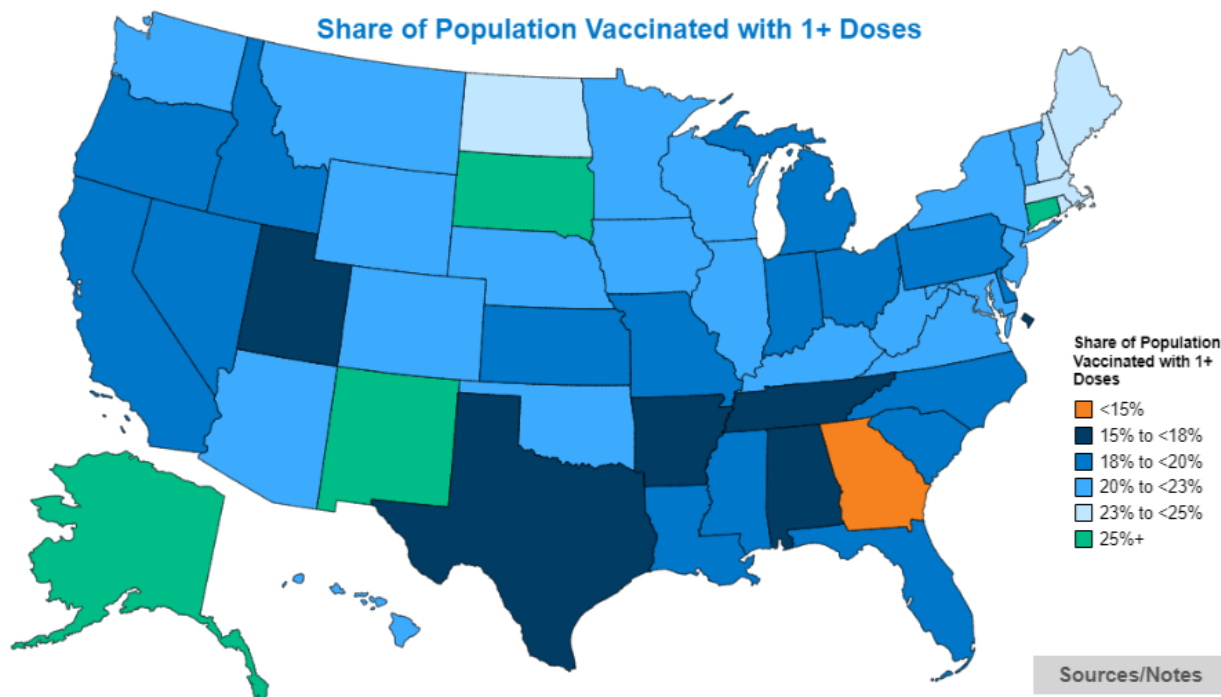
Total Cases:
29,320,580

Total Deaths:
531,654

Positivity Rate
13.2%

Hospitalized:
40,212

Share of Population Vaccinated with 1+ Doses



National COVID-19 Vaccination Progress



Vaccination Progress

Most Recent Two Weeks

■ First Doses ■ Second Doses

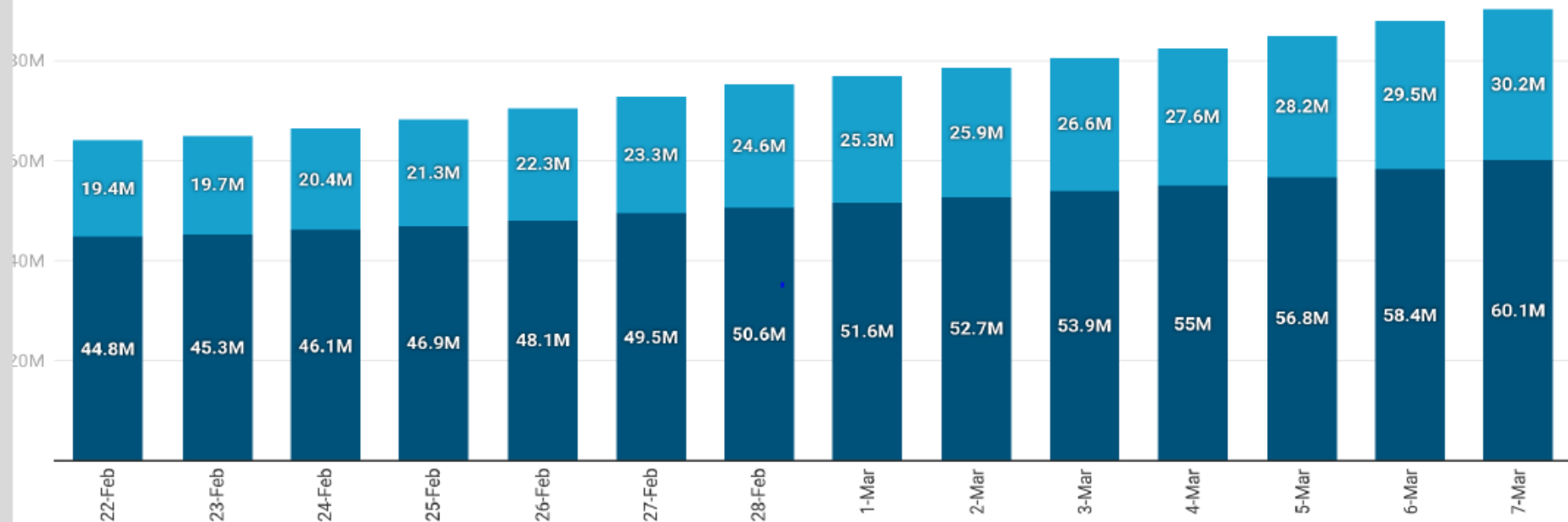


Chart: Health Industry Advisor LLC • Source: CDC, Bloomberg • Created with Datawrapper



National COVID-19 Vaccination Progress

Vaccinations of Adult Population

% receiving 1 or 2 doses, as of March 7

■ % 2 Doses ■ % 1 dose

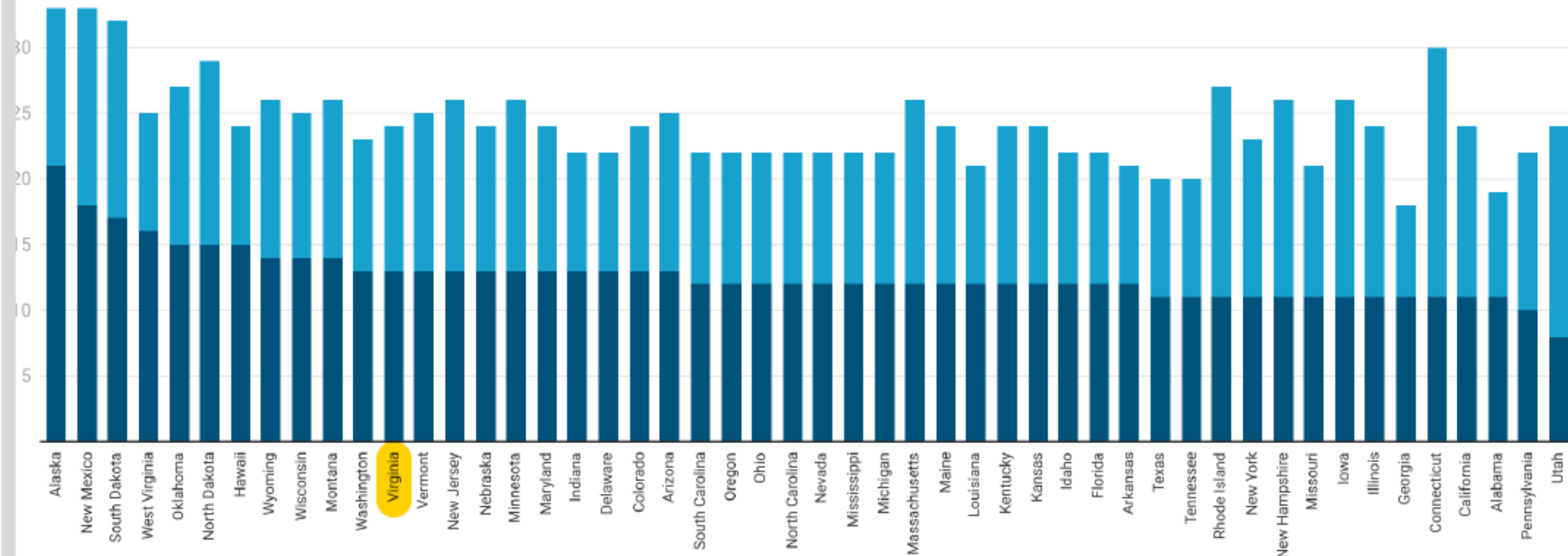


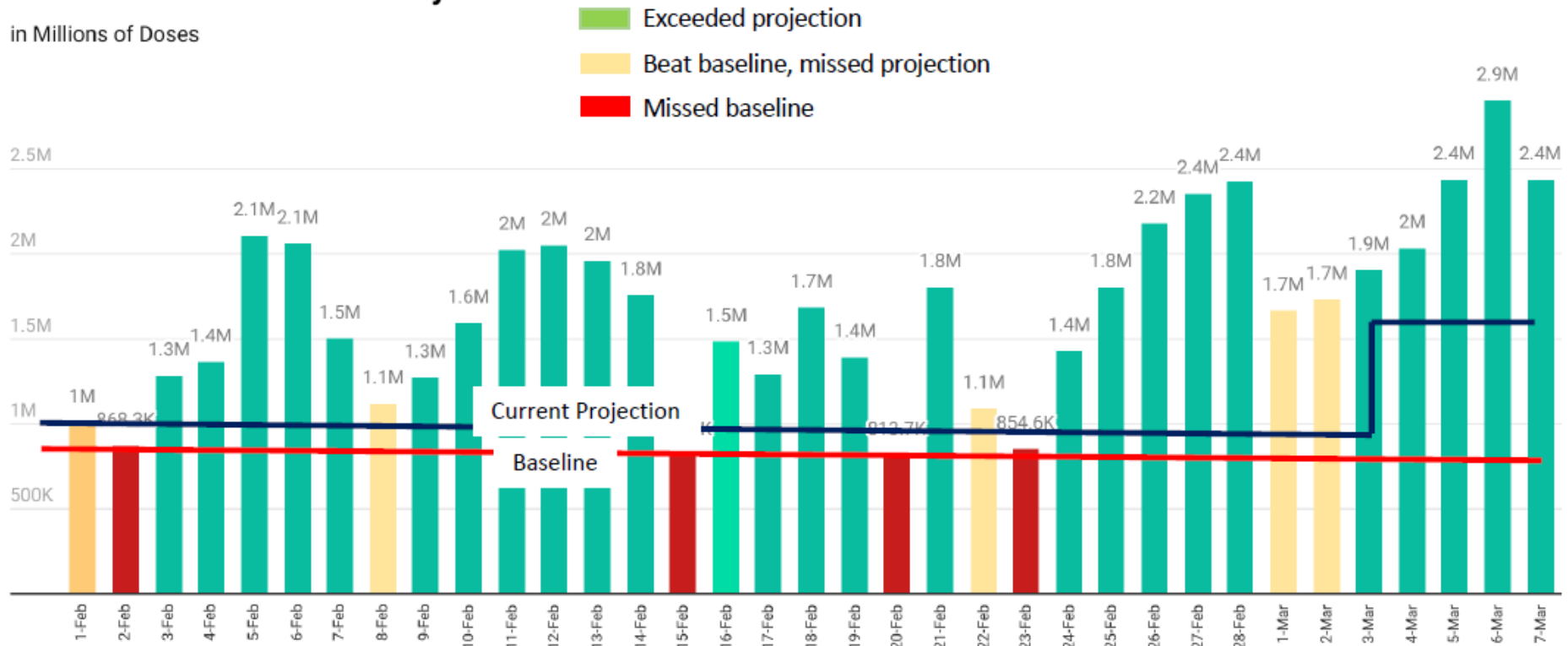
Chart: Health Industry Advisor LLC • Source: CDC, Bloomberg • Created with Datawrapper

National COVID-19 Vaccination Progress



Pace of Vaccinations - Daily

in Millions of Doses



Baseline: 100 Million Doses in 100 Days Current Projection: Ramped-Up Vaccinations; Additional 100M Pfizer and Moderna doses; and JNJ vaccine available on 3/1

Chart: Health Industry Advisory LLC • Source: Bloomberg • Created with Datawrapper

Virginia COVID-19 Vaccination Progress

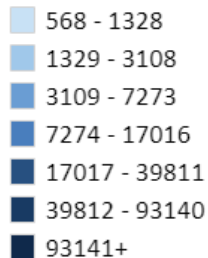


Total Doses Administered	People Vaccinated with at Least One Dose*	People Fully Vaccinated	% of the Population Vaccinated with at Least One Dose
2,740,975	1,796,749	1,010,519	21.1%

* Includes people vaccinated with 1 or 2 doses of a 2-dose vaccine, including doses administered through the Federal CDC Pharmacy Partnership for Long Term Care Facilities.

People Vaccinated by Locality of Residence and Vaccination Status

At Least One Dose Count

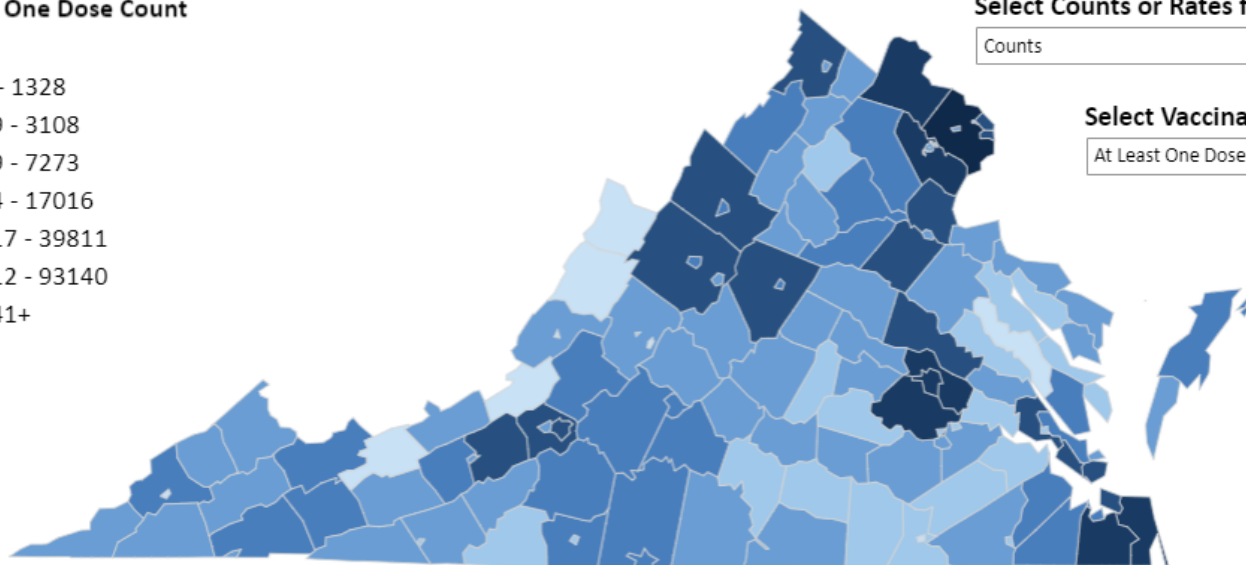


Select Counts or Rates for the Map

Counts ▼

Select Vaccination Status

At Least One Dose ▼



People Not Mapped: 245,996

Impact of COVID-19 on Hospitals



Virginia hospitals incurred more than \$270 million in direct costs to increase capacity, purchase PPE, and care for COVID-19 patients.

The temporary cessation of scheduled medical procedures resulted in significant declines in hospital and procedure volumes.

- Elective procedure volumes were down 66% in April, 33% in May, and 20% in June.
- Emergency department volumes were down 45% in April, 36% in May, and 20% in June.
- The Average Daily Census was down 24% in April and 36% in May but showed signs of recovery in June.

The decline in hospital volumes resulted in Virginia hospitals losing \$2 billion in revenue between April and June 2020.

Impact of COVID-19 on Hospitals



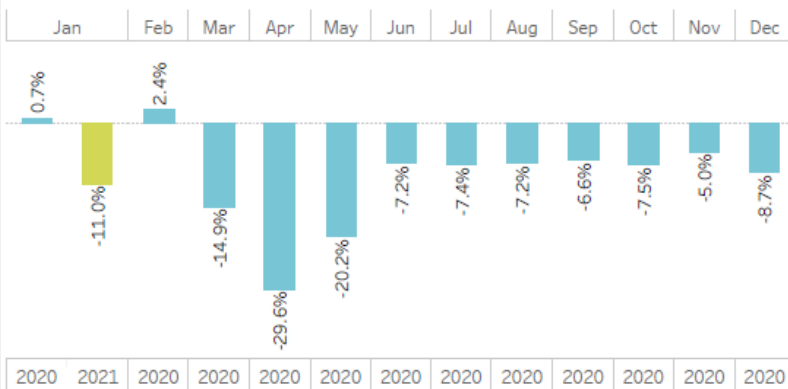
Section 1.4

Monthly Volume Changes Compared to 2019

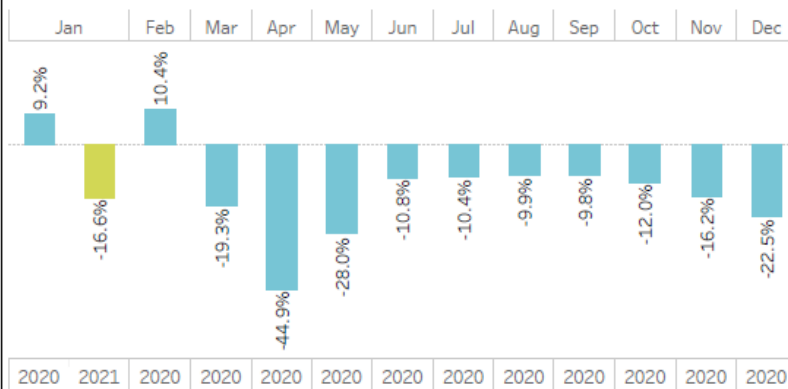
Data as of 1/31/2021



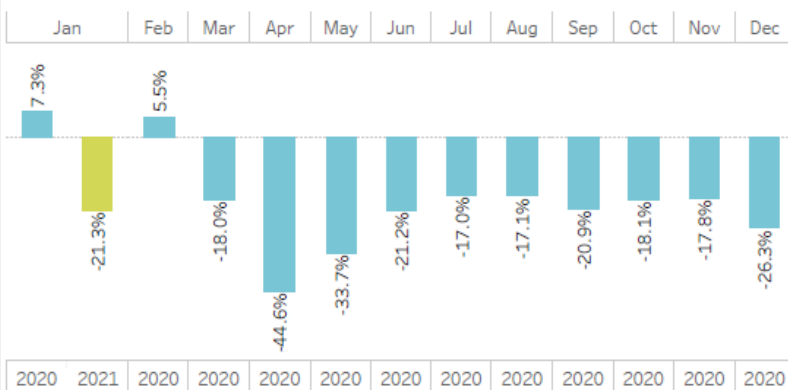
Inpatient Admissions



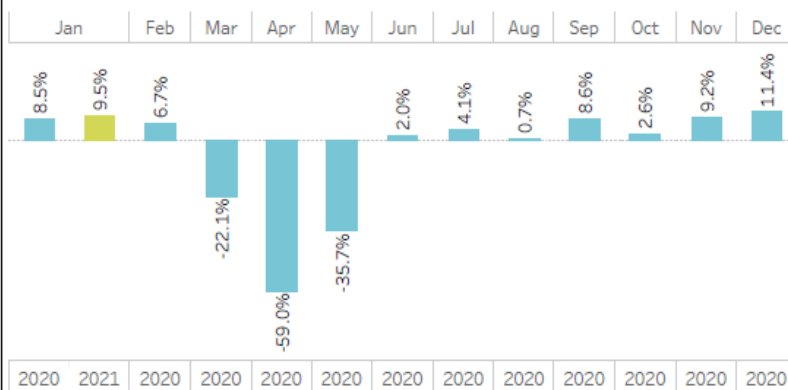
Observation Visits



Emergency Visits



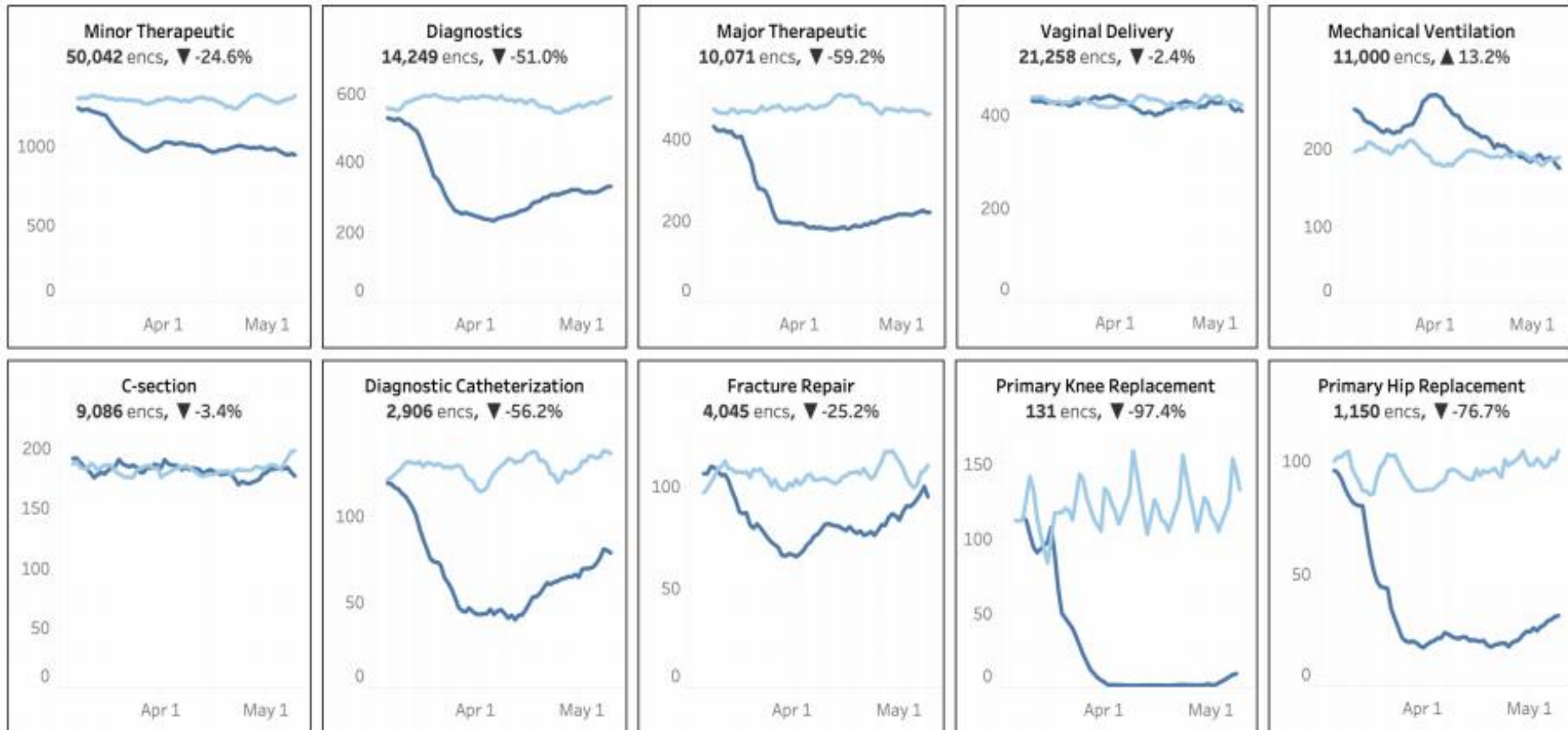
Outpatient Visits





Procedures and Surgeries

— 2019
— 2020





Healthcare Utilization

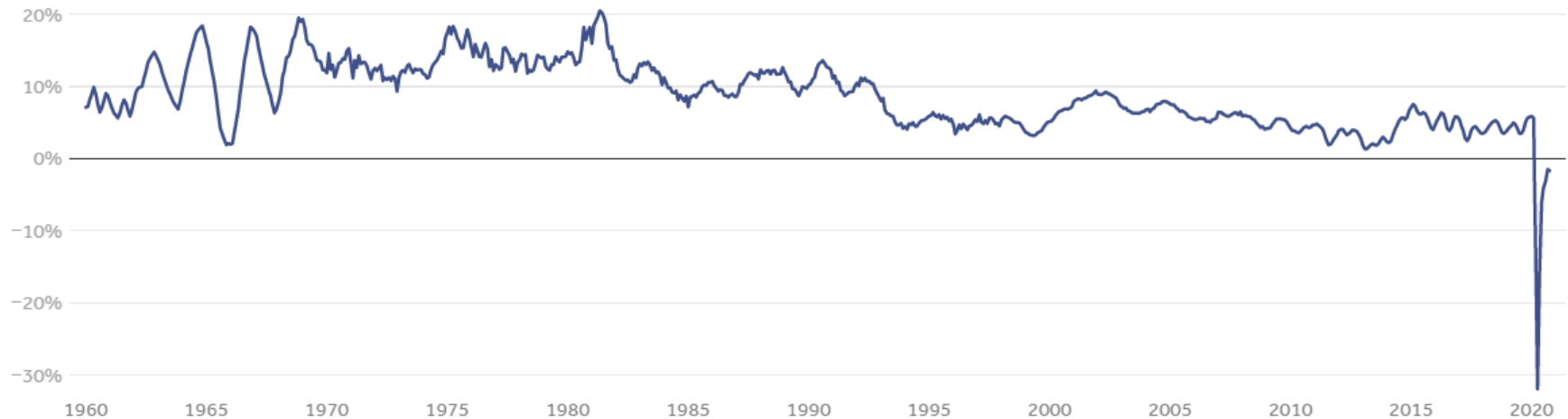
	Dec. 2020	3-Month Moving Average	12-Month Moving Average
Total health care	-3.3%	-2.9%	-6.4%
Hospital care	-8.0%	-6.9%	-10.7%
Physician and clinical services	-0.8%	-0.9%	-5.9%
Prescription drugs	6.2%	5.3%	4.7%
Nursing home care	-11.9%	-10.3%	-7.0%
Dental Services	-18.6%	-17.2%	-23.6%
Home health care	3.1%	2.9%	-1.6%
Other professional services	-1.0%	-2.3%	-4.2%
Other personal health care	1.6%	1.5%	1.6%
Other nondurable medical products	8.4%	10.5%	6.7%
Durable medical equipment	4.5%	4.5%	-5.1%

Source: Altarum analysis of monthly BLS data combined with Altarum HSEI spending data.



Healthcare Spending

Year over year percent change in personal consumption expenditures on health care services, January 1960 - October 2020



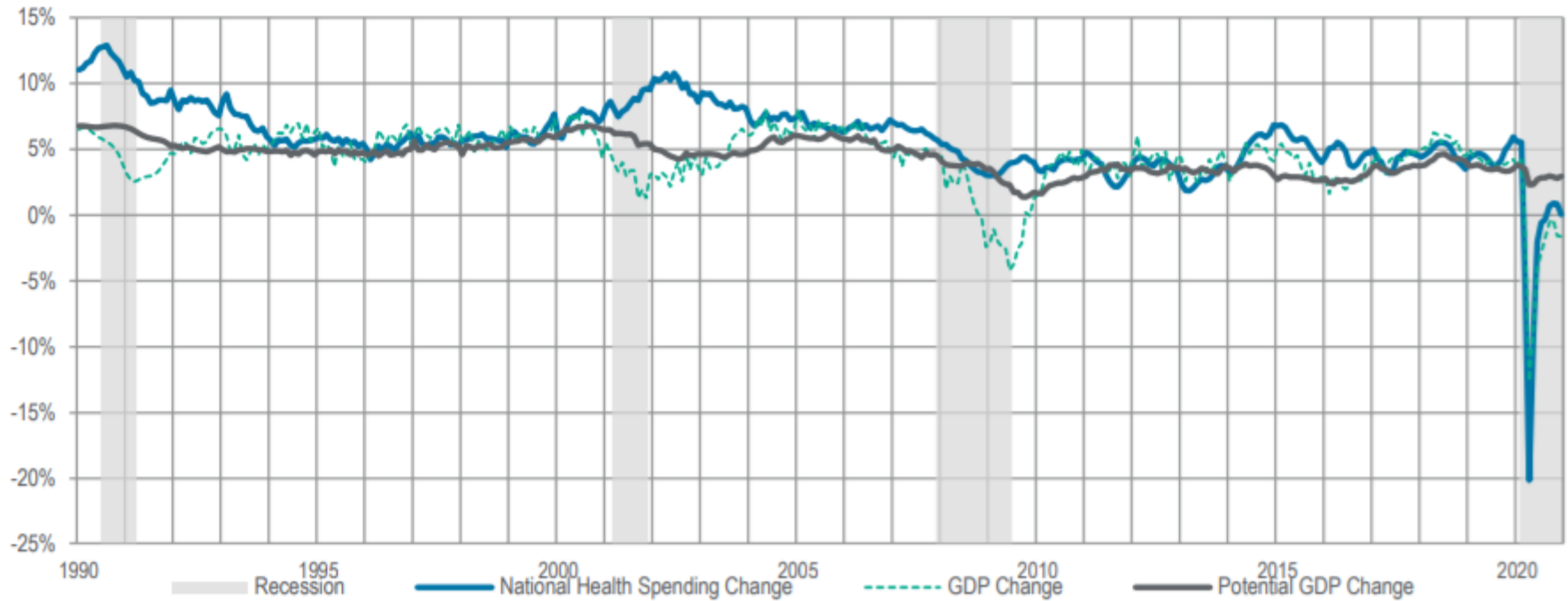
Note: Monthly spending data are annualized

Source: [KFF analysis of BEA Data](#) • [Get the data](#) • [PNG](#)

Peterson-KFF
Health System Tracker



Healthcare Spending

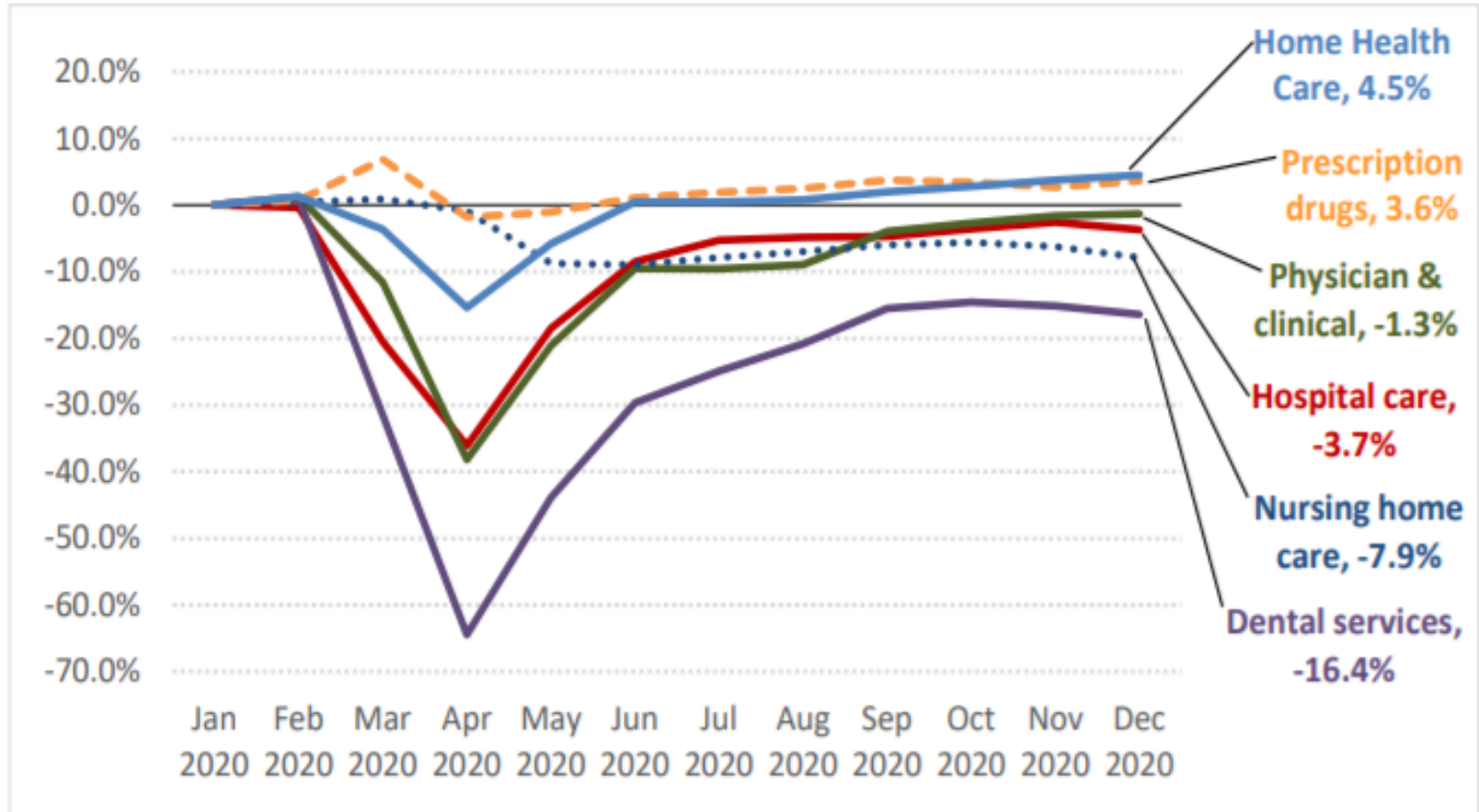


Source: Altarum monthly national health spending estimates. The monthly GDP is from IHS Markit.

Note: Lightly shaded bars denote recession periods.

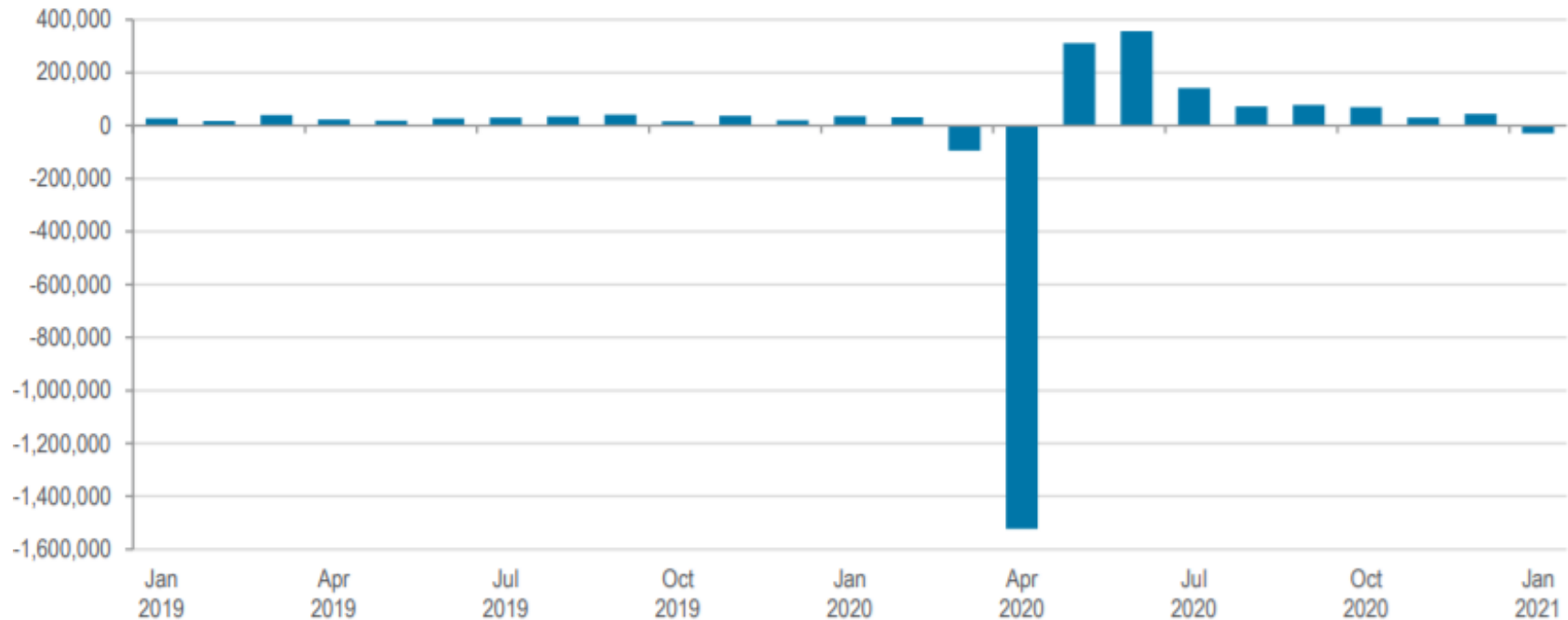


Healthcare Spending





Change in Health Care Employment



Healthcare jobs contracted significantly early in the pandemic. As of January 2021, there were ~500,000 fewer healthcare jobs, with hospital employment down 1.2%, ambulatory care jobs down 1.8%, and nursing and residential care facility jobs down 9% compared to January 2020.



Increased Use of Telehealth

➤ Consumers Turn to Telehealth in 2020*

Used telehealth services in 2019



Used telehealth services during pandemic



Interest in using telehealth going forward



➤ Providers Comfort with Telehealth

➡ Providers are seeing **50-175 times** the number of patients via telehealth than they did before the pandemic.

➡ Learn more about **AHA's telehealth resources:**
aha.org/telehealth

.....

Providers view telehealth more favorably than they did before COVID-19



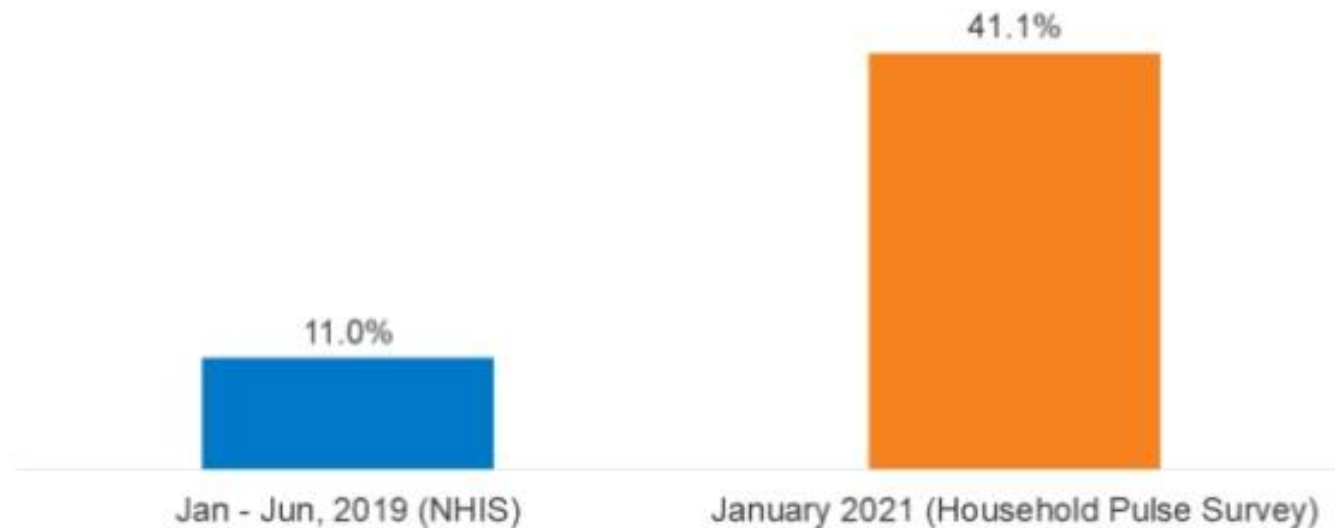
Providers more comfortable using telehealth



Increased Demand for Behavioral Health/SUD Services



Average Share of Adults Reporting Symptoms of Anxiety Disorder and/or Depressive Disorder, January-June 2019 vs. January 2021



NOTES: Percentages are based on responses to the GAD-2 and PHQ-2 scales. Pulse findings (shown here for January 6 – 18, 2021) have been stable overall since data collection began in April 2020.

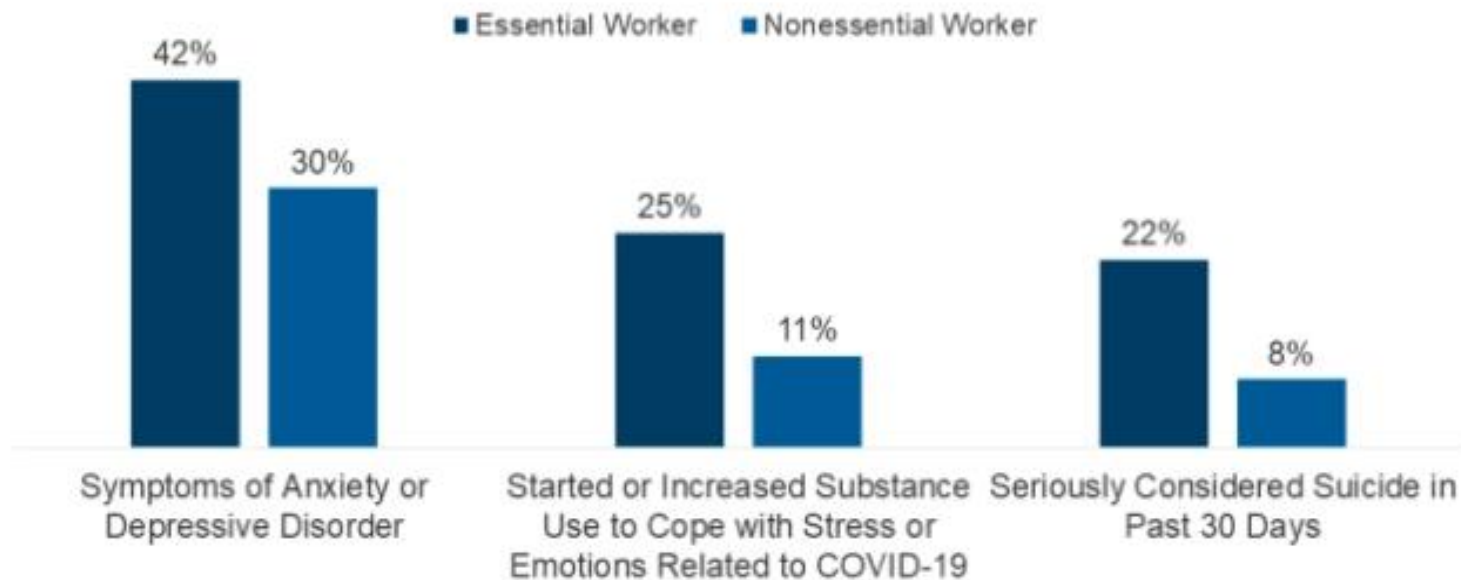
SOURCE: NHIS Early Release Program and U.S. Census Bureau Household Pulse Survey. For more detail on methods, see: <https://www.cdc.gov/nchs/data/nhis/earlyrelease/ERmentalhealth-508.pdf>

KFF

Increased Demand for Behavioral Health/SUD Services



Among Essential and Nonessential Workers, Share of Adults Reporting Mental Distress and Substance Use, June 2020



NOTES: Data is among adults ages 18 and above. Essential worker status was self-reported.

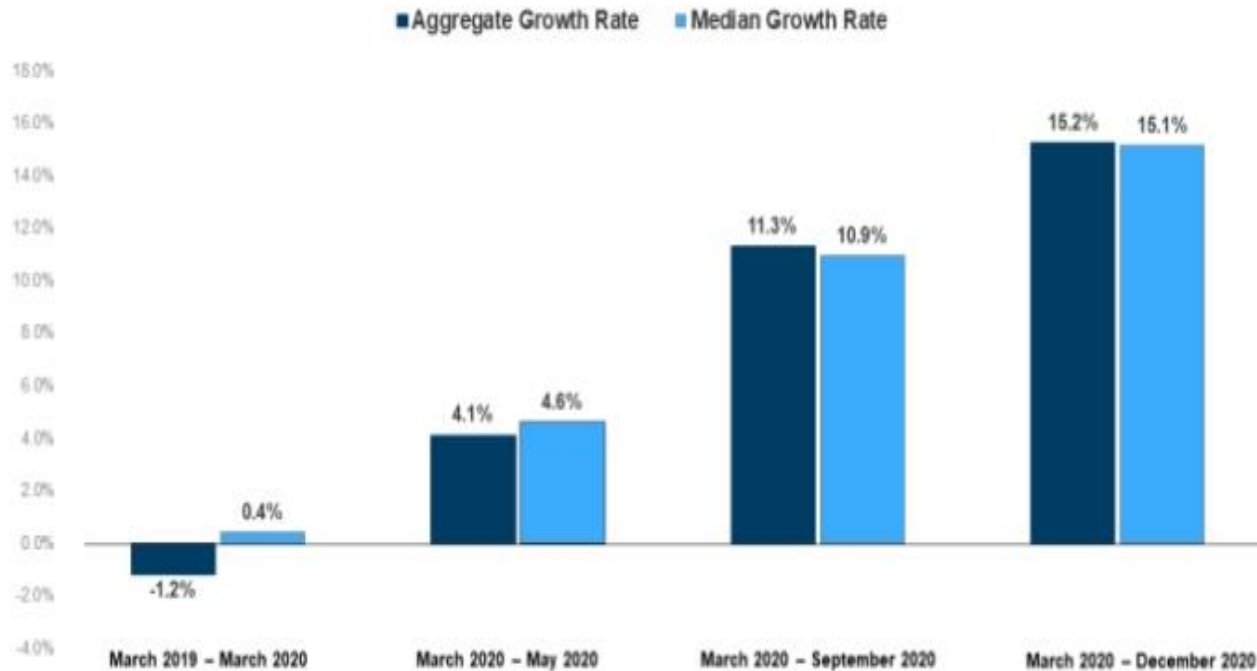
SOURCE: Czeisler ME, Lane RI, Petrosky E, et al. Mental Health, Substance Use, and Suicidal Ideation During the COVID-19 Pandemic — United States, June 24–30, 2020. MMWR Morb Mortal Wkly Rep 2020;69:1049–1057. DOI: <http://dx.doi.org/10.15585/mmwr.mm6932a1>

KFF



Growth in Medicaid Enrollment

MCO Enrollment Growth Rates: March 2019 – December 2020



NOTE: Aggregate growth rates were calculated using states that reported in both periods. March 2019 – March 2020, 32 states reported in both periods. March 2020 – May 2020, 27 states reported in both periods. March 2020 – September 2020, 30 states reported in both periods. March 2020 – December 2020, 28 states reported in both periods.
SOURCE: KFF analysis of state Medicaid managed care enrollment reports.

KFF

There are 533,283 adults newly enrolled in Medicaid as of 3/15/21 in Virginia compared to 401,701 as of April 2020.

Business/Employer Regulations



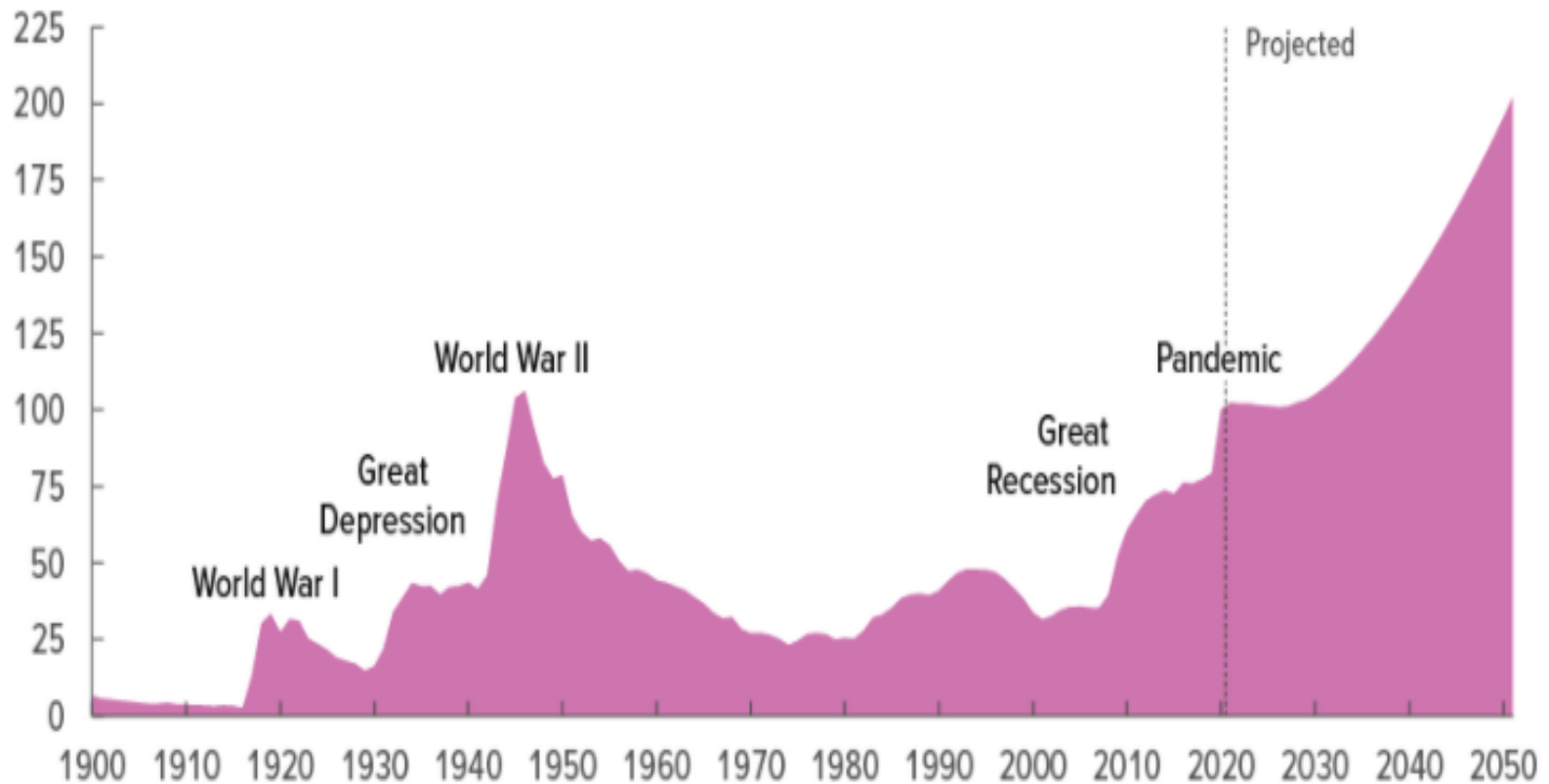
- Statewide restrictions on capacity, hours, etc.
- DOLI Regulations
 - Risk based classification of all employees based on work environment, virus presence, # employees, physical space, etc.
 - Requirements around training, PPE, other mitigation
 - Requirements on return-to-work for exposed/infected employees



The four exposure risk levels represent probable distribution of risk.



U.S. Debt to GDP





Potential Long-Term Implications

Vaccinations vs.
Variants

Impact of Delayed
Care

Staying Power of
Telehealth

State
Budgets/Medicaid
Enrollment

Hospitals' Role in
Public Health
System

New Payment
Models

Health Insurance
Costs/Coverage

Health Equity

Policy/Regulatory
Environment



Questions