



ONCOLOGY DEMAND RECAPTURE IS A HEALTH SYSTEM PRIORITY

A robust plan to safely serve oncology demand is necessary to support timely patient access and avoid lasting financial repercussions



One of the most valuable service lines, typically representing **25% to 40%** of health system margins.



On average, a newly diagnosed cancer case contributes **\$20K+** to service-line contribution margin.



With providers reopening this week, competition is more intense for demand recapture and competing as a provider of choice.

WHAT'S YOUR PLAN FOR DEMAND RECAPTURE?

Cancer patients have always played an active role evaluating their cancer care provider, but COVID-19 adds a new dimension to consumer decision making. Health systems must consider four patient profiles when formulating their demand recapture strategy.

CANCER SCREENINGS



80-90%
decline in screenings¹

Referrals from PCPs for routine screenings pre-COVID-19 that are now in the post COVID-19 recovery queue

NEW PATIENT VISITS



40% *decline in new patient visits²*

Anxious patients that are pre-diagnosis and newly diagnosed cancer patients requiring consultation and treatment planning

ON TREATMENT PATIENTS



17% *decline in chemo in the NE US²*

Cancer patients actively receiving or beginning surgical, systemic therapy, radiotherapy or combination therapy treatment during COVID-19

ESTABLISHED PATIENTS

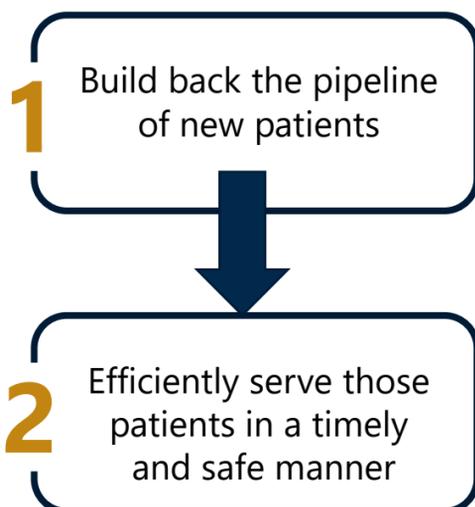


80% *rise in cancellations/no shows²*

Established cancer patients being managed during treatment, palliative care, end of life care, survivorship or active surveillance

¹ STAT. "Routine cancer screenings have plummeted during the pandemic, medical records data show"; Rebecca Robbins, May 4, 2020. <https://www.statnews.com/2020/05/04/cancer-screenings-drop-coronavirus-pandemic-epic/>
² The Cancer Letter, "Real-World Evidence, COVID-19 vs. community oncology"; Matthew Bin Han Ong, May 1, 2020. https://cancerletter.com/articles/20200501_1/

CRITICAL PLANNING REQUIREMENTS



Build patient and referrer confidence to create demand

- Segmentation of communication approach by patient profile and type
- Phone, email and social marketing campaigns
- Education on the safety protocols in place
- Referral physician relationships and awareness of patients that can be seen quickly and safely

Ensure access and capacity planning to meet demand

- Workforce optimization, including best use of navigators and APPs for physician load leveling
- Throughput management, including pre-visit COVID-19 screens, labs and case reviews done in advance
- Extending hours of operation daily and into the weekend
- Utilizing digital, including virtual second opinion clinics