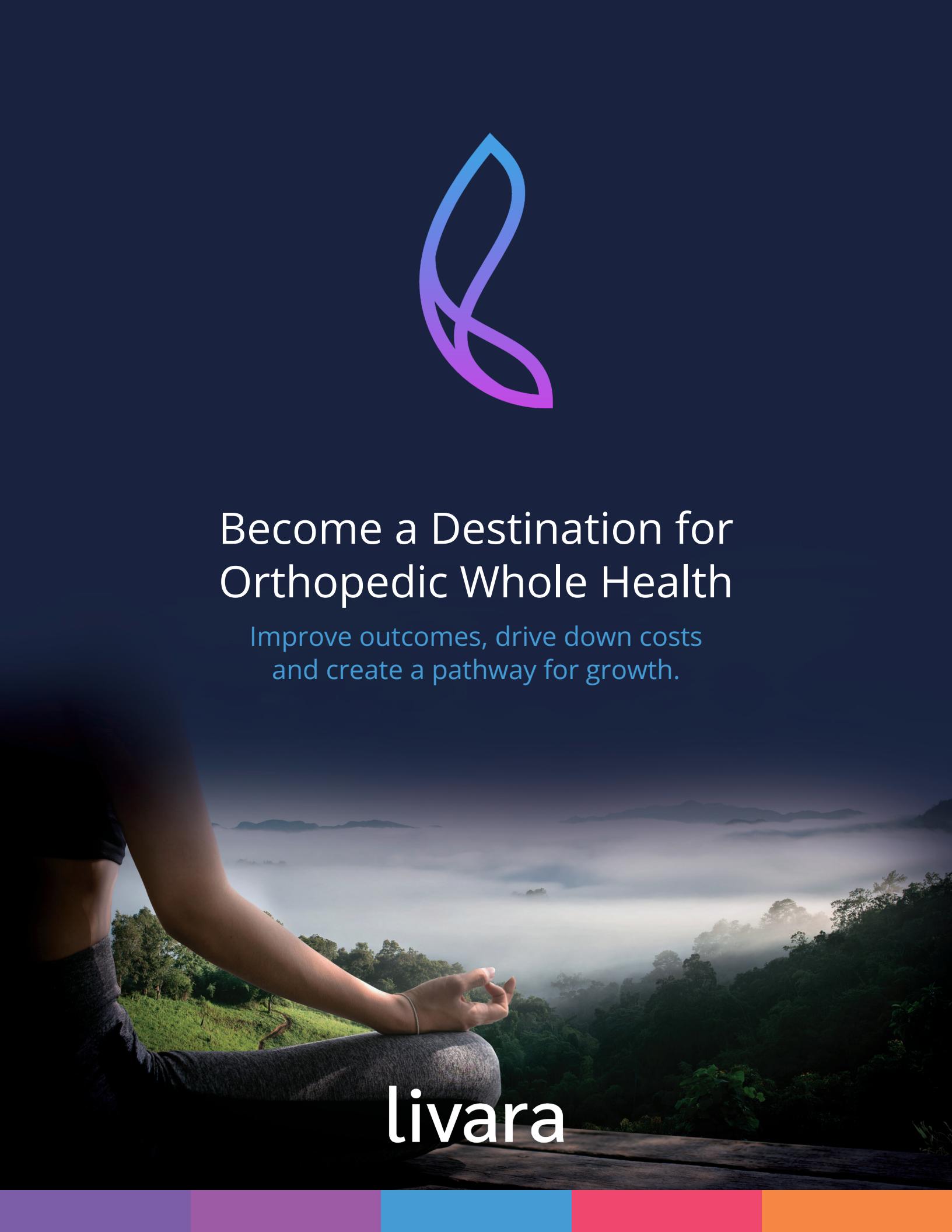




Become a Destination for Orthopedic Whole Health

Improve outcomes, drive down costs
and create a pathway for growth.



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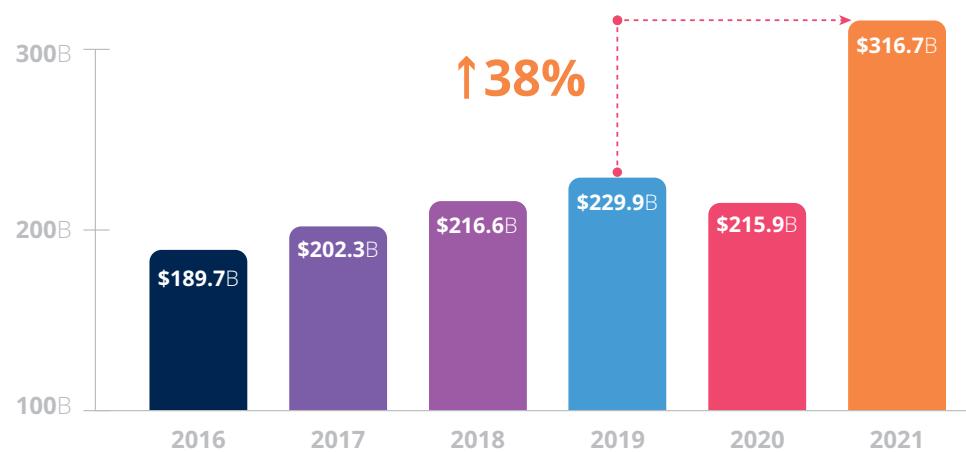


Unsustainable Costs in Orthopedic Care and the Beginning of Risk

The healthcare ecosystem in 2022 faces a unique challenge. As competition for patients accelerates in a post-pandemic world, providers and health systems are making investments in expanding their consumer focused options for care. Expensive inpatient services continue to experience headwinds, while outpatient options continue to accelerate. For example, Medicare is expanding the list of procedures which can be performed in an outpatient setting, including lumbar spine fusion. This is a clear warning shot to fee for service medicine. At the same time, value-based care is rapidly changing the landscape. Payors and employers are looking to more aggressively shift financial risk to providers—but are providers prepared to accept risk?

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Orthopedic care has taken center stage in this dynamic. Costs for musculoskeletal care are the highest among all healthcare specialties in the US at over \$400 billion per year driven by aging demographics, a complex set of comorbidities impacting pain and orthopedic issues, and an insatiable demand for timely and effective treatments. With the expansion of outpatient treatment options and the pressures from payors on costs, it's time to prepare for the shift towards becoming an integrated destination for orthopedic health.

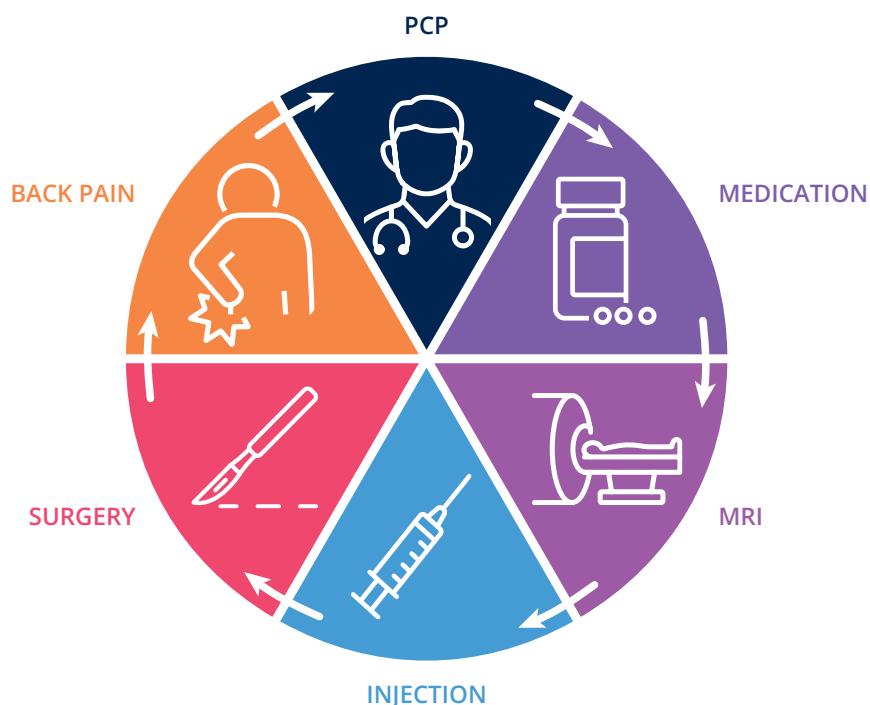




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The Current Patient Experience

The scenario plays out every day in the U.S. Your lower back has nagged you for years since you felt a tweak lifting some heavy boxes. You have seen your primary care doctor multiple times who has prescribed some medication to take the edge off. With no real relief, your PCP sends you to get an MRI which shows a ruptured disc. You are referred to pain management for a steroid injection. Frustrated by the lack of improvement, you go to a surgeon and are told you should have surgery to fix the disc problem and they can schedule that the following week. Surgery has limited success with possible risk of future operations. You try to do your part and schedule with physical therapy, but it is not coordinated with your care team, not engaged and ineffective - and you drop out after a few sessions. Round and round it goes with no coordination, wasted time and money and importantly, limited results. As a patient, you can't help but feel disappointed by the experience which has necessitated time off work and growing copays, all while the pain persists and you inch closer to surgery day.





Limitations of Technology

Like all specialties over the last year, MSK became the focus for multiple digital solutions to fill in the gap for in-person treatment disruptions across the country. Digital rehab vendor solutions have proliferated to meet a surging demand by employers who wanted to offer a convenient way to address acute and chronic back pain and other MSK disorders. The promise is enticing – with wearable technologies and Ipads, could technology replace or materially account for a cohort of MSK patients? Could health systems leverage this new technology to enhance patient engagement and improve health outcomes? Can digital technology be the solution for risk-based providers seeking ways to reduce total cost of care and drive growth?

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Yes and no.

While there are certainly compelling use cases for digital technology in MSK, the vast majority of MSK cases run into a truism of healthcare – healthcare is local and personal. For anyone who has suffered from a ruptured disc, the notion of using a wearable strap in lieu of in-person care falls short of the human touch. The future should not be seen as digital. It should be seen as integrated.

Digital Health has seen a leveling off following the pandemic as patients find a new balance between online and in person care.



*Commonwealth Fund (August 13th 2020)



But Your Current Physical Therapy Strategy Won't Solve This Problem

As some providers trial pure digital MSK solutions, others redouble efforts with their existing physical therapy footprint. But there are a few challenges with this strategy. Namely:

- **Traditional physical therapy has little in the way of differentiation from the providers down the street. To succeed in the new healthcare landscape, orthopedic providers need to expand their value proposition to referring providers and to their community. This means offering all the services a patient needs for sustained musculoskeletal health—like nutrition, mindfulness and sleep specialties—under one roof.**
- **You can't grow if you don't have sufficient access. As providers exit their careers, patients can wait weeks for their first appointment or evaluation. This is a space where digital can play a role, allowing patients to engage online before being seen in person.**
- **Rich data sets are also essential, to ensure your therapists understand the leading risk factors for each patient and tailor their program accordingly.**

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In short, the future will be about positioning your program as a destination for orthopedic whole health. Done well, you'll be the most accessible and differentiated program in your community, growing referrals in the process.



Introducing Non-Operative Orthopedic Care Management

As a leading provider of patient centered orthopedic health, we're partnering with providers and health systems to offer a different approach, one that creates a comprehensive destination program for your community. One that addresses 100% of orthopedic care utilizing the complete spectrum of non-operative care modules and professionals to meet members along their entire journey of MSK care - from prevention to treatment and beyond.

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Livara helps providers navigate musculoskeletal referrals for patients, leveraging its technology platform to offer virtual access to address immediate, preventative, pre and post-operative orthopedic care and rehabilitation. By providing online access to its multidisciplinary team of resources, Livara allows partners to grow through a differentiated approach to patient care. In addition to growth, Livara helps providers alleviate the frustrating issue of access by providing easy access to its integrated team of physical therapists, specialty clinicians, wellness counselors, pain psychologists, and nutritionists while patients await their appointment date. Beyond that, by partnering with both payors and providers, Livara guides health plan members through their care, providing the kind of data driven, comprehensive and full integrated care that's essential to value-based medicine.

94
Net Promoter Score

70.5%
Patient Narcotic Elimination

20%
Growth in Referring Providers

84.9%
MCID for
HADS-Depression

51.4%
Average Patient
Reduction in Back Pain

+25%
2022 Referrals
Growth



A Model for Success

Having partnered with orthopedic providers for over 15 years to create and manage a destination program for orthopedic health, we recommend considering the following when thinking about a partner for your physical therapy and orthopedic health growth strategy.

VALIDATE OUTCOMES

The ultimate goal—Value-based Care— starts with a long record of proven outcomes. Any partner should be able to wow you with consistent outcomes, and should volunteer to provide you with the raw actuarial data to support their claims.

MINIMIZE CAPITAL COSTS

Rather than build new clinics, optimize what you already have.

LED BY PHYSICIANS

You don't want to partner with a company that doesn't understand the complexities of physician relationships. A physician led partner that is driving growth in their own clinics is best equipped to work collaboratively with your existing clinical footprint to optimize success.

DRIVE REFERRALS AND GROWTH

Partners should be able to demonstrate that in addition to managing your existing patients, they can drive net new patients into the system with a ready-made sales strategy.

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DIFFERENTIATE THE PATIENT EXPERIENCE

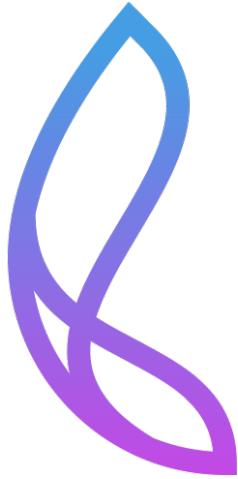
Physical therapy can be the first service a patient interacts with within your system. That experience should be seamless, differentiated, and leave them with a positive view of your system. A partner should have a minimum 85 net promoter score for their program and 90 or above for their therapists.

COMBINE CLINICAL AND DIGITAL

The future of healthcare is neither digital nor in person - it's a hybrid of both. Any partner to help you achieve a differentiated destination for orthopedic health should have both a distinguished clinical model as well as a modern digital experience to be able to treat every patient on their terms and meet their expectations.

REQUIRE JV EXPERIENCE

Beyond building a differentiated orthopedic program, further position your system for success by co-developing a JV. The entity can move towards taking risk on lives. Choose a partner with JV experience.



The Next Step

The future of orthopedic patient care is coming into focus, and we believe that having a partner to develop a leading edge orthopedic health program is the next innovation of MSK treatment. This does not have to be capital investment nor does it need to fundamentally disrupt your existing primary care or specialist footprint. Choose your partner carefully, because the time to compete for these patients is fast approaching and once aligned, they'll be hard to engage in the future.

Are you ready to have a conversation with the leading partner for physical therapy and non-operative orthopedic care? To schedule a consultative call with Livara, a platform for driving orthopedic growth and engagement, email **lang@spinezone.com**.

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