

Changing CV Practice Landscape - Indiana

Findings from ACC Cardiovascular
Practice Census

Presented to the ACC Indiana Chapter

September 2010



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Methodology

- Survey sent to physicians in each state from the Chapter Governors.
- Initial invitation sent 5/5 with reminders on 5/19, 6/2, and 6/9. Telephone interviews were conducted 7/28 – 8/9 to solicit responses from those who did not initially respond to the survey.
- A total of 2,413 unique practices in the U.S. and 49 in the state of Indiana participated in this study after surveys were cleaned and duplicate practices eliminated.



This research represents

	Total	Indiana
CV Practices	2,413	49
Patients treated/week	800,486	22,565
Cardiologists	13,898	645
Other physicians	23,806	413
Nurse practitioners	4,434	126
Physician assistants	2,469	29
Clinical nurse specialists	1,589	9
Registered nurses	16,247	474
Pharmacists	844	11
Administrative support	35,599	1,321



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Practice Setting

	Total	Indiana
CV Group	37%	33%
Solo practitioner	24%	16%
Multi-specialty	9%	8%
Medical School/University	10%	6%
Non-Govt Hospital	14%	33%
Govt Hospital	3%	2%
HMO	0%	0%
Industry	0%	0%
Other	2%	0%

	Total	Indiana
No answer	13%	15%
Rural	11%	14%
Suburban	38%	34%
Urban	37%	37%

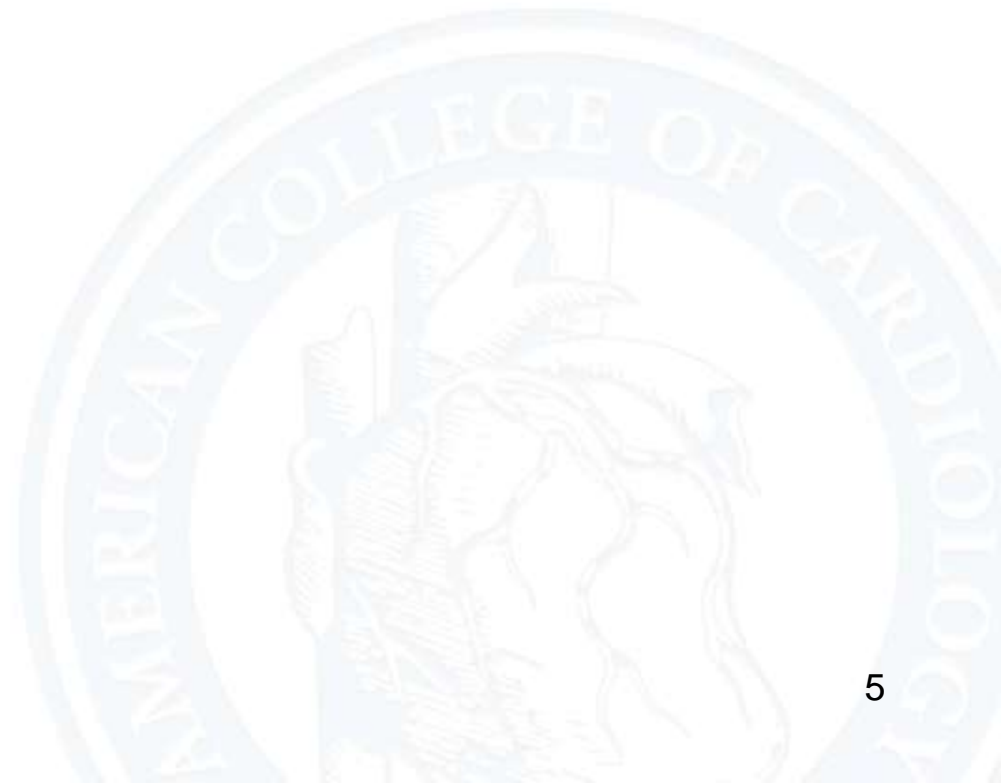


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Executive Summary



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Response to CMS Cuts

	<u>Total</u>	<u>Indiana</u> <u>(n=49)</u>
No new equipment	43%	37%
Reduce staff to save expenses	39%	37%
Reduce MD income/salaries	35%	22%
Reduce benefits	29%	24%
Reduce non-MD salaries	20%	14%
Limit services	15%	12%
Reduce office hours and availability	10%	4%
Limit number of new Medicare patients	8%	2%
Increase non-MD staff for clinical	9%	8%
Other	14%	10%
None of these activities were related to CMS fee schedule change	27%	33%

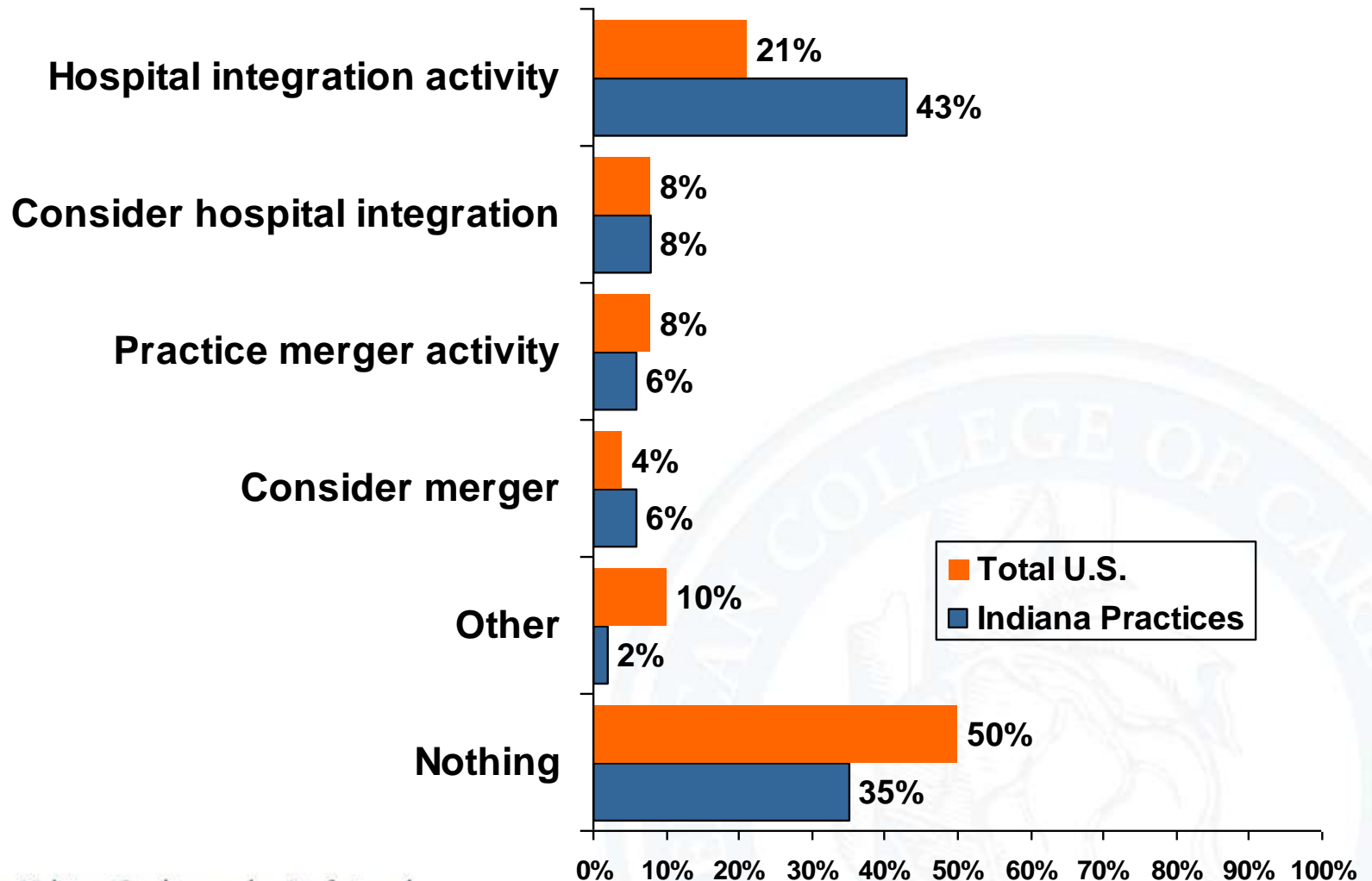


Staff Reductions

	<u>Total</u>	<u>Indiana</u>
Physician	1,489	6
Mid-level Practitioners (RN, NP, CV Tech, CNS, Pharmacist, etc)	2,620	42
Administrative Support	4,275	43
TOTAL LAYOFFS	8,384	91
Increase in non-physician clinical support	309	4
Patients affected by limited Medicare coverage	12,253	100
Physician salaries reduced by ...	8.5%	8.9%
Non-physician salaries reduced by ...	5.3%	3.5%



Changing Practice Landscape- Indiana



Activity among Indiana practices ...

18 practices have integrated into a hospital system

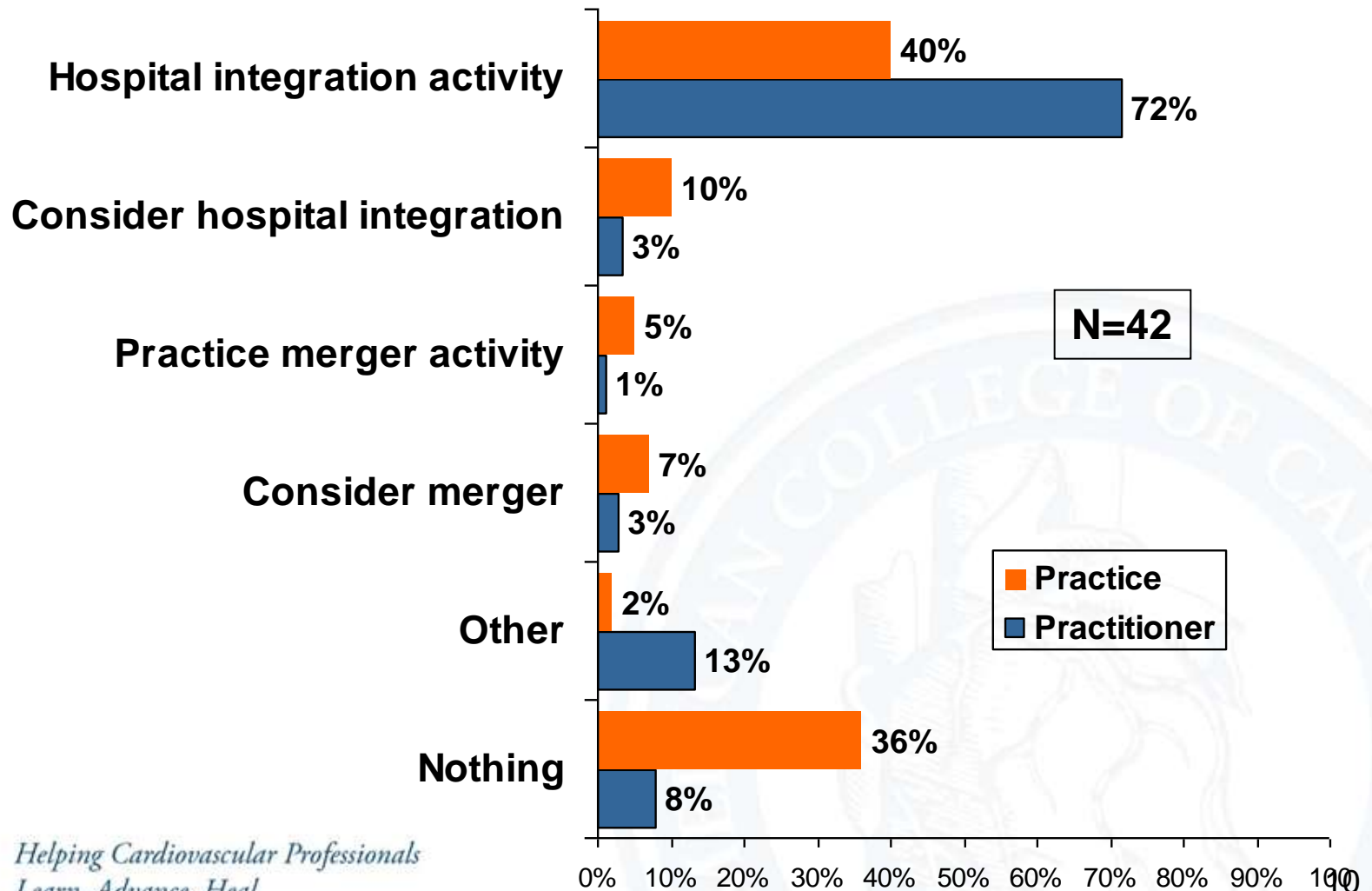
3 are in discussions about hospital integration

2 practices have merged with another practice

1 practices are in discussions about practice mergers



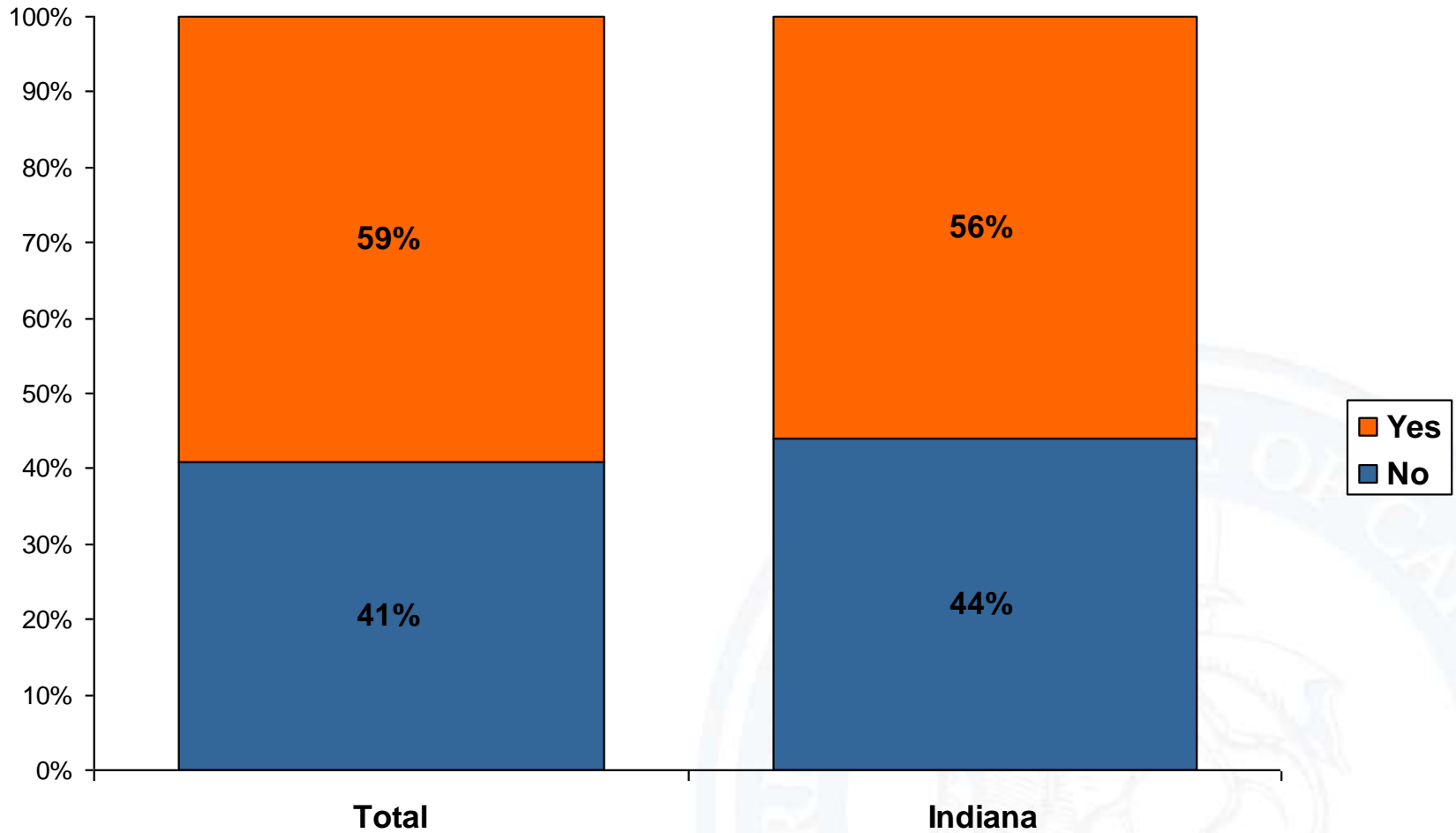
Changing Indiana Private Practice* Landscape – Practice vs. Practitioner



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* Includes solo-practitioners

EHR Usage



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*Q: Does your main practice use an electronic health record
(not including billing records)?*

Detailed Findings



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Response to CMS Cuts

	<u>Total</u>	<u>Indiana</u> <u>(n=49)</u>
No new equipment	43%	37%
Reduce staff to save expenses	39%	37%
Reduce MD income/salaries	35%	22%
Reduce benefits	29%	24%
Reduce non-MD salaries	20%	14%
Limit services	15%	12%
Reduce office hours and availability	10%	4%
Limit number of new Medicare patients	8%	2%
Increase non-MD staff for clinical	9%	8%
Other	14%	10%
None of these activities were related to CMS fee schedule change	27%	33%



Response to CMS Cuts – Private Practices*

	<u>Total</u> <u>(n=1678)</u>	<u>Indiana</u> <u>(n=28)</u>
No new equipment	51%	39%
Reduce staff to save expenses	45%	39%
Reduce MD income/salaries	43%	25%
Reduce benefits	37%	29%
Reduce non-MD salaries	26%	14%
Limit services	19%	11%
Reduce office hours and availability	13%	7%
Limit number of new Medicare patients	11%	4%
Increase non-MD staff for clinical	8%	11%
Other	15%	11%
None of these activities were related to CMS fee schedule change	19%	29%



Response to CMS Cuts – Group Practices*

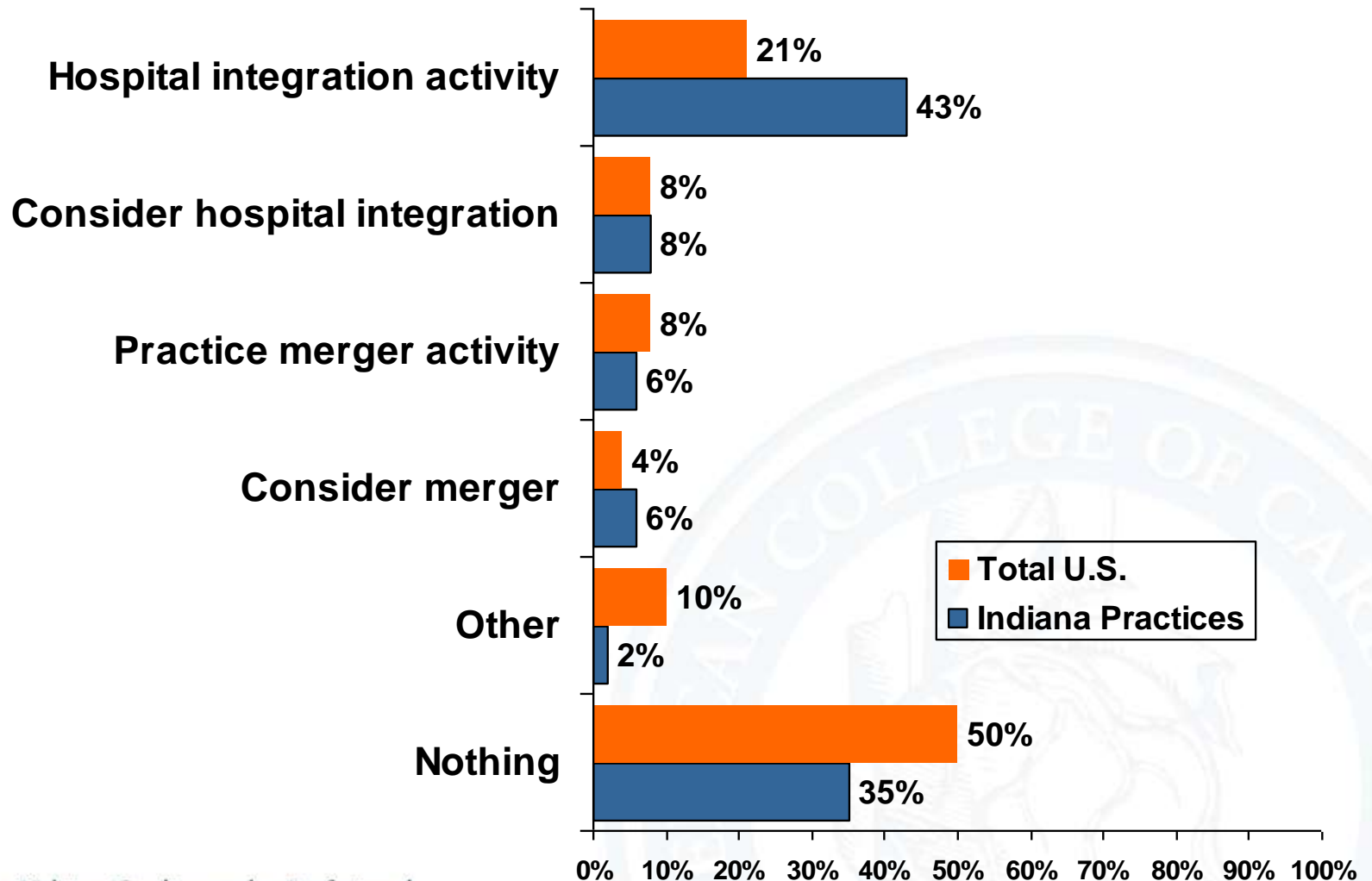
	<u>Total</u> <u>(n=1108)</u>	<u>Indiana</u> <u>(n=20)</u>
No new equipment	50%	35%
Reduce staff to save expenses	50%	50%
Reduce MD income/salaries	45%	25%
Reduce benefits	40%	40%
Reduce non-MD salaries	28%	20%
Limit services	18%	10%
Reduce office hours and availability	10%	10%
Limit number of new Medicare patients	9%	5%
Increase non-MD staff for clinical	10%	15%
Other	13%	15%
None of these activities were related to CMS fee schedule change	18%	25%



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* Excludes solo-practitioners

Changing Practice Landscape- Indiana



Changing Practice Landscape – All Practices

	<u>Total</u> <u>(n=2413)</u>	<u>Indiana</u> <u>(n=49)</u>
<u>Hospital Integration Activity (Net)</u>	21%	43%
Have begun discussions on hospital integration	10%	6%
Have recently integrated into a hospital setting (within past 6 months)	3%	12%
Have integrated into a hospital – more than 6 months ago	9%	24%
<u>Considering hospital integration</u>	8%	8%
<u>Practice Merger Activity (Net)</u>	8%	6%
Have begun discussions on merging with another practice	4%	2%
Have recently merged w/another practice (within past 6 months)	1%	2%
Have merged with another practice – more than 6 months ago	3%	2%
<u>Considering a merge with another practice</u>	4%	6%
<u>Other</u>	10%	2%
<u>Nothing</u>, practice has no plans to merge/integrate	50%	35%



Changing Practice Landscape – Private Practices*

	<u>Total Private Practices</u> (n=1900)	<u>Indiana Private Practices</u> (n=42)
<u>Hospital Integration Activity (Net)</u>	23%	40%
Have begun discussions on hospital integration	12%	7%
Have recently integrated into a hospital setting (within past 6 months)	3%	12%
Have integrated into a hospital – more than 6 months ago	9%	21%
<u>Considering hospital integration</u>	9%	10%
<u>Practice Merger Activity (Net)</u>	9%	5%
Have begun discussions on merging with another practice	5%	0%
Have recently merged w/another practice (within past 6 months)	1%	2%
Have merged with another practice – more than 6 months ago	2%	2%
<u>Considering a merge with another practice</u>	4%	7%
<u>Other</u>	8%	2%
<u>Nothing, practice has no plans to merge/integrate</u>	47%	36%



Changing Practice Landscape – Group Practices*

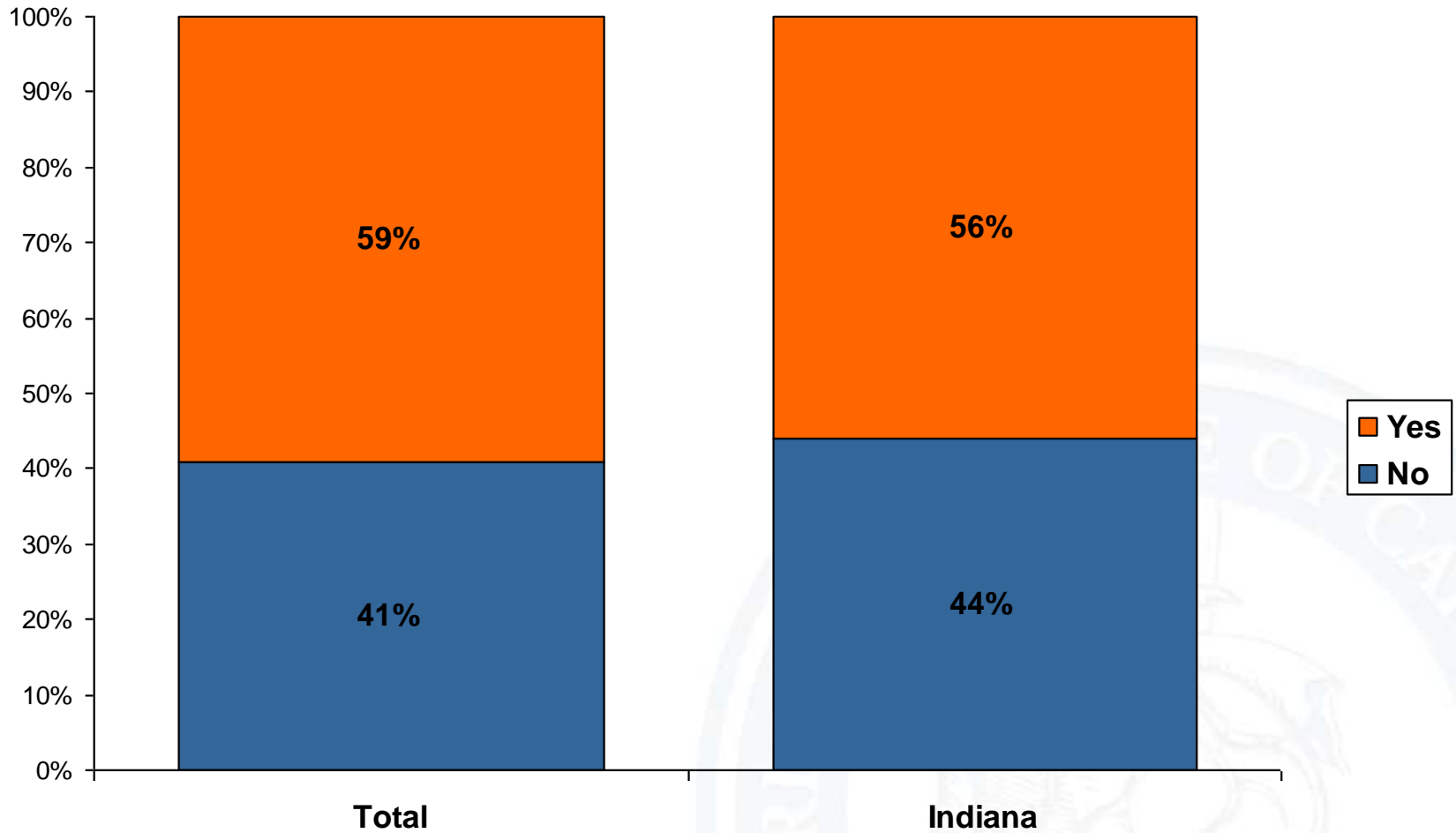
	<u>CV Group Practices</u> (n=1313)	<u>Indiana Group Practices</u> (n=34)
<u>Hospital Integration Activity (Net)</u>	30%	50%
Have begun discussions on hospital integration	14%	9%
Have recently integrated into a hospital setting (within past 6 months)	4%	15%
Have integrated into a hospital – more than 6 months ago	11%	26%
<u>Considering hospital integration</u>	9%	9%
<u>Practice Merger Activity (Net)</u>	10%	6%
Have begun discussions on merging with another practice	5%	0%
Have recently merged w/another practice (within past 6 months)	2%	3%
Have merged with another practice – more than 6 months ago	3%	3%
<u>Considering a merge with another practice</u>	4%	6%
<u>Other</u>	8%	3%
<u>Nothing, practice has no plans to merge/integrate</u>	40%	26%



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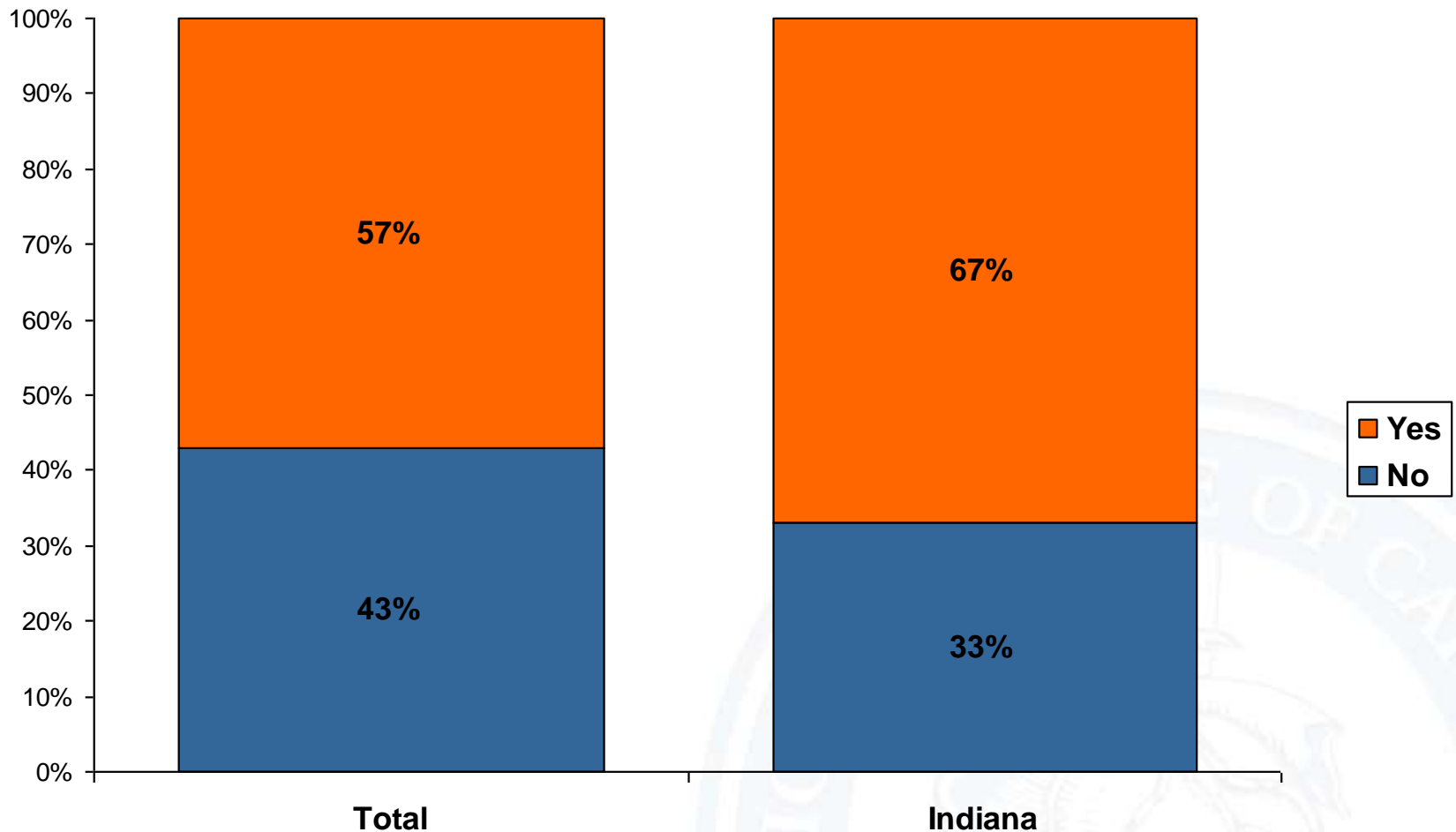
EHR Usage



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*Q: Does your main practice use an electronic health record
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Prevalence of Team-Based Care Approach



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Q: A “team based” approach to care is one where there is a multidisciplinary group of professionals who have distinct roles but who participate together in decision making and coordination of care and share responsibility for the quality of care. Would you describe the approach to care delivery in your practice as “team based” using these non-physician practitioners and clinical staff?



**For questions about this report please contact
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