

Changing CV Practice Landscape - Ohio

Findings from ACC Cardiovascular
Practice Census

Presented to the ACC Ohio Chapter

September 2010



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

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 69 in the state of Ohio participated in this study after surveys were cleaned and duplicate practices eliminated.



This research represents

	Total	Ohio
CV Practices	2,413	69
Patients treated/week	800,486	73,736
Cardiologists	13,898	540
Other physicians	23,806	2,270
Nurse practitioners	4,434	166
Physician assistants	2,469	38
Clinical nurse specialists	1,589	15
Registered nurses	16,247	230
Pharmacists	844	2
Administrative support	35,599	919



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

Practice Setting

	Total	Ohio
CV Group	37%	36%
Solo practitioner	24%	12%
Multi-specialty	9%	14%
Medical School/University	10%	10%
Non-Govt Hospital	14%	23%
Govt Hospital	3%	3%
HMO	0%	0%
Industry	0%	0%
Other	2%	1%

	Total	Ohio
No answer	13%	10%
Rural	11%	13%
Suburban	38%	51%
Urban	37%	26%

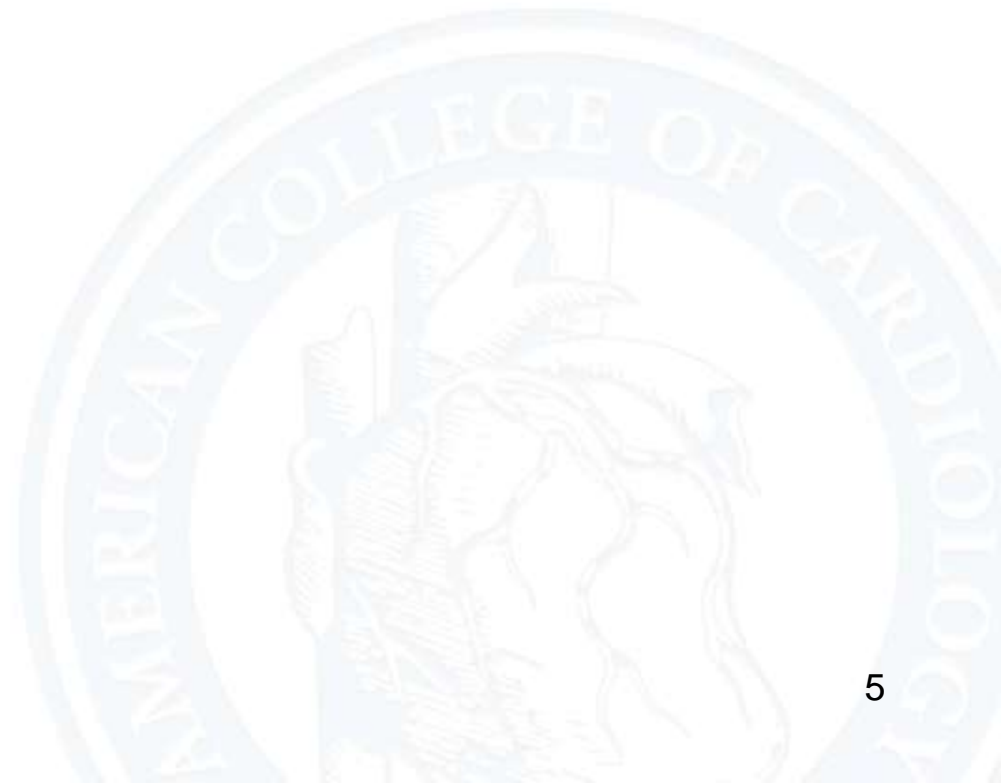


*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

Executive Summary



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*



Response to CMS Cuts

	<u>Total</u>	<u>Ohio</u> <u>(n=69)</u>
No new equipment	43%	36%
Reduce staff to save expenses	39%	42%
Reduce MD income/salaries	35%	22%
Reduce benefits	29%	26%
Reduce non-MD salaries	20%	13%
Limit services	15%	9%
Reduce office hours and availability	10%	9%
Limit number of new Medicare patients	8%	0%
Increase non-MD staff for clinical	9%	10%
Other	14%	13%
None of these activities were related to CMS fee schedule change	27%	29%



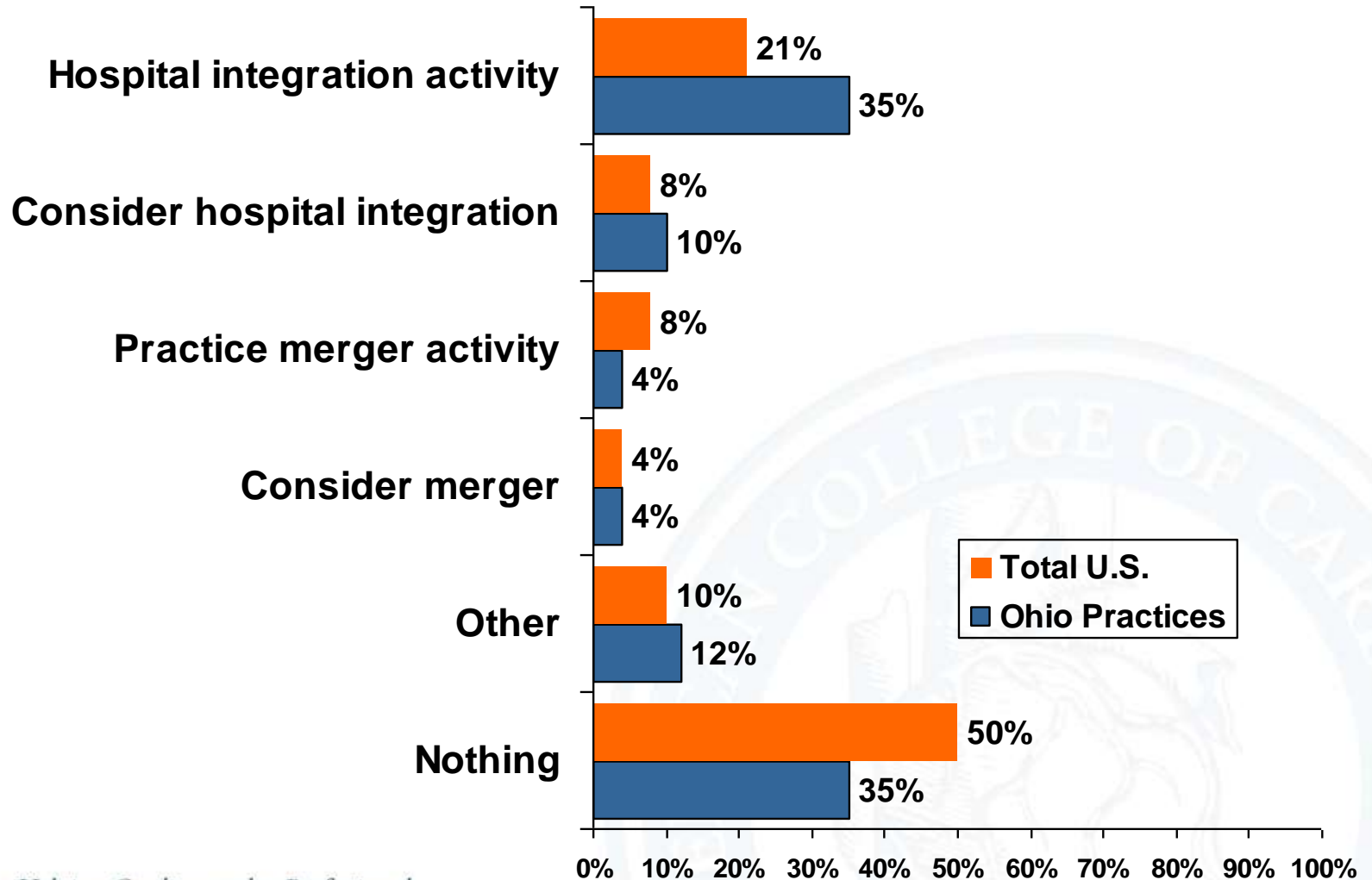
Staff Reductions

	<u>Total</u>	<u>Ohio</u>
Physician	1,489	92
Mid-level Practitioners (RN, NP, CV Tech, CNS, Pharmacist, etc)	2,620	75
Administrative Support	4,275	136
TOTAL LAYOFFS	8,384	303
Increase in non-physician clinical support	309	1
Patients affected by limited Medicare coverage	12,253	0
Physician salaries reduced by ...	8.5%	9.1%
Non-physician salaries reduced by ...	5.3%	4.8%



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

Changing Practice Landscape- Ohio



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

Activity among Ohio practices ...

15 practices have integrated into a hospital system

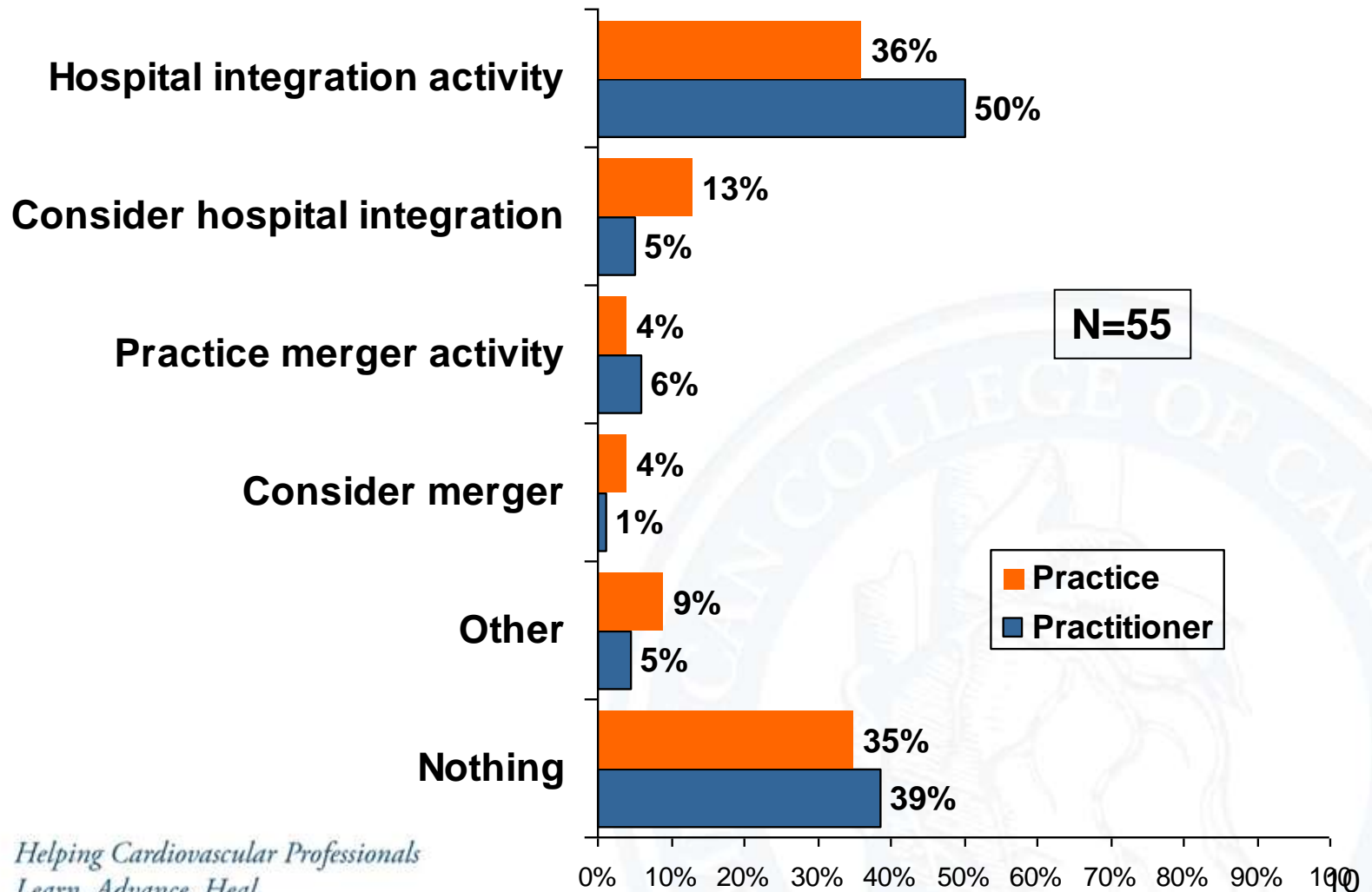
9 are in discussions about hospital integration

1 practice has merged with another practice

2 practices are in discussions about practice mergers



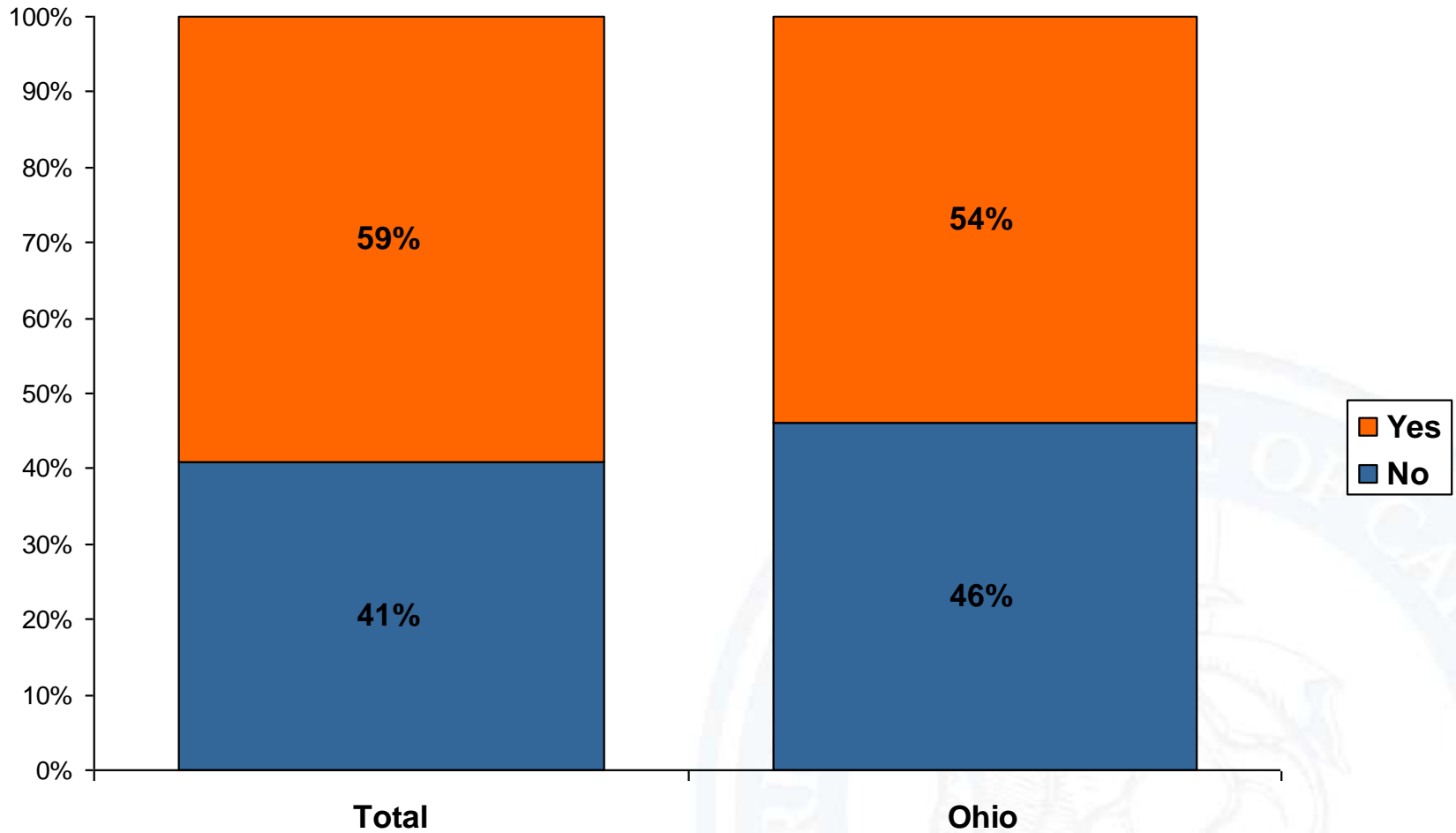
Changing Ohio Private Practice* Landscape – Practice vs. Practitioner



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

* Includes solo-practitioners

EHR Usage



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

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

Detailed Findings



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*



Response to CMS Cuts

	<u>Total</u>	<u>Ohio</u> <u>(n=69)</u>
No new equipment	43%	36%
Reduce staff to save expenses	39%	42%
Reduce MD income/salaries	35%	22%
Reduce benefits	29%	26%
Reduce non-MD salaries	20%	13%
Limit services	15%	9%
Reduce office hours and availability	10%	9%
Limit number of new Medicare patients	8%	0%
Increase non-MD staff for clinical	9%	10%
Other	14%	13%
None of these activities were related to CMS fee schedule change	27%	29%



Response to CMS Cuts – Private Practices*

	<u>Total</u> <u>(n=1678)</u>	<u>Ohio</u> <u>(n=43)</u>
No new equipment	51%	42%
Reduce staff to save expenses	45%	58%
Reduce MD income/salaries	43%	26%
Reduce benefits	37%	33%
Reduce non-MD salaries	26%	21%
Limit services	19%	14%
Reduce office hours and availability	13%	14%
Limit number of new Medicare patients	11%	0%
Increase non-MD staff for clinical	8%	9%
Other	15%	12%
None of these activities were related to CMS fee schedule change	19%	19%



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

* Includes solo-practitioners

Response to CMS Cuts – Group Practices*

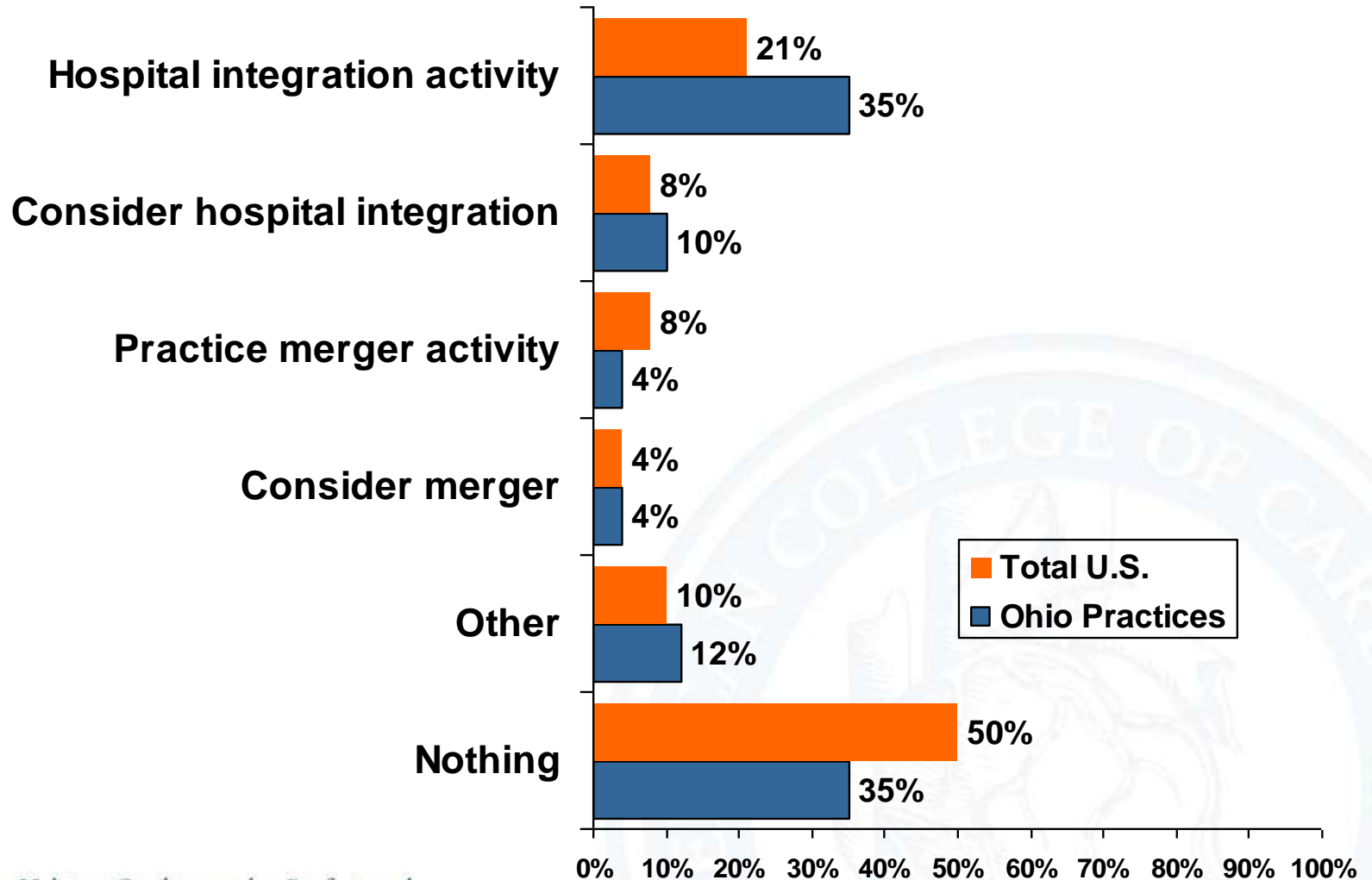
	<u>Total</u> <u>(n=1108)</u>	<u>Ohio</u> <u>(n=35)</u>
No new equipment	50%	43%
Reduce staff to save expenses	50%	57%
Reduce MD income/salaries	45%	29%
Reduce benefits	40%	31%
Reduce non-MD salaries	28%	20%
Limit services	18%	14%
Reduce office hours and availability	10%	14%
Limit number of new Medicare patients	9%	0%
Increase non-MD staff for clinical	10%	11%
Other	13%	14%
None of these activities were related to CMS fee schedule change	18%	17%



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

* Excludes solo-practitioners

Changing Practice Landscape- Ohio



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

Changing Practice Landscape – All Practices

	<u>Total</u> <u>(n=2413)</u>	<u>Ohio</u> <u>(n=69)</u>
<u>Hospital Integration Activity (Net)</u>	21%	35%
Have begun discussions on hospital integration	10%	13%
Have recently integrated into a hospital setting (within past 6 months)	3%	0%
Have integrated into a hospital – more than 6 months ago	9%	22%
<u>Considering hospital integration</u>	8%	10%
<u>Practice Merger Activity (Net)</u>	8%	4%
Have begun discussions on merging with another practice	4%	3%
Have recently merged w/another practice (within past 6 months)	1%	1%
Have merged with another practice – more than 6 months ago	3%	0%
<u>Considering a merge with another practice</u>	4%	4%
<u>Other</u>	10%	12%
<u>Nothing</u>, practice has no plans to merge/integrate	50%	35%



Changing Practice Landscape – Private Practices*

	<u>Total Private Practices (n=1900)</u>	<u>Ohio Private Practices (n=55)</u>
<u>Hospital Integration Activity (Net)</u>	23%	36%
Have begun discussions on hospital integration	12%	15%
Have recently integrated into a hospital setting (within past 6 months)	3%	0%
Have integrated into a hospital – more than 6 months ago	9%	22%
<u>Considering hospital integration</u>	9%	13%
<u>Practice Merger Activity (Net)</u>	9%	4%
Have begun discussions on merging with another practice	5%	4%
Have recently merged w/another practice (within past 6 months)	1%	0%
Have merged with another practice – more than 6 months ago	2%	0%
<u>Considering a merge with another practice</u>	4%	4%
<u>Other</u>	8%	9%
<u>Nothing</u>, practice has no plans to merge/integrate	47%	35%



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

* Includes solo-practitioners

Changing Practice Landscape – Group Practices*

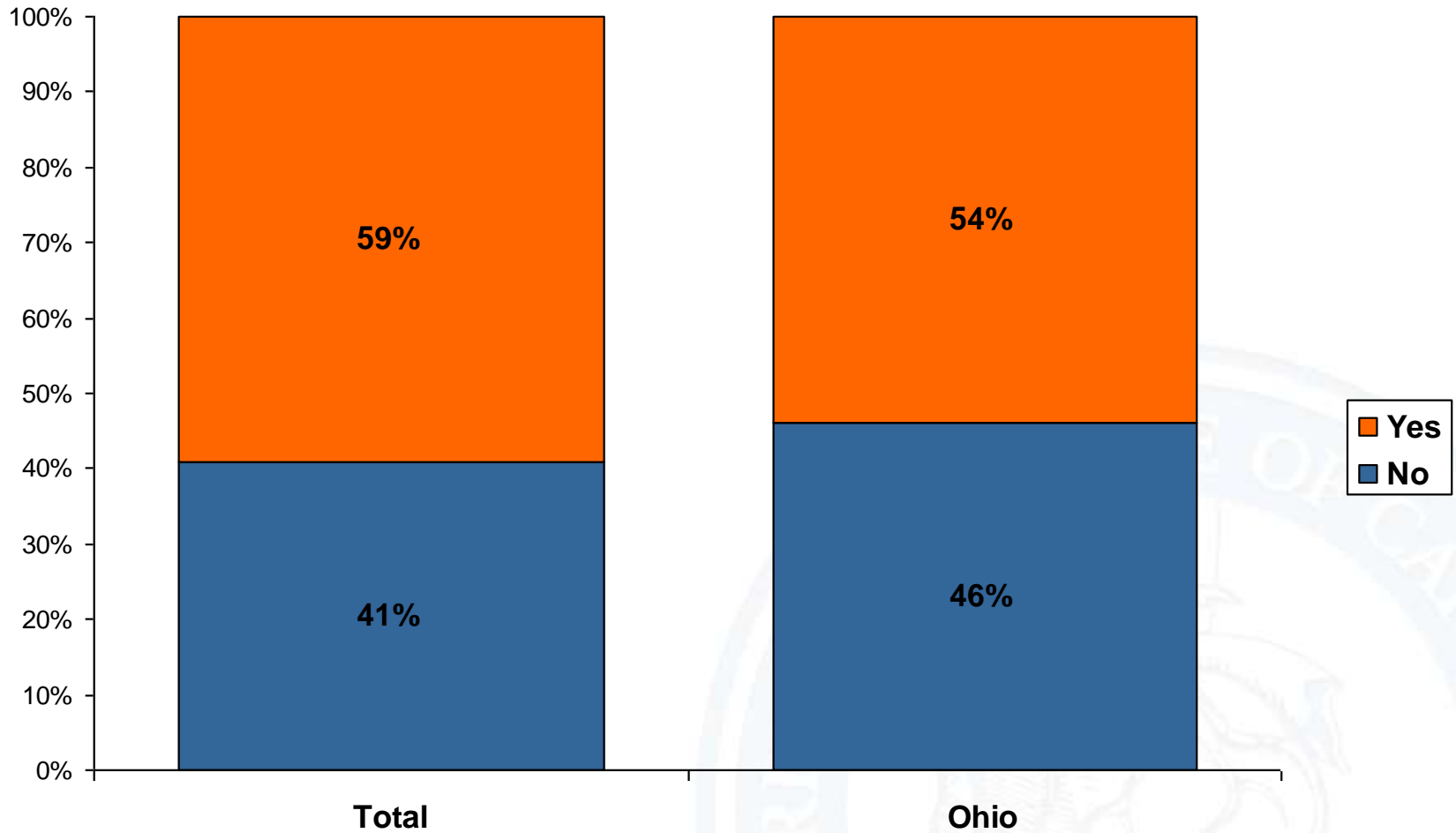
	<u>CV Group Practices</u> (n=1313)	<u>Ohio Grp Practices</u> (n=44)
<u>Hospital Integration Activity (Net)</u>	30%	30%
Have begun discussions on hospital integration	14%	9%
Have recently integrated into a hospital setting (within past 6 months)	4%	0%
Have integrated into a hospital – more than 6 months ago	11%	20%
<u>Considering hospital integration</u>	9%	14%
<u>Practice Merger Activity (Net)</u>	10%	2%
Have begun discussions on merging with another practice	5%	2%
Have recently merged w/another practice (within past 6 months)	2%	0%
Have merged with another practice – more than 6 months ago	3%	0%
<u>Considering a merge with another practice</u>	4%	5%
<u>Other</u>	8%	11%
<u>Nothing, practice has no plans to merge/integrate</u>	40%	39%



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

* Excludes solo-practitioners

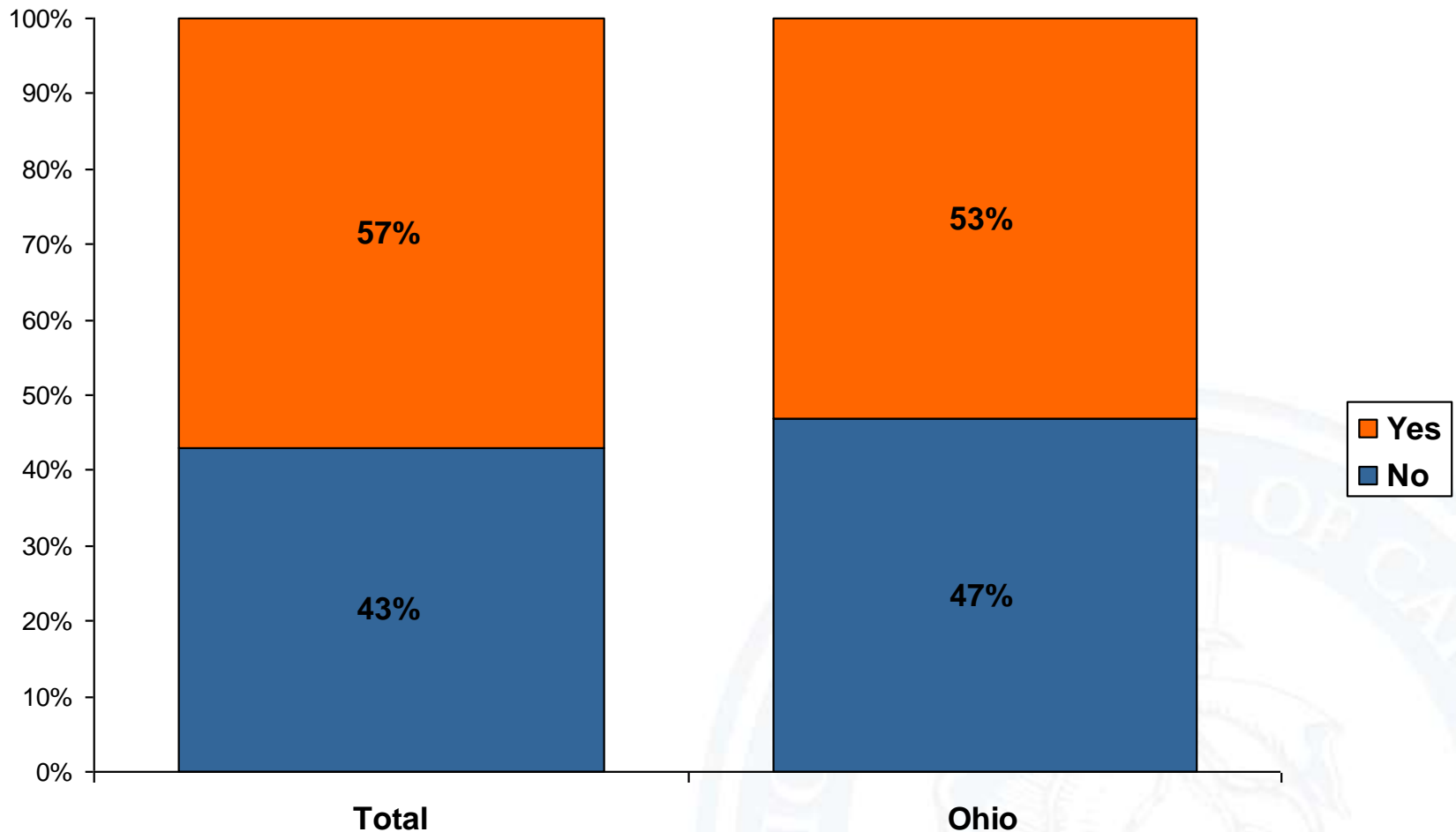
EHR Usage



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

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

Prevalence of Team-Based Care Approach



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*

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
Anne Rzeszut, Director of ACC Market Research
at arzeszut@acc.org or 202.375.6434**



*Helping Cardiovascular Professionals
Learn. Advance. Heal.*