2020 Urgent Practice Survey Summary

On March 29th, NCMGMA, NCMS and Curi started distributing the same set of questions to a collective e-distribution list on a weekly basis. The goal: to garner a snapshot of North Carolina's healthcare practices as we moved through the coronavirus pandemic. Certain weeks featured a subset of questions addressing specific segments of the business of healthcare: finance, telehealth and practice reopening.

The information and data collected has been compiled and used anonymously to better understand the most acute and immediate needs and to establish any trends to inform our policymakers on behalf of the physicians, PAs, practice administrators and the patients of North Carolina. Thank you to all of our members and practices who have contributed to these report-out results.

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NCMS NORTH CAROLINA MEDICAL SOCIETY

2020 Survey Overview

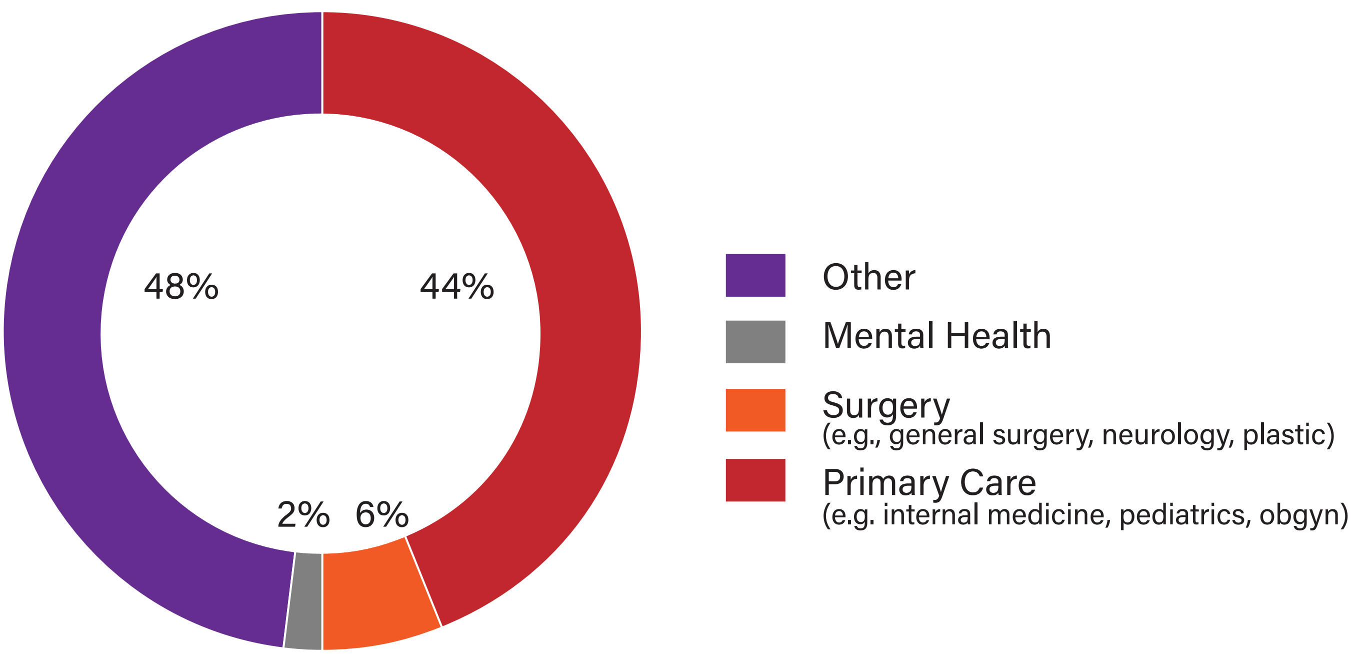
3,142
Total number of survey respondents in 2020.

80
Number of North Carolina counties represented.

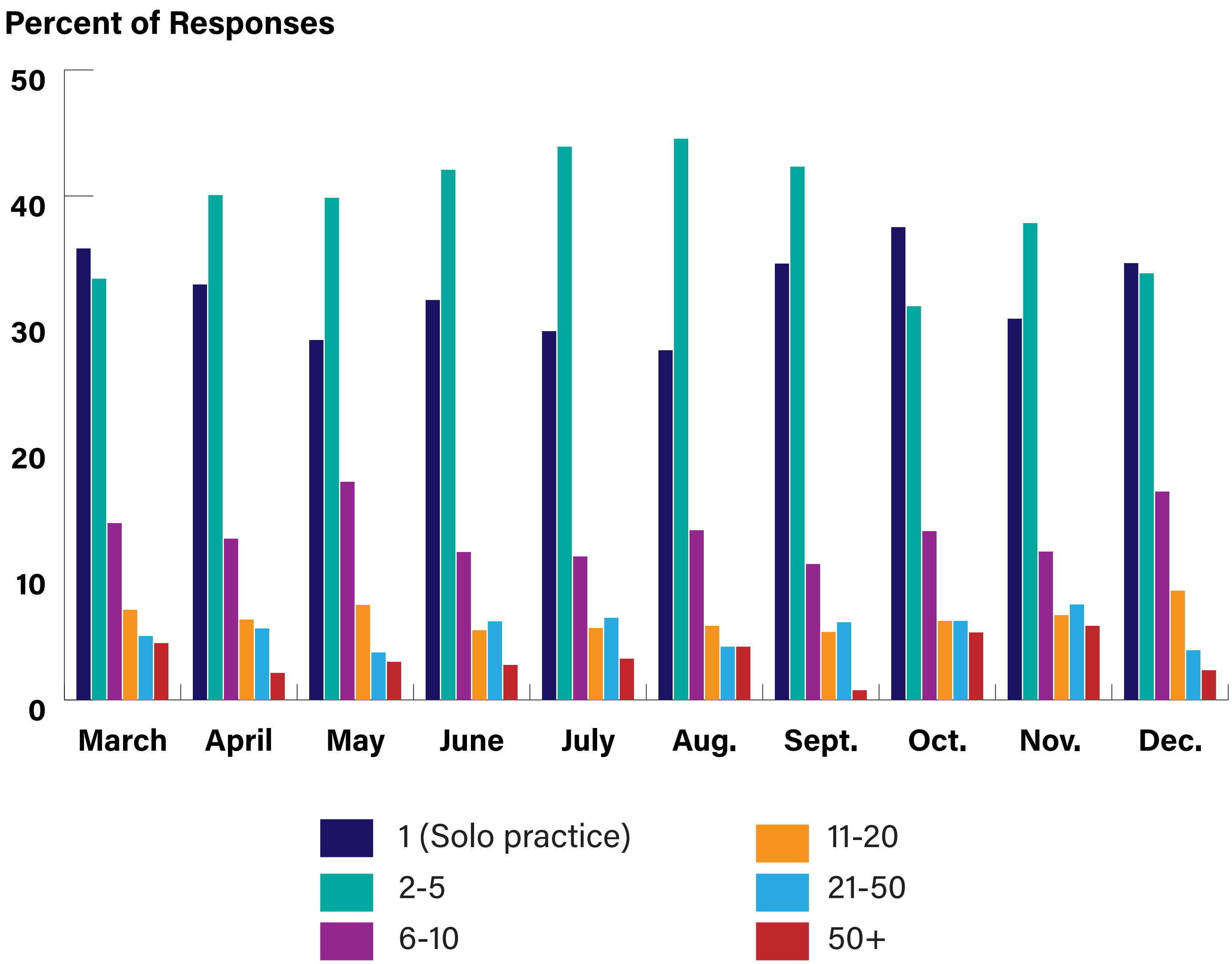
72
Number of healthcare specialties represented.

175
Average number of respondents to each survey.

Percentage of Respondents by Specialty

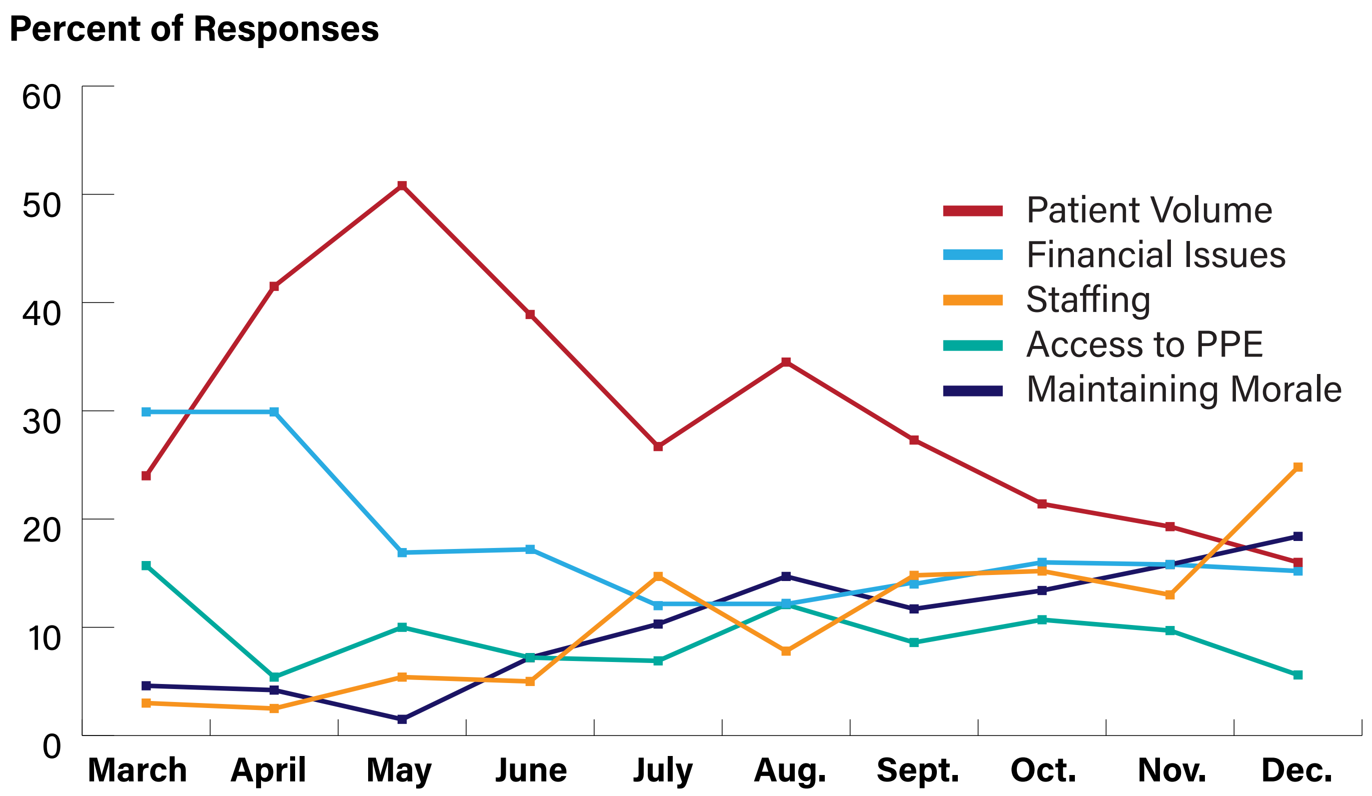


Average Size of Practices Responding



2020 Survey Trends

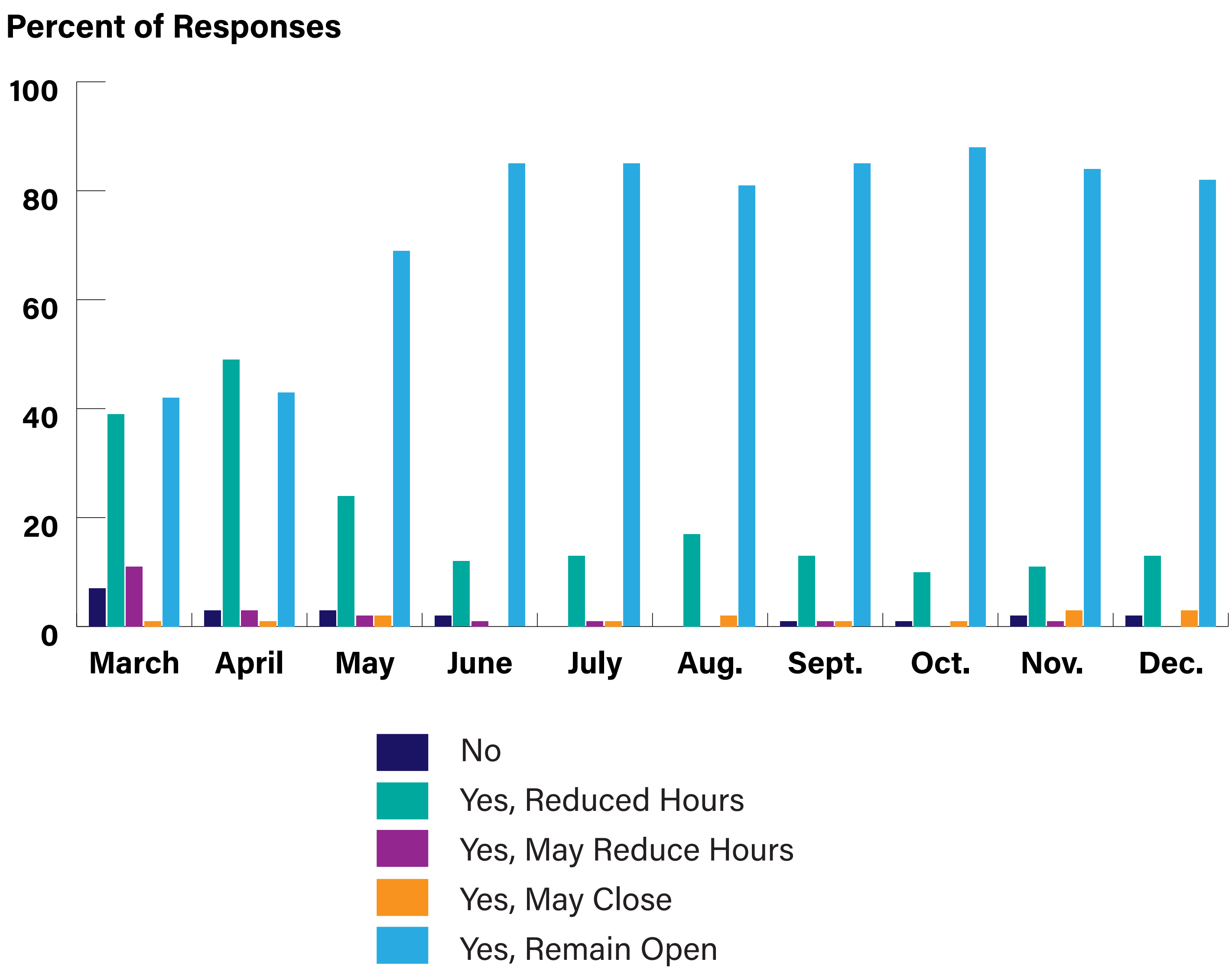
Foremost Concerns for Practices



Notable:

- Concerns over patient volume and financial issues spiked early and then declined (but never went away)
- Concerns about staffing and maintaining staff morale became much more prominent toward the end of the year

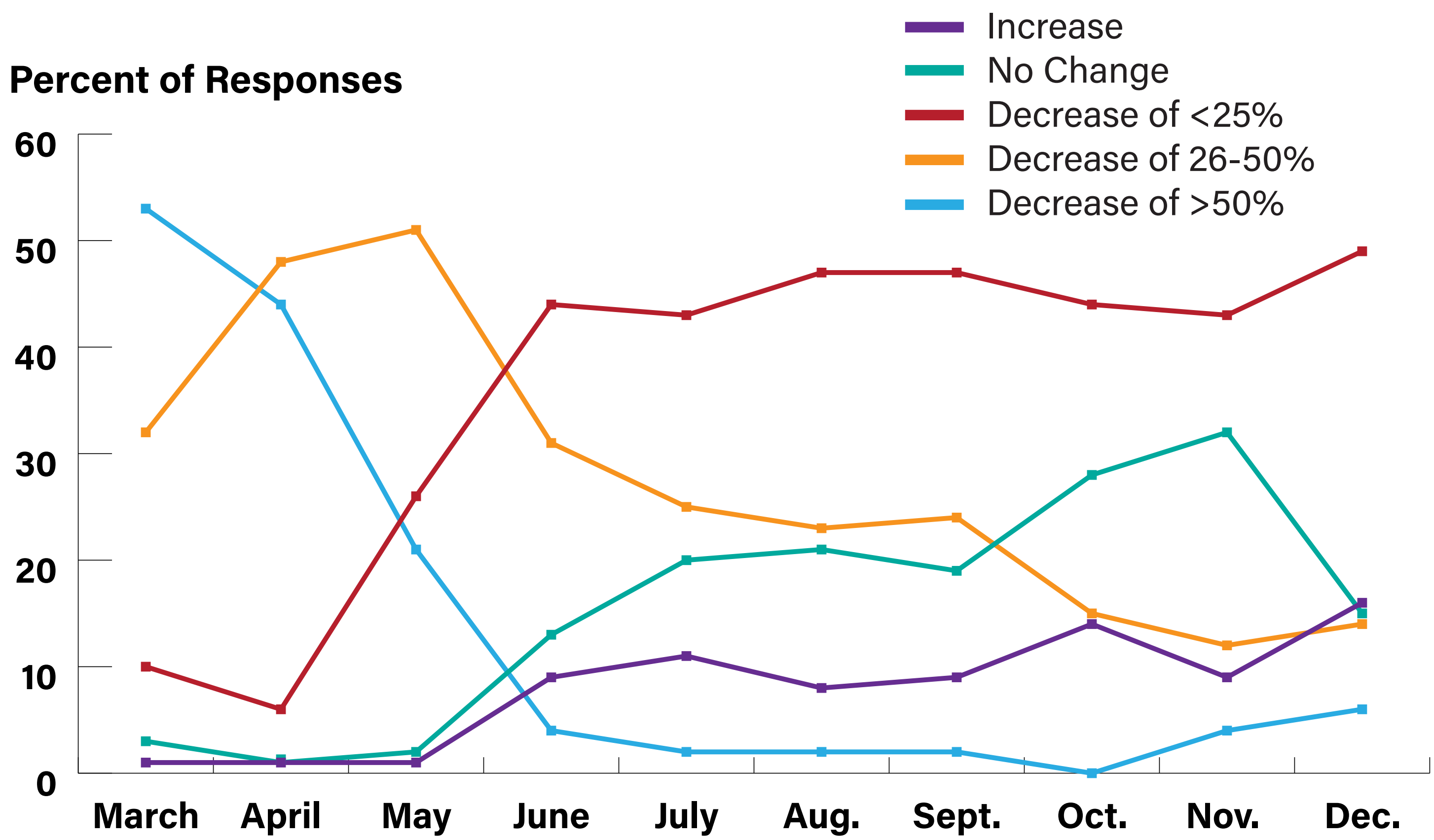
Practice Status - Open and Seeing Patients?



Notable:

- Many practices reduced hours early in the year and some practices closed
- By June more than 80% of practices were open with normal hours (and expected to stay that way)

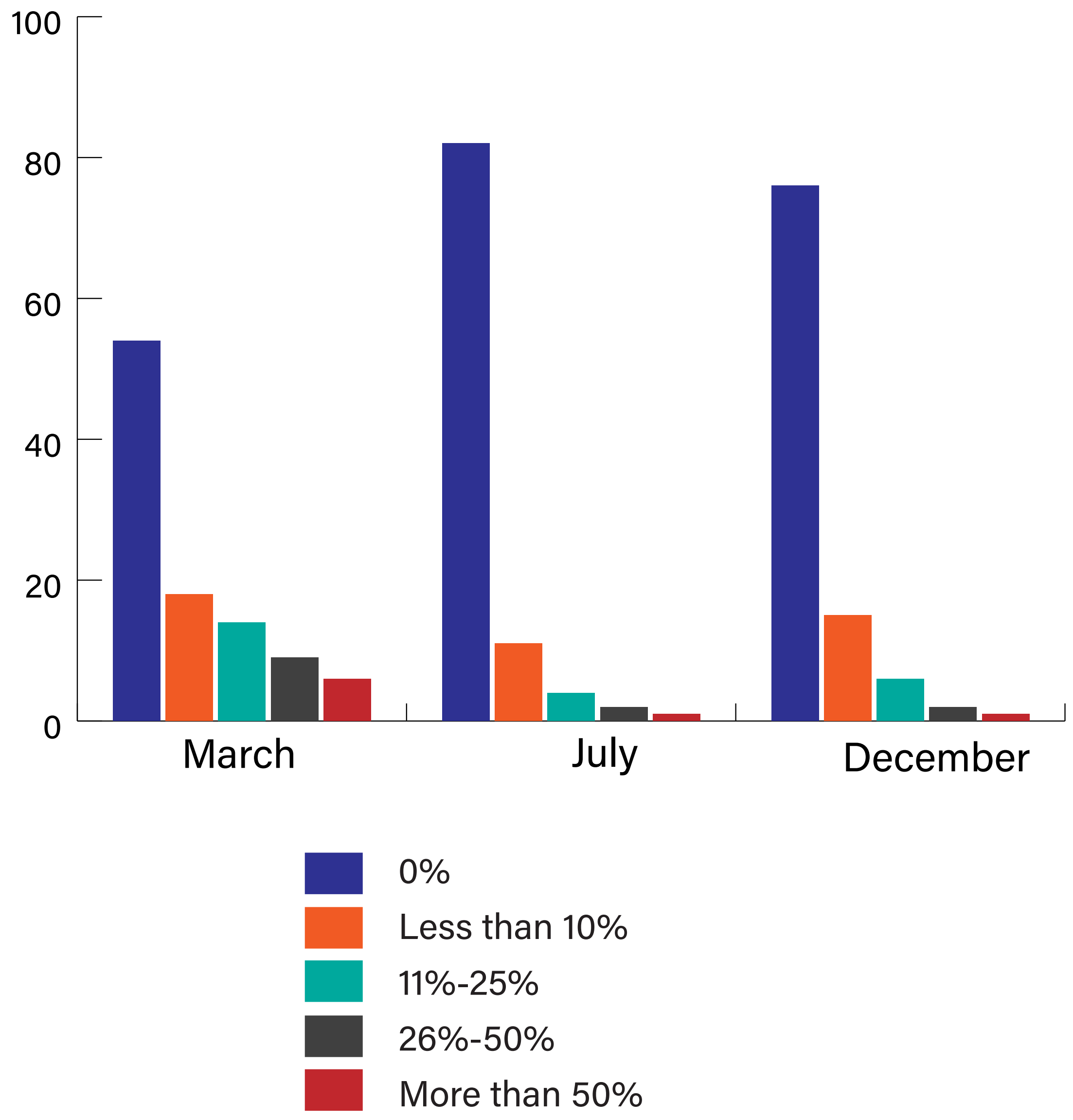
Current Patient Volume Compared to Pre-Covid



Notable:

- Practices reported huge drops in patient volume in March and April (with 92% of practices reporting volume decreases of at least 25% at the end of April)
- Patient volumes returned but did not fully recover for most practices over the course of the year (19% of practices reported volume decrease of at least 25% in the December survey; 68% still reported at least some decrease in patient volume in December)
- Since June, about 10% of practices consistently reported having an increase in patient volume compared to the pre-pandemic period

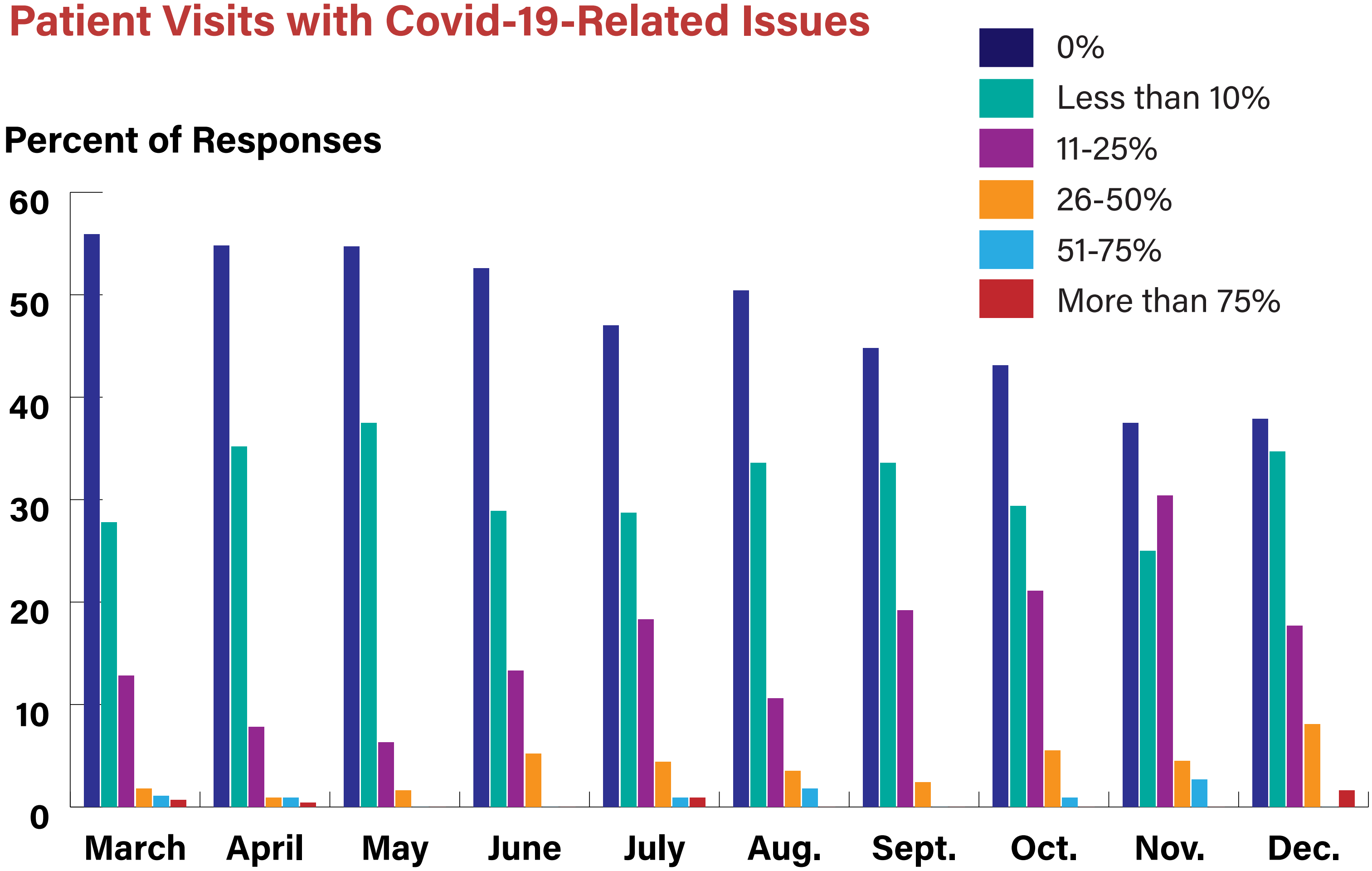
Practices with Lay-Offs/Furloughs



Notable:

- Almost half of practices had laid-off or furloughed staff by the end of March
- By June (and for the rest of the year) less than a quarter of practices were reporting having laid-off or furloughed staff

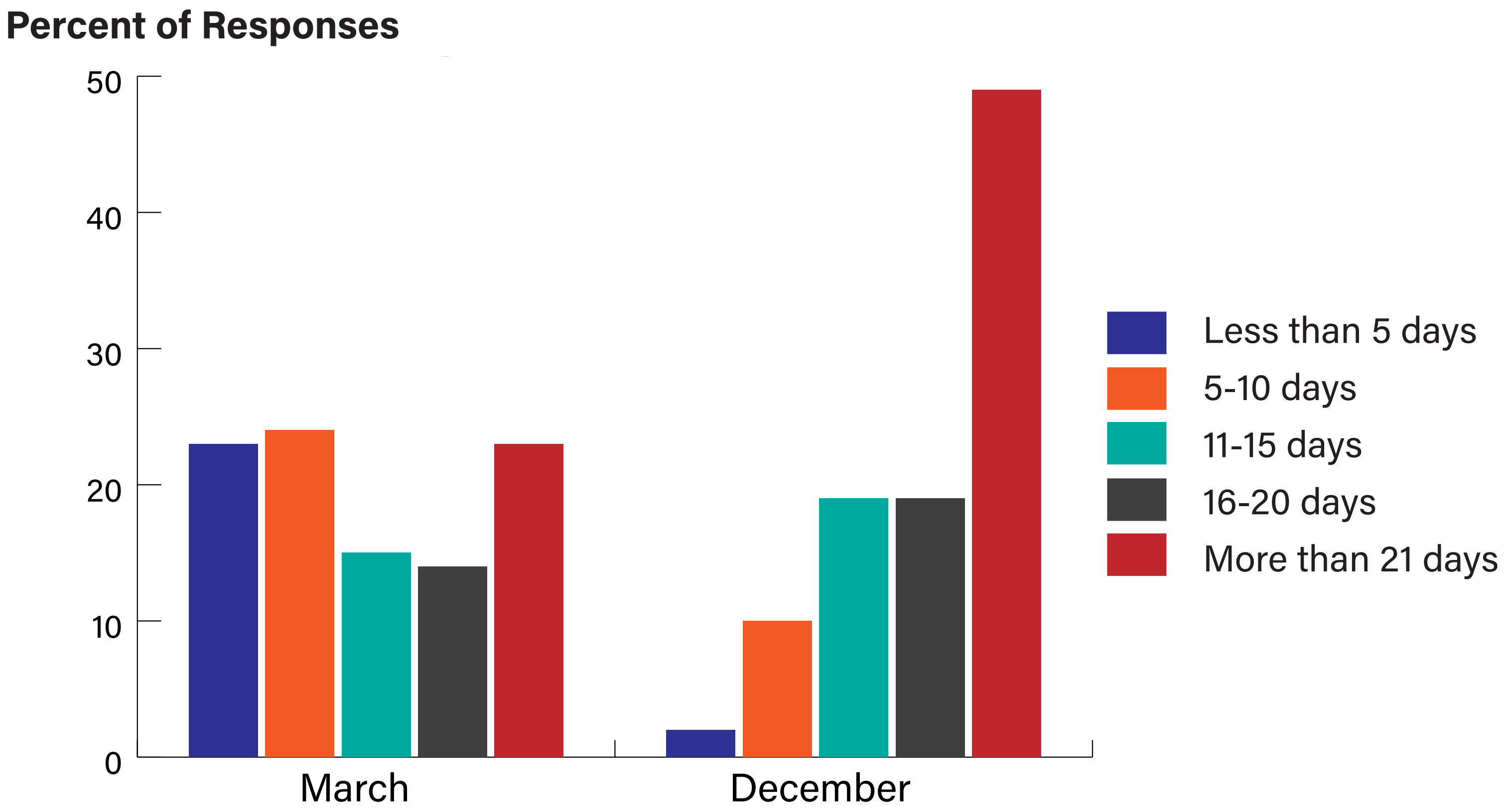
Patient Visits with Covid-19-Related Issues



Notable:

- The majority of practices (from 53%-61%) reported not having any patient visits to address Covid-19-related issues through the end of June
- The percentage of practices reporting not having any patient visits to address Covid-19-related issues has since decreased to less than 40%
- By December, the percentage of practices reporting that more than a quarter of their patient visits were for Covid-19-related issues reached a high of 10%

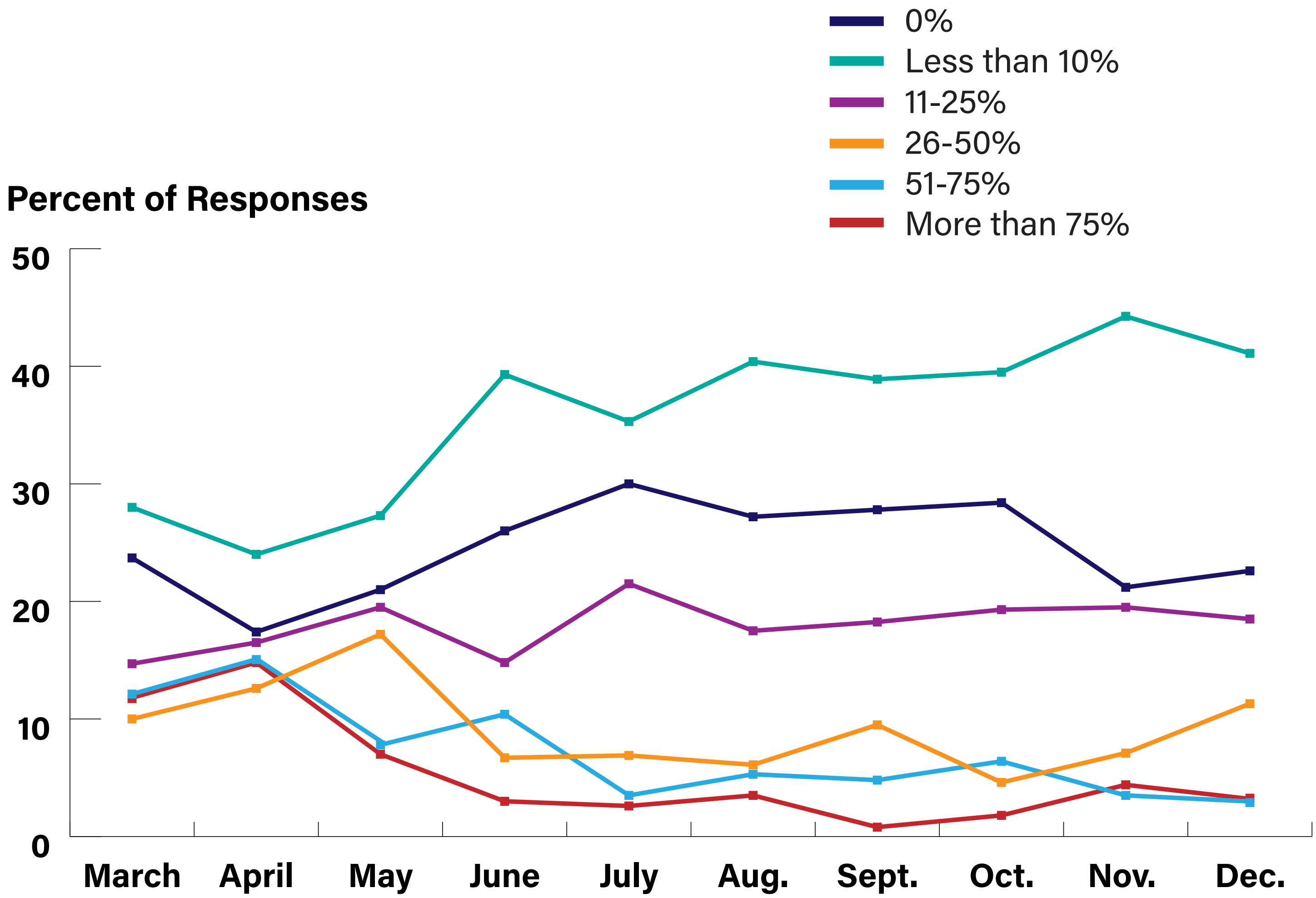
Days of PPE Remaining



Notable:

- Practices struggled with having sufficient PPE on hand through the end of April, but from that point forward there was a steady growth in the amount of PPE that practices had available
- Despite this improvement, more than 5% of practices reported having less than 5 days of PPE on hand until the end of July, and 1-2% of practices still report having this little PPE on hand

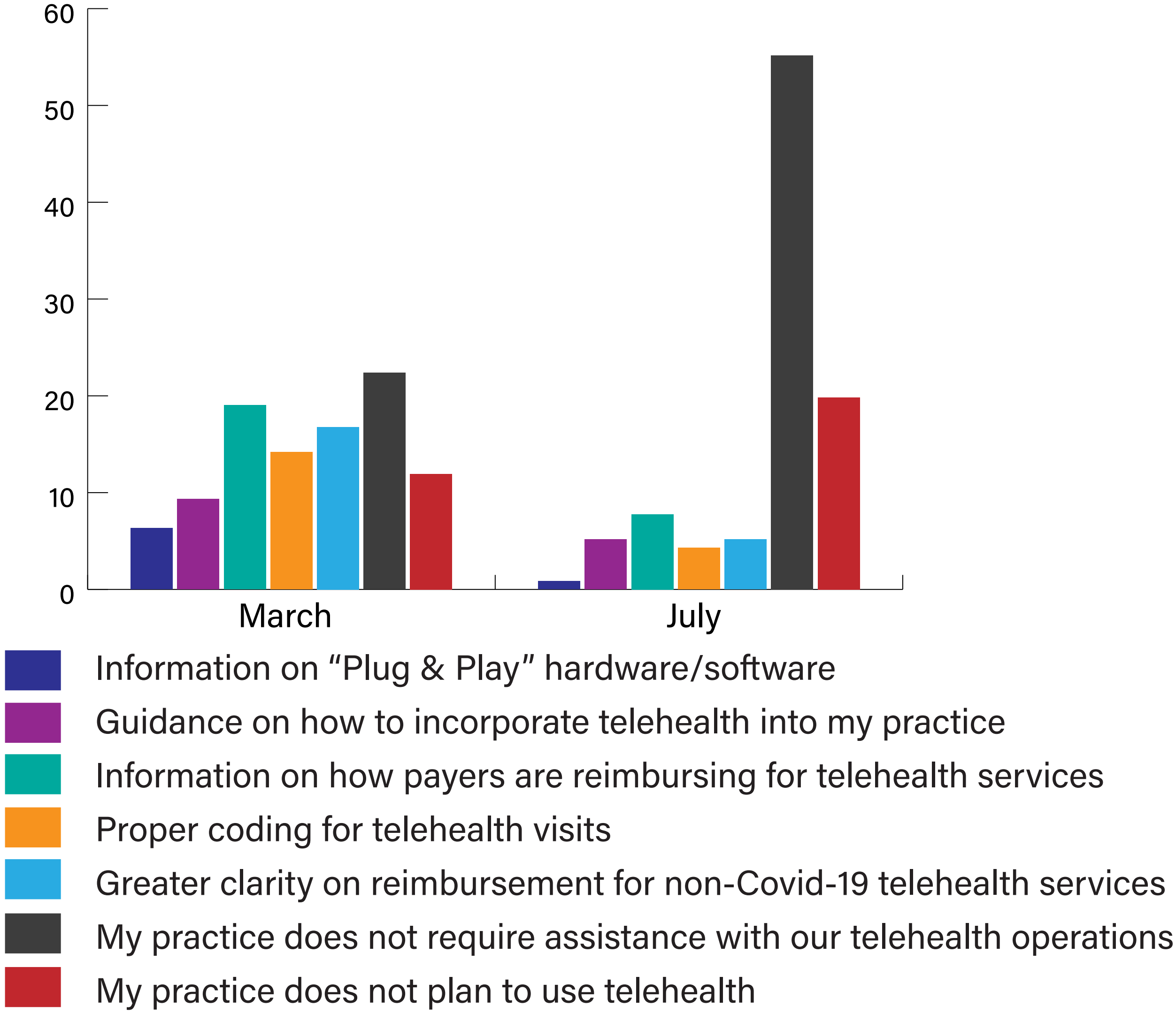
Patients Treated Via Telehealth



Notable:

- By April, more than 40% of practices were seeing at least a quarter of their patients by telehealth
- As practices reopened and patients became more willing to visit providers again, the number of practices seeing at least a quarter of their patients by telehealth declined to as low as 12%

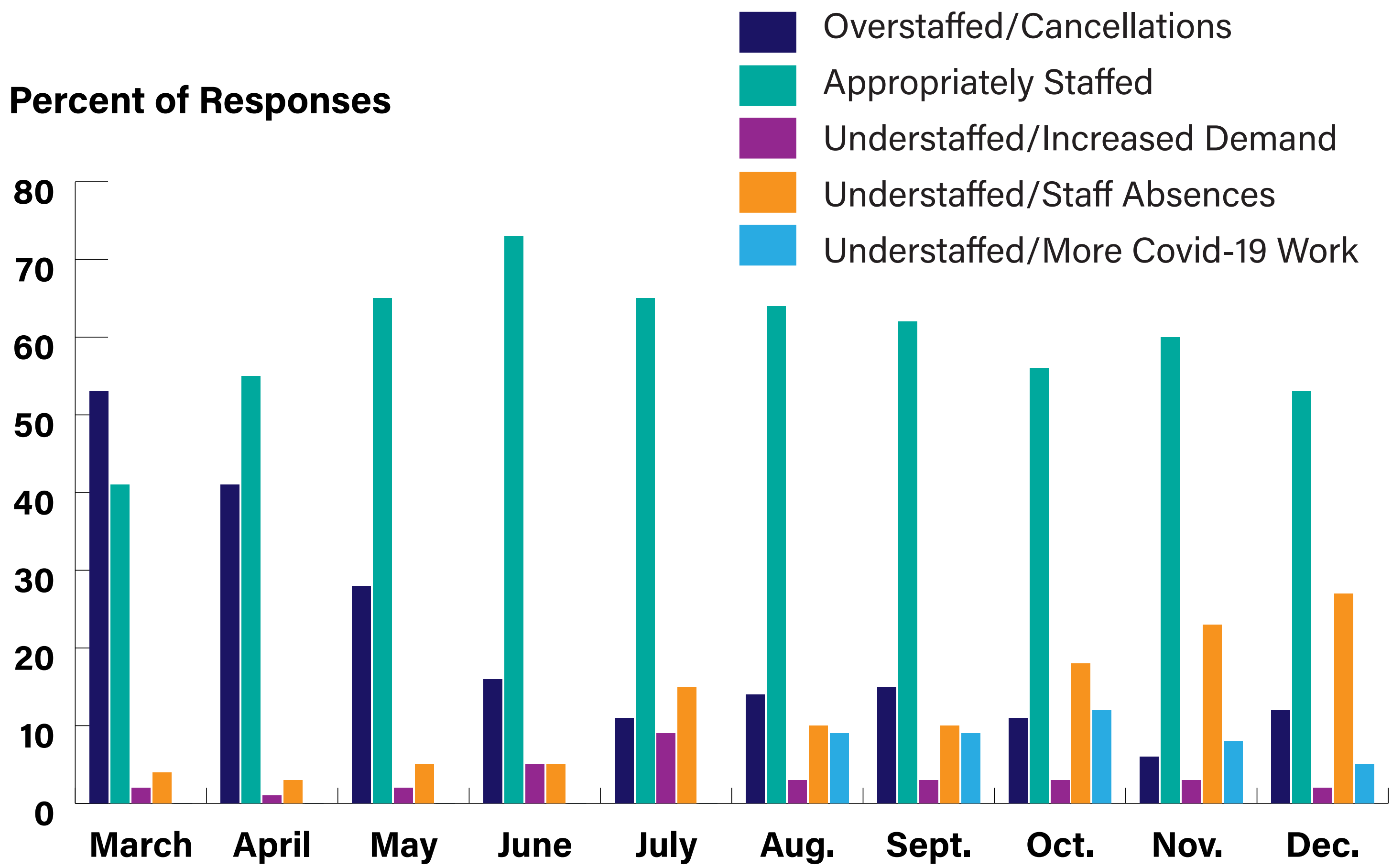
Telehealth Assistance Needed



Notable:

- In the early days of the pandemic, practices rushed to implement telehealth. There was a need for a wide variety of assistance, but the main need for assistance was related to billing and coding issues
- By the end of May, more than 50% of practices said that they did not need help with their telehealth operations
- At least 10% of practices always reported not planning to use telehealth, and this percentage had increased to almost 20% by December

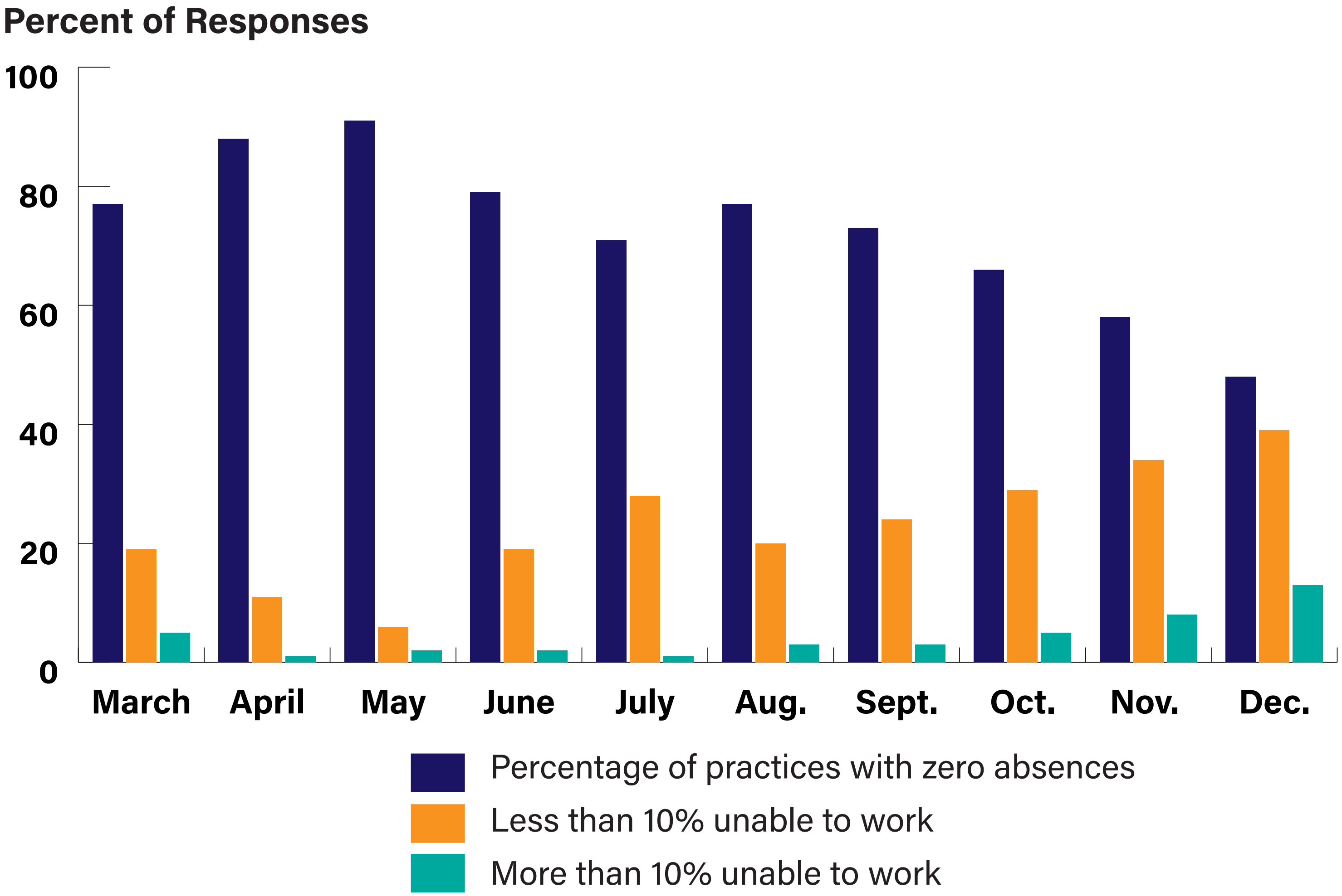
Staffing Levels Compared to Pre-Covid



Notable:

- More than half of practices were overstaffed due to appointment cancellations in the March survey, but by June, 73% of practices were appropriately staffed
- After June there was a relatively steady increase in the number of practices that reported being understaffed (35% in December), with this increase primarily being driven by an increase in staff absences (27% in December)

Percentage of Staff Not Able to Attend Work Because of Covid-19 Exposure



Notable:

- From March to May, the number of practices reporting no staff unable to work because of suspected or actual Covid-19 exposure increased, but this number has continually declined since that time.
- In December, for the first time, more than half of practices reported having at least some staff missing work due to suspected or actual Covid-19 exposure.