

NC Academy of Family Physicians and NC Pediatric Society COVID-19 Impact Survey Results (March 31, 2020)

Executive Summary

As North Carolina grapples with the COVID-19 pandemic, the NC Academy of Family Physicians and the NC Pediatric Society conducted survey of practicing primary care physicians, that ultimately included responses from 753 pediatricians and family physicians. The survey was conducted over four days in late March.

Findings show that primary care physicians are suffering extreme financial distress. Additionally, they struggle with an inadequate supply of Personal Protective Equipment (PPE), as well as the transition to virtual visits in a very quick time frame. While there is much appreciation for the work that has been done, primary care physicians face substantial immediate challenges in the coming weeks. While there were some differences between family physicians and pediatricians, areas of need were remarkably consistent. However, physician-owned practices faced a more dire financial situation and struggled more to obtain PPE.

KEY TAKEAWAYS

- All primary care practices are facing urgent needs in several different areas, including finances, PPE and telehealth.
- There is an urgent need for PPE in primary care. Physician-owned practices report an even greater need for PPE.
- Almost all primary care practices indicated concerns around the financial impact of COVID-19, with physician-owned practices reporting the greatest need.
- The large majority of primary care practices (90 percent) are working to implement telehealth.
- Practices are very concerned about their own ability and the ability of their patients to use telehealth effectively.
- The large majority of practices are taking drastic actions to lower costs by reducing hours, salaries and/or workforce. Eighty-three percent of respondents reported that their practices were under significant or extreme financial pressure. Physician-owned practices are considering taking even more drastic steps.
- Rural practices are more likely to consider permanent closure or selling their practice.
- There is a serious risk that the state will lose primary care capacity as a result of the COVID-19 pandemic if immediate assistance is not provided.

The two associations are examining how to best support practices while they face these challenges. Some of the potential actions are included throughout the report, such as:

- Sharing strategies to obtain PPE.
- Educating practices and patients on the availability and use of telehealth.
- Linking practices with financial resources including short-term assistance, payment changes, etc.
- Advocating for appropriate legislative action.

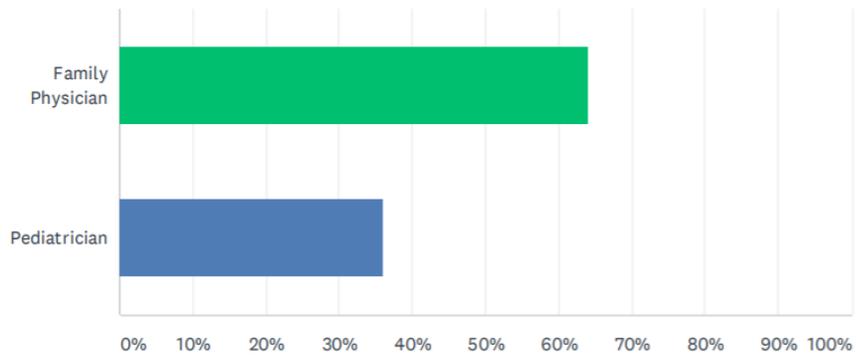
While practices are reporting unprecedented challenges, they consistently report willingness to find solutions, move forward constructively and continue to work to advance the health of North Carolinians.

NC Pediatric Society and NC Academy of Family Physicians COVID-19 Impact Survey – Results (March 31, 2020)

Dates of Survey: Thursday, March 26 – Monday, March 30

Q1 Please indicate which type of physician you are (check one):

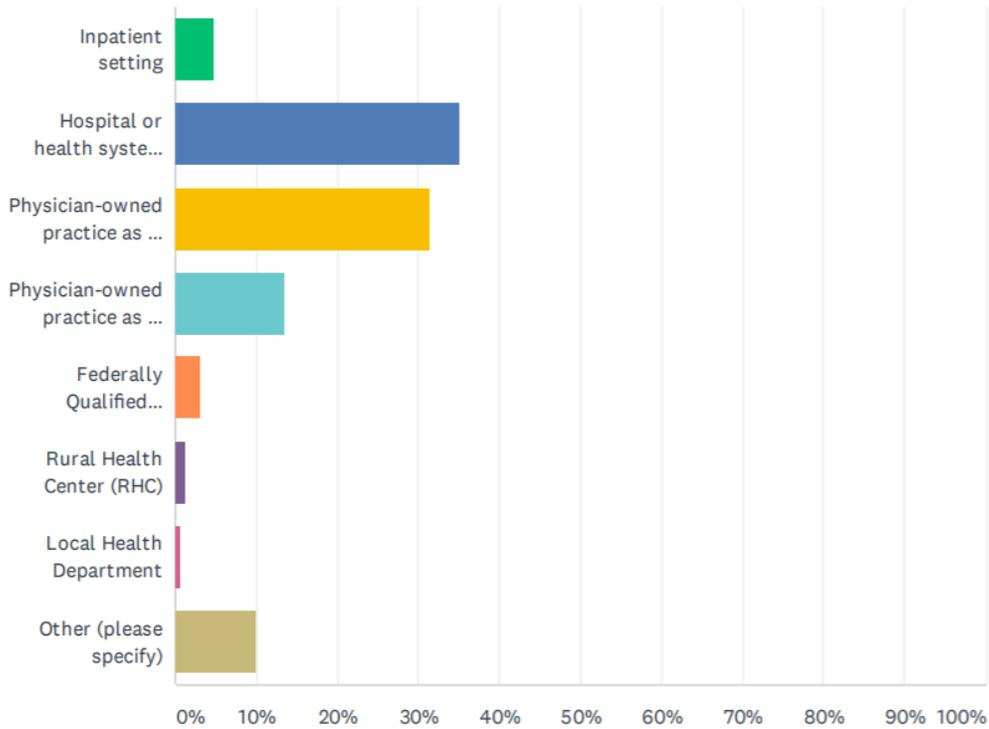
Answered: 753 Skipped: 0



ANSWER CHOICES	RESPONSES	
Family Physician	64.01%	482
Pediatrician	35.99%	271
TOTAL		753

Q2 What best describes your practice setting (check one):

Answered: 753 Skipped: 0



ANSWER CHOICES	RESPONSES	
Inpatient setting	4.91%	37
Hospital or health system owned outpatient practice	35.06%	264
Physician-owned practice as an equity partner	31.47%	237
Physician-owned practice as an employed physician	13.68%	103
Federally Qualified Health Center (FQHC)	3.05%	23
Rural Health Center (RHC)	1.20%	9
Local Health Department	0.66%	5
Other (please specify)	9.96%	75
TOTAL		753

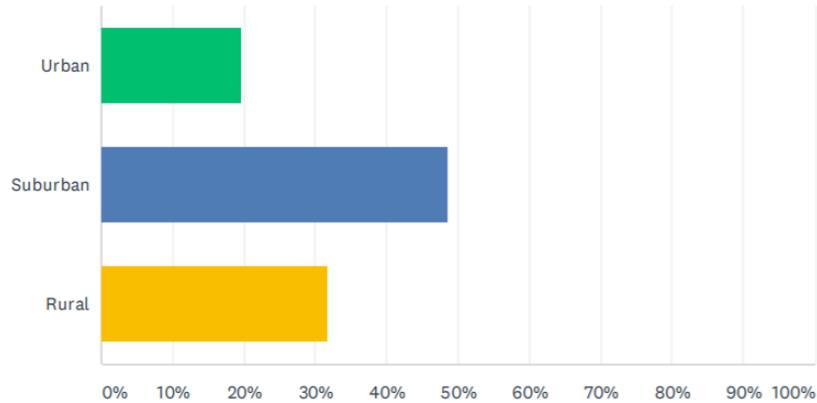
Practice Setting Cross Tabs

DESCRIBE YOUR PRACTICE SETTING (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
Inpatient	4.91	6.27	4.14	5	
Hospital/System-Owned Outpatient	35.06	28.78	38.59	31.25	
Physician-Owned as an Equity Partner	31.47	43.17	24.9	33.75	69.71
Physician-Owned as an Employee	13.68	15.5	12.66	10.42	30.29
Physician-Owned TOTAL Regardless of Your Status	45.15	58.67	37.56	44.17	100
FQHC	3.05	0.74	4.36	5.83	
Rural Health Center	1.2	0	1.87	3.75	
Health Department	0.66	0.37	0.83	1.25	
Other	10	5.17	12.6	8.75	

TAKEAWAY: Pediatric practices are more likely to be physician-owned than family medicine practices.

Q3 How would you describe your practice location (choose one):

Answered: 753 Skipped: 0



ANSWER CHOICES	RESPONSES	
Urban	19.65%	148
Suburban	48.47%	365
Rural	31.87%	240
TOTAL		753

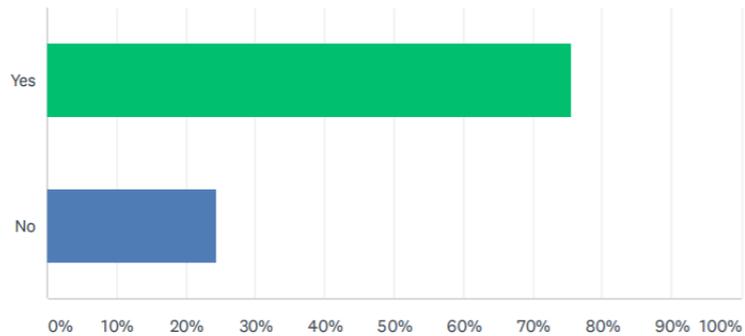
Practice Location Cross Tabs

DESCRIBE YOUR PRACTICE LOCATION (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
Urban	19.65	22.14	18.26		14.71
Suburban	48.47	54.61	45.02		54.12
Rural	31.87	23.25	36.72	100	31.18

TAKEAWAY: Family medicine practices are more likely to be rural than pediatric practices.

Q4 Many practices have had trouble with Personal Protective Equipment (PPE) such as gowns, masks, etc., as a result of the COVID-19 pandemic? Has your practice had trouble acquiring these items?

Answered: 753 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	75.56%	569
No	24.44%	184
TOTAL		753

PPE Needs Cross Tabs

	ALL	PEDS	FamMed	Rural	Physician-Owned
PPE NEEDS (Percentage)	75.56	78.6	73.86	74.58	88.53

TAKEAWAYS:

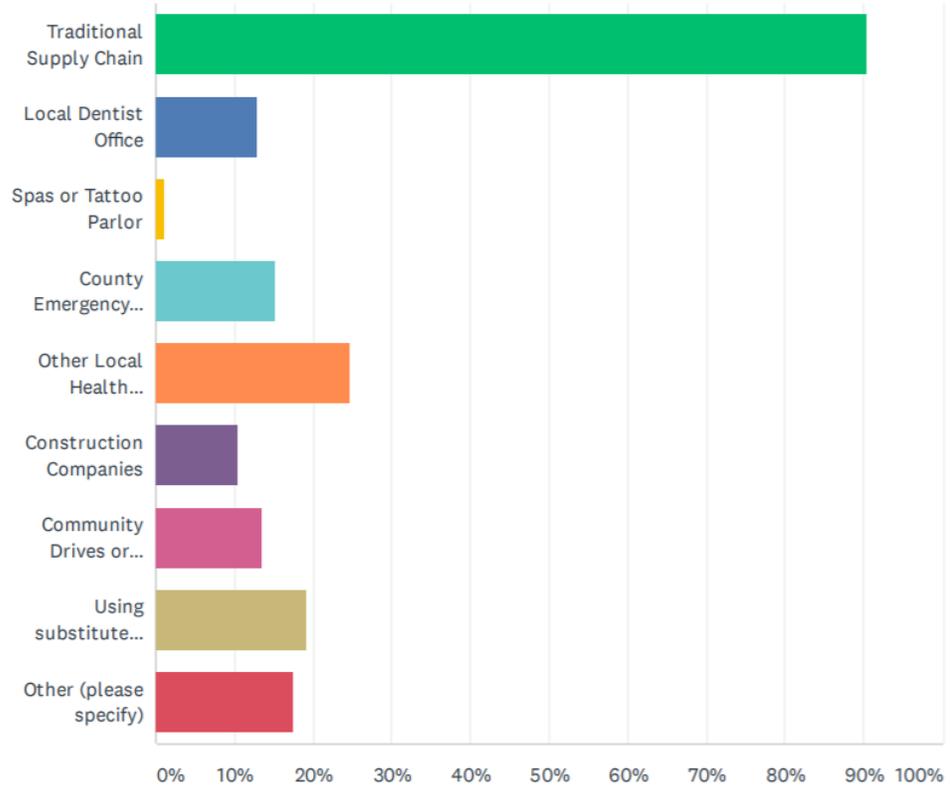
- All primary care practices are in need of PPE.
- However, not surprisingly, physician-owned practices have a greater need for PPE.

POTENTIAL ACTION ITEMS

- Provide resources to practices on strategies to obtain PPE
- Assure need of practices for PPE is included in policy discussions

Q5 Please indicated the sources you have contacted to try to obtain I
(check all that apply):

Answered: 731 Skipped: 22



ANSWER CHOICES	RESPONSES	
Traditional Supply Chain	90.29%	660
Local Dentist Office	13.00%	95
Spas or Tattoo Parlor	1.09%	8
County Emergency Management Office	15.18%	111
Other Local Health Providers	24.76%	181
Construction Companies	10.40%	76
Community Drives or Requesting Donations	13.68%	100
Using substitute products (bandanas, ponchos, handmade masks, etc.)	19.29%	141
Other (please specify)	17.65%	129
Total Respondents: 731		

Sources Contacted for PPE Cross Tabs

PPE SOURCES TRIED (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
Traditional Supply Chain	90.29	92.34	89.15	88.41	96.46
Dentist	13	23.37	7.23	7.73	20.35
Spa/Tattoo Parlor	1.04	1.53	0.85	1.29	2.06
County Emergency Management	15.18	13.03	16.36	20.17	23.01
Other Health Provider	24.76	26.44	23.83	27.04	30.68
Construction Field	10.4	12.26	9.36	12.45	15.63
Community Drives/Requests	13.68	10.34	15.53	11.16	12.98
Substitute Product (Bandanas, Trash Bags, etc.)	19.24	25.29	15.96	20.17	28.02
Other	17.65	20.31	16.17	18.03	17.7

TAKEAWAYS:

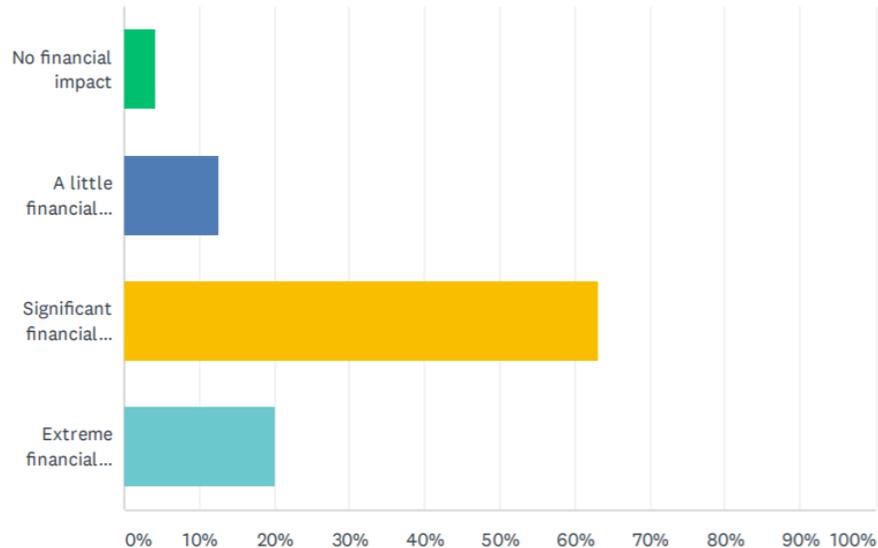
- Physician-owned practices have tried every possible resource more than other practices.
- Pediatric practices have more likely used substitute products as PPE.
- Practices are as likely to be using substitute products, as they are to seek help through County Emergency Management. This may speak to the lack of connection between primary care and the traditional emergency management system.

POTENTIAL ACTION ITEMS:

- Promote County Emergency Management as a resource to practices
- Support NC DHHS efforts to monitor, increase and distribute PPE

Q6 What type of financial pressure has the COVID-19 pandemic put on your practice (check one)?

Answered: 742 Skipped: 11



ANSWER CHOICES	RESPONSES	
No financial impact	4.18%	31
A little financial impact	12.53%	93
Significant financial impact	63.21%	469
Extreme financial impact	20.08%	149
TOTAL		742

Financial Impact Cross Tabs

FINANCIAL IMPACT (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
None	4.18	2.64	5.03	3.81	1.18
Little	12.53	9.43	14.26	15.68	7.67
Significant	63.21	63.02	63.31	62.29	61.65
Extreme	20.08	24.91	17.4	18.22	29.5
Significant or Extreme	83.29	87.93	80.71	80.51	91.15

TAKEAWAYS:

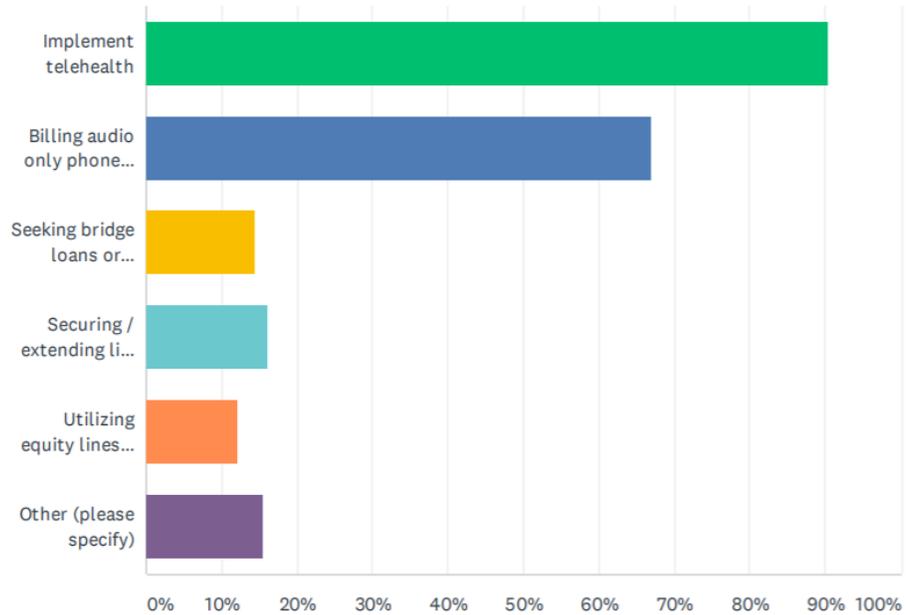
- Not surprisingly, physician-owned practices are seeing the greatest financial impact.
- Pediatric practices, who are more likely to report being physician-owned, also reported a slightly greater financial impact than family medicine practices.

POTENTIAL ACTION ITEMS:

- Encourage the state and other payers to provide financial and other support to primary care practices.

Q7 What steps are you taking to improve revenue as a result of the COVID-19 pandemic (check all that apply)?

Answered: 741 Skipped: 12



ANSWER CHOICES	RESPONSES	
Implement telehealth	90.28%	669
Billing audio only phone visits when appropriate	66.94%	496
Seeking bridge loans or business loans or assistance	14.44%	107
Securing / extending lines of credit	16.19%	120
Utilizing equity lines or lines of credit	12.15%	90
Other (please specify)	15.52%	115
Total Respondents: 741		

Steps to Improve Revenue Cross Tabs

STEPS TO IMPROVE REVENUE (Percentage)	ALL	PEDS	FamMed	Rural	Physician- Owned
Implement Telehealth	90.28	94.7	87.84	85.29	93.2
Implement Audio Only Visits	66.94	63.26	68.97	65.55	64.2
Bridge Loans/Busienss Loans	14.44	22.73	9.85	13.45	28.99
Securing/Extending Lines of Credit	16.19	26.52	10.48	14.71	33.43
Utilize Equity Lines	12.15	17.8	9.01	15.97	25.44
Other	15.52	14.77	15.93	18.49	15.98

TAKEAWAYS:

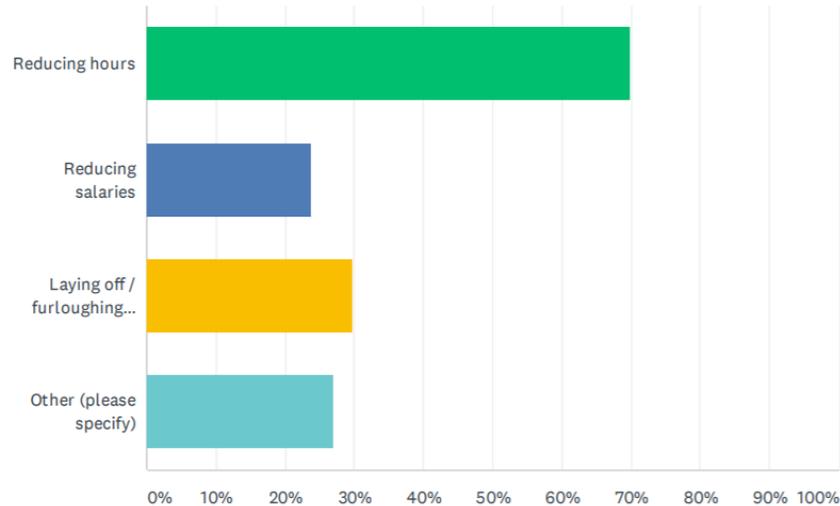
- The large majority of all practices are working to implement telehealth.
- Not surprisingly, physician-owned practices are more likely to be seeking bridge loans or lines of credit. Given that a higher percentage of pediatric practices are physician-owned, a higher percentage of pediatric practices are also seeking these types of loans.
- Only a third of physician-owned practices are securing or extending lines of credit, which would be the quickest way of securing short-term cash.

POTENTIAL ACTION ITEMS:

- Provide information on securing immediate lines of credit and other short-term support.
- Educate our members about small business loans and changes that payers are making to provide upfront revenue for practices could be a key area of support moving forward.
- Support appropriate legislative action.

Q8 What steps are you taking to reduce costs as a result of the COVID-19 pandemic (check all that apply)?

Answered: 702 Skipped: 51



ANSWER CHOICES	RESPONSES	
Reducing hours	69.94%	491
Reducing salaries	23.93%	168
Laying off / furloughing staff	29.77%	209
Other (please specify)	27.07%	190
Total Respondents: 702		

Cost Reduction Measures Cross Tabs

STEPS TO REDUCE COSTS (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
Reduce Hours	69.94	80.71	63.84	65.18	79.15
Reduce Salaries	23.93	31.5	19.64	17.41	35.05
Layoff/Furlough Employees	29.77	36.22	26.12	26.34	37.46
Other	27.07	20.47	30.8	30.8	20.24

TAKEAWAY:

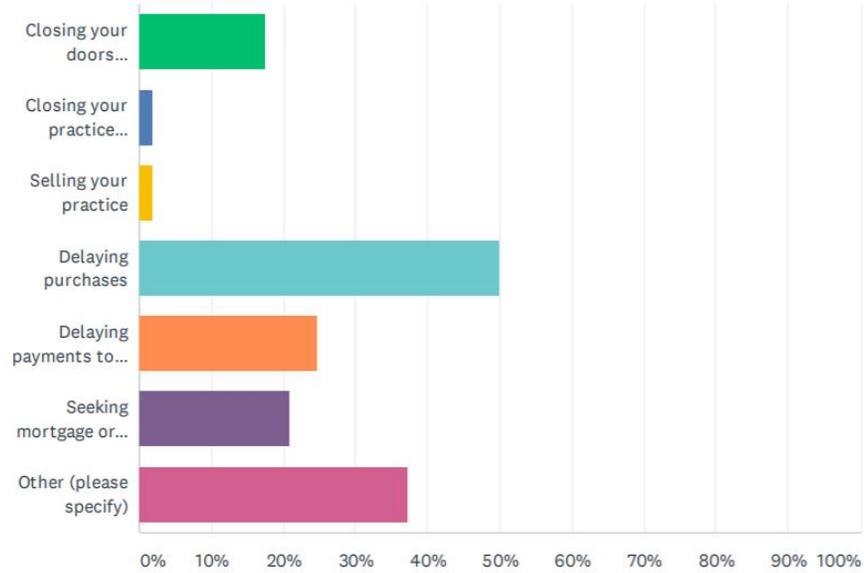
- Again, a higher percentage of physician-owned practices are taking more severe cost reduction steps. This is also true for pediatric practices, since a higher percentage of those practices are physician owned.
- The large majority of practices are taking drastic actions to lower costs by reducing hours, salaries and/or workforce. This is especially true for physician-owned practices.

POTENTIAL ACTION ITEMS:

- Provide education on unemployment law provisions for independent practices.
- Promote state volunteer opportunities relating to workforce surge.

Q9 Are you considering any of the following due to this pandemic (check all that apply)?

Answered: 611 Skipped: 142



ANSWER CHOICES	RESPONSES	
Closing your doors temporarily	17.68%	108
Closing your practice permanently	1.96%	12
Selling your practice	1.96%	12
Delaying purchases	49.92%	305
Delaying payments to vendors	24.71%	151
Seeking mortgage or other loan extensions	20.95%	128
Other (please specify)	37.32%	228
Total Respondents: 611		

Other Actions Under Consideration Cross Tabs

ARE YOU CONSIDERING THESE (Percentage)	ALL	PEDS	FamMed	Rural	Physician- Owned
Temporarily Closing	17.68	12.61	20.57	19.69	18.93
Permanently Closing	1.96	2.25	1.87	3.63	3.15
Selling Your Practice	1.96	1.35	2.31	2.59	3.79
Delaying Purchases	49.92	60.36	43.96	50.26	66.25
Delaying payments	24.71	36.49	17.99	25.39	41.01
Securing Mortgage/Loan Extensions	20.95	30.18	15.68	19.17	37.85
Others	37.32	29.73	41.65	35.75	21.14

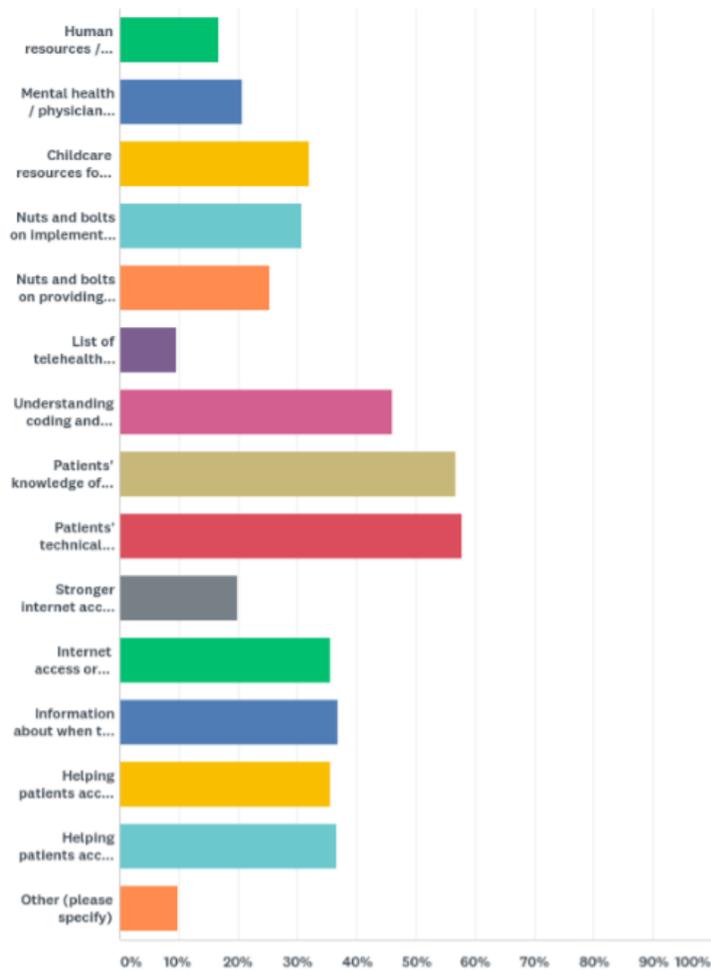
TAKEAWAYS:

- A higher percentage of family medicine practices are considering temporary closure.
- A higher percentage of pediatric practices are considering delaying purchases or delaying payments.
- Physician-owned practices are considering taking numerous cost-reducing actions across the board.
- Rural practices are more likely to consider permanent closure or selling their practice.
- There is a serious chance that the state will lose primary care capacity if immediate assistance is not provided.

POTENTIAL ACTION ITEM:

- Encourage the State and other payers to provide financial and other support to primary care practices.

Q10 Are there other areas where you need specific assistance during this crisis (check all that apply)?



ANSWER CHOICES	RESPONSES	
Human resources / benefits assistance	16.81%	120
Mental health / physician well-being assistance	20.73%	148
Childcare resources for you and/or your staff	32.07%	229
Nuts and bolts on implementing telehealth for the practice	30.81%	220
Nuts and bolts on providing telehealth from your own home	25.35%	181
List of telehealth vendors	9.66%	69
Understanding coding and recent insurance changes on telehealth	46.08%	329
Patients' knowledge of the availability of telehealth	56.72%	405
Patients' technical ability to use telehealth	57.84%	413
Stronger internet access for the physician's home or office	19.89%	142
Internet access or stronger access for your patient	35.57%	254
Information about when to do an in person visit versus virtual well and other visits	36.83%	263
Helping patients access other resources (food, shelter, etc.)	35.57%	254
Helping patients access mental health services	36.55%	261
Other (please specify)	9.80%	70
Total Respondents: 714		

Areas of Assistance Cross Tabs

AREAS OF NEED (Percentage)	ALL	PEDS	FamMed	Rural	Physician-Owned
HR/Benefits	16.81	18.69	15.76	16.44	22.74
Mental Health/Physician Well Being	20.73	19.46	21.44	17.33	14.33
Childcare for You or Staff	32.07	31.52	32.39	27.56	28.97
Nuts & Bolts on Telehealth for Practice	30.81	33.07	29.54	36.89	29.28
Nuts & Bolts on Telehealth for at Home	25.35	23.74	26.26	27.56	21.81
Telehealth Vendors	9.66	10.12	9.41	14.22	12.15
Understanding Telehealth Coding	46.08	50.97	43.33	47.11	52.65
Patient Knowledge of Availability of Telehealth	56.72	53.31	58.64	54.67	59.5
Patient Technical Ability to Use Telehealth	57.84	48.25	63.24	63.56	57.01
Stronger Internet Access for Physician	19.89	20.62	19.47	20	23.05
Access to or Stronger Internet Access for patient	35.57	33.85	36.54	40.89	33.33
Info about when to do an in-person vs. virtual visit	36.83	40.47	34.79	41.33	37.69
Helping patient access other resources	35.57	37.74	34.35	35.11	29.6
Helping patient access mental health resources	36.55	39.69	34.79	33.33	34.27
Other	9.8	7.39	11.16	7.11	6.85

TAKEAWAYS:

- Physician-owned and rural practices tend to have numerous areas of great need.
- Pediatric practices were more likely to ask for information about when to do a virtual visit versus an in-person visit.
- Family medicine practices had greater concerns about the ability of their patients to handle telehealth technology. This is not surprising, since family physicians have an older patient base (Medicare).
- Top areas of overall concern included:
 - Patients' technical ability to use telehealth,
 - Patient knowledge of the availability of telehealth, and
 - Information around coding for telehealth visits.

POTENTIAL ACTION ITEMS:

- Promote the state's childcare resources for health professionals.
- Support legislation to strengthen childcare workforce.
- Promote telehealth resources from national and state sources.
- Consider a webinar or other education on telehealth.
- Create venue for members to share successful strategies around telehealth.
- Provide information on appropriate coding for telehealth.
- Advocate for partners to focus on telehealth resources for primary care.
- Promote telehealth visits to patients through various means, including:
 - Social Media
 - Possible press releases or press contacts
 - Possible letters to the editor
- Work with partners to determine possible criteria for when to do live visits as opposed to virtual visits.

- **What one thing would be most helpful to you right now whether mentioned above or not (open response question)? – n=567**

Takeaways:

- Personal Protective Equipment was by far the most mentioned issue in these answers.
- The next most critical item was need of financial assistance.
- Two other areas mentioned frequently were resources around telehealth and greater testing availability.
- Other items that were not mentioned as much but were still mentioned regularly included: best practices, consistency around guidelines and mental health/stress reduction support for themselves and their staff.
- In addition, numerous people mentioned anticipating the availability of a vaccine and the desire to help disseminate a vaccine at the appropriate time.
- Primary care physicians are taking this crisis very seriously, so much so, that three quarters of survey respondents actually answered an open response question.

Please provide any additional comments or insights you may have (n=283)

Takeaways / Comments and Themes That Stood Out:

- Teams stepping up.
- Having hours cut on one hand but wanting to help in different ways on the other hand.
- Financial losses.
- Overwhelmed with information.
- Appreciation for what the associations are doing to help.
- Legal risk.
- PPE.
- Focusing on use of technology and Bluetooth enabled home devices – a possible positive.