

American Osteopathic Association Member Poll



**Presented by:
Benenson Strategy Group
May 11th, 2010**

Methodology

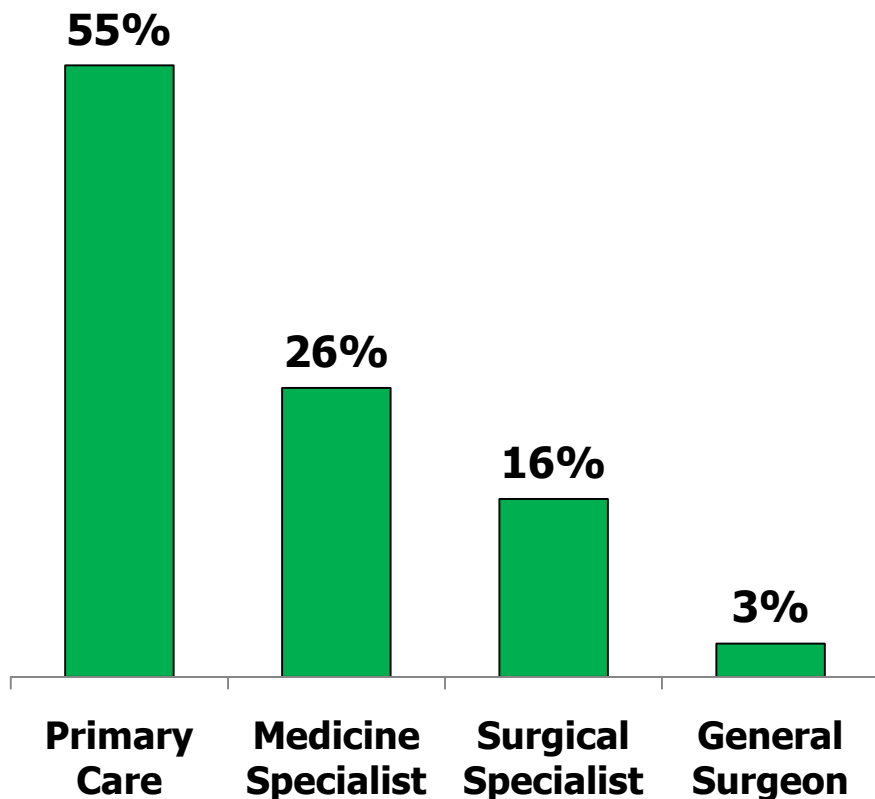
- ❖ **The Benenson Strategy Group conducted 1021 interviews with American Osteopathic Association members who provide direct patient care at least 20% of the time in their current position.**
- ❖ **All interviews were conducted online from April 28th through May 1st, 2010. The sample was then weighted to ensure it was proportionately representative of the American Osteopathic Association's membership.**
- ❖ **The margin of error is $\pm 3.0\%$ at the 95% confidence level. It is higher among subgroups.**

Membership Profile

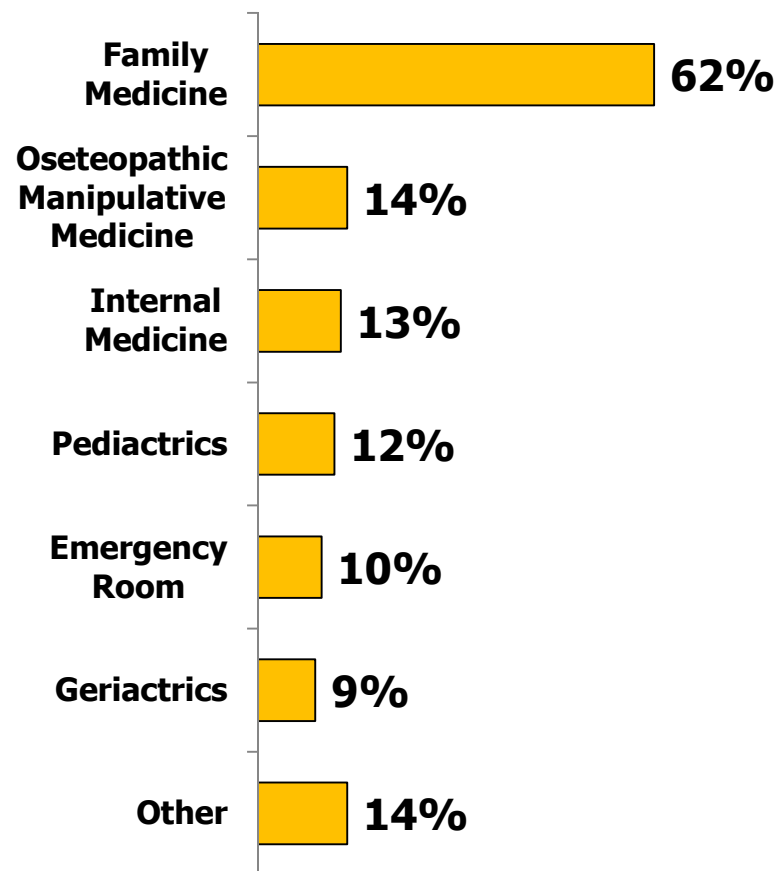


Primary Care Physicians More Than Half Of Membership – Most Practice Family Medicine

Type Of Physician (All Respondents)



Type of Primary Care
(Of 55% who said they were primary care physicians)

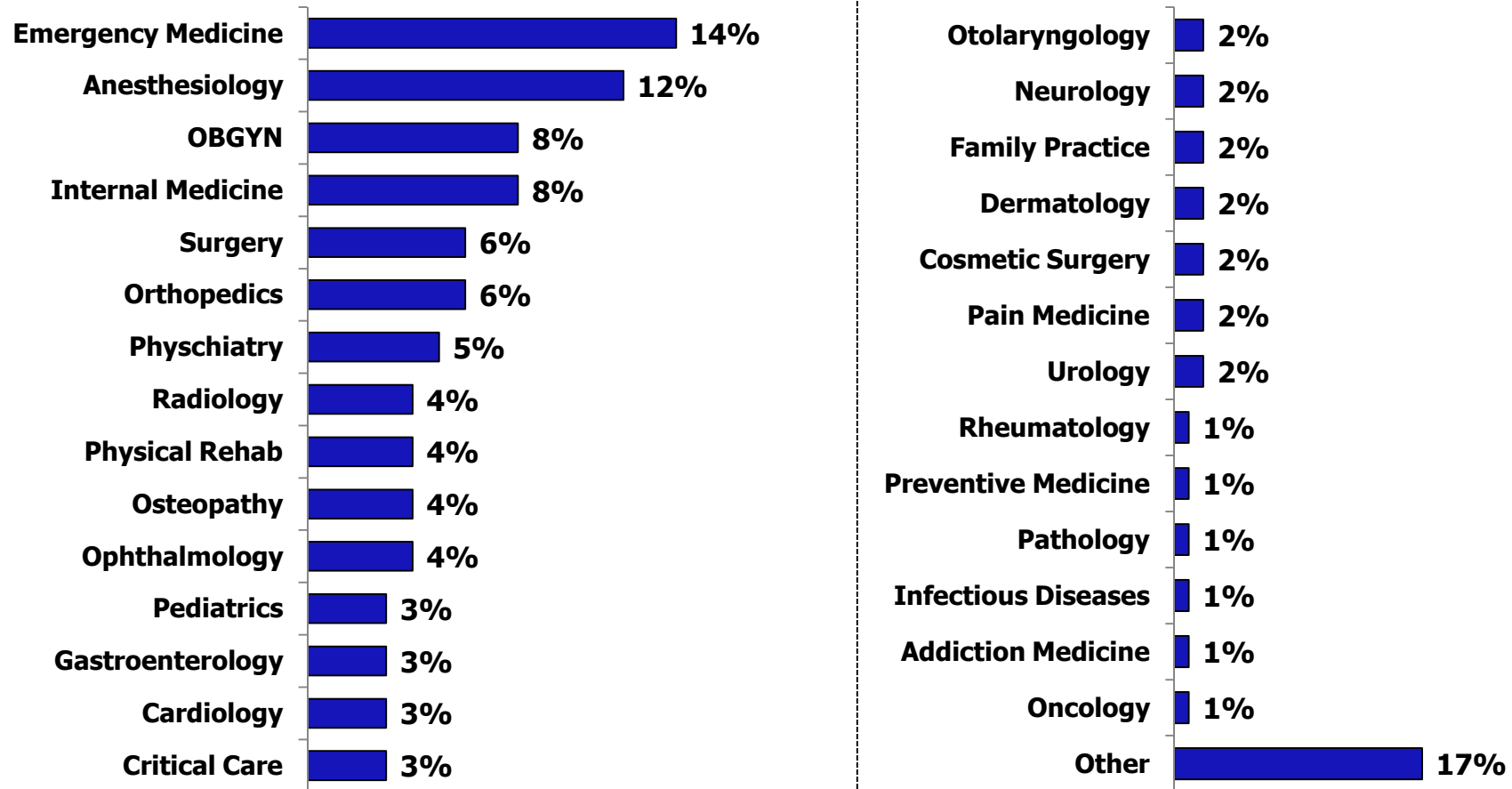


Q7: Generally speaking, which type of physician best describes you?

Q8: (Asked of Primary Care in Q7) And what type of primary care do you focus on?

Breakdown Of Specializations

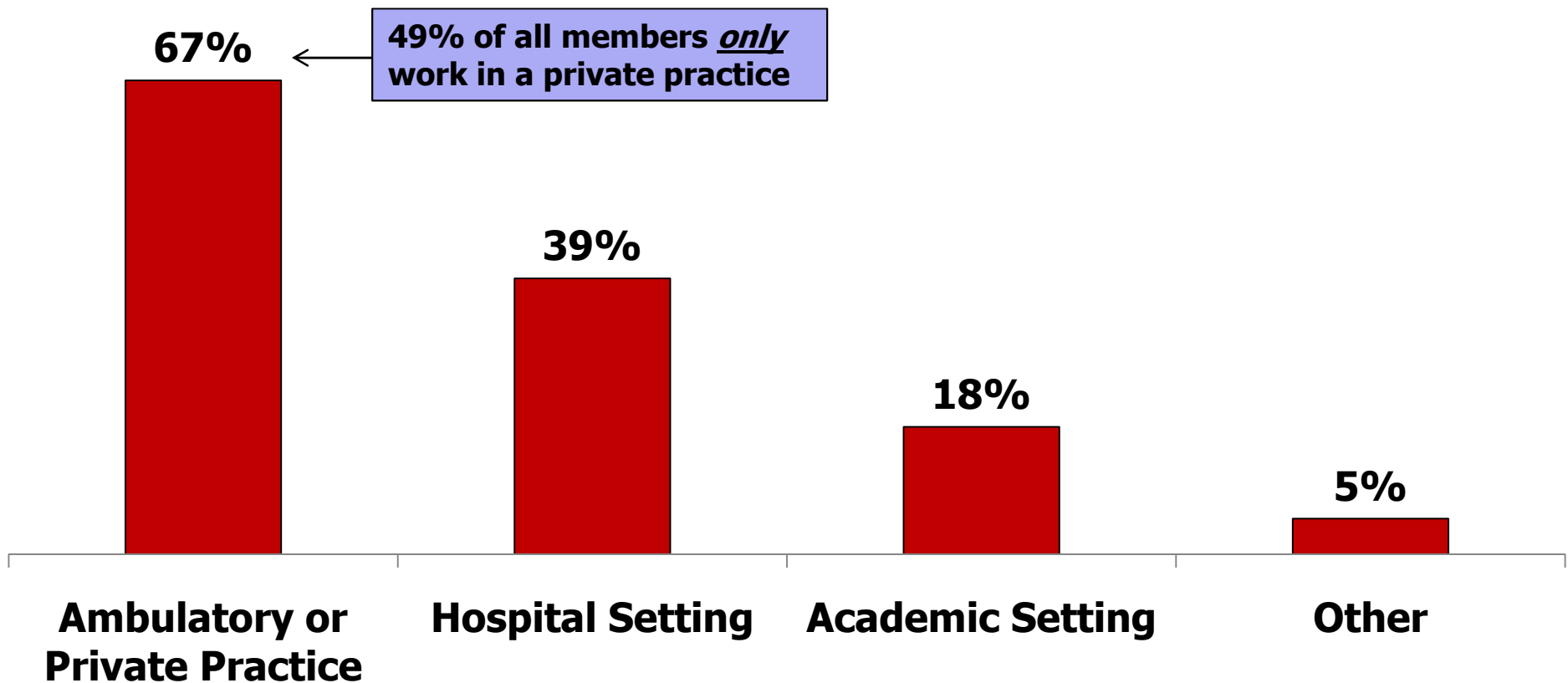
Type Of Specialization (Multiple Responses Permitted)
(Asked of non-primary care physicians)



Q9: (If not primary care in Q7) Please indicate the types of medicine you specialize in.

Two-Thirds Of Members Work In An Ambulatory Or Private Practice

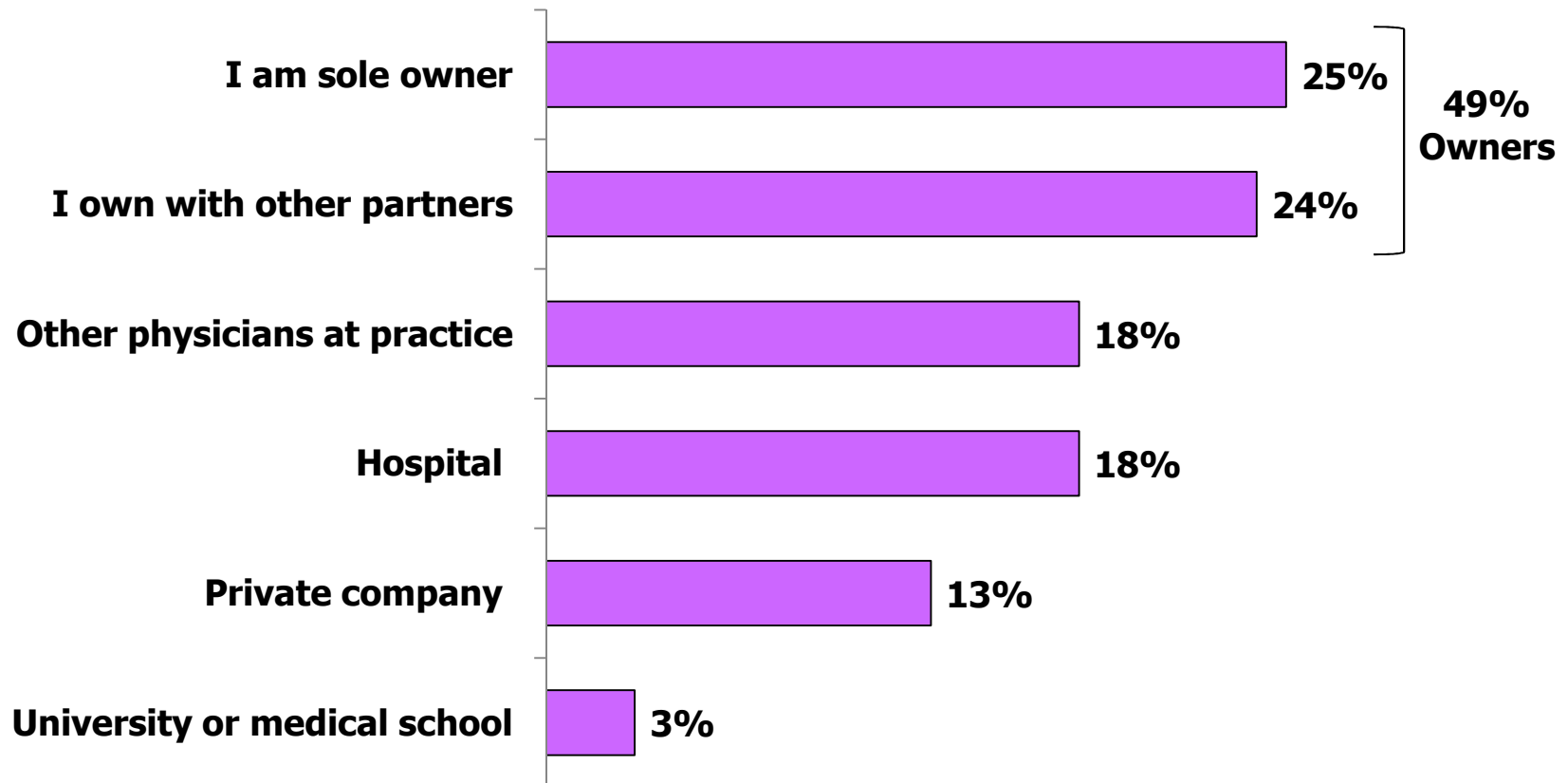
Primary Place Of Work
(All Respondents; multiple responses permitted)



Q10: Do you work in a:

Almost Half Of Private Practice Doctors Own Their Practice Either By Themselves Or With Other Partners

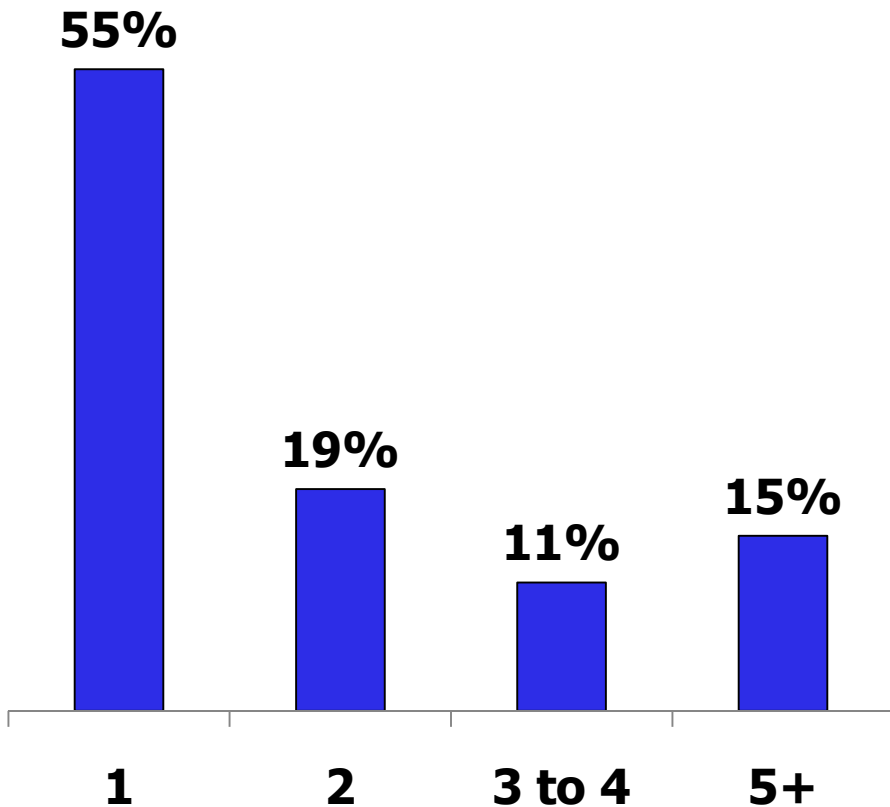
Private Practice Ownership
(Asked of physicians who work in a private/ambulatory practice)



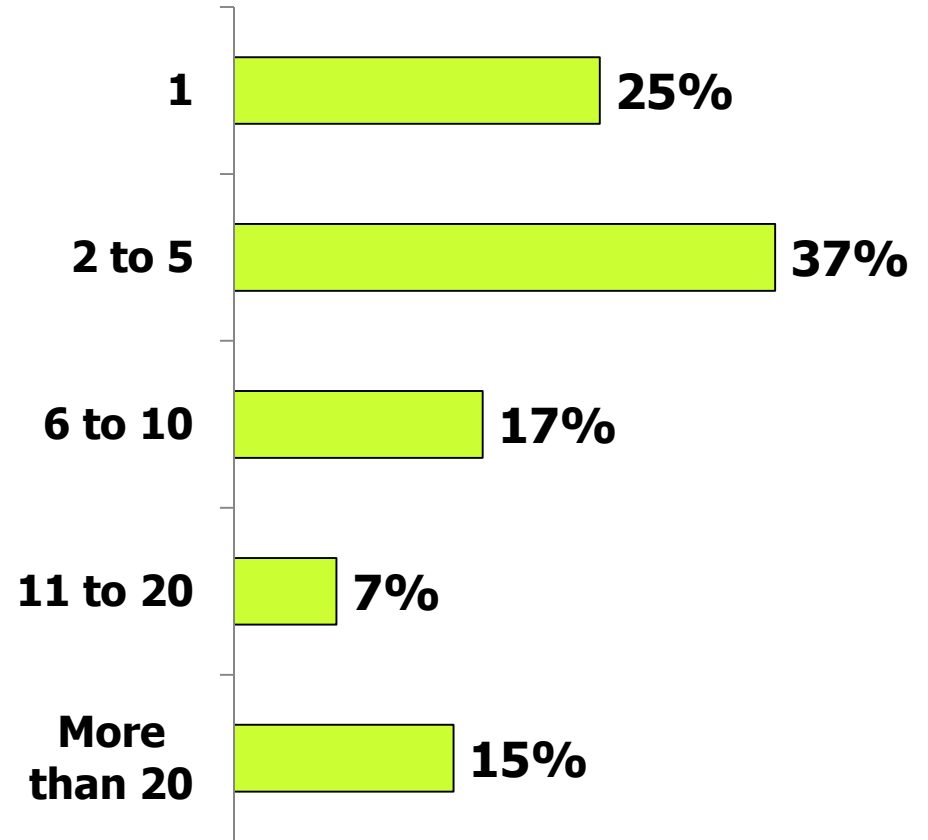
Q13: (If ambulatory or private practice) Which of the following best describes your practice?

Majority Of Private Practices Have One Location; Three In Four Have More Than One Doctor

Office Locations In Practice
(Asked of physicians who work in a private/ambulatory practice)



Doctors In Practice (All Locations)
(Asked of physicians who work in a private/ambulatory practice)

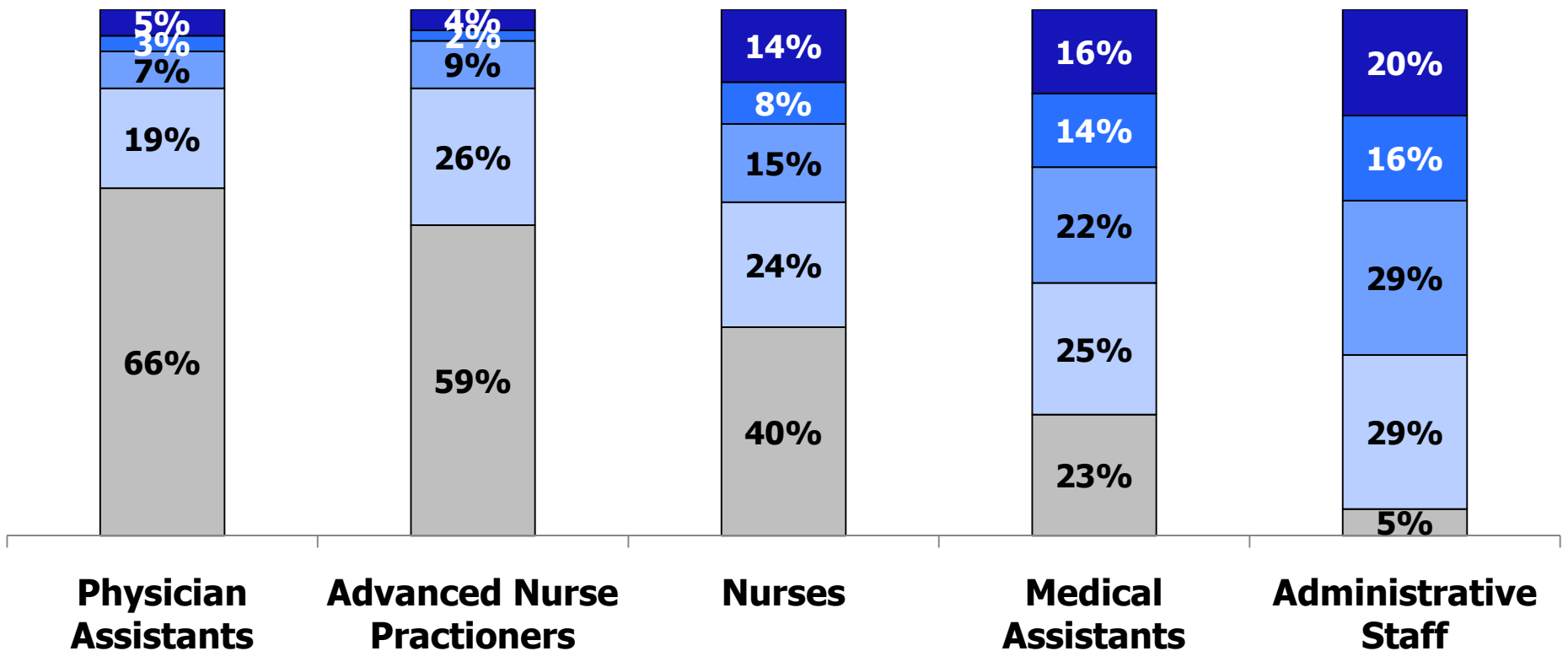


Q14: (If ambulatory or private practice) How many different office locations (i.e. different addresses) are in your practice?
Q15: (If ambulatory or private practice) How many doctors work at your practice (all locations)?

Administrative Staff And Medical Assistants Common, Majority Of Practices Lack Advanced Nurse Practitioners Or Physician Assistants

Other People That Work At Practice:
(Asked of physicians who work in a private/ambulatory practice)

0 1 to 2 3 to 5 6 to 10 More than 10

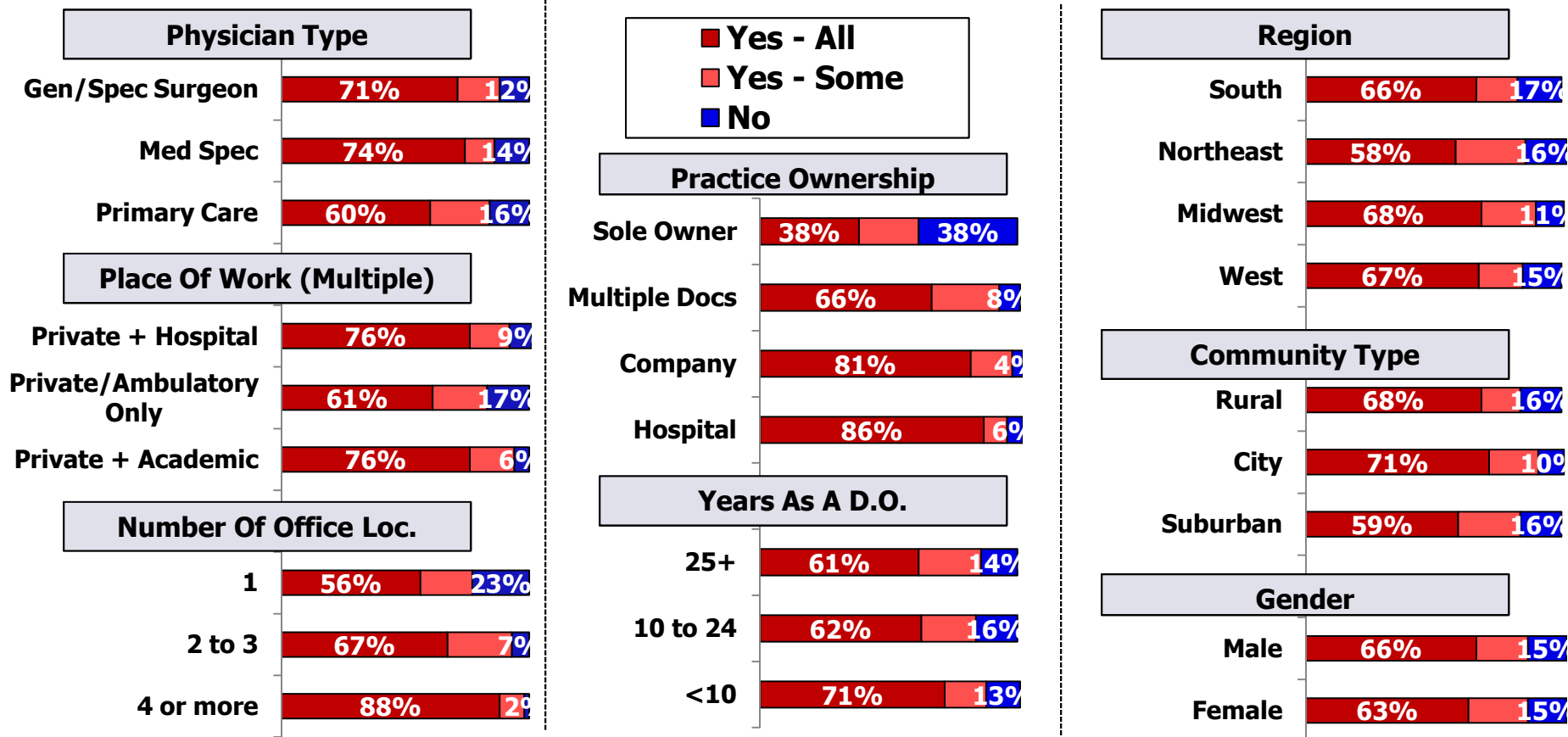


Q16: (If ambulatory or private practice) Other than physicians, how many other people work at your practice in each of the following areas?

Larger Practices More Likely To Offer Health Insurance To Employees

Self-owned Practices Least Likely, By Far, To Offer Insurance

Provide Health Insurance To Employees
(Asked of physicians who work in private/ambulatory practice)

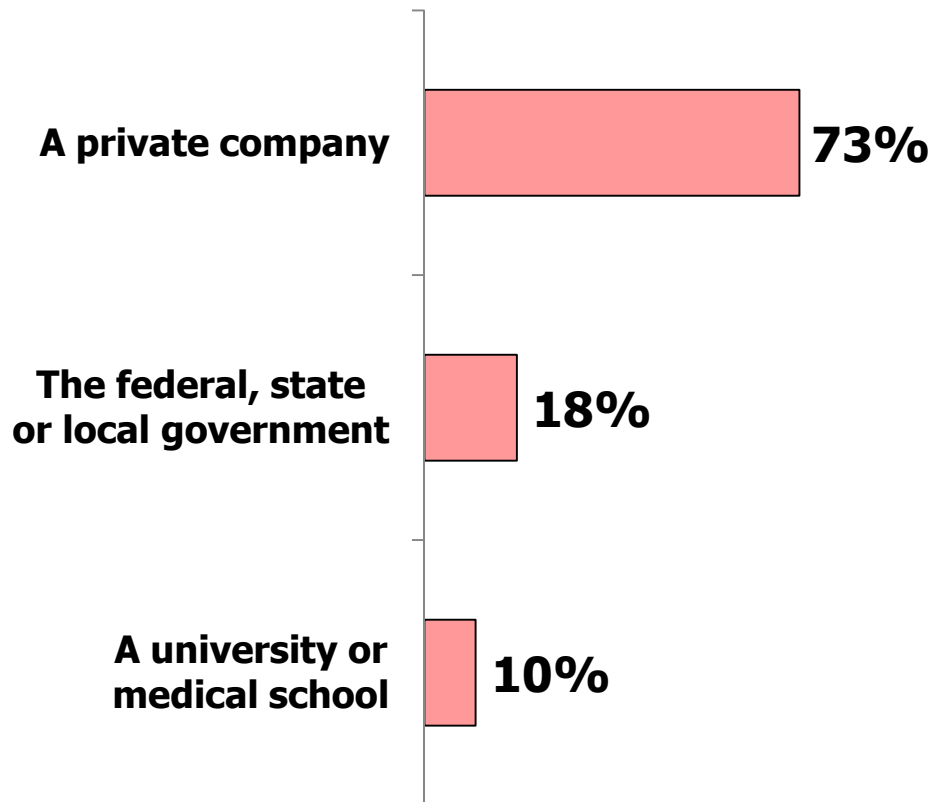


Q19: (If ambulatory or private practice) Does your practice provide health insurance for employees?

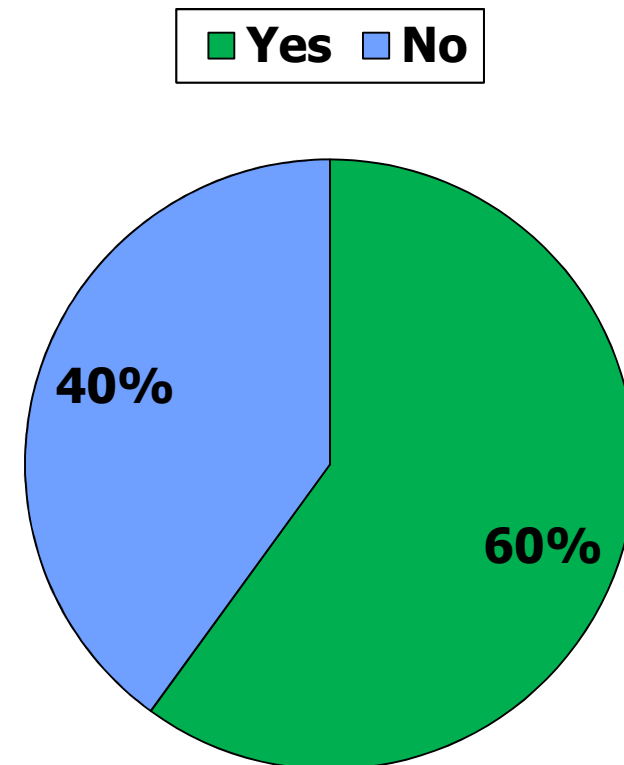


AOA Members Who Work In Hospitals

Hospital Owned By:
(Asked of physicians who work in hospital)



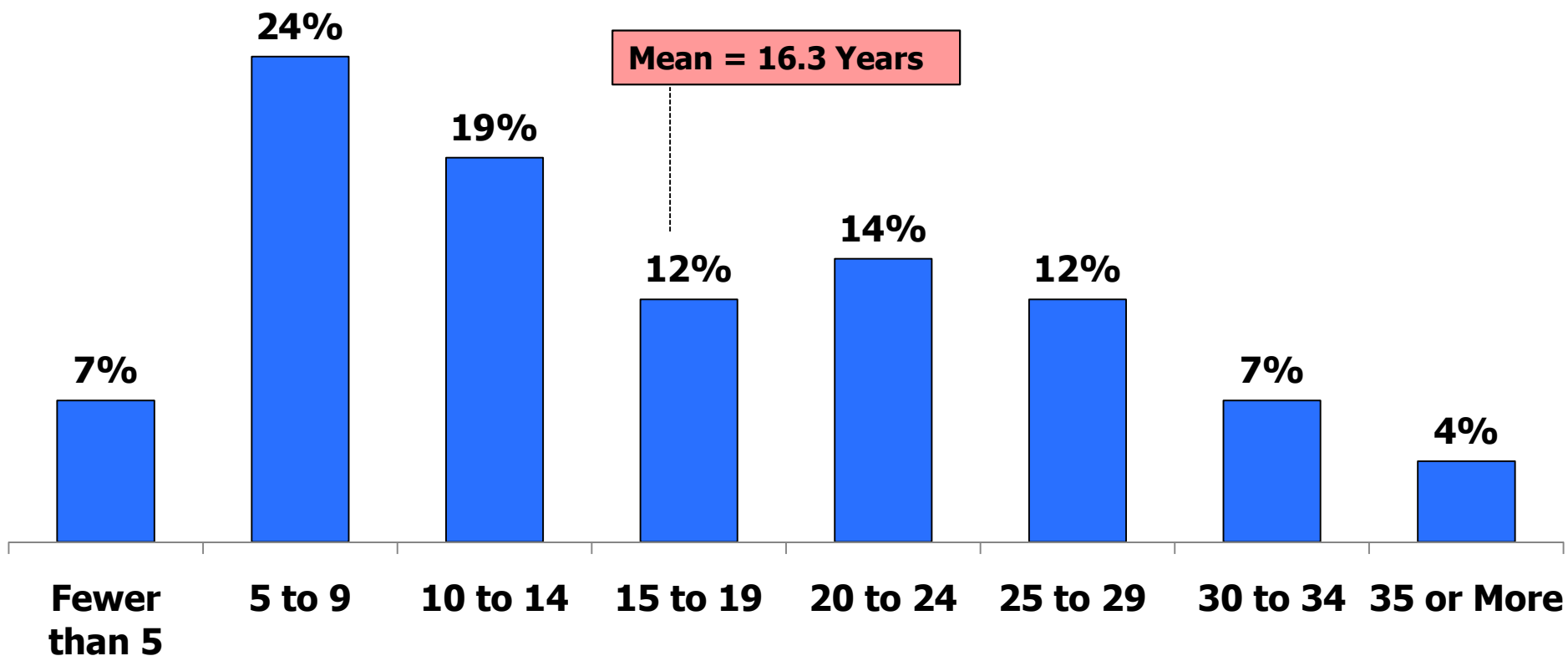
Teaching Hospital?
(Asked of physicians who work in hospital)



Q11: (If work in a hospital) Is your hospital owned by:
Q12: (If work in a hospital) Is your hospital a teaching hospital?

The Average AOA Member Has Been A Physician For 16.3 Years

Years As An Osteopathic Physician (All Respondents)



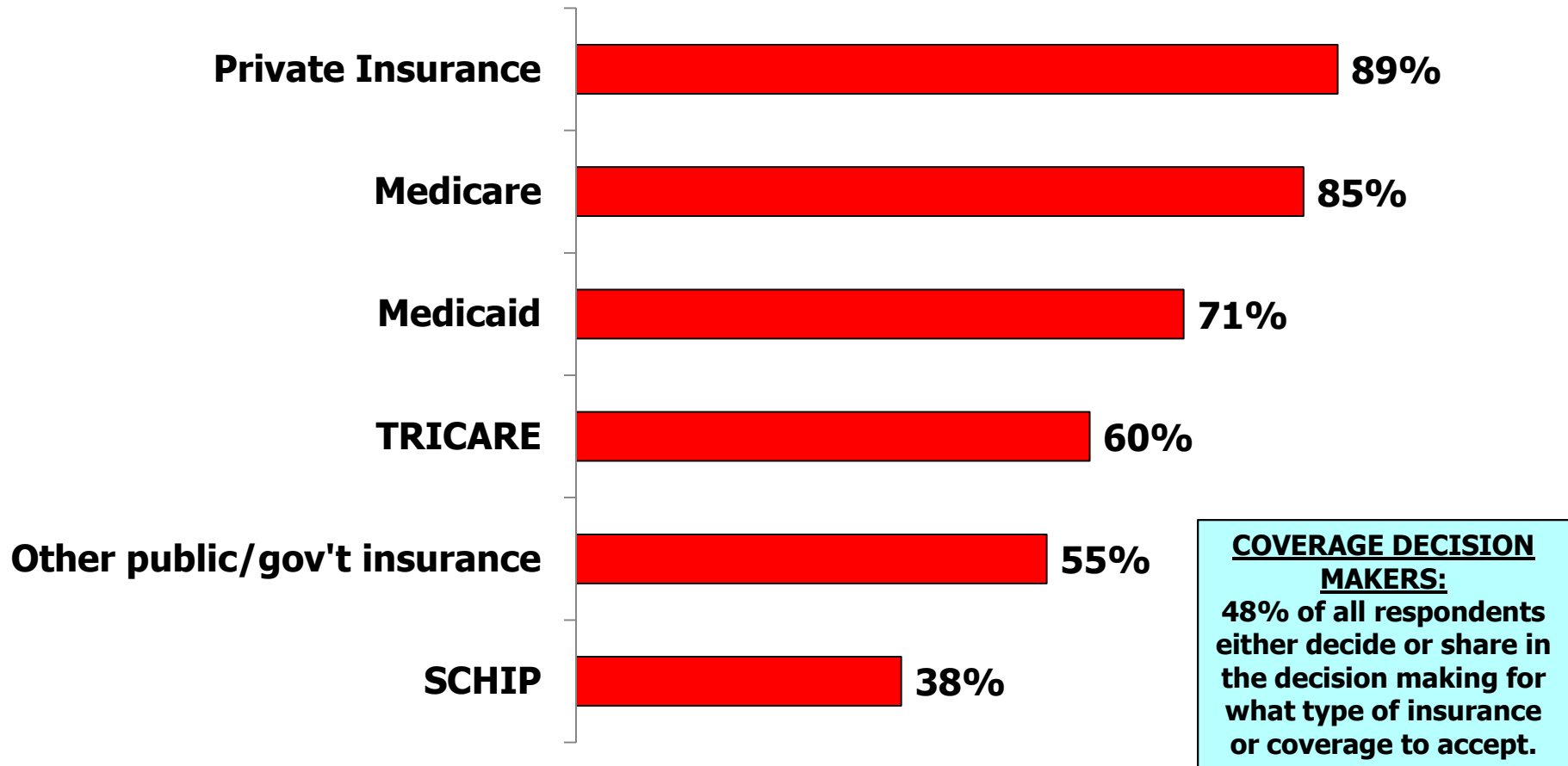
Q5: For how many years have you been an osteopathic physician?

Practice Mix



Coverage Accepted From Current Patients

Types Of Coverage Accepted From Current Patients (Multiple Responses Permitted)
(All Respondents)

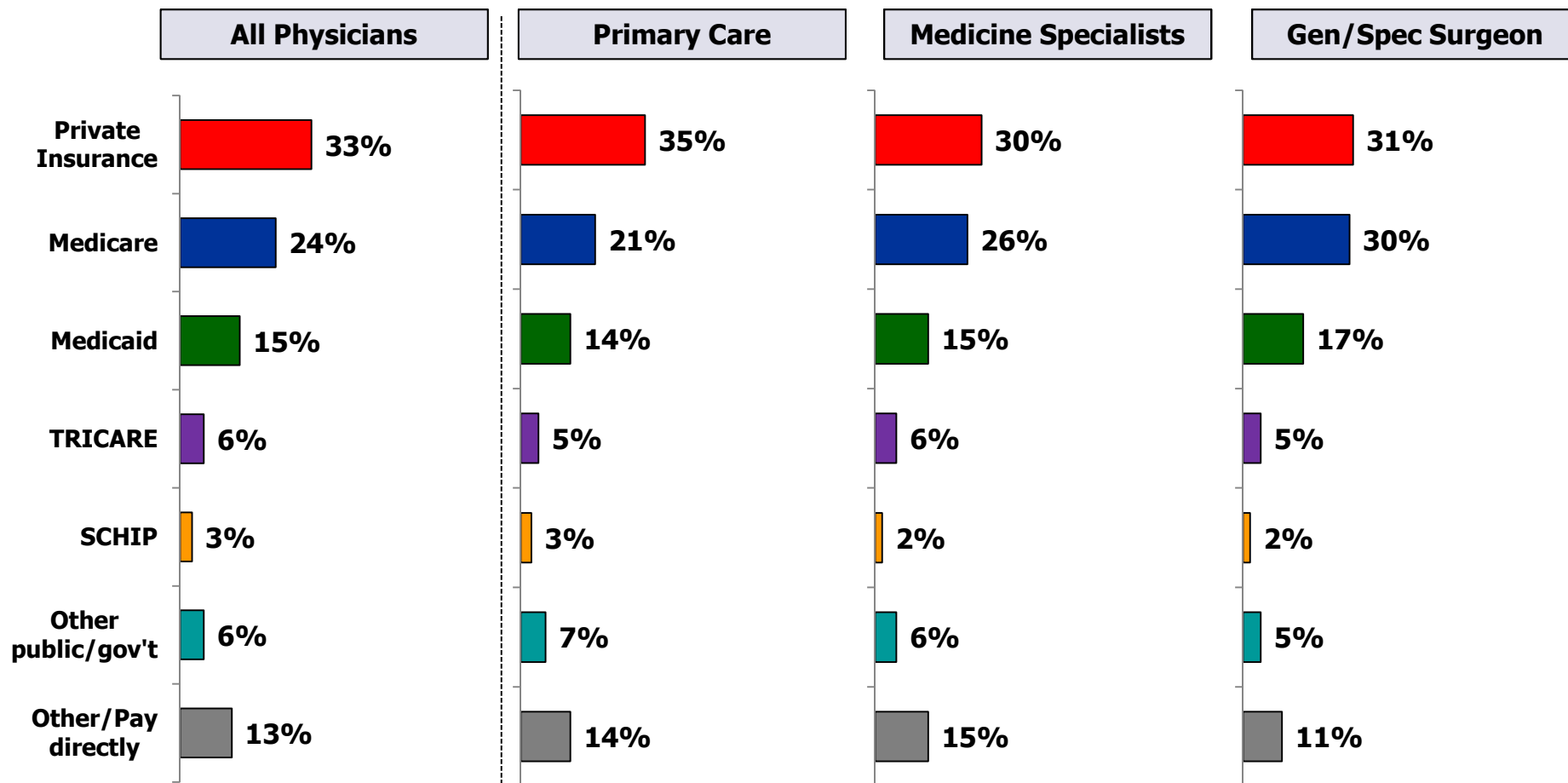


Q20: Which of the following types of coverage do you accept from current patients?

Q26: When it comes to deciding whether or not to accept a specific type of insurance coverage, which of the following statements best describes your role in the decision-making process: I am the sole decision maker, I share in the decision making with others, I have little or no say in the decision. 14

Surgeons Somewhat More Likely Than Primary Care Doctors To Accept Medicare

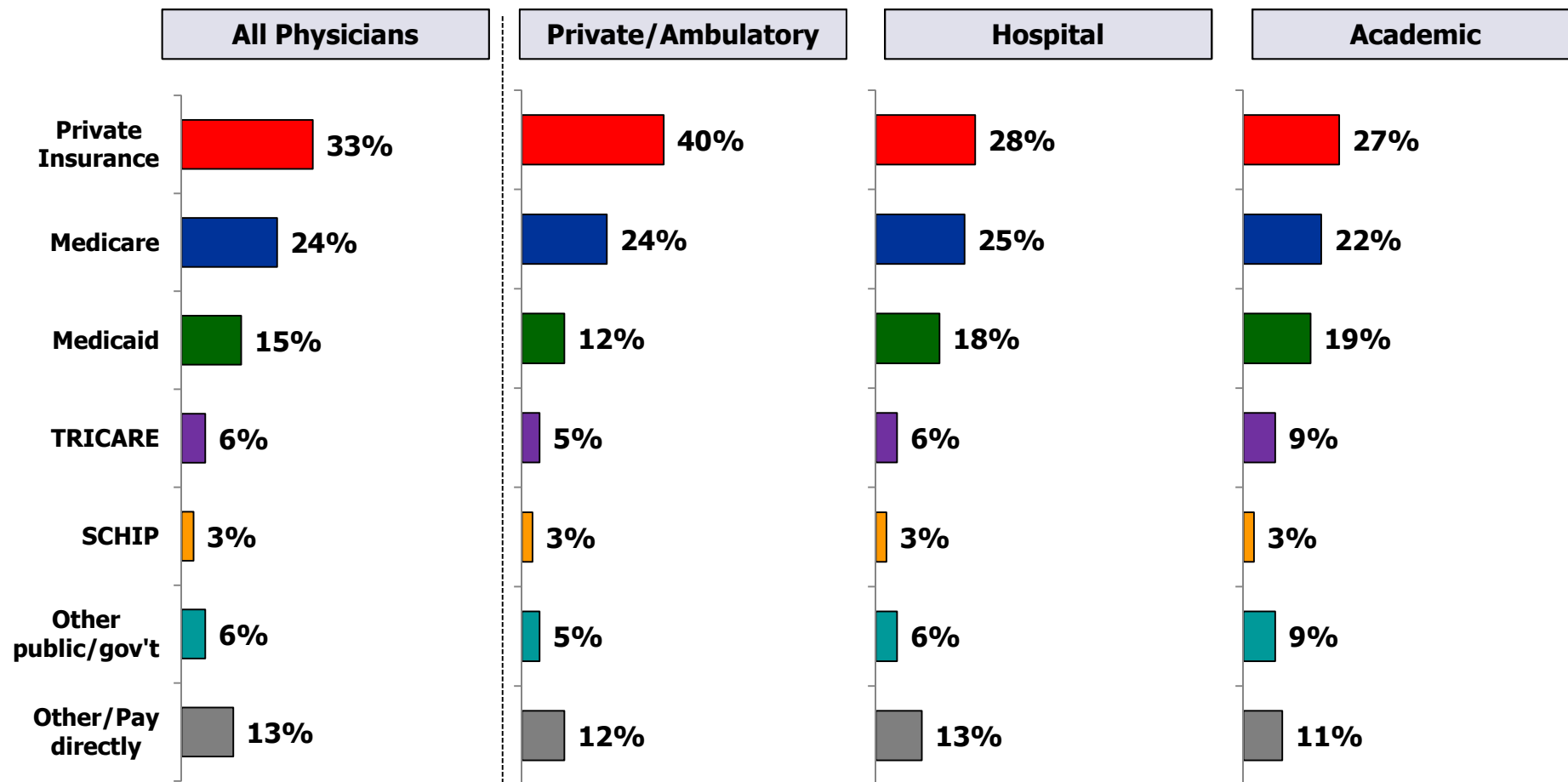
Average Practice Mix By Type Of Doctor



Q21: To the best of your ability, please indicate what percentage of your patients (the ones you see personally), have each of these types of coverage:

Bigger Segment Of Private/Ambulatory Practice Patients Have Private Insurance

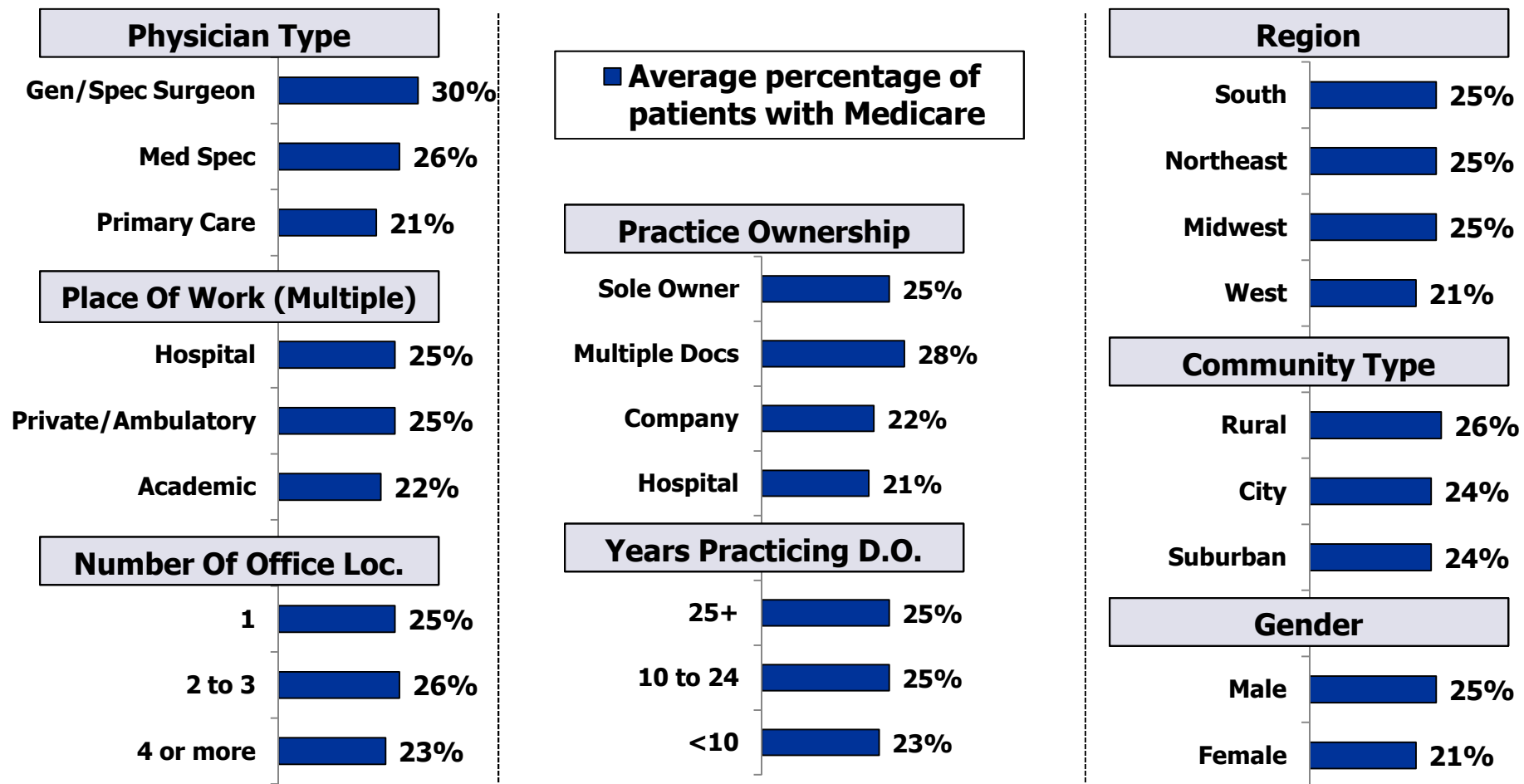
Average Practice Mix By Place Of Work



Q21: To the best of your ability, please indicate what percentage of your patients (the ones you see personally), have each of these types of coverage:

Medicare As A Percentage Of Practice Mix Somewhat Lower Among Primary Care

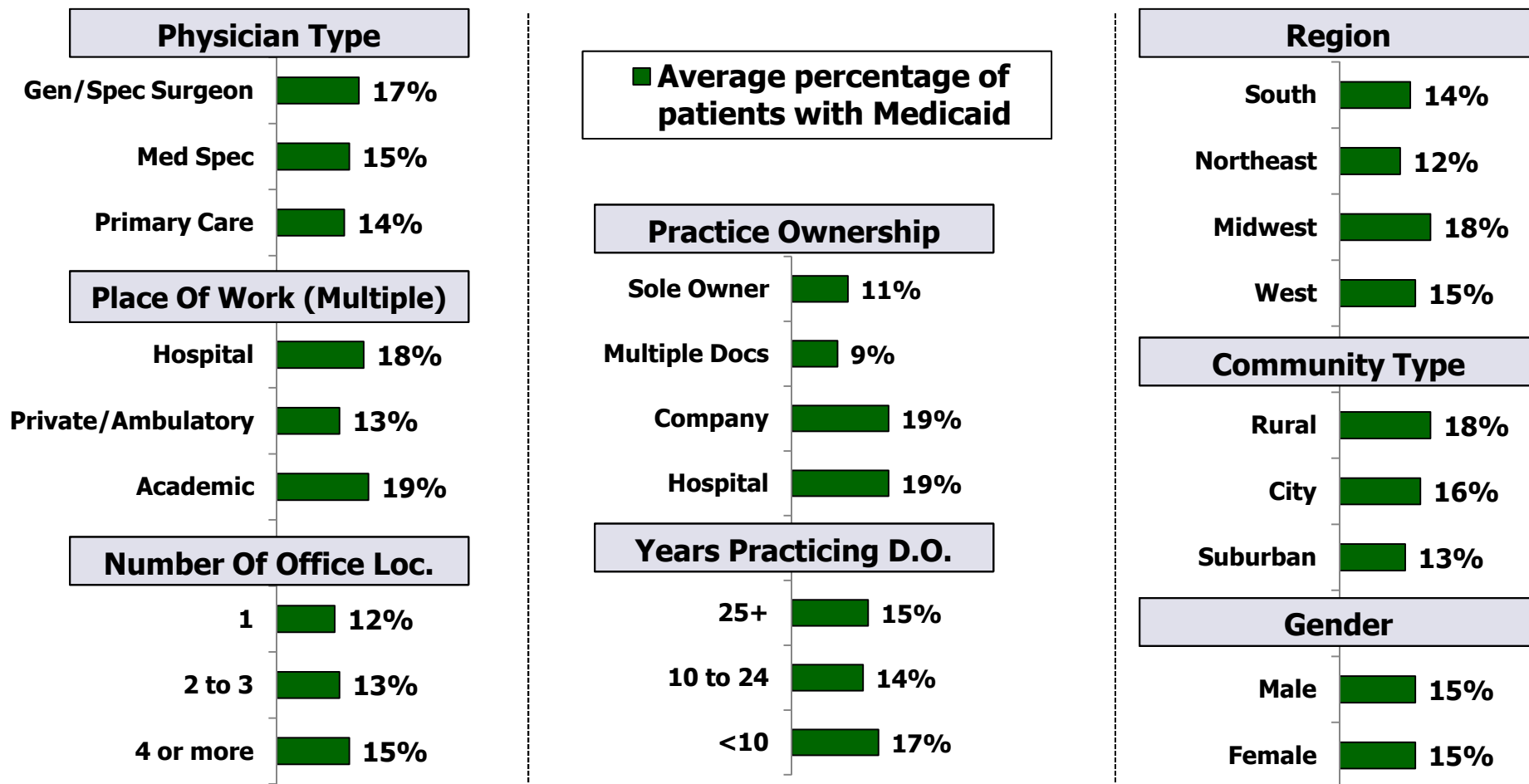
Medicare % Of Practice Mix By Demographics (overall average: 24% Medicare)



Q21_1: To the best of your ability, please indicate what percentage of your patients (the ones you see personally), have each of these types of coverage: (Medicare)

Medicaid Coverage Reasonably Steady Across Demographics, Somewhat Higher In Midwest

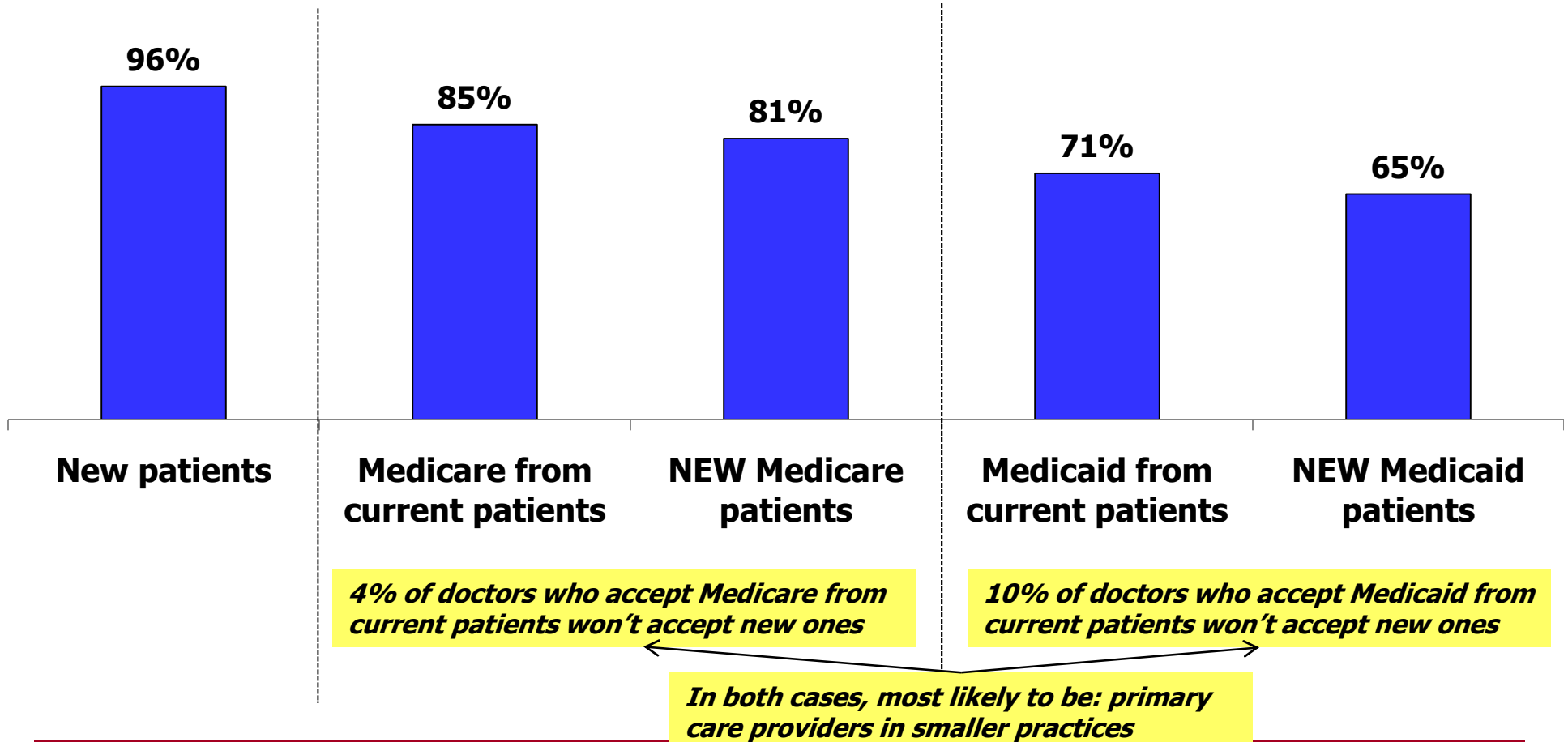
Patient Medicaid Coverage By Physician Demographics (15% Overall)



Q21_2: To the best of your ability, please indicate what percentage of your patients (the ones you see personally), have each of these types of coverage: (Medicaid)

Almost All Physicians Accepting New Patients Including Medicare, Somewhat Fewer Medicaid

% Of All Respondents Accepting...



Q22: Are you currently accepting any new patients?
Q23: (If Yes in Q22) Are you currently accepting new Medicare patients?
Q24: (If Yes in Q22) Are you currently accepting new Medicaid patients?

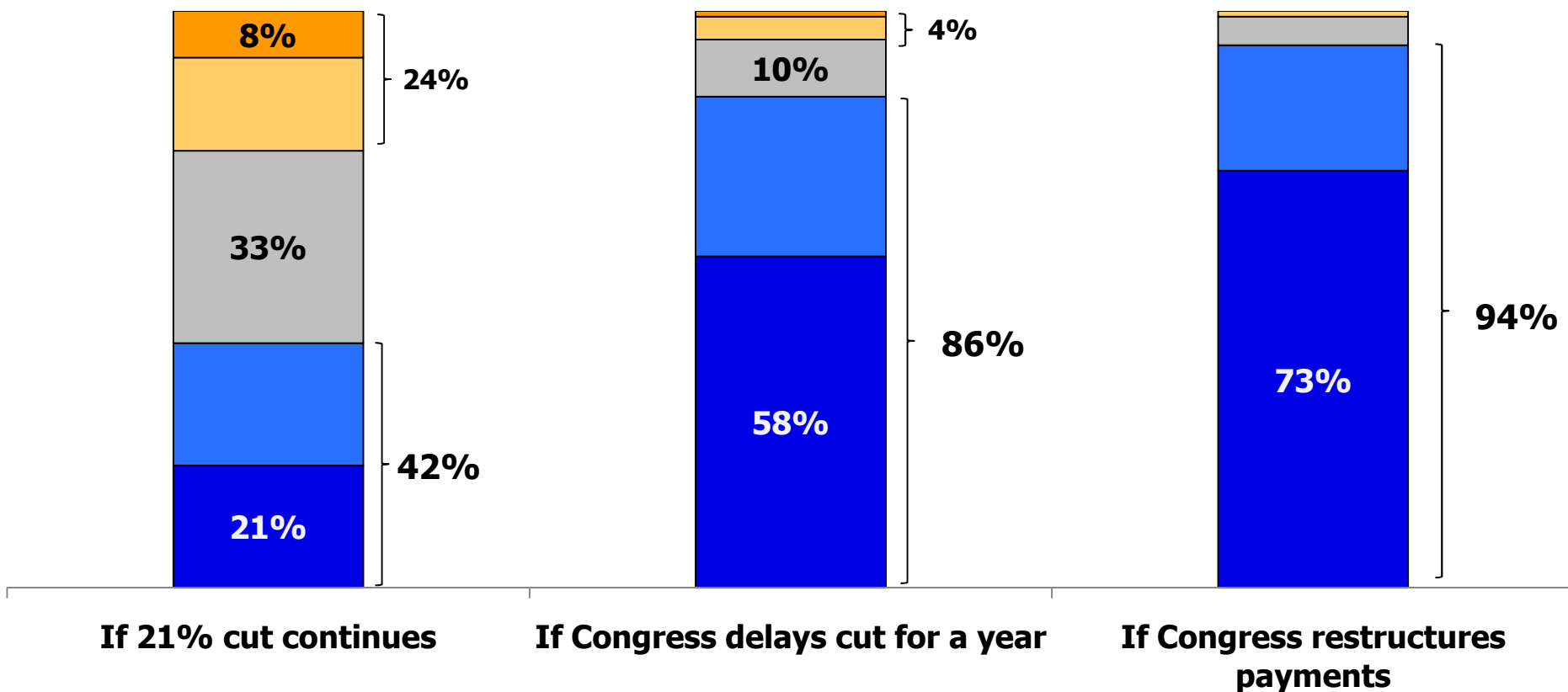
Medicare Payment Rate



Nearly One In Four Say They Would Drop Current Medicare Patients If Cut Continues

Effect On CURRENT Medicare Patients (Asked of decision makers who accept Medicare)

■ Def accept Medicare ■ Prob accept ■ Might/might not accept ■ Prob NOT accept ■ Def NOT accept Medicare



Q42: If this 21% cut in the payment rate occurs on June 1st, when it comes to your CURRENT Medicare patients, will you:

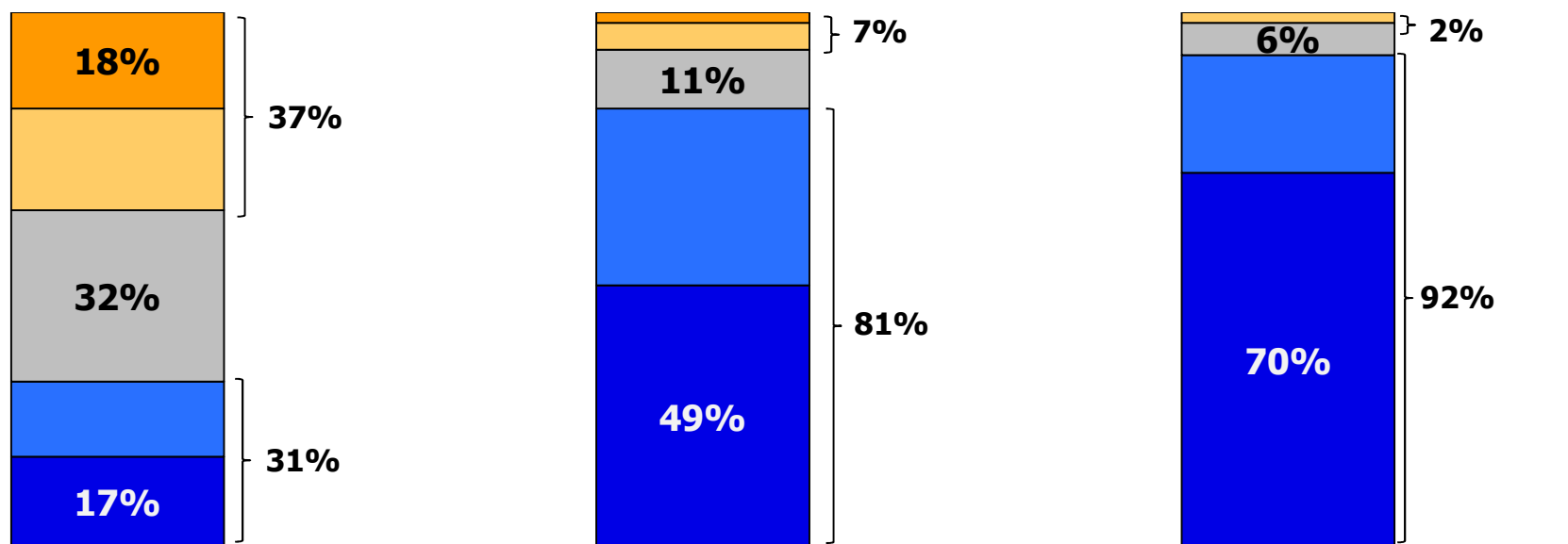
Q44: This 21% cut has been scheduled to happen several times before, but Congress has always voted to delay the cuts. If Congress voted to delay this cut for another year, when it comes to your CURRENT Medicare patients, will you:

Q46: If the Medicare payment rate was restructured so payment rates increased with the cost of care, when it comes to your CURRENT Medicare patients, would you:

Restructuring The Payment Rate Would Preserve Access For Future Medicare Patients

Effect On NEW Medicare Patients
(Asked of decision makers who accept Medicare)

■ Def accept Medicare ■ Prob accept ■ Might/might not accept ■ Prob NOT accept ■ Def NOT accept Medicare



If 21% cut continues

If Congress delays cut for a year

If Congress restructures payments

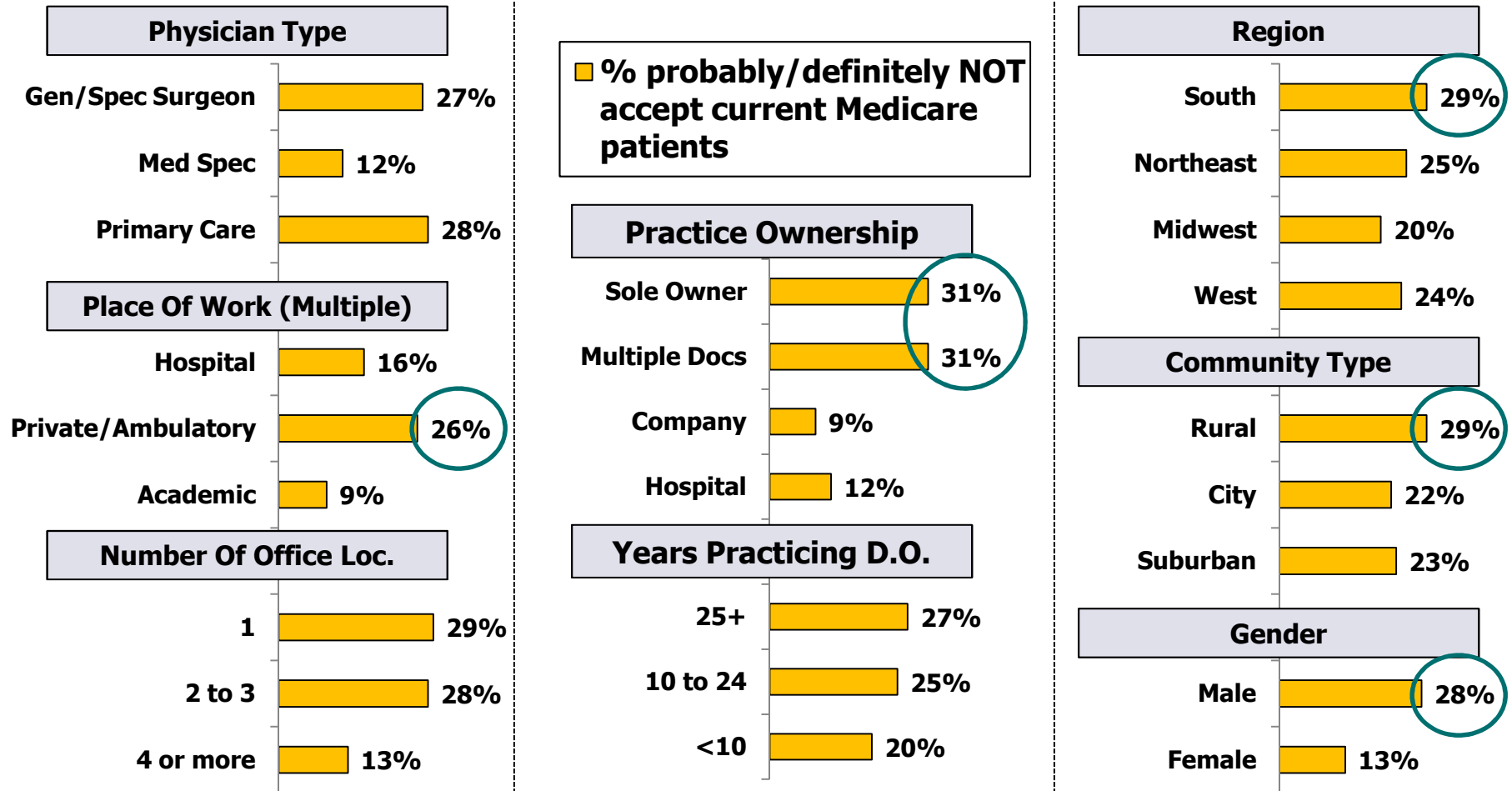
Though the base size is small, 34% of doctors who don't currently cover Medicare patients say they would if Congress restructured the rate to reflect cost of care.



Q43: And if this 21% cut in the payment rate occurs on June 1st, when it comes to NEW Medicare patients, will you:
Q45: And if Congress voted to delay this cut for another year, when it comes to NEW Medicare patients, would you:
Q47: And if the Medicare payment rate was restructured so payment rates increased with the cost of care, would you:

Private Practices, Those Owned By Doctors, Men More Likely To Stop Seeing Current Medicare Patients...

Effect Of 21% Cut On CURRENT Medicare Patients (24% Not Accept, Overall)
(Asked of decision makers who accept Medicare)

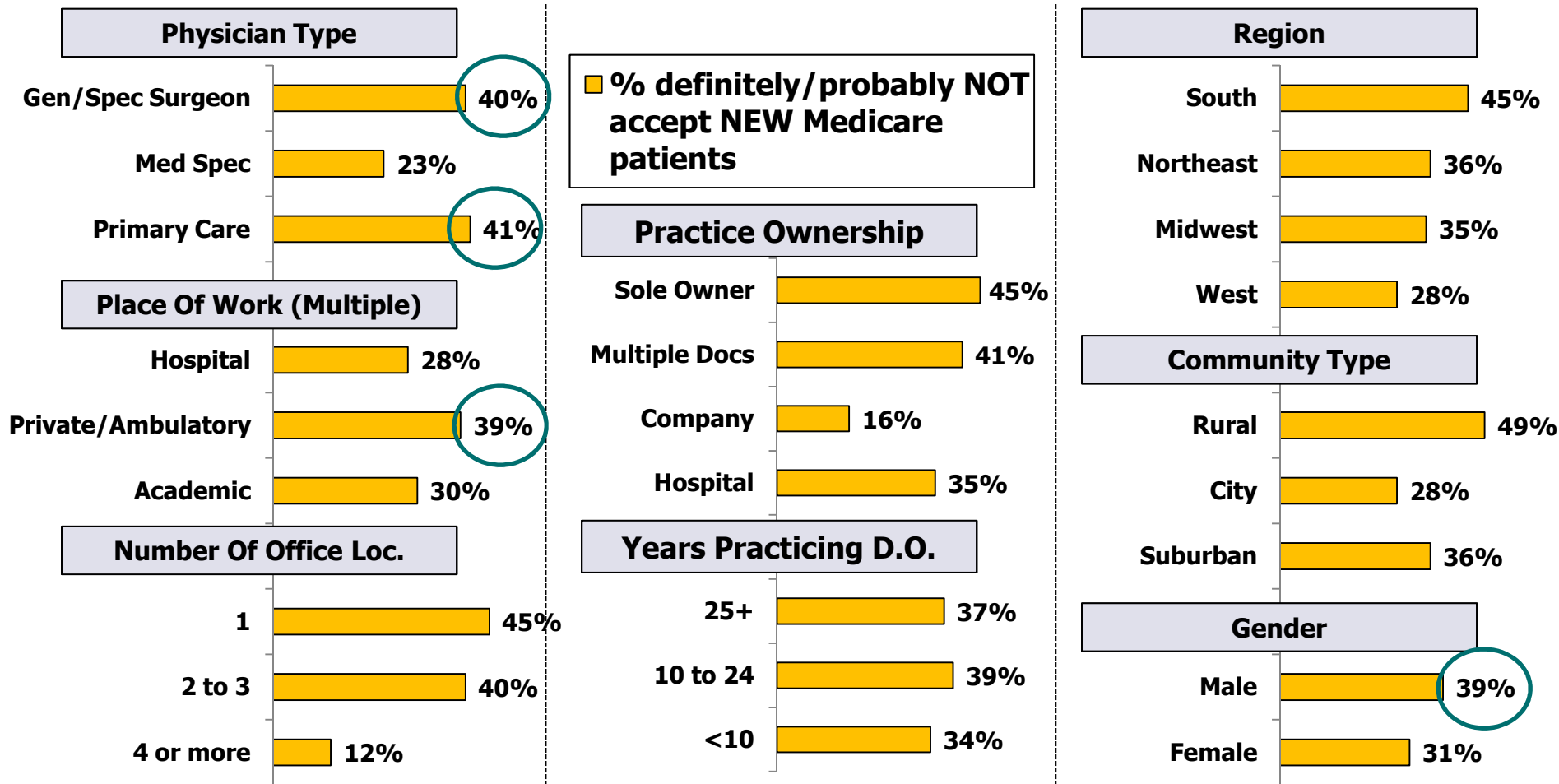


Q42: If this 21% cut in the payment rate occurs on June 1st, when it comes to your CURRENT Medicare patients, will you:



...And Stop Seeing New Medicare Patients

**Effect Of 21% Cut On NEW Medicare Patients (37% Not Accept, Overall)
(Asked of decision makers who accept Medicare)**



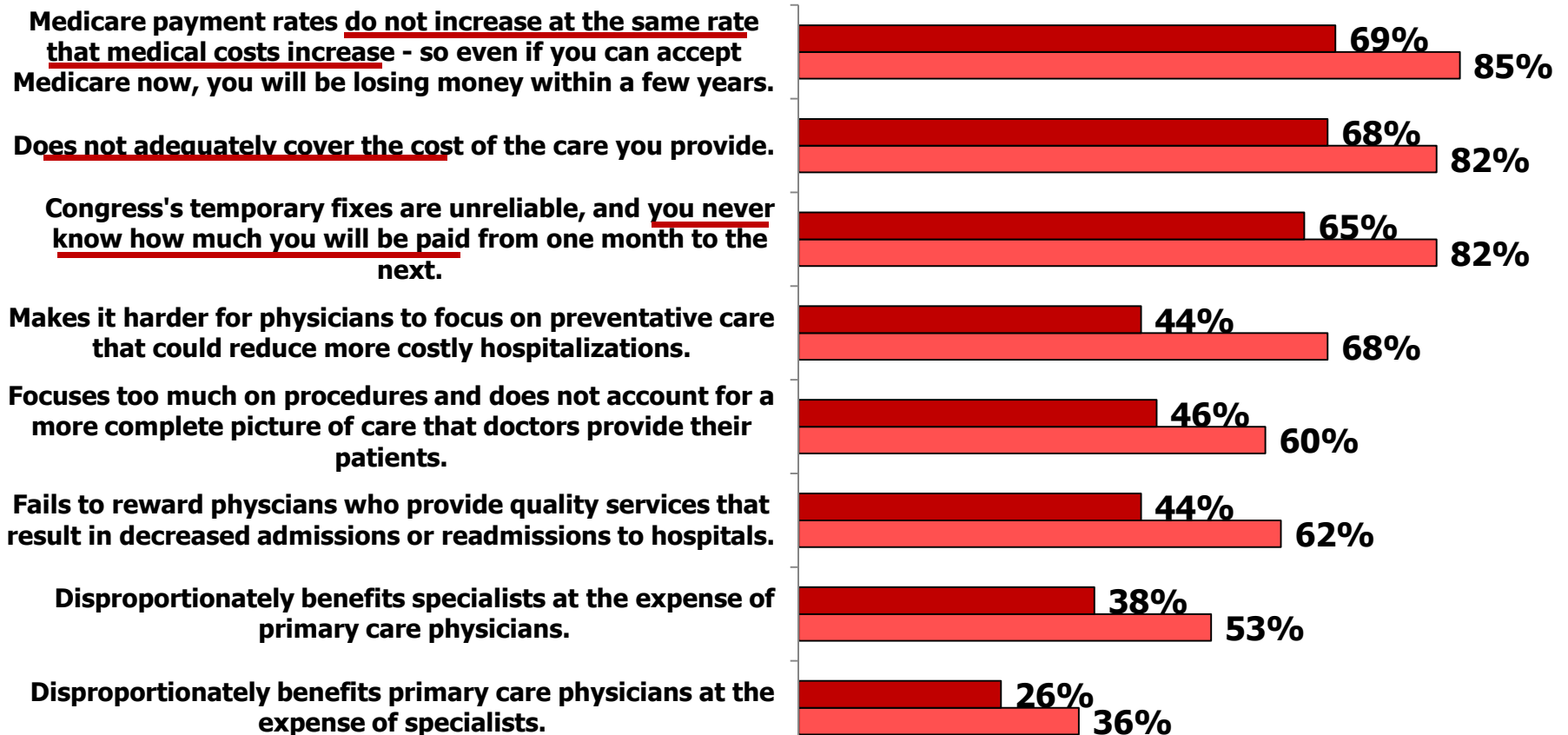
Q43: And if this 21% cut in the payment rate occurs on June 1st, when it comes to NEW Medicare patients, will you:



Payment Inadequacy, Unreliability Cited As Top Concerns About Payment Rate

Concerns About Medicare Payment Rate (1-7 Scale) (Asked of decision makers who accept Medicare)

■ 7 - Concerns A Great Deal ■ 6-7



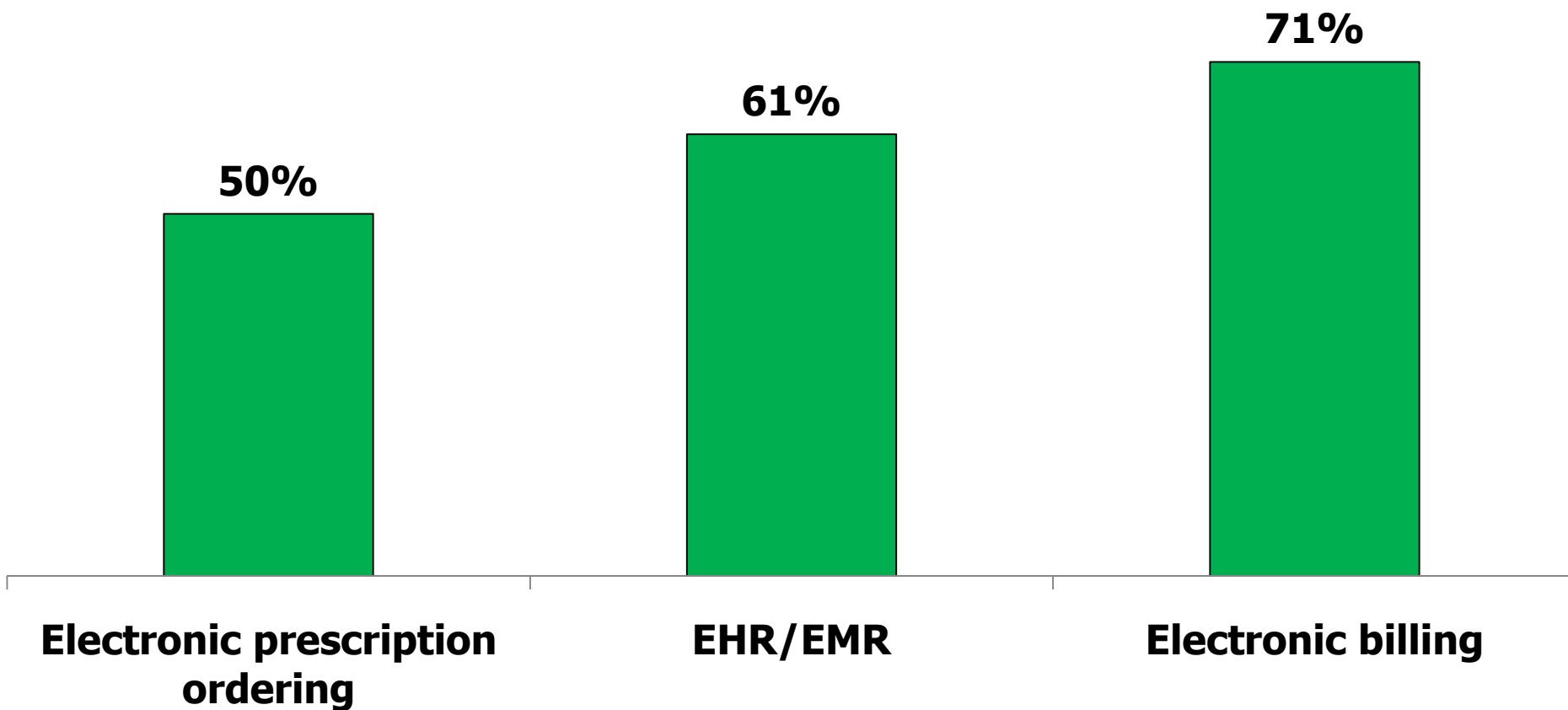
Q49_1-8: Now you will see different concerns people have about the Medicare payment rate. For each, please indicate how much it concerns you personally. Please use a scale of 1 to 7 where 7 means it concerns you a great deal and 1 means it does not concern you at all.

Electronic Health Records (EHR)



Majority Of Members Report Using Some Form Of Electronic Health Technology

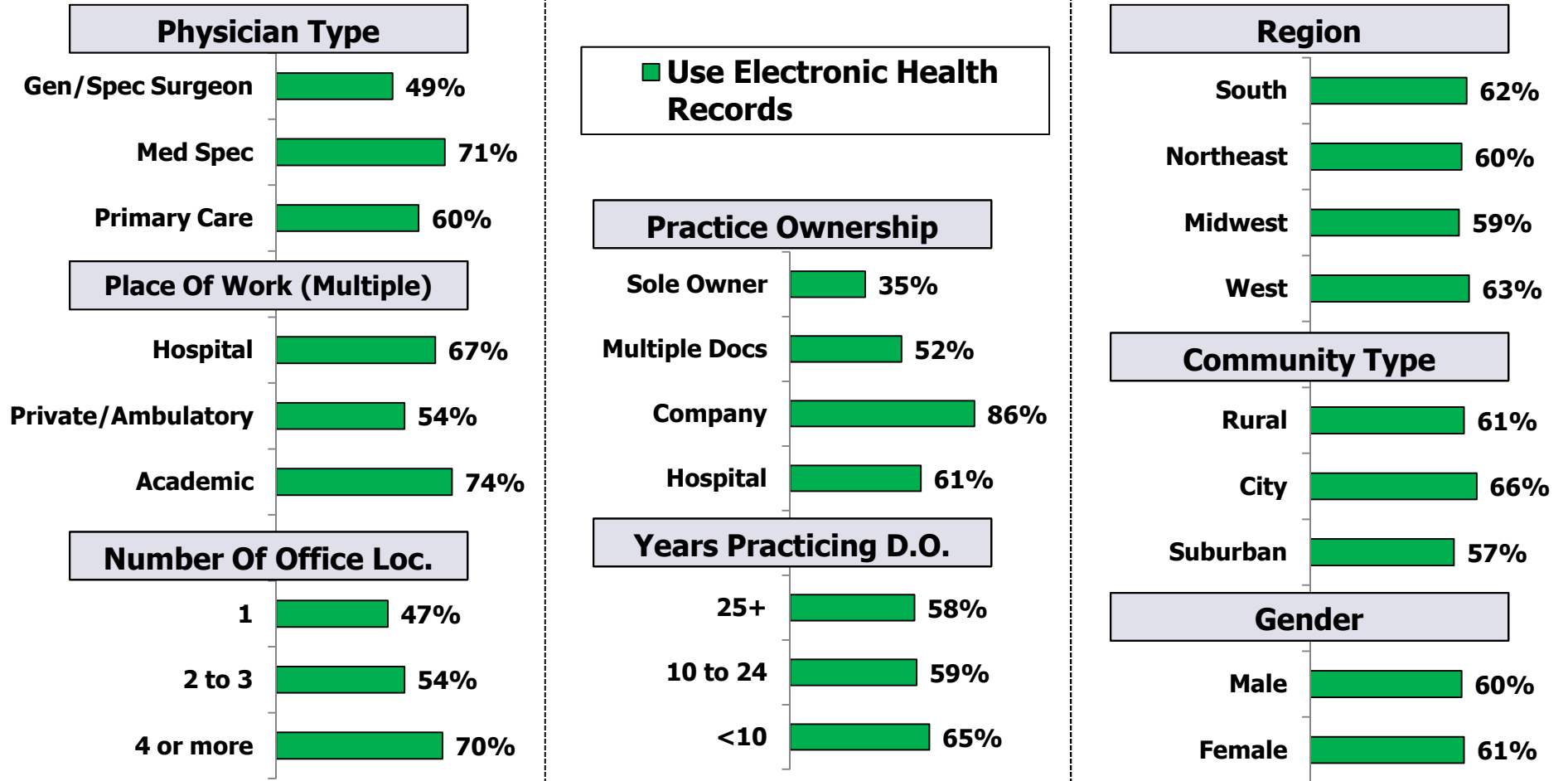
Types Of Electronic Systems Used (Multiple Responses Permitted)
(All Respondents)



Q27: Do you currently use any of the following?

Practices With More Locations/Institutionally Owned More Likely Have EHR, Benefit From Economies Of Scale

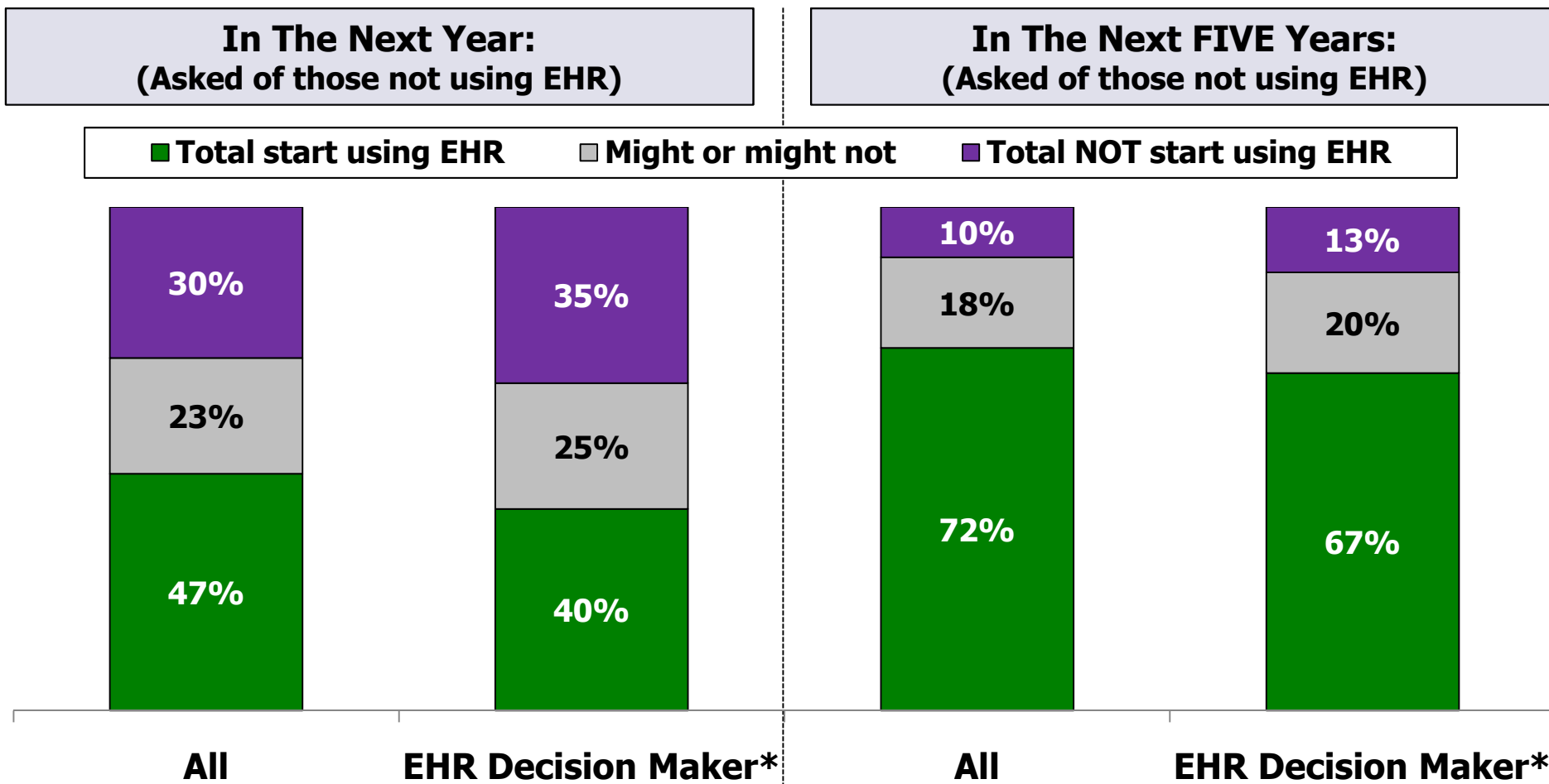
Electronic Health Record Usage By Physician Demographics (61% Overall) (All Respondents)



Q27: Do you currently use any of the following?



Strong Majority Of Those Without EHR Plan On Using EHR System In Next Five Years



**EHR Decision Makers either share or solely decide whether or not to use EHR systems.*



Q29: In the next year, do you think you will:

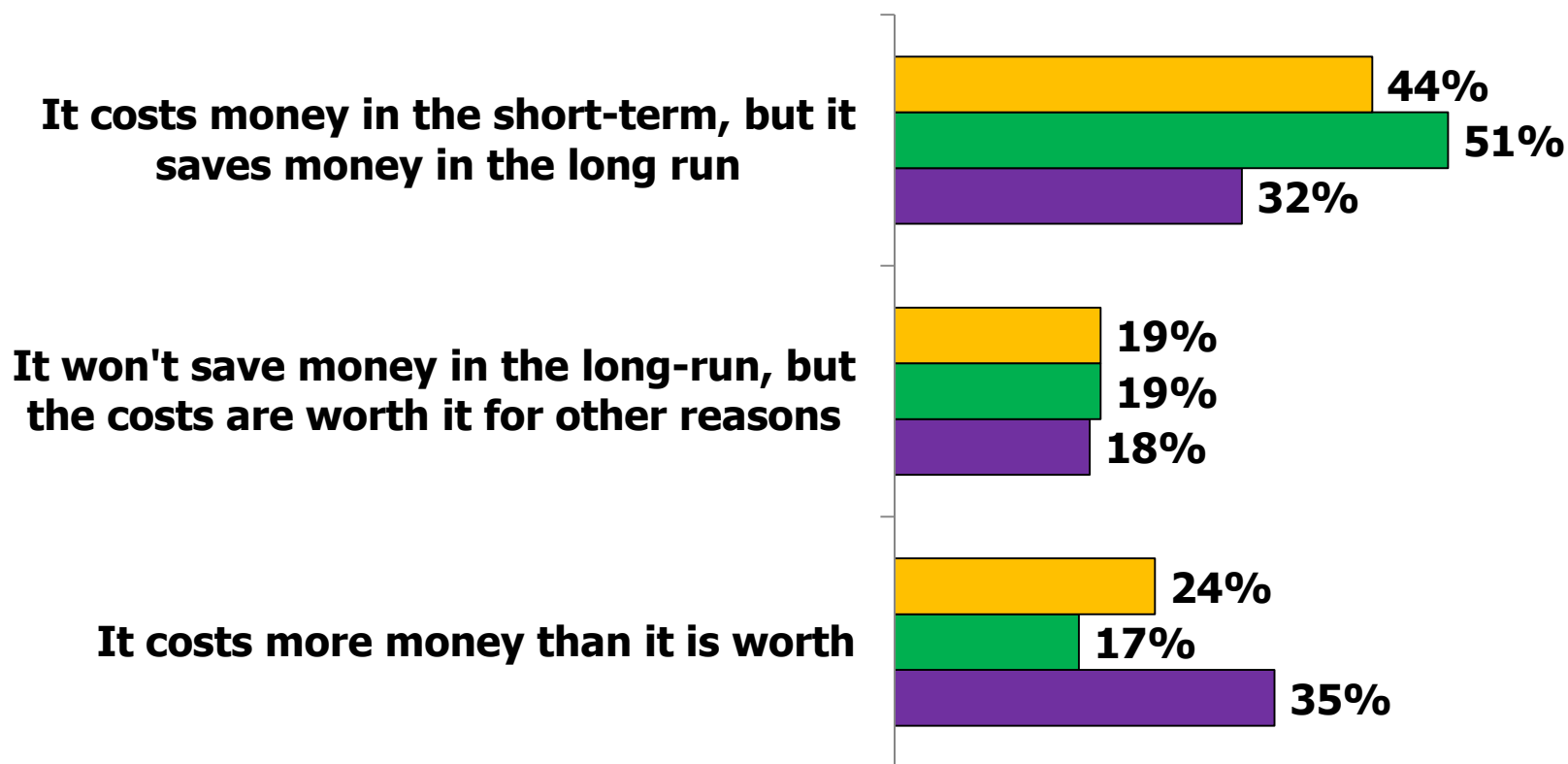
Q30: And in the next FIVE years, do you think you will:

Q33: When it comes to deciding whether or not to use electronic health records, which of the following statements best describes your role in the decision making process: I am the sole decision maker, I share in the decision with others, I have little or no say in the decision.

Most Members – Including Half Of Those Without EHR Yet – Believe It Is Worth The Cost

Opinion Of Electronic Health Records (All Respondents)

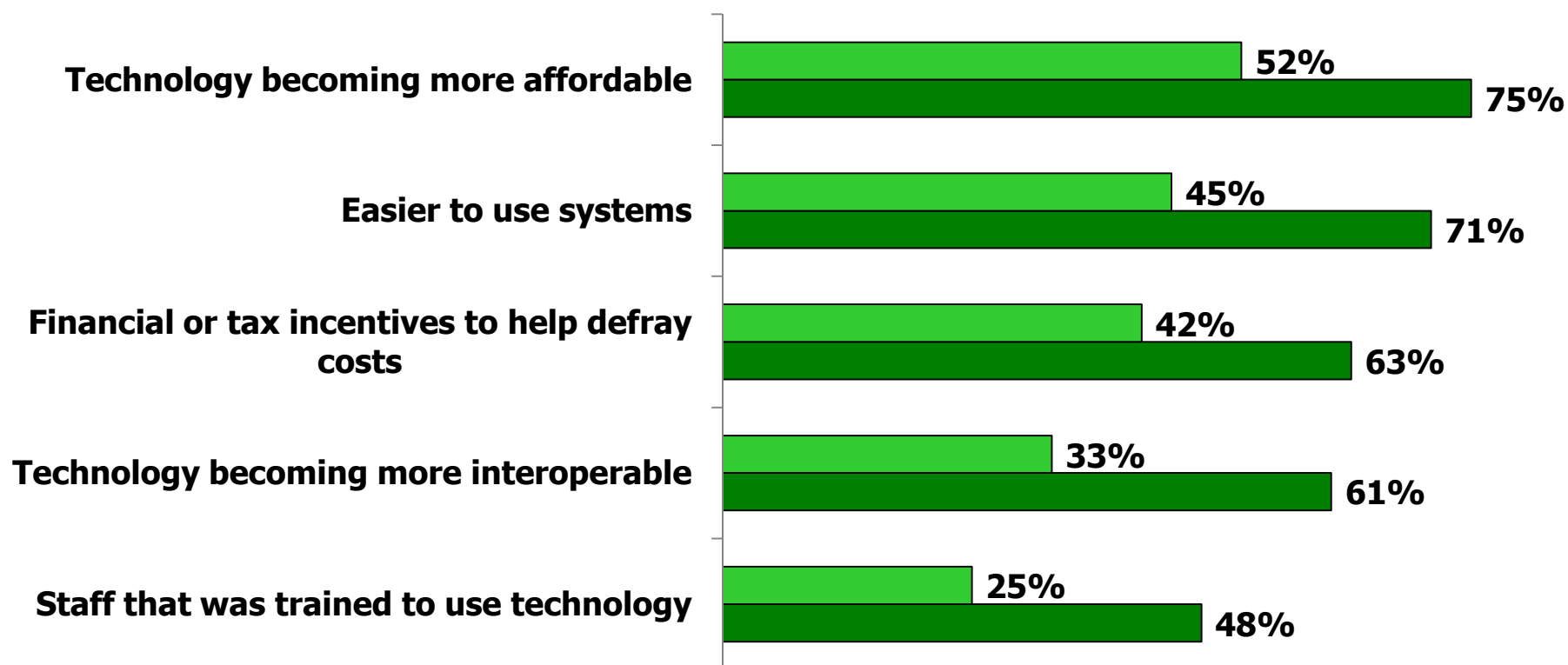
■ All Physicians ■ Have EHR ■ Don't Have EHR



Lower Costs And Better Systems Would Make Non-Users More Likely To Use EHR

Actions That Could Lead To EHR Implementation (Asked of EHR decision makers who are not using EHR)

■ 7 - Much More Likely To Use EHR ■ 6 to 7



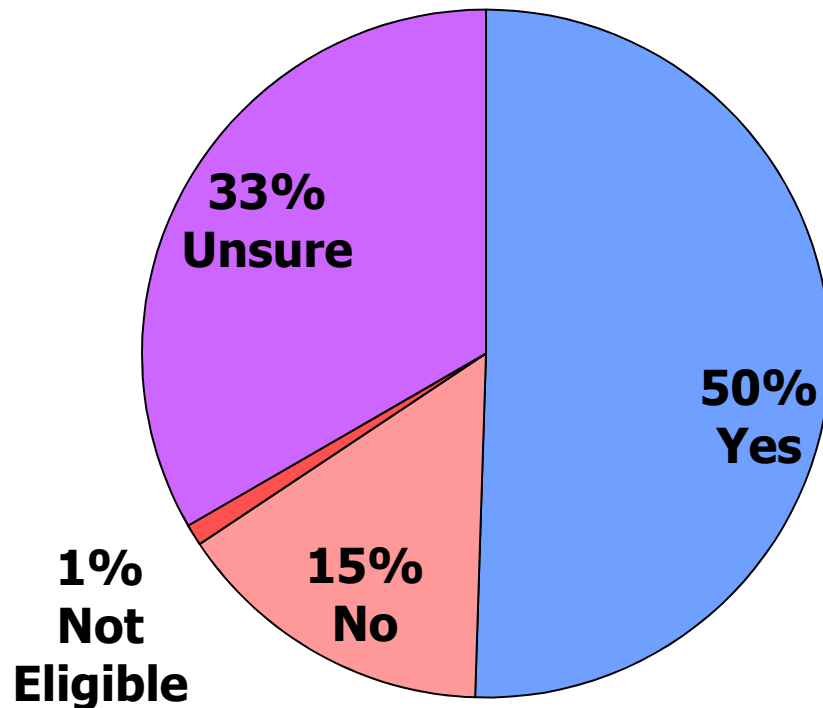
Q34: Now you are going to see a list of things that might make some people more likely to implement EHR. For each, please indicate whether it would make you more likely to use EHR at your practice. Use a scale of 1 to 7, where 7 means it would make you MUCH more likely to use EHR, and 1 means it would not have any effect on your decision to use EHR.

Physician Quality Reporting Initiative (PQRI)



Half Of Physicians That Accept Medicare Say They Participate In PQRI; A Third Don't Know

Participation In PQRI (Asked of those who accept Medicare patients)



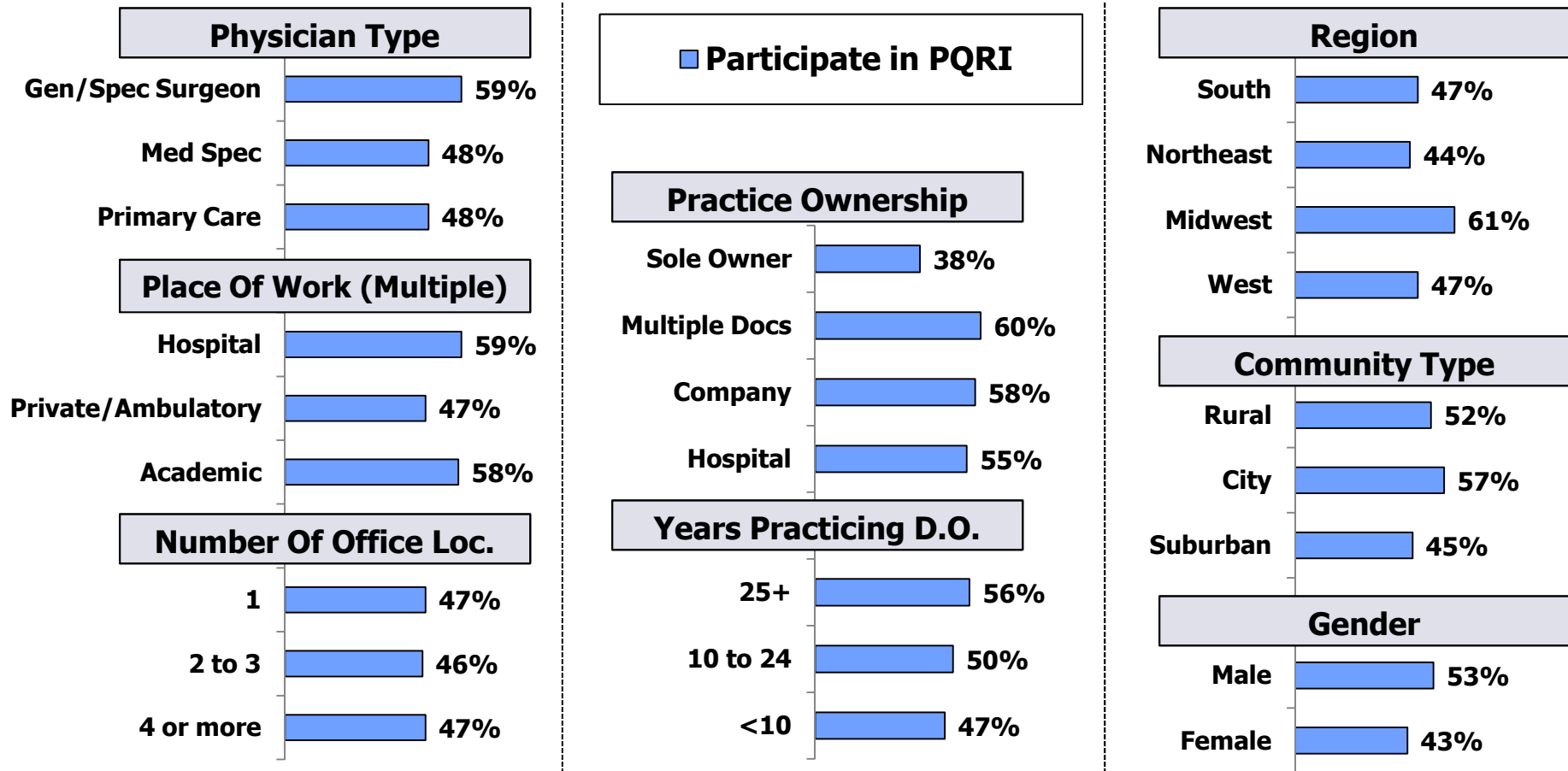
42% of Medicare physicians participate in another quality reporting program
25% participate in another program AND PQRI



Q35: Does your practice or hospital report information as part of the Physician Quality Reporting Initiative (PQRI)?
Q41: Do you participate in a quality reporting or quality improvement program other than the PQRI?

Surgeons, Midwesterners, More Experienced D.O.'s, More Likely To Participate In PQRI

PQRI Participation By Physician Demographics (50% Overall)
(Asked if accept Medicare)

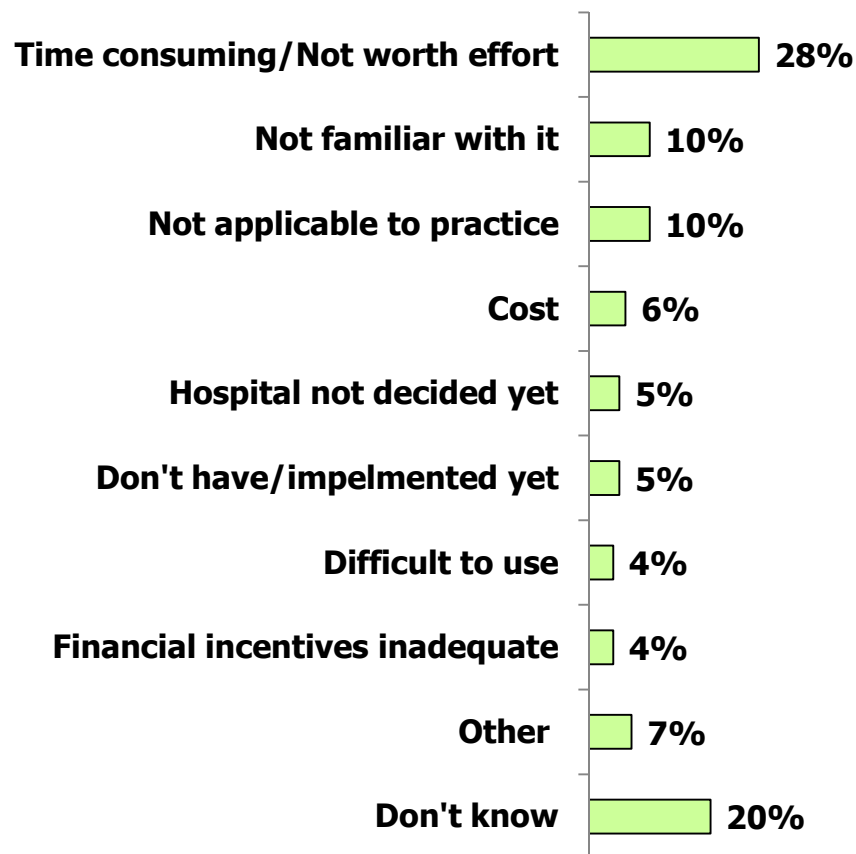


Q35: Does your practice or hospital report information as part of the Physician Quality Reporting Initiative (PQRI)?

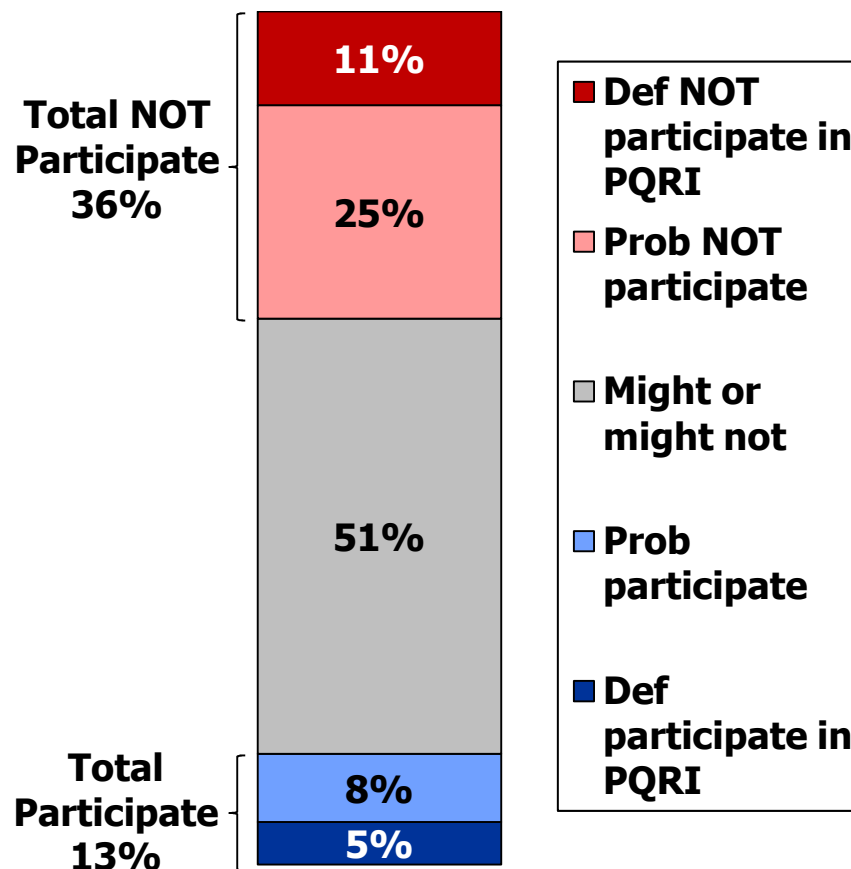


Those Not In PQRI Think It's Not Worth The Effort, Not Likely To Participate In Next Year

**Main Reason For No PQRI
(Asked if not participating in PQRI)**



**Participation In Next Year
(Asked if not participating in PQRI)**

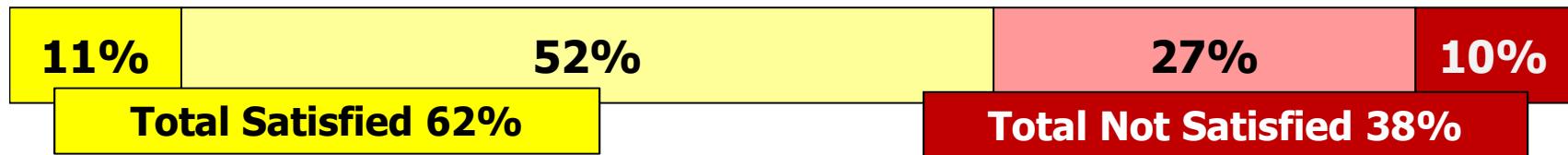


Q36: What is the main reason you do not participate in the Physician Quality Reporting Initiative? (Open Ended)
 Q37: In the next year do you think you will definitely participate in the PQRI, probably participate in the PQRI, might or might not participate in the PQRI, probably NOT participate in the PQRI, definitely NOT participate in the PQRI?

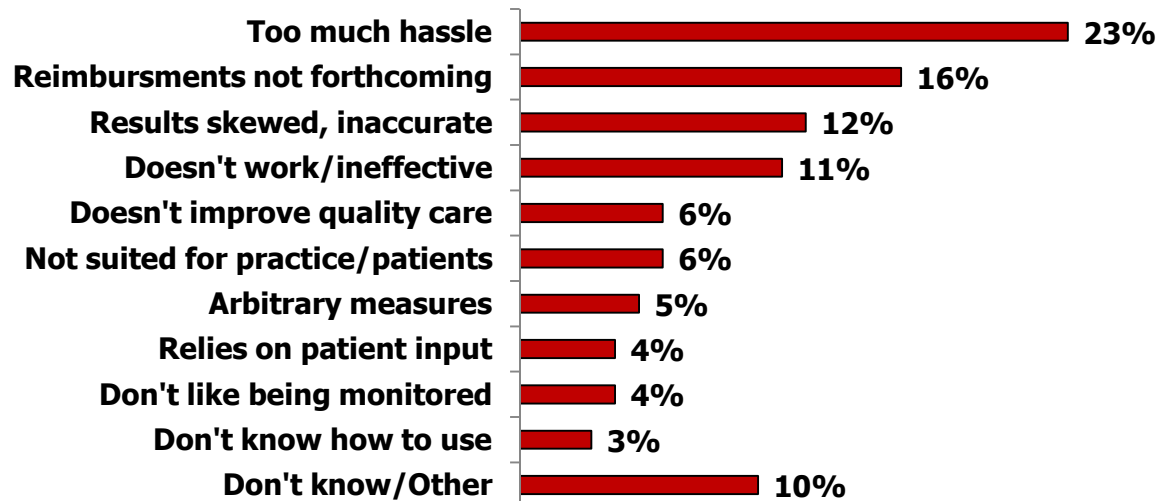
Majority Of Those Who Use PQRI Satisfied With It, Feel It Improves Quality Of Care

Satisfaction With PQRI (If participating in PQRI)

■ Very satisfied
 ■ Somewhat satisfied
 ■ Not very satisfied
 ■ Not at all satisfied



Main Reason Not Satisfied (Open ended; asked of those not satisfied with PQRI)



Q38: How satisfied are you with the Physician Quality Reporting Initiative (PQRI)?

Q39: (If Not Satisfied in Q38) Specifically, what is the main reason you are not satisfied with the PQRI? (Open Ended)