

THE PHYSICIANS FOUNDATION



**A SURVEY OF AMERICA'S PHYSICIANS:
PRACTICE PATTERNS AND PERSPECTIVES**

RESPONSES FROM THE STATE OF INDIANA

Following are responses from the state of Indiana to a national survey of physicians commissioned by The Physicians Foundation and conducted by Merritt Hawkins. Of 13,575 survey responses, 1.3% (or some 179 responses) were from physicians in Indiana. Responses of Indiana physicians are compared to all survey responses.

1. Which best describes your feelings about the current state of the medical profession?

| | Indiana | All |
|-------------------|---------|-------|
| Very positive | 1.8% | 3.9% |
| Somewhat positive | 24.5% | 27.9% |
| Somewhat negative | 51.5% | 44.8% |
| Very negative | 22.2% | 23.4% |

2. Which best describes how you feel about the future of the medical profession?

| | Indiana | All |
|-------------------------------|---------|-------|
| Very positive/optimistic | 1.8% | 3.1% |
| Somewhat positive/optimistic | 18.3% | 19.5% |
| Somewhat negative/pessimistic | 49.1% | 45.4% |
| Very negative/pessimistic | 30.8% | 31.5% |

3. How would you rate the professional morale of physicians you know?

| | Indiana | All |
|-------------------|---------|-------|
| Very positive | 0.6% | 1.8% |
| Somewhat positive | 14.2% | 17.7% |
| Somewhat negative | 64.5% | 55.8% |
| Very negative | 20.7% | 24.6% |

4. How would you rate your own professional morale?

| | Indiana | All |
|-------------------|---------|-------|
| Very positive | 8.4% | 11% |
| Somewhat positive | 24.6% | 30.7% |
| Somewhat negative | 47.8% | 41% |
| Very negative | 19.2% | 17.3% |

5. What is your medical specialty?

| | Indiana | All |
|---------------------------|---------|-------|
| Family Physician | 16.3% | 14.2% |
| General Internal Medicine | 5.9% | 11.3% |
| Pediatrics | 12.4% | 9.3% |
| Surgical Specialty | 12.5% | 13.6% |
| Medical Specialty | 14.4% | 12.2% |
| Ob/GYN | 5.9% | 6.2% |
| General Surgery | 6.5% | 4.4% |
| Other | 26.1% | 28.8% |

6. What is your current professional status?

| | Indiana | All |
|---|---------|-------|
| Employed by hospital, group or other entity | 62.5% | 43.7% |
| Practice owner/partner/associate | 31.5% | 48.5% |
| Other | 6.0% | 7.8% |

7. Some physicians believe that the medical profession is in decline. Do you:

| | Indiana | All |
|-------------------|---------|-------|
| Mostly agree | 41.2% | 41.6% |
| Somewhat agree | 44.0% | 42.6% |
| Somewhat disagree | 8.3% | 8.6% |
| Mostly disagree | 6.5% | 7.2% |

8. Two years ago, which best described your attitude to medical practice?

| | Indiana | All |
|--------------------------------|---------|-------|
| Very positive/satisfying | 11.9% | 14.1% |
| Somewhat positive/satisfying | 52.4% | 52.1% |
| Somewhat negative/unsatisfying | 35.1% | 30.1% |
| Very negative/unsatisfying | 0.6% | 3.7% |

9. Which best describes your attitude toward medical practice today?

| | Indiana | All |
|--------------------------------|---------|-------|
| Very positive/satisfying | 4.2% | 7.3% |
| Somewhat positive/satisfying | 27.5% | 31.7% |
| Somewhat negative/unsatisfying | 47.3% | 41.2% |
| Very negative/unsatisfying | 21.0% | 19.8% |

10. If you had your career to do over, would you choose to be a physician?

| | Indiana | All |
|-----|---------|-------|
| Yes | 60.7% | 66.5% |
| No | 39.3% | 33.5% |

11. Would you recommend medicine as a career to your children or other young people?

| | Indiana | All |
|-----|---------|-------|
| Yes | 36.7% | 42.1% |
| No | 63.3% | 57.9% |

12. If you had the ability, would you retire today?

| | Indiana | All |
|-----|---------|-------|
| Yes | 62.1% | 60.6% |
| No | 37.9% | 39.4% |

13. What is your age?

| | Indiana | All |
|-------|---------|-------|
| 20-29 | 0.0% | 0.9% |
| 30-39 | 15.0% | 12.9% |
| 40-49 | 25.8% | 21.0% |
| 50-59 | 40.7% | 34.4% |
| 60-69 | 16.3% | 24.0% |
| 70-79 | 2.4% | 5.8% |
| 80-89 | 0.0% | 0.9% |

14. What is your gender?

| | Indiana | All |
|--------|---------|-------|
| Male | 72.3% | 73.6% |
| Female | 27.7% | 26.4% |

15. What are the two factors you find most satisfying about medical practice?

| | Indiana | All |
|-----------------------------|---------|-------|
| Patient relationships | 39.8% | 80.2% |
| Prestige of medicine | 5.4% | 10% |
| Intellectual stimulation | 38.0% | 69.7% |
| Interaction with colleagues | 8.7% | 19.2% |
| Financial rewards | 6.3% | 11.7% |

16. What are the two factors you find least satisfying about medical practice?

| | Indiana | All |
|---|---------|-------|
| Long hours/lack of personal time | 13.9% | 24.9% |
| Liability/defensive medicine pressures | 22.3% | 40.3% |
| Reimbursement issues | 10.7% | 27.3% |
| Lack of clinical autonomy | 4.2% | 9.2% |
| Dealing with Medicare/Medicaid/government regulations | 12.8% | 27.4% |
| Pressure of running a practice | 2.7% | 5.6% |
| Non-clinical paperwork | 11.3% | 18.1% |
| Uncertainty/changes of health reform | 12.5% | 21.5% |
| Managed care | 1.5% | 7.6% |
| EMR implementation | 6.2% | 9.2% |
| Other | 2.1% | 5.1% |

17. What do you plan to do over the next one to three years?

| | Indiana | All |
|---|---------|-------|
| Continue as I am | 36.8% | 49.8% |
| Cut back on hours | 11.5% | 22.0% |
| Retire | 6.7% | 13.4% |
| Switch to a concierge practice | 4.3% | 6.8% |
| Relocate to another community | 8.7% | 10.9% |
| Cut back on patients seen | 6.7% | 9.6% |
| Seek a non-clinical job within healthcare | 7.1% | 5.6% |
| Work part-time | 2.4% | 6.5% |
| Work locum tenens | 4.0% | 6.4% |
| Seek a non-healthcare job/business | 3.2% | 6.4% |
| Close my practice to new patients | 2.0% | 4.0% |
| Seek employment with a hospital | 3.6% | 5.6% |
| Other | 3.2% | 5.5% |

18. How has the passage of the Patient Protections and Affordable Care Act affected your feelings about the direction and future of Healthcare in America?

| | Indiana | All |
|------------------------------|---------|-------|
| I am more positive | 17.8% | 18.5% |
| I am less positive | 64.4% | 59.3% |
| My feelings have not changed | 17.8% | 22.3% |

19. Most physicians today are focused on their daily responsibilities and are unsure of where the health system will be or how they will fit into it three to five years from now.

| | Indiana | All |
|-------------------|---------|-------|
| Mostly agree | 54.4% | 55.2% |
| Somewhat agree | 39.1% | 36.5% |
| Somewhat disagree | 4.7% | 5.6% |
| Mostly disagree | 1.8% | 2.7% |

20. Physicians have little influence of the direction of healthcare and have little ability to affect change. Do you:

| | Indiana | All |
|-------------------|---------|-------|
| Mostly agree | 57.1% | 50.4% |
| Somewhat agree | 25.6% | 31.7% |
| Somewhat disagree | 15.5% | 12.7% |
| Mostly disagree | 1.8% | 5.2% |

21. Hospital employment of physicians is a positive trend likely to enhance quality of care and decrease cost. Do you:

| | Indiana | All |
|-------------------|---------|-------|
| Mostly agree | 5.9% | 4.6% |
| Somewhat agree | 20.7% | 19.9% |
| Somewhat disagree | 34.9% | 32.8% |
| Mostly disagree | 38.5% | 42.7% |

22. Hospital employment of physicians will erode the physician/patient relationship and quality of care. Do you:

| | Indiana | All |
|-------------------|---------|-------|
| Mostly agree | 32.0% | 38.5% |
| Somewhat agree | 34.9% | 33.1% |
| Somewhat disagree | 21.3% | 20.2% |
| Mostly disagree | 11.8% | 8.2% |

23. Is your practice or employer seeking designation as an Accountable Care Organization?

| | Indiana | All |
|--------|---------|-------|
| Yes | 32.0% | 21.9% |
| No | 36.0% | 44.0% |
| Unsure | 32.0% | 34.1% |

24. Which best describes your feelings about ACOs?

| | Indiana | All |
|--|---------|-------|
| They are likely to enhance quality/decrease cost | 10.2% | 9.0% |
| Quality/cost gains will not justify organizational cost/effort | 24.6% | 21.8% |
| Unlikely to increase quality/decrease cost | 42.5% | 40.6% |
| Unsure about structure/purpose of ACOs | 22.7% | 26.6% |

25. Which best describes your feelings about medical homes?

| | Indiana | All |
|---|---------|-------|
| They are likely to increase quality/reduce costs | 23.8% | 24.4% |
| They are unlikely to improve quality/reduce costs | 42.9% | 37.7% |
| Unsure about structure/purpose of medical homes | 33.3% | 37.9% |

26. On average, how many hours do you work a week?

| | Indiana | All |
|-------------|---------|-------|
| 0-20 | 0.6% | 4% |
| 21-30 | 4.7% | 4.5% |
| 31-40 | 14.8% | 12.2% |
| 41-50 | 20.1% | 21.9% |
| 51-60 | 21.3% | 26.1% |
| 61-70 | 18.4% | 15.3% |
| 71-80 | 14.8% | 9.9% |
| 81-90 | 4.1% | 3.9% |
| 91-100 | 1.2% | 1.6% |
| 101 or more | 0.0% | 2.1% |

27. Of these, how many hours do you work each week on non-clinical (paperwork) duties only?

| | Indiana | All |
|------------|---------|-------|
| 0-10 | 56.3% | 58% |
| 11-20 | 26.9% | 26.1% |
| 21-30 | 9.0% | 9.3% |
| 31-40 | 4.8% | 3.7% |
| 41-50 | 1.2% | 1.5% |
| 51-60 | 1.2% | .9% |
| 61 or more | 0.6% | .5% |

28. On average, how many patients do you see per day?

| | Indiana | All |
|------------|---------|-------|
| 0-10 | 22.9% | 19.5% |
| 11-20 | 38.6% | 39.8% |
| 21-30 | 24.7% | 26.8% |
| 31-40 | 10.8% | 8.1% |
| 41-50 | 1.8% | 2.6% |
| 51-60 | 0.0% | 0.8% |
| 61 or more | 1.2% | 2.4% |

29. Which of the following best describes your current practice?

| | Indiana | All |
|---|---------|-------|
| I am overextended and overworked | 20.5% | 19.5% |
| I am at full capacity | 48.8% | 39.8% |
| I have time to see more patients and assume more duties | 30.7% | 26.8% |

30. Have cost or time constraints caused you to close your practice to Medicare or Medicaid patients?

| | Indiana | All |
|---------------------------------|---------|-------|
| Yes, Medicare | 8.6% | 8.6% |
| Yes, Medicaid | 21.9% | 26.8% |
| No, I have not closed to either | 69.5% | 64.7% |

31. Estimate the approximate amount of uncompensated care you personally (not your group) provide each year.

| | Indiana | All |
|-------------------|---------|-------|
| \$0-\$5,000 | 13.2% | 14.6% |
| \$5001-\$15,000 | 7.2% | 10.6% |
| \$15,001-\$25,000 | 9.9% | 12.6% |
| \$25,001-\$35,000 | 5.3% | 6.5% |
| \$35,001-\$50,000 | 13.8% | 16.4% |
| \$50,001 or more | 50.7% | 39.3% |

32. Describe your income from the practice of medicine over the last three years.

| | Indiana | All |
|------------|---------|-------|
| Flat | 39.4% | 39.7% |
| Declining | 47.9% | 46.7% |
| Increasing | 12.7% | 13.6% |

33. As a result of the ongoing problems with Medicare fee schedule updates, what actions have you taken or are you planning to take?

| | Indiana | All |
|--|---------|-------|
| Place new or additional limits on Medicare acceptance | 16.4% | 22.9% |
| Accept no new Medicare patients | 9.0% | 12.6% |
| Terminate existing Medicare patients | 2.2% | 2.8% |
| Change status to non-participating | 3.7% | 6.8% |
| Formally opt out of Medicare | 3.0% | 6.9% |
| Place new or additional limits on Medicaid acceptance | 17.9% | 22.2% |
| Reduce the amount of charity care I deliver | 13.4% | 22.0% |
| Increase standard fees charged to other patients | 6.7% | 15.5% |
| Delay information technology implementation | 7.1% | 15.9% |
| Renegotiate or terminate some commercial health plan contracts | 7.8% | 17.7% |
| Reduce staff compensation or benefits | 12.8% | 27.0% |

34. Has your practice implemented Electronic Medical Records?

| | Indiana | All |
|-----|---------|-------|
| Yes | 77.4% | 69.5% |
| No | 22.6% | 30.5% |

35. If yes, what effect has EMR had on the quality of patient care in your practice?

| | Indiana | All |
|--|---------|-------|
| No effect | 13.3% | 12.9% |
| Has improved quality of care | 28.1% | 32.9% |
| Not yet improved quality, but I anticipate it will | 12.5% | 13.4% |
| Has not improved quality, and I do not anticipate it will | 20.3% | 18.5% |
| May improve quality, but not worth the investment | 8.6% | 7.9% |
| Decreased quality, but I anticipate it eventually will improve quality | 3.9% | 4.0% |
| Decreased quality and I do not anticipate it will improve quality | 13.3% | 10.4% |

36. Are you a member of your:

| | Indiana | All |
|----------------------------------|---------|-------|
| County medical society | 43.2% | 50.1% |
| State medical society | 53.3% | 63.6% |
| National specialty society | 74.6% | 70.4% |
| American Medical Association | 24.9% | 24.5% |
| American Osteopathic Association | 8.3% | 5.2% |

37. Do you have significant concerns that EMR poses a risk to patient privacy?

| | Indiana | All |
|-----|---------|-------|
| Yes | 44.8% | 47.4% |
| No | 55.2% | 52.6% |

About The Physicians Foundation

The Physicians Foundation is a nonprofit 501(c)(3) organization that seeks to advance the work of practicing physicians and help facilitate the delivery of healthcare to patients. It pursues its mission through a variety of activities including grant making, research, white papers and policy studies. Since 2005, The Foundation has awarded numerous multi-year grants totaling more than \$28 million. In addition, The Foundation focuses on the following core areas: physician leadership, physician practice trends, physician shortage issues, and the impact of healthcare reform on physicians and patients. As the healthcare system in America continues to evolve, The Physicians Foundation is steadfast in its determination to strengthen the physician-patient relationship and assist physicians in sustaining their medical practices in a difficult practice environment. For more information, visit www.PhysiciansFoundation.org.

About Merritt Hawkins

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