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The State of the Physician Workforce and Policy Implications

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December 9, 2021



Association of
American Medical Colleges

Workforce shortages are happening now

 The Des Moines Register

Flu, COVID and staffing shortages have this Iowa hospital worried

Flu, COVID and staffing shortages have generally test for flu more aggressive!

1 week ago



 USNews.com

U.S. Faces Crisis of Burned-Out Health Care Workers

Before the pandemic, physicians were at twice the risk for burnout ... and 4 out of 5 of those who remain say that staff shortages have...

2 weeks ago



 Boston 25 News

'Critical staffing shortage' from pandemic forcing new guidance for Mass. hospitals

"The current strain on hospital capacity is due to longer than average hospital stays... separate and..."



 Vox

With Covid-19 in retreat, US hospitals still face a nursing shortage

Why many American hospitals have a staffing crisis. Burnout among the health care workforce remains acute 20 months into the pandemic. About...

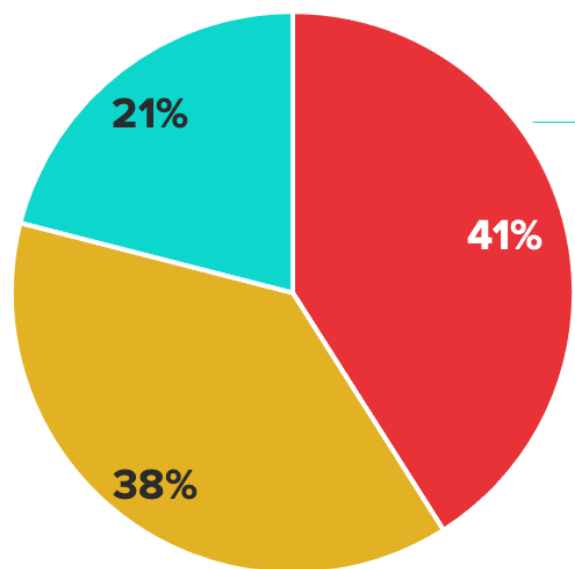
3 weeks ago



About 4 in 5 Health Care Workers Say They've Been Affected by Shortage of Medical Professionals

Health care workers were asked whether the national shortage of medical workers had affected them and their place of work

■ Major impact ■ Minor impact ■ No impact



Those who said the shortage has had an impact were asked to describe it

“Our emergency rooms are at or over capacity all the time and we are getting more complaints”

“Have to work more hours as others have quit because of vaccine mandates and not making enough money”

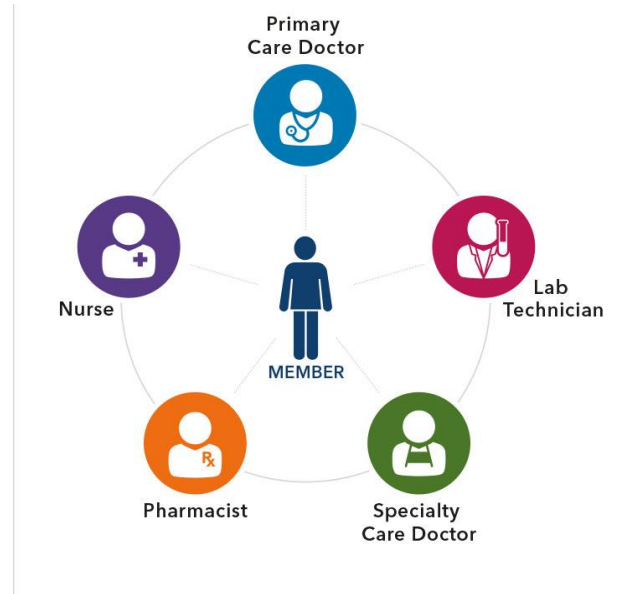
“An almost insurmountable workload that has caused the remaining individuals to become completely burnt out”

MORNING CONSULT

Poll conducted Sept. 2-8, 2021, among 1,000 U.S. health care workers, with a margin of error of +/-3%. Figures may not add up to 100% due to rounding.

What can be done at the local level re: shortages?

licensing restrictions



team based care models



**Can increased
telehealth use
stop workforce
shortages?**

**How COVID
will continue
impacting us?**





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Updates on Telehealth – new data

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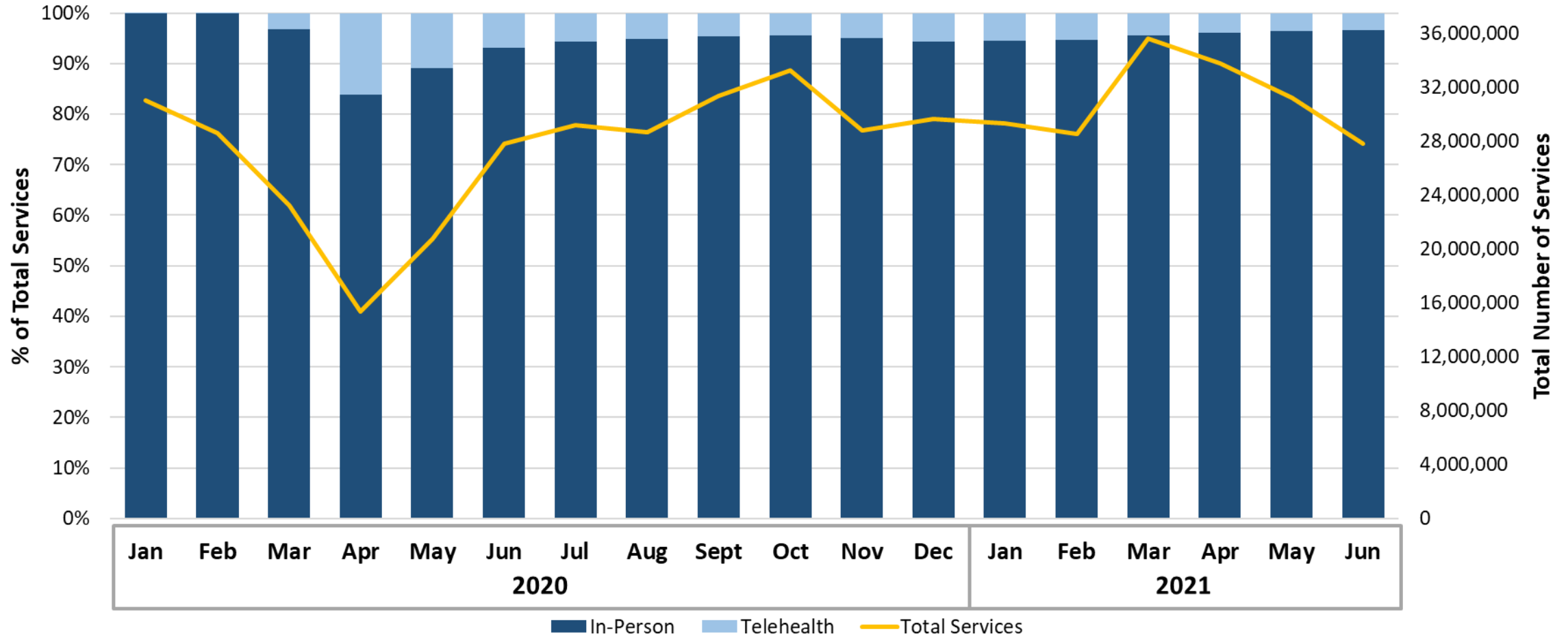
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Faculty Practice Plan Telehealth Utilization Across All Ambulatory Services, Jan 2020 – Jun 2021

Distribution of Telehealth Services as a Percent of Total Ambulatory Services by Month

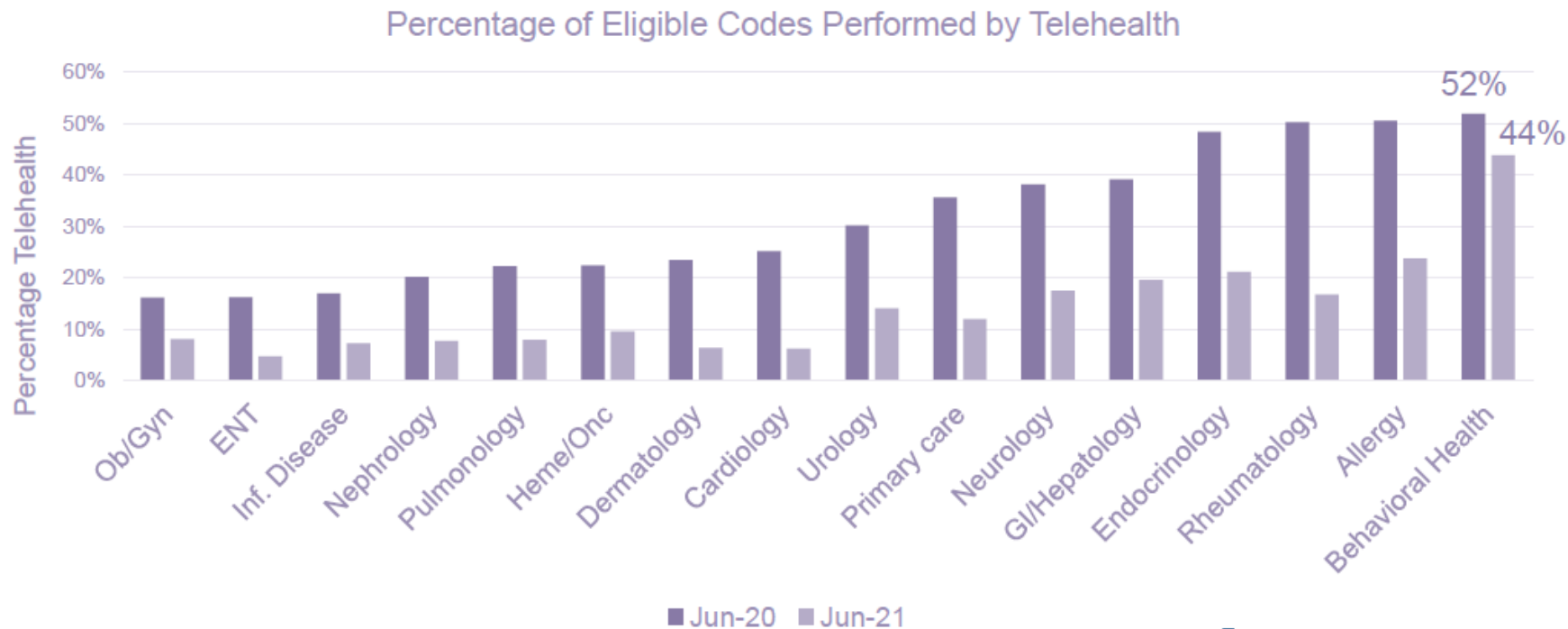


Source: AAMC analysis of physician and non-physician claims billed by Faculty Practice Plan members of the Clinical Practice Solutions Center. The Clinical Practice Solutions Center (CPSC) is a product of the Association of American Medical Colleges (AAMC) and Vizient that collects billing data from member practice plans to provide benchmarks and help them improve performance.

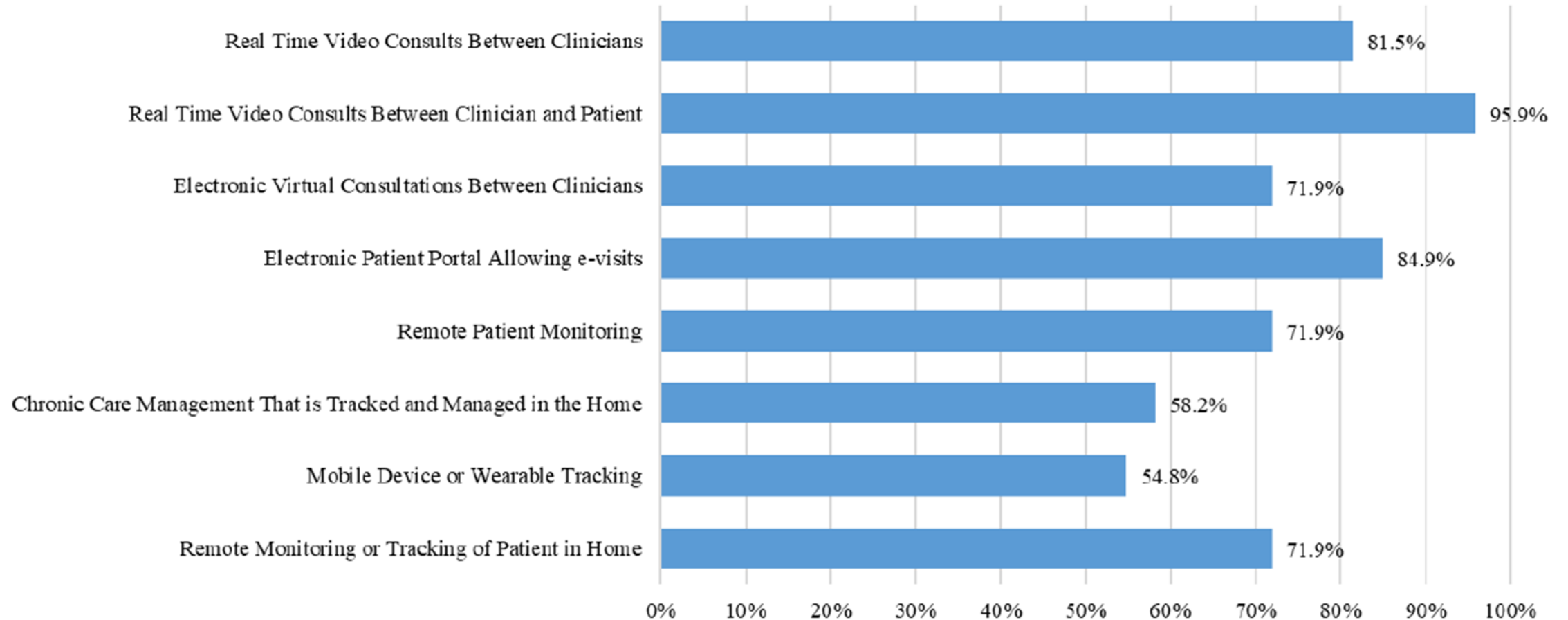
Note: 73 CPSC members had shared their claims data through June 2021 at the time of this analysis (October 2021). "Total services" includes all in-person and telehealth claims. Telehealth encounters were identified based on place of service = 02 or modifiers 95, GT, GQ, G0 on the claim; CPT codes G2010, G2012, 99451, 99452, 99446-99449, 99421-99423, 99091, 99457, 99458, 99473, 99474, and 99493-99495 were also counted as telehealth. Claims are across all payers, places of service, and specialties.

Which specialty categories are utilizing telehealth?

The percentage of visits performed via telehealth has dropped considerably between June of 2020 and June of 2021. In June of 2021, behavioral health stands out for utilizing virtual care for patients.



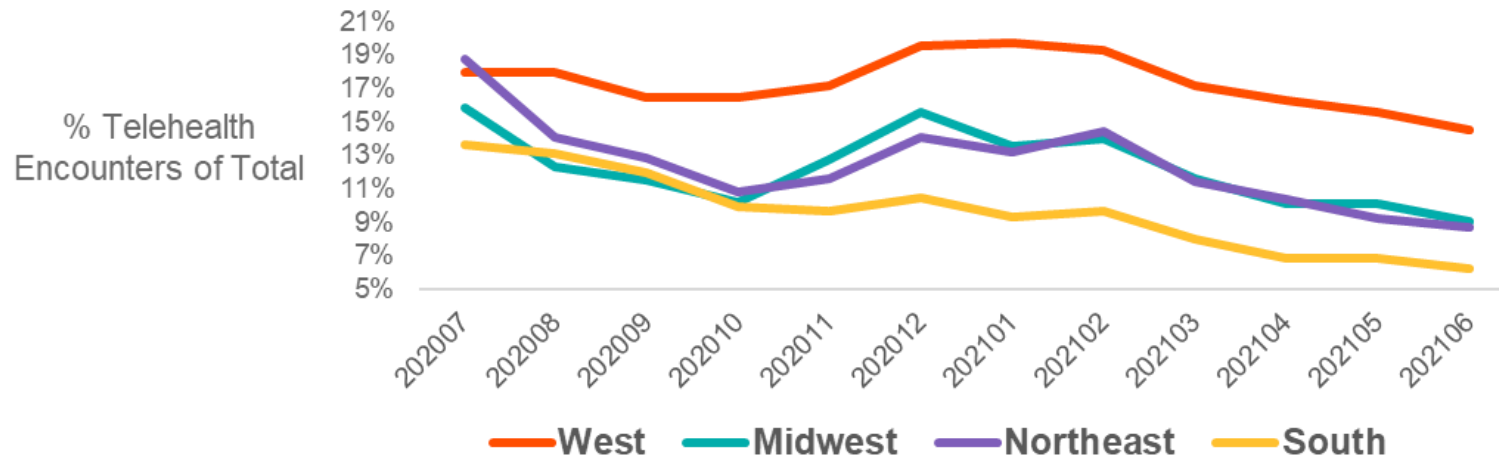
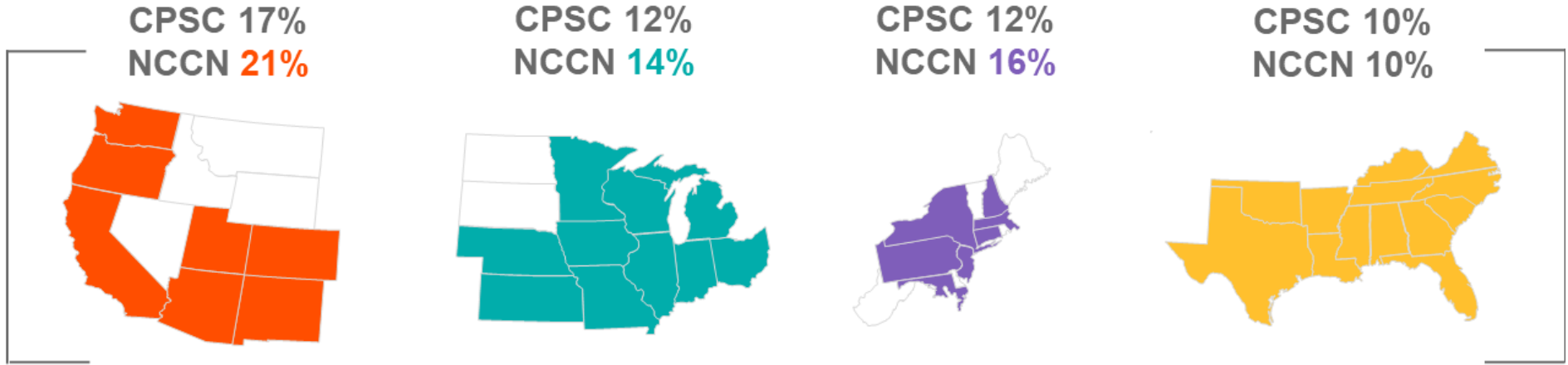
Telehealth Services Offered by AAMC Member Teaching Hospitals in FY2020



Based on 146 survey respondents. Respondents could choose multiple telehealth service types.

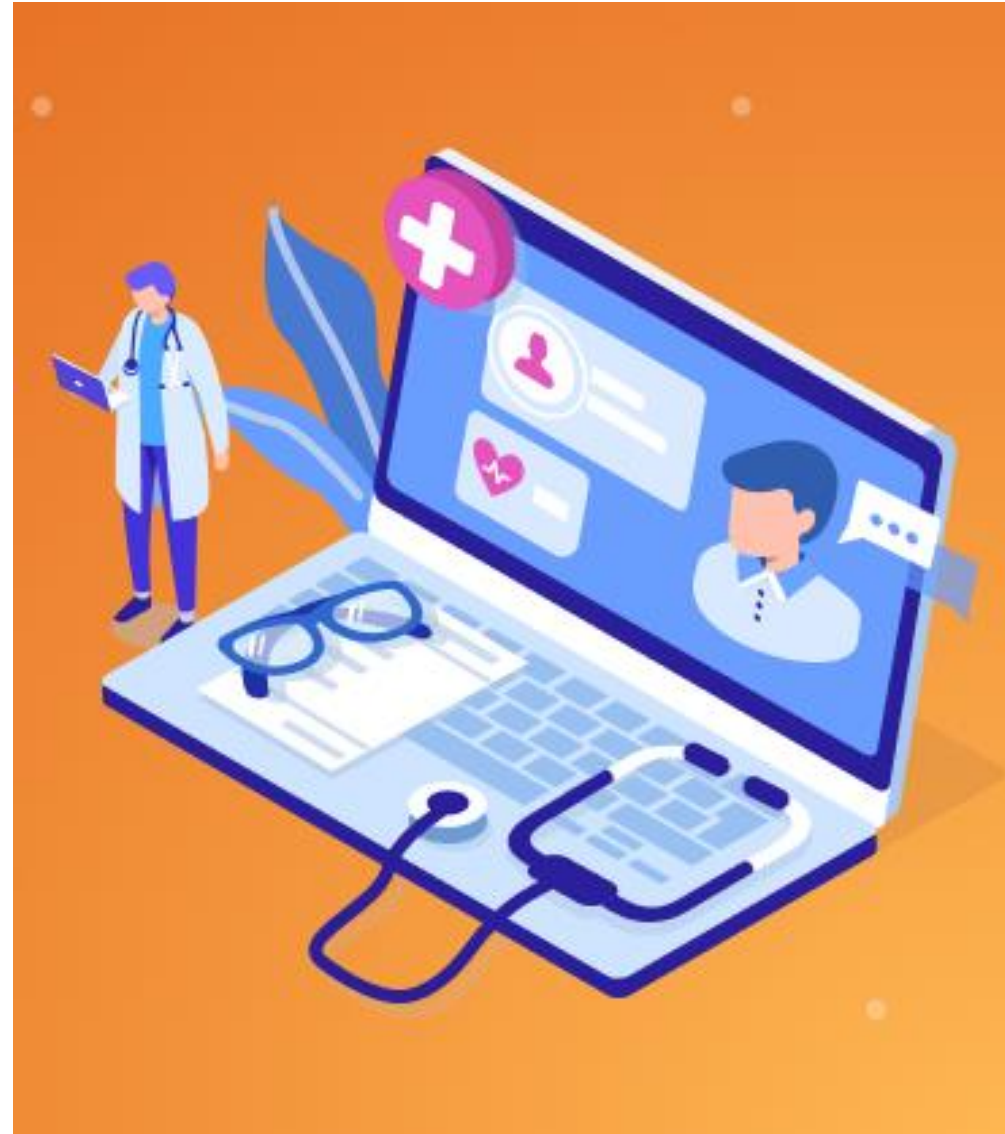
Source: 2020 Council of Teaching Hospitals and Health Systems Survey of Hospital Operations & Financial Performance
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Percentage of Telehealth Encounters Out of Total
Jul-Jun 2021



Is telehealth permanent?

10-20% of visits moving forward





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Hospital Margins and Costs

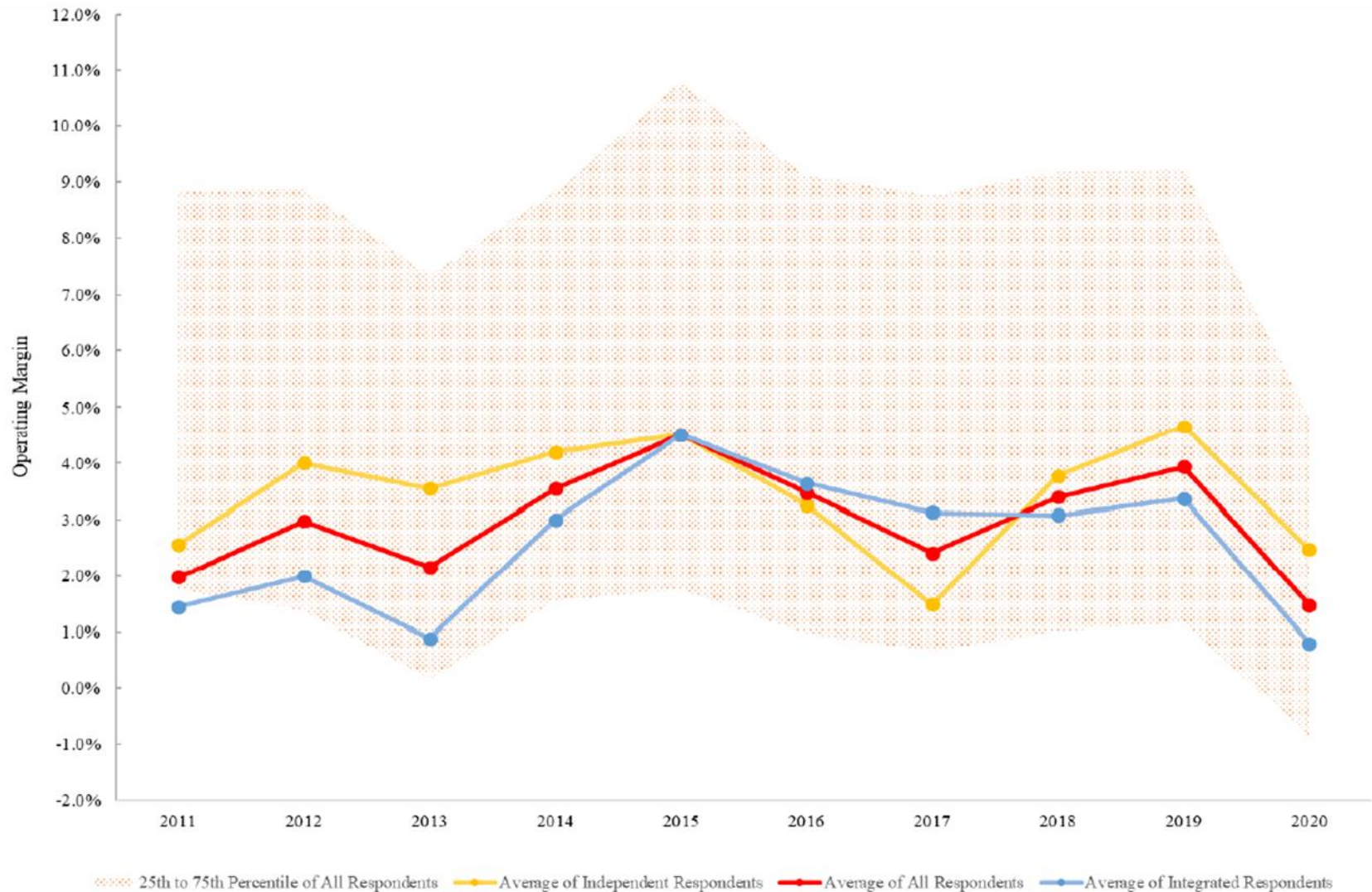
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AAMC Member Teaching Hospital Operating Margins: FY2011-2020



Source: 2020 Council of Teaching Hospitals and Health Systems Survey of Hospital Operations & Financial Performance Autumn 2021 Databook

AAMC Member Teaching Hospital Margin and Utilization Trends: FY2011 through FY2020

Trends in hospital casemix index (CMI), adjusted FTEs per occupied bed, and average length of stay continue to increase, some metrics dramatically, as they have for the nine years prior to FY2020 – marking a trend that started before the pandemic. Reflecting the impact of the pandemic, however, average total CMI, average FTEs per occupied bed, and average length of stay have increased 4.6%, 7.7%, and 1.7%, respectively, in just the last year. In the same time period, total margins have dropped 2.4% on average.

Fiscal Year	Overall Total CMI	Estimated Adjusted FTEs per Occupied Bed (Including Contracted/Outsourced FTEs)	Total Margin	Average Length of Stay
2011	1.619	6.4	5.05%	5.6
2012	1.638	6.6	4.97%	5.6
2013	1.672	6.5	5.71%	5.6
2014	1.709	6.6	5.76%	5.7
2015	1.738	6.5	5.50%	5.8
2016	1.806	6.5	5.48%	5.8
2017	1.825	6.6	5.90%	5.8
2018	1.864	6.5	5.51%	5.9
2019	1.875	6.5	5.92%	6.0
2020	1.962	7.0	4.52%	6.1

Source: 2020 Council of Teaching Hospitals and Health Systems Survey of Hospital Operations & Financial Performance
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Additional Costs of Treating COVID-19 at AAMC Member Teaching Hospitals: Fiscal Year 2020

107 AAMC member teaching hospitals submitted data reflecting additional COVID-19 costs incurred during FY 2020. On average, each surveyed institution spent an additional \$39 million - largely comprised of additional PPE, staffing, and other direct costs.

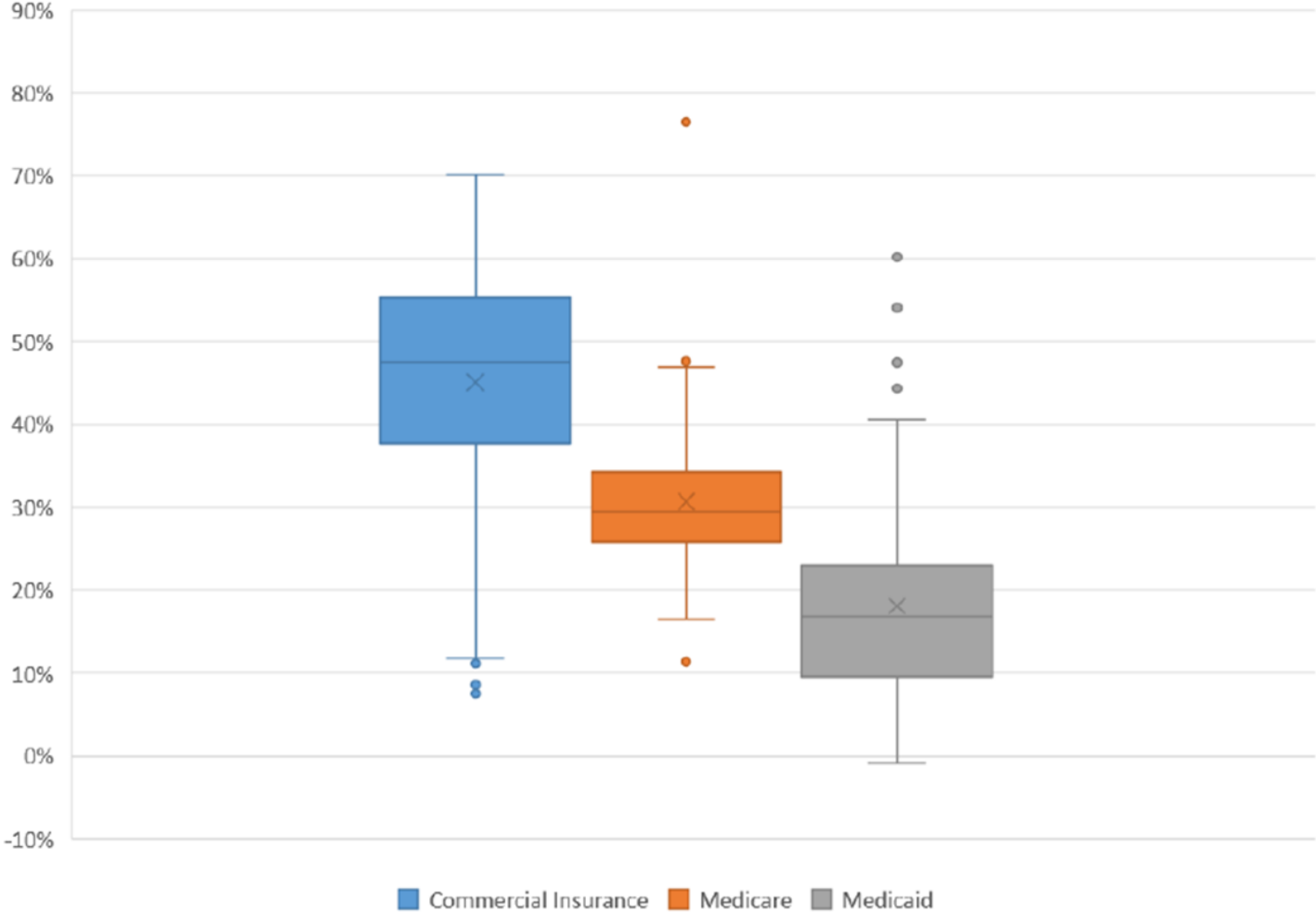
Additional Costs	Hospitals	Average	75th Percentile	Median	25th Percentile
Telehealth	52	\$969,137	\$1,405,811	\$470,645	\$201,685
PPE	92	\$10,147,653	\$8,355,392	\$2,625,461	\$916,900
Drugs	67	\$2,080,273	\$2,572,452	\$1,122,767	\$235,577
Staffing	96	\$16,464,694	\$15,335,367	\$6,533,492	\$3,573,638
Other Direct ¹	92	\$10,913,829	\$8,823,868	\$3,672,897	\$1,279,535
Community	51	\$4,259,485	\$3,735,061	\$1,409,106	\$404,906
Vaccinations ²	14	\$683,364	\$366,345	\$79,083	\$24,919
All Other Costs	28	\$8,587,312	\$7,653,083	\$4,020,701	\$524,796
Total Costs	107	\$39,021,364	\$40,805,623	\$21,443,859	\$9,427,490

¹Additional costs labeled as "Other Direct" include costs for hospital reconfiguration, distancing measures, etc.

²Additional costs labeled as "Vaccinations" include costs for vaccine administration, storage, and staffing.

Source: 2020 Council of Teaching Hospitals and Health Systems Survey of Hospital Operations & Financial Performance
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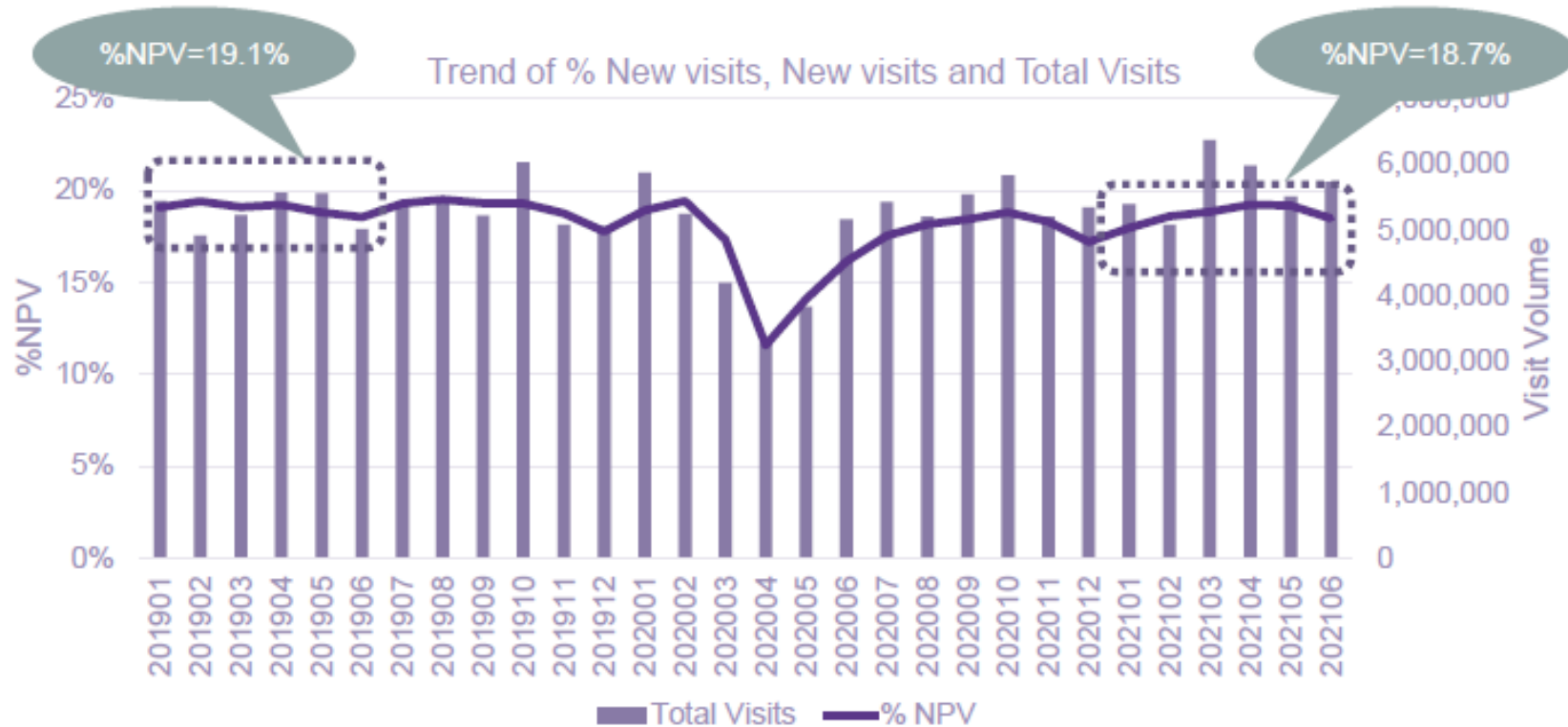
AAMC Member Teaching Hospital Percent of Net Patient Service Revenue by Payment Source, FY2020



Source: 2020 Council of Teaching Hospitals and Health Systems Survey of Hospital Operations & Financial Performance
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Current state vs. pre-pandemic: Percentage of new visits (18 specialties) has gone back to the pre-pandemic level of ~19%

Clinical Practice Solutions Center



New and Total Visits: Identified using E&M CPT codes, Place of service – Office, Telehealth, Off Campus Outpatient Hospital, On Campus Outpatient Hospital
 Specialties: Allergy/Immunology, Cardiology, Dermatology, Endocrinology, ENT, Gastroenterology/Hepatology, Hematology/Oncology, Infectious Disease, Nephrology, Neurology, Obstetrics/Gynecology, Ophthalmology, Orthopedics, Primary care, Pulmonology, Rheumatology, Surgery, Urology





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Questions?

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