

2014

SURVEY

Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates

A survey examining the time needed to schedule a new patient appointment with a physician in 15 major metropolitan markets and the rates of physician Medicaid and Medicare acceptance in these markets. Based on 2013 data.



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Summary Report

2014 Survey Of Physician Appointment Wait Times And Medicaid And Medicare Acceptance Rates

OVERVIEW

Merritt Hawkins is a national healthcare search and consulting firm specializing in the recruitment of physicians in all medical specialties as well as advanced practice clinical professionals. Established in 1987, Merritt Hawkins is a company of AMN Healthcare (NYSE: AHS) the innovator in healthcare workforce solutions and the largest provider of healthcare staffing services in the nation.

Merritt Hawkins conducts an ongoing series of surveys on a wide range of physician workforce topics, including physician recruiting incentives, physician practice patterns, hospital recruiting patterns, physician revenue generation and related subjects. This report summarizes the results of Merritt Hawkins' 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates.

The survey was conducted to determine the average time new patients must wait before they can see a physician in a variety of large metropolitan markets. The survey also examines the percentage of physicians willing or able to schedule Medicaid and Medicare patients in these markets.

The survey is intended to gauge patient access to medical services and may be taken by healthcare professionals, policy makers, and academics as one indicator of the current state of physician supply and demand in select markets and in select medical specialties. This is third time Merritt Hawkins has conducted a physician appointment wait time survey. The first Survey of Physician Appointment Wait Times was conducted in 2004 and the second in 2009. These surveys included data on Medicaid rates of acceptance among physicians but not Medicare rates of acceptance. Comparisons to 2004 and 2009 results are included in this report where relevant.



METHODOLOGY

From June 1, 2013 through November 5, 2013, research associates at Merritt Hawkins called physician offices in 15 metropolitan areas with the purpose of scheduling a new patient appointment. The survey focused on five medical specialties: cardiology, dermatology, obstetrics-gynecology, orthopedic surgery and family practice. Names of physicians were selected at random from Internet-based physician office listings such as the online Yellow Pages.

Merritt Hawkins' research associates were tasked with contacting a minimum of 10 different physician practices/medical groups (rather than multiple physicians in one practice/medical group) per specialty per metropolitan area, if possible, and a maximum of 20 different offices, with 20 being the preferred goal.

In each call, research associates asked to be told the first available time for a new patient appointment with a physician. Depending on the specialty at issue, they indicated a non-emergent reason for the appointment, as follows:

CARDIOLOGY

A heart check-up

DERMATOLOGY

A routine skin exam to detect possible carcinomas/melanomas

ORTHOPEDIC SURGERY

Injury or pain in the knee

OBSTETRICS/GYNECOLOGY

A routine "well-woman" gynecological exam

FAMILY PRACTICE

A routine physical



Research associates also asked if the physician in question accepted Medicaid or Medicare as a form of payment.

Merritt Hawkins' goal was to replicate the experience of someone new to a community, new to an insurance plan, or otherwise in need of a new patient, non-emergent physician appointment seeking to schedule such an appointment through a generally accessible source, including the Internet, the Yellow Pages or a PPO physician directory. Phone research was conducted during an approximate five-month period. The results therefore are a snapshot of physician accessibility at a particular time and in a particular place. A change in timing or approach could yield different results.

Merritt Hawkins conducted similar surveys in 2004 and 2009, and comparisons are made in this survey to results of these prior surveys. It should be noted, however, that no attempt was made to contact the same practices that were contacted in 2004 and 2009. In addition, in 2009, family practice was added to the variety of specialties included in the survey, and therefore no comparison can be made in this specialty to results tabulated in 2004. As referenced above, rates of physician Medicaid acceptance were included in the 2004 and 2009 surveys. 2014 marks the first time that rates of Medicare acceptance were included in the survey.



Metropolitan service areas in which surveys were conducted:

Surveys were conducted in metropolitan areas located in geographically diverse regions of the country, including Atlanta, Boston, Dallas, Denver, Detroit, Houston, Los Angeles, Miami, Minneapolis, New York, Philadelphia, Portland, San Diego, Seattle, Washington, D.C.

When survey was conducted:

June 1, 2013 – November 5, 2013

Medical specialties surveyed:

Cardiology, Dermatology, Obstetrics-Gynecology, Orthopedic Surgery, Family Practice

Number of distinct medical offices surveyed:

1,399

Key Findings

Following are some of the key findings resulting from Merritt Hawkins' 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Rates of Acceptance



- At 45.4 days, **Boston has the highest cumulative average wait time** for a physician appointment of the 15 metropolitan markets surveyed. Boston also had the highest average wait times when the survey was conducted in 2009 and 2004.
- The average appointment wait time to see a family physician ranged from a high of 66 days in Boston to a low of 5 days in Dallas.
- The average appointment wait time to see an obstetrician/gynecologist ranged from a high of 46 days in Boston to a low of 10 days in Seattle.
- The average appointment wait time to see a dermatologist ranged from a high of 72 days in Boston to a low of 16 days in Miami.

- The average appointment wait time to see a cardiologist ranged from a high of 32 days in Washington, D.C. to a low of 11 days in Atlanta.
- The average appointment wait time to see an orthopedic surgeon ranged from a high of 18 days in San Diego to a low of 5 days in Philadelphia, Minneapolis and Houston.
- The average cumulative wait times to see a cardiologist in all 15 markets was 16.8 days, up from 15.5 days in 2009 but down from 18.8 days in 2004.
- The average cumulative wait time to see a dermatologist in all 15 markets was 28.8 days, up from 22.1 days in 2009 and 24.3 days in 2004.
- The average cumulative wait time to see an obstetrician/gynecologist in all 15 markets was 17.3 days, down from 27.5 days in 2009 and 23.3 days in 2004.
- The average cumulative wait time to see an orthopedic surgeon in all 15 markets was 9.9 days, down from 16.8 days in 2009 and 16.9 days in 2004.

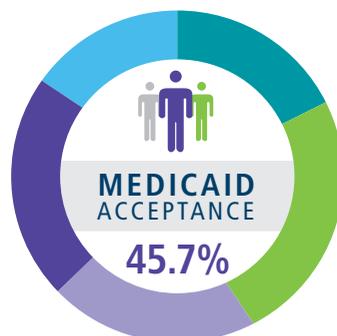
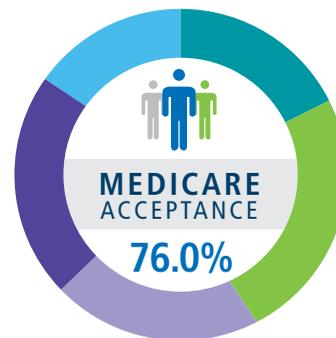


- At 10.2 days, **Dallas has the lowest cumulative average wait time** for a physician appointment of the 15 markets surveyed.

- The average cumulative wait time to see a family physician in all 15 markets was 19.5 days, approximately the same as 20.3 days in 2009 (family practice was not included in the survey in 2004).
- The **average cumulative wait time to see a physician** for all five specialties surveyed in 2014 in all 15 markets was **18.5 days**, down from 20.4 days in 2009 and 20.9 days in 2004.
- Boston has the highest rate of Medicaid acceptance by physicians in the 15 markets surveyed (73%), while Dallas has the lowest (23%).
- Of the 15 markets surveyed, Boston has the highest rate of Medicare acceptance by physicians in all five specialties (98%) while Minneapolis has the lowest (38.2%).
- The **cumulative average rate of Medicare acceptance** in all 5 specialties and in all 15 markets surveyed was **76%** (rates of Medicare acceptance were not included in the 2009 and 2004 surveys).



- The longest reported wait time to see a physician was 256 days for a dermatology appointment in Minneapolis. The shortest reported wait time to see a physician was 1 day in multiple specialties and multiple markets.
- The **cumulative average rate of Medicaid acceptance by physicians** in all 5 specialties and in all 15 markets surveyed was **45.7%**, down from 55.4% in 2009 and 49.9% in 2004.



Following is a listing of appointment wait times, Medicaid and Medicare acceptance by specialty and by market.

CARDIOLOGY - Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Offices	Shortest Time to Appt	Longest Time to Appt	Average Time to Appt	Accepts Medicaid? Yes (%)	Accepts Medicare? Yes (%)
Wash., D.C., 2013	16	4 days	186 days	32 days	63	94
Wash., D.C., 2009	10	4 days	37 days	18 days	100	NA
Wash., D.C., 2004	16	Same day	23 days	12 days	100	NA
San Diego, 2013	20	1 day	132 days	28 day	55	85
San Diego, 2009	18	2 days	90 days	22 days	100	NA
San Diego, 2004	19	9 days	72 days	17 days	68	NA
Denver, 2013	10	5 days	78 days	28 days	50	80
Denver, 2009	17	1 day	47 days	12 days	86	NA
Denver, 2004	20	2 days	128 days	23 days	20	NA
Boston, 2013	20	1 day	133 days	27 days	85	100
Boston, 2009	17	5 days	64 days	21 days	100	NA
Boston, 2004	18	7 days	120 days	37 days	11	NA
Miami, 2013	17	4 days	70 days	18 days	71	82
Miami, 2009	14	4 days	200 days	29 days	64	NA
Miami, 2004	15	3 days	45 days	21 days	40	NA
Detroit, 2013	18	3 days	52 days	17 days	83	100
Detroit, 2009	14	4 days	14 days	8 days	100	NA
Detroit, 2004	17	7 days	42 days	20 days	65	NA
New York, 2013	20	1 day	29 days	15 days	70	75
New York, 2009	11	1 day	33 days	14 days	100	NA
New York, 2004	20	3 days	26 days	22 days	0	NA
Minneapolis, 2013	14	6 days	27 days	15 days	7	36
Minneapolis, 2009	14	5 days	110 days	47 days	100	NA
Minneapolis, 2004	20	2 days	105 days	15 days	80	NA
Los Angeles, 2013	16	3 days	29 days	12 days	44	100
Los Angeles, 2009	13	1 day	30 days	11 days	100	NA
Los Angeles, 2004	18	1 day	23 days	14 days	22	NA
Portland, 2013	16	1 day	20 days	12 days	88	94
Portland, 2009	11	3 days	14 days	11 days	100	NA
Portland, 2004	20	2 days	128 days	25 days	100	NA
Dallas, 2013	20	1 day	84 days	11 days	30	80
Dallas, 2009	12	2 days	14 days	8 days	8	NA
Dallas, 2004	17	2 days	16 days	10 days	0	NA
Atlanta, 2013	20	1 day	78 days	11 days	90	95
Atlanta, 2009	20	1 day	9 days	5 days	100	NA
Atlanta, 2004	20	3 days	28 days	17 days	80	NA
Houston, 2013	20	1 day	26 days	11 days	65	75
Houston, 2009	19	1 day	25 days	10 days	84	NA
Houston, 2004	20	2 days	43 days	11 days	85	NA
Seattle, 2013	20	3 days	21 days	9 days	70	100
Seattle, 2009	14	1 day	21 days	8 days	86	NA
Seattle, 2004	18	1 day	24 days	9 days	0	NA
Philadelphia, 2013	15	1 day	21 days	6 days	47	87
Philadelphia, 2009	12	1 day	21 days	11 days	8	NA
Philadelphia, 2004	20	1 day	136 days	27 days	80	NA
Total, 2013	262	2.4 days	65.7 days	16.8 days	63	86
Total, 2009	216	2.4 days	48.6 days	15.5 days	82	NA
Total, 2004	278	3.0 days	65.8 days	18.8 days	50	NA

DERMATOLOGY - Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Offices	Shortest Time to Appt	Longest Time to Appt	Average Time to Appt	Accepts Medicaid? Yes (%)	Accepts Medicare? Yes (%)
Boston, 2013	20	3 days	181 days	72 days	55	100
Boston, 2009	18	3 days	365 days	54 days	67	NA
Boston, 2004	18	7 days	120 days	50 days	17	NA
Minneapolis, 2013	20	5 days	265 days	56 days	15	30
Minneapolis, 2009	15	3 days	48 days	16 days	87	NA
Minneapolis, 2004	19	9 days	231 days	43 days	100	NA
Philadelphia, 2013	20	7 days	108 days	49 days	15	100
Philadelphia, 2009	20	3 days	365 days	47 days	60	NA
Philadelphia, 2004	20	6 days	140 days	33 days	15	NA
Denver, 2013	20	7 days	180 days	37 days	30	85
Denver, 2009	14	3 days	97 days	40 days	29	NA
Denver, 2004	20	Same day	60 days	21 days	20	NA
Seattle, 2013	20	3 days	122 days	32 days	35	75
Seattle, 2009	10	1 day	41 days	11 days	60	NA
Seattle, 2004	15	2 days	117 days	27 days	27	NA
Portland, 2013	20	3 days	199 days	27 days	45	85
Portland, 2009	11	1 day	57 days	25 days	28	NA
Portland, 2004	20	3 days	50 days	30 days	100	NA
New York, 2013	20	4 days	157 days	24 days	30	50
New York, 2009	17	1 day	45 days	11 days	12	NA
New York, 2004	20	Same day	17 days	9 days	0	NA
Detroit, 2013	20	1 day	105 days	22 days	45	100
Detroit, 2009	16	1 day	31 days	11 days	67	NA
Detroit, 2004	20	5 days	68 days	25 days	25	NA
Houston, 2013	20	4 days	120 days	21 days	40	80
Houston, 2009	20	1 day	200 days	31 days	0	NA
Houston, 2004	20	2 days	91 days	13 days	0	NA
Dallas, 2013	20	1 day	46 days	17 days	0	85
Dallas, 2009	20	1 day	68 days	18 days	15	NA
Dallas, 2004	14	10 days	70 days	34 days	0	NA
Wash., D.C., 2013	20	1 day	39 days	17 days	15	85
Wash., D.C., 2009	13	1 day	34 days	16 days	28	NA
Wash., D.C., 2004	15	Same day	32 days	15 days	87	NA
Miami, 2013	20	3 days	129 days	16 days	45	55
Miami, 2009	20	1 day	57 days	12 days	70	NA
Miami, 2004	14	1 day	55 days	17 days	71	NA
San Diego, 2013	20	1 day	102 days	14 days	10	65
San Diego, 2009	21	1 day	51 days	10 days	100	NA
San Diego, 2004	18	2 days	43 days	12 days	33	NA
Atlanta, 2013	20	2 days	83 days	14 days	15	100
Atlanta, 2009	21	1 day	71 days	15 days	0	NA
Atlanta, 2004	20	2 days	68 days	12 days	100	NA
Los Angeles, 2013	14	1 day	31 days	14 days	7	79
Los Angeles, 2009	12	1 day	56 days	13 days	58	NA
Los Angeles, 2004	16	Same day	36 days	14 days	50	NA
Total, 2013	294	3.1 days	123.9 days	28.8 days	27	78
Total, 2009	233	3.4 days	104.4 days	22.1 days	44	NA
Total, 2004	269	3.3 days	80.9 days	24.3 days	43	NA

OBSTETRICS-GYNECOLOGY - Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Offices	Shortest Time to Appt	Longest Time to Appt	Average Time to Appt	Accepts Medicaid? Yes (%)	Accepts Medicare? Yes (%)
Boston, 2013	20	5 days	103 days	46 days	90	100
Boston, 2009	10	14 days	200 days	70 days	77	NA
Boston, 2004	16	3 days	126 days	45 days	56	NA
Portland, 2013	20	3 days	136 days	35 days	75	90
Portland, 2009	14	1 day	58 days	19 days	42	NA
Portland, 2004	20	1 day	79 days	30 days	100	NA
Philadelphia, 2013	16	4 days	95 days	22 days	63	81
Philadelphia, 2009	15	1 day	161 days	46 days	27	NA
Philadelphia, 2004	17	8 days	72 days	28 days	24	NA
Denver, 2013	20	3 days	90 days	22 days	35	55
Denver, 2009	15	5 days	56 days	15 days	33	NA
Denver, 2004	20	1 day	33 days	23 days	25	NA
Detroit, 2013	20	4 days	84 days	16 days	70	95
Detroit, 2009	14	1 day	50 days	15 days	50	NA
Detroit, 2004	20	8 days	90 days	39 days	40	NA
Atlanta, 2013	20	3 days	56 days	15 days	20	60
Atlanta, 2009	16	1 day	41 days	17 days	62	NA
Atlanta, 2004	20	3 days	57 days	24 days	25	NA
Wash., D.C., 2013	20	1 day	39 days	15 days	35	80
Wash., D.C., 2009	8	6 days	69 days	33 days	38	NA
Wash., D.C., 2004	20	2 days	22 days	11 days	100	NA
San Diego, 2013	20	6 days	41 days	14 days	45	55
San Diego, 2009	20	1 day	200 days	35 days	15	NA
San Diego, 2004	15	2 days	96 days	31 days	80	NA
Houston, 2013	17	2 days	39 days	14 days	41	47
Houston, 2009	20	1 day	137 days	41 days	60	NA
Houston, 2004	18	5 days	69 days	20 days	72	NA
Miami, 2013	20	4 days	38 days	10 days	40	55
Miami, 2009	18	1 day	60 days	22 days	28	NA
Miami, 2004	12	3 days	12 days	10 days	50	NA
Seattle, 2013	20	3 days	38 days	10 days	50	70
Seattle, 2009	14	1 day	200 days	39 days	50	NA
Seattle, 2004	17	1 day	153 days	26 days	70	NA
New York, 2013	17	1 day	35 days	10 days	24	24
New York, 2009	14	1 day	53 days	13 days	14	NA
New York, 2004	20	1 day	29 days	14 days	5	NA
Minneapolis, 2013	20	3 days	28 days	10 days	40	40
Minneapolis, 2009	15	1 day	14 days	5 days	47	NA
Minneapolis, 2004	15	6 days	61 days	20 days	80	NA
Dallas, 2013	20	1 day	18 days	10 days	30	65
Dallas, 2009	21	1 day	65 days	17 days	14	NA
Dallas, 2004	15	1 day	60 days	17 days	100	NA
Los Angeles, 2013	14	1 day	26 days	8 days	36	86
Los Angeles, 2009	14	1 day	116 days	26 days	57	NA
Los Angeles, 2004	16	1 day	52 days	19 days	69	NA
Total, 2013	284	2.9 days	57.7 days	17.3 days	47	67
Total, 2009	228	2.5 days	98.7 days	27.5 days	41	NA
Total, 2004	261	3.0 days	65.1 days	23.3 days	60	NA

ORTHOPEDIC SURGERY - Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Offices	Shortest Time to Appt	Longest Time to Appt	Average Time to Appt	Accepts Medicaid? Yes (%)	Accepts Medicare? Yes (%)
San Diego, 2013	20	7 days	63 days	18 days	15	55
San Diego, 2009	14	3 days	33 days	10 days	14	NA
San Diego, 2004	14	5 days	36 days	13 days	0	NA
Detroit, 2013	18	4 days	46 days	18 days	72	94
Detroit, 2009	3	6 days	19 days	11 days	33	NA
Detroit, 2004	18	5 days	48 days	18 days	22	NA
Boston, 2013	20	4 days	48 days	16 days	70	95
Boston, 2009	9	5 days	79 days	40 days	44	NA
Boston, 2004	16	1 day	60 days	24 days	88	NA
Denver, 2013	20	1 day	68 days	15 days	45	100
Denver, 2009	11	1 day	56 days	15 days	45	NA
Denver, 2004	20	2 days	36 days	23 days	40	NA
Wash., D.C., 2013	18	1 day	34 days	11 days	44	83
Wash., D.C., 2009	8	5 days	43 days	16 days	37	NA
Wash., D.C., 2004	20	1 day	25 days	8 days	20	NA
Portland, 2013	17	1 day	28 days	10 days	53	76
Portland, 2009	19	1 day	17 days	9 days	100	NA
Portland, 2004	20	Same day	26 days	19 days	100	NA
Miami, 2013	20	1 day	30 days	9 days	60	75
Miami, 2009	14	2 days	19 days	7 days	36	NA
Miami, 2004	14	7 days	21 days	11 days	14	NA
New York, 2013	20	3 days	20 days	9 days	40	50
New York, 2009	17	3 days	47 days	15 days	24	NA
New York, 2004	20	2 days	39 days	16 days	10	NA
Dallas, 2013	20	1 day	21 days	8 days	25	85
Dallas, 2009	20	1 day	365 days	45 days	20	NA
Dallas, 2004	14	2 days	18 days	10 days	43	NA
Los Angeles, 2013	17	3 days	31 days	7 days	35	88
Los Angeles, 2009	11	3 days	45 days	12 days	45	NA
Los Angeles, 2004	14	1 day	112 days	43 days	0	NA
Atlanta, 2013	18	1 days	38 days	6 days	20	75
Atlanta, 2009	13	1 days	19 days	10 days	46	NA
Atlanta, 2004	20	Same day	12 days	8 days	100	NA
Seattle, 2013	18	1 day	18 days	6 days	28	83
Seattle, 2009	20	1 day	19 days	5 days	15	NA
Seattle, 2004	14	3 days	27 days	12 days	79	NA
Philadelphia, 2013	18	1 day	8 days	5 days	50	72
Philadelphia, 2009	8	1 day	60 days	22 days	63	NA
Philadelphia, 2004	16	4 days	76 days	18 days	25	NA
Minneapolis, 2013	18	1 day	11 days	5 days	17	33
Minneapolis, 2009	14	10 days	42 days	20 days	93	NA
Minneapolis, 2004	14	7 days	93 days	19 days	79	NA
Houston, 2013	18	1 day	13 days	5 days	78	94
Houston, 2009	11	1 day	35 days	17 days	45	NA
Houston, 2004	20	5 days	38 days	15 days	30	NA
Total, 2013	282	2.1 days	31.8 days	9.9 days	43	77
Total, 2009	192	2.9 days	59.9 days	16.8 days	44	NA
Total, 2004	254	2.8 days	43.0 days	16.9 days	44	NA

FAMILY PRACTICE - Ranked by Longest Average Wait Time to Shortest Average Wait Time

City	Total Offices	Shortest Time to Appt	Longest Time to Appt	Average Time to Appt	Accepts Medicaid? Yes (%)	Accepts Medicare? Yes (%)
Boston, 2013	20	12 days	152 days	66 days	65	95
Boston, 2009	17	6 days	365 days	63 days	53	NA
New York, 2013	19	14 days	38 days	26 days	32	42
New York, 2009	19	6 days	61 days	24 days	79	NA
Atlanta, 2013	20	1 day	112 days	24 days	40	80
Atlanta, 2009	18	3 days	21 days	9 days	67	NA
Seattle, 2013	20	3 days	129 days	23 days	55	100
Seattle, 2009	20	2 days	14 days	8 days	80	NA
Philadelphia, 2013	18	1 day	98 days	21 days	67	89
Philadelphia, 2009	18	3 days	15 days	9 days	72	NA
Los Angeles, 2013	19	1 day	126 days	20 days	53	79
Los Angeles, 2009	20	1 day	365 days	59 days	30	NA
Houston, 2013	20	1 day	178 days	19 days	55	70
Houston, 2009	20	1 day	29 days	17 days	50	NA
Denver, 2013	20	1 day	62 days	16 days	20	55
Denver, 2009	16	1 day	45 days	14 days	94	NA
Detroit, 2013	20	1 day	74 days	16 days	50	90
Detroit, 2009	17	3 days	31 days	14 days	59	NA
Wash., D.C., 2013	14	1 day	62 days	14 days	71	93
Wash., D.C., 2009	19	3 days	365 days	30 days	63	NA
Portland, 2013	20	3 days	45 days	13 days	60	85
Portland, 2009	19	3 days	16 days	8 days	79	NA
Miami, 2013	16	1 day	56 days	12 days	56	81
Miami, 2009	15	1 day	25 days	7 days	40	NA
Minneapolis, 2013	17	1 day	30 days	10 days	35	53
Minneapolis, 2009	20	2 days	23 days	10 days	85	NA
San Diego, 2013	14	1 day	17 days	7 days	86	100
San Diego, 2009	20	1 day	92 days	24 days	80	NA
Dallas, 2013	20	1 day	10 days	5 days	30	55
Dallas, 2009	20	1 day	27 days	8 days	50	NA
Total, 2013	277	2.87 days	79.3 days	19.5 days	50.6	77.3
Total, 2009	278	2.47 days	99.6 days	20.3 days	65.4	NA

AVERAGE WAIT TIMES BY METROPOLITAN AREA

City	Cardiology	Dermatology	OB/GYN	Orthopedic Surgery	Family Practice
Atlanta, 2013	11 days	14 days	15 days	6 days	24 days
Atlanta, 2009	5 days	15 days	17 days	10 days	9 days
Atlanta, 2004	17 days	21 days	24 days	8 days	NA
Boston, 2013	27 days	72 days	46 days	16 days	66 days
Boston, 2009	21 days	54 days	70 days	40 days	63 days
Boston, 2004	37 days	50 days	45 days	24 days	NA
Dallas, 2013	11 days	17 days	10 days	8 days	5 days
Dallas, 2009	8 days	18 days	17 days	45 days	8 days
Dallas, 2004	10 days	34 days	17 days	10 days	NA
Denver, 2013	28 days	37 days	22 days	15 days	16 days
Denver, 2009	12 days	40 days	15 days	15 days	14 days
Denver, 2004	23 days	21 days	23 days	23 days	NA
Detroit, 2013	17 days	22 days	16 days	18 days	16 days
Detroit, 2009	7.5 days	12 days	15 days	11 days	14 days
Detroit, 2004	20 days	25 days	39 days	18 days	NA
Houston, 2013	11 days	21 days	14 days	5 days	19 days
Houston, 2009	11 days	31 days	41 days	17 days	17 days
Houston, 2004	11 days	13 days	20 days	15 days	NA
Los Angeles, 2013	12 days	14 days	8 days	7 days	20 days
Los Angeles, 2009	11 days	13 days	26 days	12 days	59 days
Los Angeles, 2004	14 days	14 days	19 days	43 days	NA
Miami, 2013	18 days	16 days	13 days	9 days	12 days
Miami, 2009	29 days	12 days	22 days	7 days	7 days
Miami, 2004	21 days	17 days	10 days	11 days	NA
Minneapolis, 2013	15 days	56 days	10 days	5 days	10 days
Minneapolis, 2009	47 days	17 days	5 days	20 days	10 days
Minneapolis, 2004	15 days	43 days	20 days	19 days	NA
New York, 2013	15 days	24 days	10 days	9 days	26 days
New York, 2009	14 days	11 days	13 days	15 days	24 days
New York, 2004	22 days	9 days	14 days	16 days	NA
Philadelphia, 2013	6 days	49 days	22 days	5 days	21 days
Philadelphia, 2009	11 days	47 days	46 days	22 days	9 days
Philadelphia, 2004	27 days	33 days	28 days	18 days	NA
Portland, 2013	12 days	27 days	35 days	10 days	13 days
Portland, 2009	11 days	25 days	19 days	9 days	8 days
Portland, 2004	25 days	30 days	30 days	19 days	NA
San Diego, 2013	28 days	14 days	14 days	18 days	7 days
San Diego, 2009	22 days	10 days	35 days	10 days	24 days
San Diego, 2004	17 days	12 days	31 days	13 days	NA
Seattle, 2013	9 days	32 days	10 days	6 days	23 days
Seattle, 2009	8 days	11 days	39 days	5 days	8 days
Seattle, 2004	9 days	27 days	26 days	12 days	NA
Wash., D.C. 2013	32 days	17 days	15 days	11 days	14 days
Wash., D.C. 2009	18 days	16 days	33 days	16 days	30 days
Wash., D.C. 2004	12 days	15 days	11 days	8 days	NA

MEDICAID ACCEPTANCE RATE BY METROPOLITAN AREA

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Practice (%)
Atlanta, 2013	90	15	20	20	40
Atlanta, 2009	100	0	62	46	67
Atlanta, 2004	80	100	25	100	NA
Boston, 2013	85	55	90	70	65
Boston, 2009	100	67	77	44	53
Boston, 2004	11	17	56	88	NA
Dallas, 2013	30	0	30	25	30
Dallas, 2009	8	15	14	20	50
Dallas, 2004	0	0	100	43	NA
Denver, 2013	50	30	35	45	20
Denver, 2009	86	29	33	45	94
Denver, 2004	20	20	20	40	NA
Detroit, 2013	83	45	70	72	50
Detroit, 2009	100	25	50	33	59
Detroit, 2004	65	25	40	22	NA
Houston, 2013	65	40	41	78	55
Houston, 2009	84	0	60	45	50
Houston, 2004	85	30	72	30	NA
Los Angeles, 2013	44	7	36	35	53
Los Angeles, 2009	100	58	57	45	30
Los Angeles, 2004	22	50	29	14	NA
Miami, 2013	71	45	40	60	56
Miami, 2009	64	70	28	36	40
Miami, 2004	40	71	50	14	NA
Minneapolis, 2013	7	15	40	17	35
Minneapolis, 2009	100	87	47	93	85
Minneapolis, 2004	80	100	83	79	NA
New York, 2013	70	30	24	40	32
New York, 2009	100	12	14	24	79
New York, 2004	0	0	5	10	NA
Philadelphia, 2013	47	15	63	50	67
Philadelphia, 2009	8	60	27	63	72
Philadelphia, 2004	80	15	24	75	NA
Portland, 2013	88	45	75	53	60
Portland, 2009	100	28	100	100	79
Portland, 2004	100	100	100	100	NA
San Diego, 2013	55	10	45	15	86
San Diego, 2009	100	100	15	14	80
San Diego, 2004	68	33	80	0	NA
Seattle, 2013	70	35	50	28	55
Seattle, 2009	86	60	50	15	80
Seattle, 2004	0	27	70	79	NA
Wash., D.C. 2013	63	15	35	44	71
Wash., D.C. 2009	100	0	38	37	63
Wash., D.C. 2004	100	87	100	20	NA

MEDICARE ACCEPTANCE RATE BY METROPOLITAN AREA
(Question first asked in 2013 – no data for 2009 & 2004 available)

City	Cardiology (%)	Dermatology (%)	OB/GYN (%)	Orthopedic Surgery (%)	Family Practice (%)
Atlanta, 2013	95	100	60	75	80
Boston, 2013	100	100	100	95	95
Dallas, 2013	80	85	65	85	55
Denver, 2013	80	85	55	100	55
Detroit, 2013	100	100	95	94	90
Houston, 2013	75	80	47	94	70
Los Angeles, 2013	100	79	86	88	79
Miami, 2013	82	55	55	75	81
Minneapolis, 2013	36	30	40	33	53
New York, 2013	75	50	24	50	42
Philadelphia, 2013	87	100	81	72	89
Portland, 2013	94	85	90	76	85
San Diego, 2013	85	65	55	55	100
Seattle, 2013	100	75	70	83	100
Wash., D.C. 2013	94	85	80	83	93

Trends and Observations

OVERVIEW

Merritt Hawkins' 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance is intended to present a snapshot of physician availability in five select medical specialties in 15 major metropolitan areas nationwide.

It should be noted that physician-to-population ratios in these metropolitan areas in most cases are higher than the national average (see chart below).

Physician-to-Population Ratios in 15 Metro Markets Versus the National Average

Metropolitan Area	Physician per 100,000 population
Atlanta	212.5
Boston	450.1
Dallas/Fort Worth	197.2
Denver	271.9
Detroit	268.1
Houston	235.2
Los Angeles	253.9
Miami	253.7
Minneapolis	264.1
New York	344.6
Philadelphia	322.4
Portland	297.6
San Diego	270.2
Seattle	297.8
Washington, D.C	320.1
United States	226.0

Source: America Medical Association Physician Master File

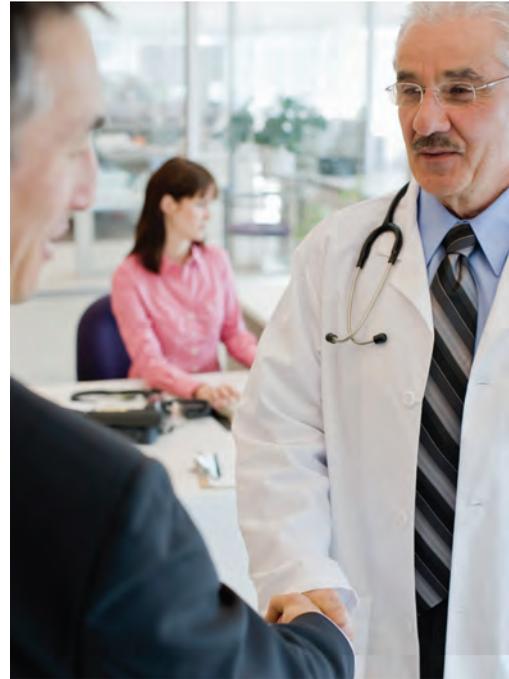
If access to physicians in metropolitan areas with a large number of physicians per capita is limited, it may be reasonable to infer that physician access could be more problematic in areas with fewer physicians per capita (with the caveat that large metropolitan areas have wide physician-to-population variations within them and often have population groups that have been designated by the federal government as medically underserved).

In so far as it was possible, Merritt Hawkins attempted to duplicate the experience of a person seeking to make a new patient appointment with a physician in one of five specialties for a non-emergent medical need in one of 15 metropolitan markets. A secondary goal was to determine the number of physician practices in various metropolitan settings willing or able to see Medicaid and Medicare patients.

The survey was conducted as a continuation of Merritt Hawkins' longstanding interest in physician supply and demand issues. In 1992, Merritt Hawkins published its first article regarding physician supply. The article contended that expanding access to healthcare as proposed by the Clinton administration would be difficult due to the widespread dearth of doctors. With the projected expansion of healthcare insurance to millions of previously uninsured people through the Affordable Care Act (ACA), that issue remains particularly relevant today.

Since 1992, Merritt Hawkins executives have authored dozens of articles on physician supply and demand issues and also have written a book on the physician shortage entitled *Will the Last Physician in America Please Turn Off the Lights?* In tandem with AMN Healthcare, Merritt Hawkins provided funding to the Council on Physician and Nurse Supply, a group of nationally noted healthcare experts that during its tenure was based at the University of Pennsylvania and was dedicated to addressing the national shortage of nurses and physicians. In 2008 and 2012, Merritt Hawkins conducted two of the largest physician surveys ever completed in the United States on behalf of The Physicians' Foundation (www.physiciansfoundation.org). These surveys, one of which was distributed to 300,000 physicians and the other to over 600,000 physicians, were intended in part to determine if physicians are taking steps that would limit patient access to their services. With AMN Healthcare, Merritt Hawkins helps organize and sponsor an annual Healthcare Workforce Summit, a gathering of healthcare workforce experts and medical facility administrators dedicated to tracking and analyzing healthcare workforce challenges and solutions.

The 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Rates of Acceptance is an attempt to bring the physician supply discussion, which often deals in abstract projections of hypothetical physician need, into practical focus by tracking the time it takes patients to schedule physician appointments.



Survey results should be approached with several caveats. It can be difficult to gauge a physician's availability through one phone call made to his or her office regarding the physician's next available appointment time. Appointment times can open up unexpectedly, allowing a patient to schedule an appointment earlier than he or she might ordinarily be able to. Should a physician happen to be on vacation or otherwise away from the office, it could take a patient longer to schedule an appointment than ordinarily would be the case. In addition, demand for medical services can fluctuate in various markets during flu season, vacation season and other times when physician utilization is uncharacteristically high or low, and appointment wait times could be uncharacteristically long or short during these periods.

As referenced above, physicians are not evenly distributed across all population groups within large metropolitan areas. Physician appointment wait times therefore may be shorter in those areas of a city where physicians are concentrated and longer in those areas where there are fewer physicians.

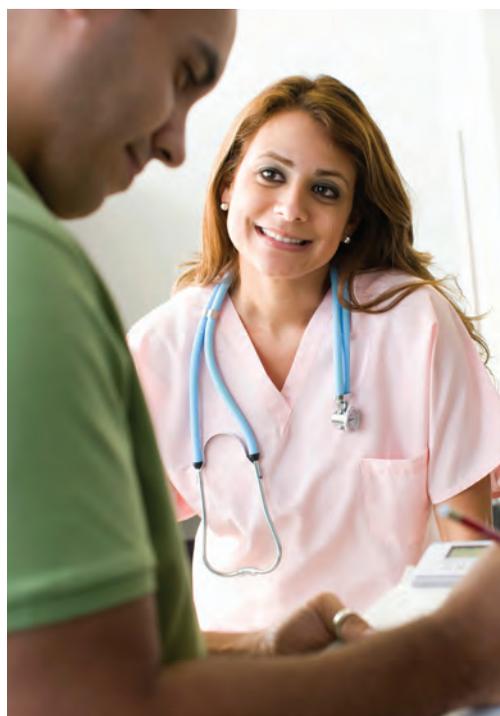
There also are the vagaries of medical practice phone systems to consider. In some cases, Merritt Hawkins' researchers could not break through the various automated telephone sequences needed to reach a person able to schedule an appointment. In other cases, researchers encountered answering machines indicating the office was temporarily not taking phone calls. In such cases, researchers moved on to other medical offices. By doing so, researchers attempted to duplicate the experience of a patient new to a community or simply in need of a physician "dialing through" various medical offices in search of an appointment.

Merritt Hawkins' researchers called seeking appointments for non-emergent medical conditions such as exams (though in the case of orthopedic surgery, researchers called seeking appointments for injury or pain to the knee). The survey therefore does not measure physician availability in cases of medical emergency.

Merritt Hawkins' researchers attempted to reach a minimum of 10 distinct medical offices/medical groups per medical specialty, per metropolitan market, with an optimum target of 20 offices. Researchers were able to contact the minimum of 10 physician offices in all markets and

all specialties, and in the great majority of cases were able to reach 15 practices or more. In some metropolitan areas, physicians in certain specialties have consolidated into large groups and there may be a limited number of groups from which to select.

Despite these caveats, we believe survey data, which Merritt Hawkins has generated three times over the course of a decade, reflect in general what patients would encounter at a given time when attempting to schedule physician appointments at physician offices in 15 of the largest cities in the United States. The survey therefore provides one indicator of physician availability in five medical specialties in 15 metropolitan areas with a relatively high concentration of physicians.



Physician Appointment Wait Times by Specialty

Merritt Hawkins' 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance reflects the ability of patients with non-emergent medical needs to access physician services in 15 large metropolitan markets. As non-clinicians, Merritt Hawkins is unable to comment on the clinical effect the appointment wait times indicated in the survey may have on patients reporting non-emergent problems similar to the hypothetical ones stated by its research associates.

However, some inferences regarding the general availability of physicians can be made based on the wait times reported for the five specialties included in the survey. In Merritt Hawkins' experience, in evaluating physician practices, a physician generally is considered to be busy if his or her practice is booked for new patient appointments two weeks or more in advance. In such cases, the recruitment of a new physician, physician assistant or nurse practitioner may be warranted.

Following is a review of the five specialties included in the survey examining which markets appear to have extended wait times and which do not.

Cardiology

In cardiology, average appointment wait times exceeded 14 days in seven of the 15 metropolitan markets: Washington, D.C. (32 days), San Diego (28 days), Denver (28

days), Boston (27 days) Miami (18 days), Detroit (17 days), New York (15 days) and Minneapolis (15 days) By contrast, in 2009, average wait times in cardiology equaled or exceeded 14 days in five of the 15 metropolitan markets, and in 2004 wait times equaled or exceeded 14 days in 11 of the 15 metropolitan markets surveyed.

The cumulative average time to schedule a cardiology appointment in all 15 markets increased in 2014 relative to 2009, but decreased relative to 2004 (see chart below)

Average Cardiology Appointment Wait Times, All Markets

YEAR	DAYS
2013	16.8
2009	15.5
2004	18.8

Twelve of the markets showed increased average wait times for cardiology relative to 2009, but only five markets showed increased wait times relative to 2004, with two markets showing the same average wait times in 2014 as in 2004.

Certain markets, including San Diego, Denver, Boston, Miami, Washington, D.C. and New York have exhibited a pattern over the three years the survey has been conducted of relatively high average wait times in cardiology, equaling or exceeding 14 days in most cases (with two exceptions: Denver in 2009 with an average wait time of 12 days and Washington, D.C. in 2004 with an average wait time of 12 days).

Others, such as Seattle, Houston, Los Angeles, Atlanta, and Dallas, have exhibited a pattern over the years the survey has been conducted of relatively short average wait times in cardiology of 14 days or fewer (with one exception: Atlanta in 2004, with an average of 17 days).

Several markets, including Philadelphia, Detroit, Portland and Minneapolis, have exhibited a more variable pattern in cardiology. Philadelphia, for example, showed an average wait time for cardiology of six days in 2013, 11 days in 2009 and 27 days in 2004; Portland showed average wait times in cardiology of 12 days in 2013, 11 days in 2009 and 25 days in 2004, and Detroit showed average wait times in cardiology of 17 days in 2013, eight days in 2009 and 20 days in 2004. Minneapolis showed an average wait time for cardiology of 15 days in 2013 and 2004 and 47 days in 2009.

It should be noted that in these markets the average wait times in two of the three survey years are generally consistent, while there is a one year aberration. Given the variation that can exist in physician appointment wait times due to seasonality and other factors referenced above, some year by year inconsistencies are to be expected.

However, a general pattern is emerging in which variable markets such as Philadelphia, Detroit, Portland and Minnesota showed average wait times in cardiology of 15 days or less in two out of the three years the survey has been conducted. It is probable, therefore, that these markets exhibit generally moderate wait times for cardiology, though more data will be needed to confirm this conclusion.

Dermatology

In dermatology, average appointment wait times equaled or exceeded 14 days in all 15 of the metropolitan markets, and equaled or exceeded 21 days in 9 of the 15 markets (Boston, Minneapolis, Philadelphia, Denver, Seattle, Portland, New York, Detroit, and Houston).

In 2009, average wait times in dermatology equaled or exceeded 14 days in 9 of the 15 markets and in 2004 average wait times in dermatology equaled or exceeded 14 days in 12 of the 15 markets.

The average cumulative wait time to schedule a dermatology appointment in all 15 markets increased in 2013 relative to both 2009 and 2004 (see chart below):

Average Dermatology Appointment Wait Times, All Markets

YEAR	DAYS
2013	28.8
2009	22.1
2004	24.3

Eleven of the 15 markets showed increases in average wait times for dermatology in 2013 relative to 2009, and 11 showed increases in average wait times for dermatology relative to 2004 (or the wait times did not change).

As in cardiology, some markets have exhibited a pattern of relatively long appointment wait times in dermatology.

Boston, Minneapolis, Philadelphia, Denver, Portland, Houston, Dallas, Washington, D.C., and Atlanta all equaled or exceeded a 14 day average wait time in dermatology for all years the survey has been conducted (with one exception: Houston in 2004 with a wait time of 13 days).

Markets with more moderate wait times in each of the survey years include Los Angeles and San Diego. Other markets, such as Atlanta and Dallas, are more variable, but are generally consistent in two of the three years with a one year aberration, as was seen in cardiology.



Obstetrics-Gynecology

In obstetrics-gynecology, average wait times equaled or exceeded 14 days in 9 of the 15 markets, compared to 13 of the 15 metropolitan markets surveyed in both 2009 and 2004:

The average cumulative time to schedule an obstetrics-gynecology appointment in all 15 markets decreased in 2013 relative to both 2009 and 2004 (see chart below)

Average Obstetrics-Gynecology Appointment Wait Times, All Markets

YEAR	DAYS
2013	17.3
2009	27.5
2004	23.3

Four of the 15 markets showed an increase in average appointment wait times for obstetrics/gynecology relative to 2009 and four showed increases relative to 2004, while 11 showed decreases relative to 2009 and 2004.

Markets showing a pattern of average appointment wait times equaling or exceeding 14 days in each of the years the survey was conducted include Boston, Portland, Philadelphia, Denver, Detroit, Atlanta, San Diego, and Houston.

Other markets such as Los Angeles, Dallas, Seattle, and Washington, D.C. show a variable pattern in which average wait times for obstetrics/gynecology exceeded 14 days in two of the three survey years.

None of the markets have seen average wait times for obstetrics/gynecology of less than 14 days in any of the three years the survey was conducted.

Orthopedic Surgery

In orthopedic surgery, average wait times equaled or exceeded 14 days in four of the 15 markets, compared to 8 markets in 2009 and 9 markets in 2004.

The average cumulative time to schedule an orthopedic appointment in all 15 markets decreased in 2013 relative to both 2009 and 2004 (see chart below):

Average Orthopedic Surgery Wait Times, All Markets

YEAR	DAYS
2013	9.9
2009	16.8
2004	16.9

Five of the 15 markets showed an increase in average appointment wait times for orthopedics relative to 2009 and two showed increases relative to 2004.

Only two markets, Boston and Denver, exhibited average wait times for orthopedics equaling or exceeding 14 days in all three years the survey was conducted.

Three markets, Miami, Seattle, and Atlanta, exhibited wait times of less than 14 days in all three years the survey was conducted.

The other markets were variable, with Detroit, Philadelphia Minneapolis, New York, and Houston showing a pattern of wait times equaling or exceeding 14 days in two of the three years the survey was

conducted, while Dallas, Los Angeles, Atlanta, Portland and Washington, D.C. showed a pattern of wait times less than 14 days in two of the three years the survey was conducted.

Family Practice

In family practice, average wait times equaled or exceeded 14 days in 10 of the 15 markets, compared to 8 in 2009 (the first year family practice was included in the survey).

The cumulative average wait time for a family practice appointment in all 15 markets was down slightly in 2013 relative to 2009 (see chart below)

Average Family Practice Appointment Wait Times, All Markets

YEAR	DAYS
2013	19.5
2009	20.3

Ten of the 15 markets showed an increase in average wait times for family practice relative to 2009, four showed a decrease and one market did not change.

Seven markets -- Boston, New York, Los Angeles, Houston, Denver, Detroit and Washington, D.C. -- exhibited average wait times of 14 days or more in both of the years the survey included family practice.

Four markets -- Dallas, Minneapolis, Miami and Portland -- exhibited average wait times of less than 14 days in the two years the survey has included family practice.

The remaining four markets, Atlanta, Seattle, Philadelphia, and San Diego, were variable, with family practice wait times exceeding 14 days in one year and less than 14 days in the other.

Summary of Specialty Wait Times

As the numbers above indicate, average physician appointment wait times in the 2013 survey do not show a clear progression or regression in all specialties relative to wait times recorded in the previous physician appointment wait time surveys Merritt Hawkins has conducted – the data are more mixed.

For example, cumulative average wait times are up in 2013 in two specialties (cardiology and dermatology) relative to 2009, while in two specialties (obstetrics/gynecology and orthopedic surgery) wait times are down. In one specialty (family practice) wait times are essentially flat. For all five specialties and all 15 markets, cumulative appointment wait times declined in 2013 relative to 2009 and 2004.

Despite these mixed results, cumulative physician appointment wait times equal or exceed 14 days in cardiology and obstetrics-gynecology in 9 of the 15 markets surveyed. Cumulative appointment wait times equal or exceed 14 days in family practice in 10 of the 15 markets, and equal or exceed 14 days in dermatology in all of the 15 markets. As stated above, in Merritt Hawkins' experience, physicians are considered to be busy and may require the assistance of another physician or advanced practitioner when appointment wait times in their practices equal or exceed

14 days. Orthopedic surgery is the only specialty in which average appointment wait times are less than 14 days in the majority of the 15 markets.

Protracted wait times persist despite changes that have taken place in most large medical markets to varying degrees since the survey was conducted in 2004 and 2009. These changes include the incorporation into physician practices of a growing number of advanced practitioners such as physician assistants (PAs) and nurse practitioners (NPs), and the increasing availability of PAs and NPs at some 1,500 retail sites across the U.S. Though an increasing number of advanced practitioners may be absorbing millions of patient appointments that previously were handled by physicians, the survey indicates wait times in many markets remain extended.



Additional proliferating sites of service where physicians, PAs and NPs are available, such as urgent care centers and community health centers, may have reduced appointment wait times in some markets, contributing to the decline in the overall cumulative average for all five specialties relative to 2009 and 2004. Nevertheless, the cumulative physician appointment wait time in 2013 remains close to 20 days, only slightly less than it was in 2009 and 2004.

Given that the 15 markets examined in the survey generally feature a high ratio of physicians per population relative to the national average, the survey suggests that patient access to medical services often remains problematic for patients wishing to schedule a physician appointment for non-emergent medical needs, even in communities where there are many physicians.

Physician Appointment Wait Times by Market

Cumulative appointment wait times for the 15 metropolitan markets and average appointment wait times are ranked in the following charts: These charts show total average wait times for the specialties examined in a given market (227 days in the case of Boston) divided by five specialties for the overall average wait time per market.

Cumulative Average Wait Time in Days, 2013

Metro Area	Per 5 Specialties	Average Wait Time in Days Per Metro Area
Boston	227	45.4
Denver	118	23.6
Philadelphia	103	20.6
Portland	97	19.4
Minneapolis	96	19.2
Detroit	89	17.8
Washington, D.C.	89	17.8
New York	84	16.8
San Diego	81	16.2
Seattle	80	16.0
Atlanta	70	14.0
Houston	70	14.0
Miami	68	13.6
Los Angeles	61	12.2
Dallas	51	10.2
Total Cumulative Average	92.3	18.5

As these numbers indicate, Boston experienced by far the longest average wait times of any of the 15 metropolitan markets in 2013, as it did in the 2009 and 2004 surveys, with average wait times equaling or exceeding 16 days in all five specialties surveyed, even though Boston has more physicians per population than any of the other markets included in the survey. In addition, average wait times in Boston increased in three of the five specialties surveyed (dermatology, cardiology and family practice) in 2013 relative to 2009.

Cumulative Average Wait Time in Days, 2009

Metro Area	Per 5 Specialties	Average Wait Time In Days Per Metro Area
Boston	248	49.6
Philadelphia	135	27.0
Los Angeles	121	24.4
Houston	117	23.4
Washington, D.C.	113	22.6
San Diego	101	20.2
Minneapolis	99	19.8
Dallas	96	19.2
New York	96	19.2
Denver	77	15.4
Miami	77	15.4
Portland	72	14.4
Seattle	71	14.2
Detroit	60	12.0
Atlanta	56	11.2
Total Cumulative Average	102.6	20.5

Long wait times in Boston may be driven in part by the healthcare reform initiative that was put in place in Massachusetts in 2006. The initiative succeeded in covering the great majority of the state's residents. However, it has been reported in the years since that many patients in Massachusetts are encountering difficulty in accessing physicians. The Survey of Patient Appointment Wait Times continues to support these reports, as average appointment wait times in Boston were in excess of three weeks for all of the specialties surveyed except orthopedic surgery.

Cumulative Average Wait Time in Days, 2004

Metro Area	Per 5 Specialties	Average Wait Time In Days Per Metro Area
Boston	156	39.0
Philadelphia	106	26.5
Portland	104	26.0
Detroit	102	25.5
Minneapolis	97	24.3
Denver	90	22.5
Los Angeles	90	22.5
Seattle	74	18.5
San Diego	73	18.3
Dallas	71	17.8
Atlanta	70	17.5
New York	61	15.3
Houston	59	14.8
Miami	59	14.8
Washington, D.C.	46	11.5
Total Cumulative Average	83.9	20.9

Long appointment wait times in Boston could be a precursor of what is to come nationally should some 25 million people or more eventually obtain health insurance through the ACA.

Other markets, such as Detroit and Denver, also are experiencing long appointment wait times across-the-board, with average waits equaling or exceeding 16 days in all five specialties.

The survey indicates that some metropolitan markets experience comparatively long appointment wait times in certain specialties, but short wait times in others. In Minneapolis, for example, the average wait time to see a dermatologist is 56 days, while the average wait time to see an orthopedic surgeon is only five days. In San Diego, the average wait time to see a cardiologist is 28 days, while the average wait time to see a family physician is only five days.

However, no market surveyed in 2013 is experiencing across-the-board short average appointment wait times of less than 14 days in all five specialties.

Interestingly, Dallas shows the shortest cumulative physician appointment wait times in the five specialties surveyed, though it has the fewest physicians per population of the 15 metro markets. This may be the result of the variations within large metro markets referenced above, in which areas that are typically economically robust have a high concentration of physicians relative to areas that are economically challenged. Also as referenced above, some markets have created increased access to medical services through the addition of PAs and NPs to medical staffs and have added various sites of service, such as retail clinics and urgent care centers, that can make physician access easier. We believe Dallas is one such market.

Physician access in specific metropolitan markets is a function of a variety of factors, including the number of physicians available per population, the types of

physicians available, patient demographics, income levels, lifestyle preferences, insurance plans prevalent in the area and others. A relatively high number of physicians per capita does not always ensure ready access to physicians, just as ready access to one type of physician in a given market does not always mean ready access to other types of physicians within the same market.

Medicaid Rates of Acceptance

Average Medicaid acceptance rates in the 15 metropolitan markets for the five medical specialties surveyed in 2013 follow, as do averages included in the 2009 and 2004 surveys.

2013 Average Medicaid Acceptance

City	Rate for Five Specialties (%)
Boston	73.0
Portland	63.5
Detroit	63.4
Houston	55.8
Miami	53.8
Seattle	48.0
Philadelphia	47.3
Washington, D.C.	43.1
New York	39.8
San Diego	39.4
Atlanta	37.0
Los Angeles	36.4
Denver	34.4
Minneapolis	23.6
Dallas	23.0
Total Cumulative Average	45.7

As these numbers indicate, Medicaid acceptance rates among physicians vary greatly by market. In 2013, Boston showed the highest rate of Medicaid acceptance (73%) of the 15 markets surveyed, while Dallas showed the lowest rate (23%).

Some markets show a high rate of Medicaid acceptance in one specialty and a low rate of acceptance in others. In Seattle, for example, 70% of cardiologists surveyed are accepting Medicaid, while only 28% of the orthopedic surgeons surveyed are doing so. In Atlanta, 90% of cardiologists surveyed are accepting Medicaid while only 15% of the dermatologists surveyed are doing so.

The rate at which physicians accept Medicaid can vary for a number of reasons. In some cases, reimbursement rates provided by Medicaid to particular specialists may be below their cost of providing services. If not actually below costs, Medicaid reimbursement often is relatively low compared to that offered by other payers, and therefore busy physicians may have no economic incentive to see Medicaid patients. In other cases, the process of billing for and receiving Medicaid payment can be problematic and some physicians choose to avoid it.

2009 Average Medicaid Acceptance

City	Rate for Five Specialties (%)
Minneapolis	82.4
Portland	81.4
Boston	68.2
San Diego	61.8
Seattle	58.2
Denver	57.4
Atlanta	55.0
Detroit	53.4
Houston	47.8
Miami	47.6
Washington, D.C.	47.6
Philadelphia	46.0
New York	45.8
Los Angeles	40.2
Dallas	38.6
Total Cumulative Average	55.4

2004 Average Medicaid Acceptance

City	Rate for Four Specialties (%)
Portland	100.0
Minneapolis	86.0
Atlanta	76.3
Washington, D.C.	74.7
Houston	53.8
Philadelphia	48.1
San Diego	46.8
Miami	43.5
Seattle	42.2
Boston	41.3
Detroit	37.3
Dallas	35.0
Los Angeles	29.0
Denver	25.0
New York	3.8
Total Cumulative Average	49.9

In general it can be observed that Medicaid is not widely accepted in most markets surveyed. The overall rate of Medicaid acceptance in all 15 markets in 2013 was 45.7%, lower than in 2009, when it was 55.4%, and lower than 2004 when it was 49.9%. Several markets in 2009 and 2004 had Medicaid acceptance rates higher than Boston's in 2013 (including Portland, which had a 100% Medicaid acceptance rate in 2004) and no market in previous years had a lower rate of Medicaid acceptance than Dallas in 2013 (23%).

Though a form of healthcare coverage, the survey suggests Medicaid does not guarantee access to physicians in many cases. Though millions of currently uninsured patients are expected to qualify for Medicaid through the ACA, it remains to be seen if they will have ready access to physicians, even though the ACA temporarily increases Medicaid reimbursement rates to Medicare levels for some physicians.

Medicare Rates of Acceptance

Average Medicare acceptance rates in the 15 metropolitan markets for the five medical specialties surveyed are indicated in the chart in the next column:

The 2014 survey marks the first time Merritt Hawkins has asked physicians about their rate of Medicare acceptance. As the numbers to the right indicate, the rate of Medicare acceptance among physicians in the 15 markets surveyed generally is considerably higher than the

rate of Medicaid acceptance, as is the cumulative average acceptance rate for all markets (45.7% Medicaid versus 76.0% Medicare). As referenced above, Medicare typically pays higher rates than Medicaid, which is one reason it is more widely accepted by physicians. In addition, many physicians are reluctant to drop long-standing patients when they reach 65 and qualify for Medicare.

However, some physicians find that Medicare rates are too low to sustain a viable practice, and limit the number of Medicare patients they see for that reason.

Average Medicare Acceptance

City	Rate for Five Specialties (%)
Boston	98.0
Detroit	95.8
Washington, D.C.	86.4
Los Angeles	86.3
Philadelphia	86.2
Portland	86.0
Seattle	85.7
Atlanta	82.0
Denver	74.4
Dallas	74.0
Houston	73.6
San Diego	70.2
Miami	68.7
New York	49.0
Minneapolis	38.2
Total Cumulative Average	76.0

Conclusion

Merritt Hawkins' 2014 Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates offers a snapshot of physician availability in 15 large metropolitan markets, many of them with physician-to-population ratios higher than the national average.

Despite having a high number of physicians per capita, many of these markets are experiencing physician appointment wait times of 14 days or longer. The survey was conducted during a period of historic change in the healthcare delivery system in which health reform is anticipated to greatly increase the number of people with access to health insurance.

However, as the example of Boston illustrates, access to health insurance does not always guarantee access to a physician. In addition, the survey demonstrates that many if not most physicians in the 15 markets examined are not accepting Medicaid as a form of payment.

As millions of the previously uninsured obtain healthcare coverage through the ACA, ways will need to be found to ensure access to physicians, through increases in the number of medical

residency positions available nationwide, through the use of innovative staffing models that redistribute some of the work previously handled by physicians to other clinicians, through equitable payments to physicians, through the use of online and mobile technology, and through other methods (for a more thorough examination of methods to extend the physician workforce, see the AMN Healthcare book *A Guide to Healthcare Staffing*).

Merritt Hawkins will continue to conduct its Survey of Physician Appointment Wait Times and Medicaid and Medicare Acceptance Rates to determine how health reform and related trends are affecting access to physician services.

For additional information about this or other surveys conducted by Merritt Hawkins and AMN Healthcare, contact:



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- Emerging Trends in the Delivery and Financing of Healthcare
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- Recruitment Process Outsourcing
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Our speakers have a combined six decades of staffing experience. Each speaker offers a unique perspective to educate your audience and provide new insights into the trends and future of healthcare staffing.



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