

Will COVID-19 Weaken the Dental Care Safety Net?

September 1, 2020

HPI Health Policy Institute

ADA American Dental Association®



Moderator

Marko Vujicic

Chief Economist & VP
ADA Health Policy Institute



Presenter

Chelsea Fosse

Senior Health Policy Analyst
ADA Health Policy Institute



Panelists

Monica Hebl

Burleigh Dental



Darwin Hayes

State Dental Director,
New Jersey



Nicole Weddell

Weddell Pediatric Dentistry

Today



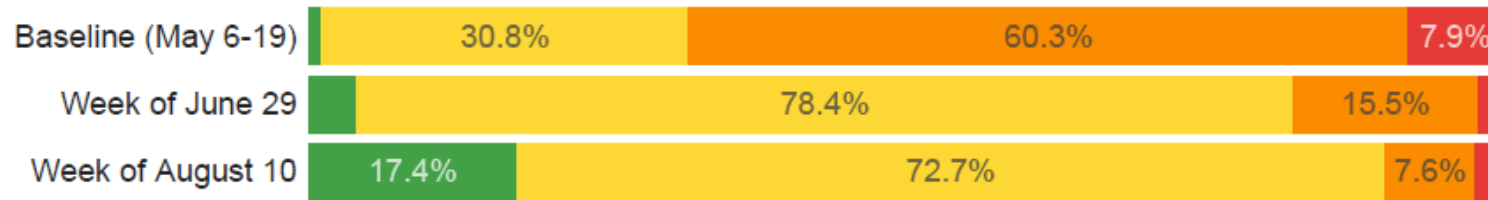
1. *Update on the latest data from HPI's COVID-19 tracking poll, comparing private practice to public health settings.*
2. *New data focusing on the safety net: scheduling hospital OR cases, Medicaid participation rates pre-COVID-19, and potential disenrollment from Medicaid due to COVID-19.*
3. *Panelist discussion.*

HPI COVID-19 Tracking Poll

- Bi-weekly poll of private practice dentists beginning March 23rd. Monthly poll of dentists in public health beginning May 6th.
- Data presented today are through August 10th.
- Core measures: Status of your practice, volume of patients and collections, PPE supply, status of practice staff.
- “Question(s) of the Week”.
- Nationally representative sample of about 4,000 dentists. State level data is available for many states.
- Links to reports and interactive data dashboard available at www.ada.org/hpi.

Core Questions: Practice Status

What is the current status of your clinic/health center's dental program?



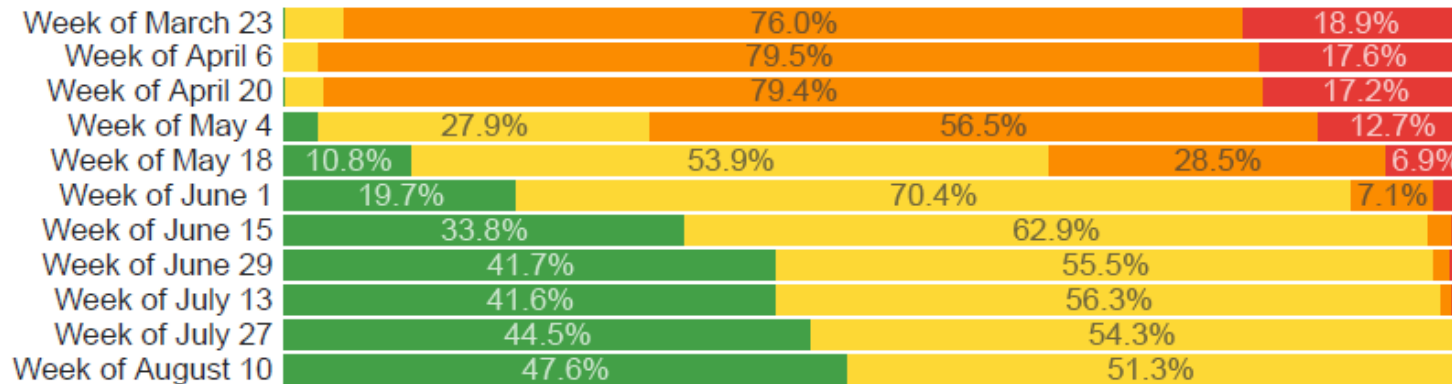
- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

Dentists in public health settings

Insight: As of the week of August 10th 98% of dental practices in the U.S. were open.

More private practices report "business as usual" compared to public health settings.

What is the current status of your dental practice?

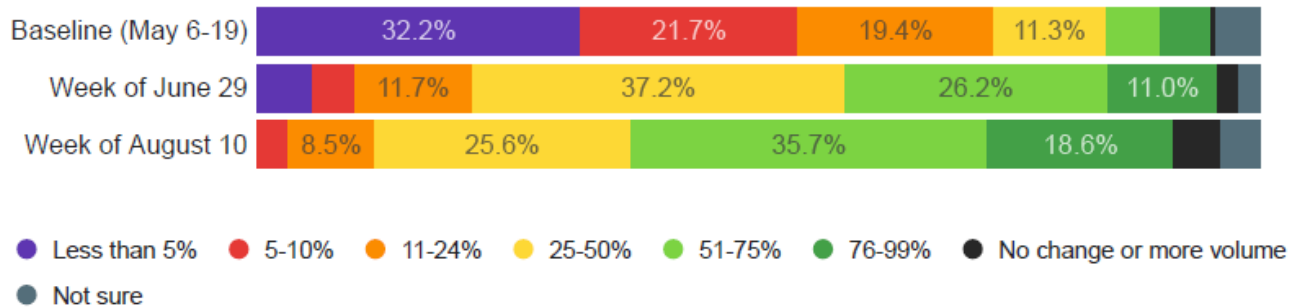


Dentists in private practice

Core Questions: Patient Volume

How does this week compare to what is typical in your clinic/health center's dental program, in terms of... *

Total patient volume?

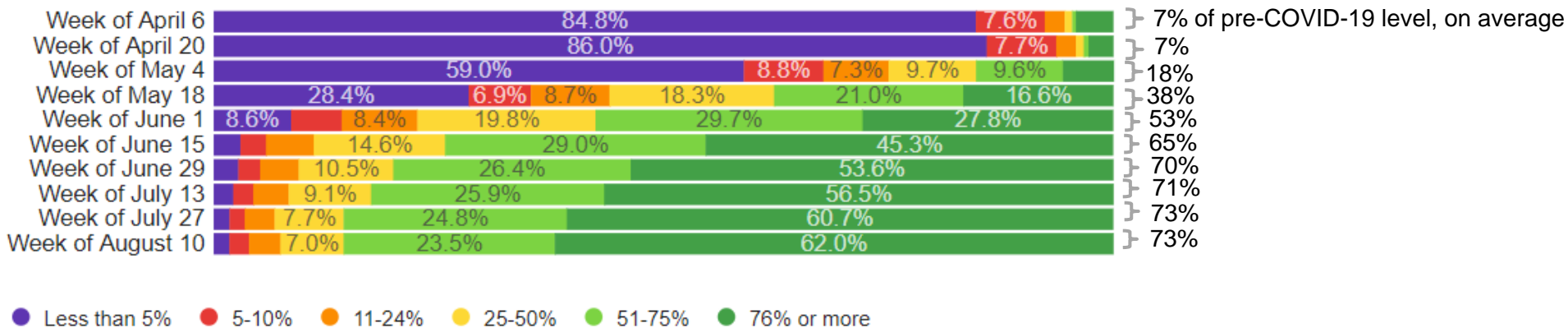


Dentists in public health settings

Insight: Patient volume in private practices is estimated at 73% of pre-COVID-19 levels for the week of August 10th, largely unchanged from a month ago.

How does this week compare to what is typical in your practice, in terms of... *

Total Patient Volume

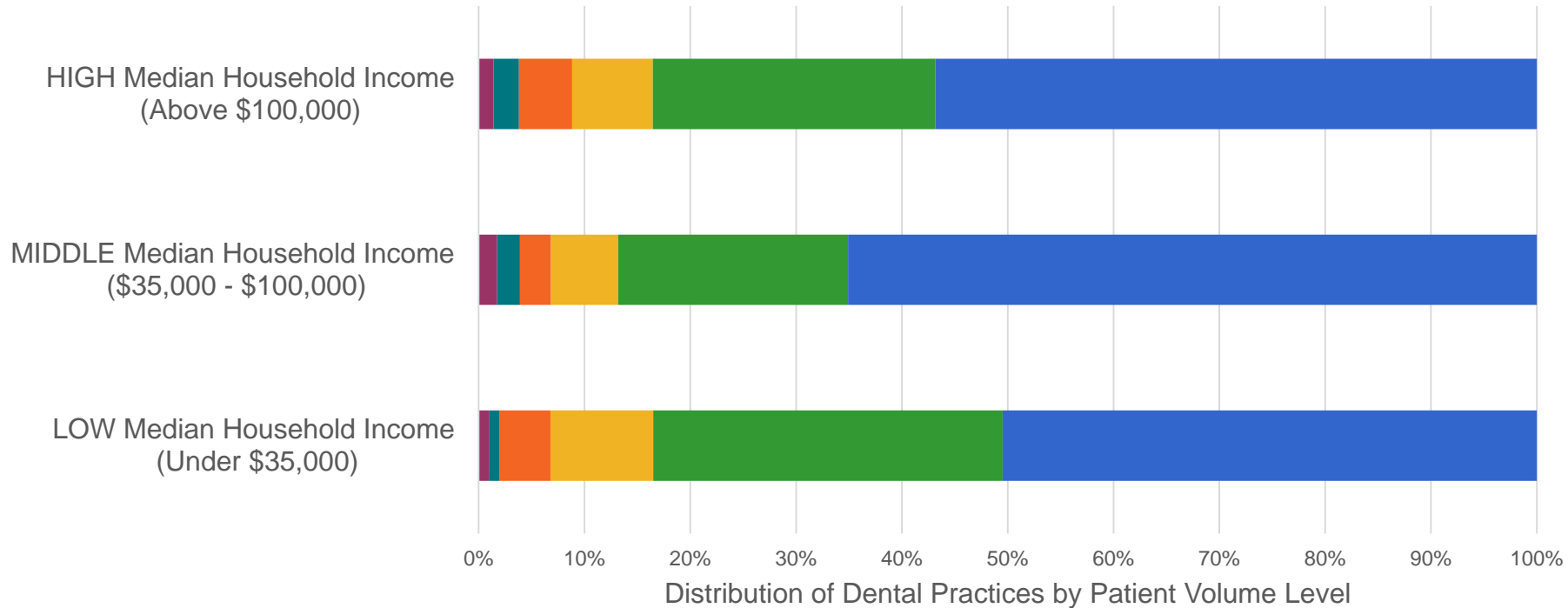


Dentists in private practice

Private practices saw a larger decline in patient volume during the shutdown period. Recovery of patient volume in public health settings is occurring more slowly.

Patient Volume: Low, Middle, and High Income Areas

Patient Volume by Median Household Income of the Dental Practice's Zip Code

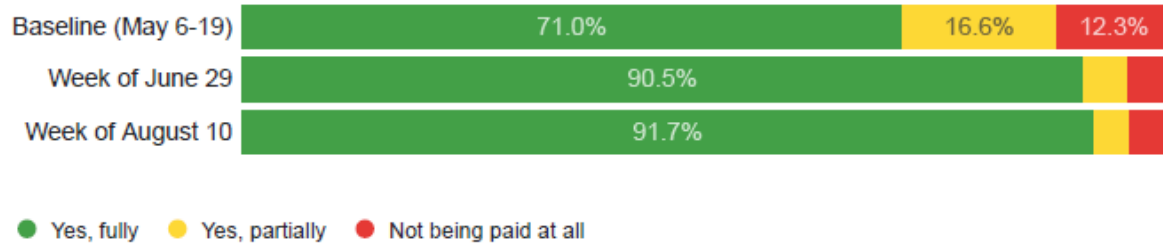


Insight: Patient volume is lower in practices located in lower income areas, but not by much.

- Less than 5% of what is typical
- 5-10% of what is typical
- 11-24% of what is typical
- 25-50% of what is typical
- 51-75% of what is typical
- 76% or more of what is typical

Core Questions: Provider Salary/Payment

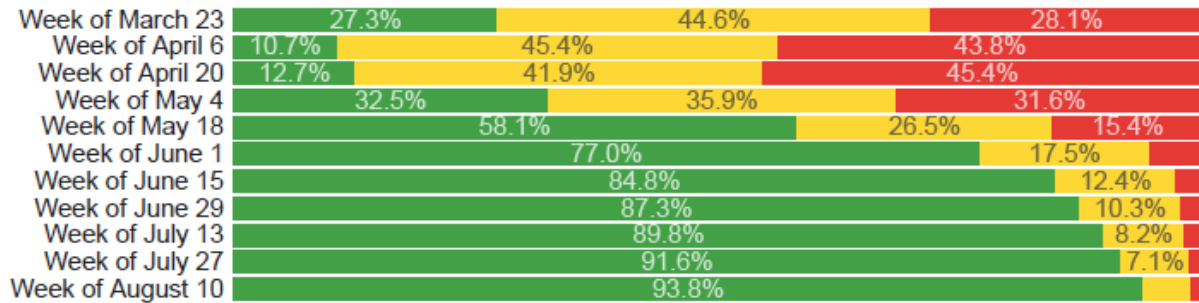
Is your clinic/health center's dental program paying you your salary this week?



Dentists in public health settings

Insight: Staffing in dental practices and health centers continues to slowly grow and is at 94% of pre-COVID-19 levels in private practices the week of August 10th.

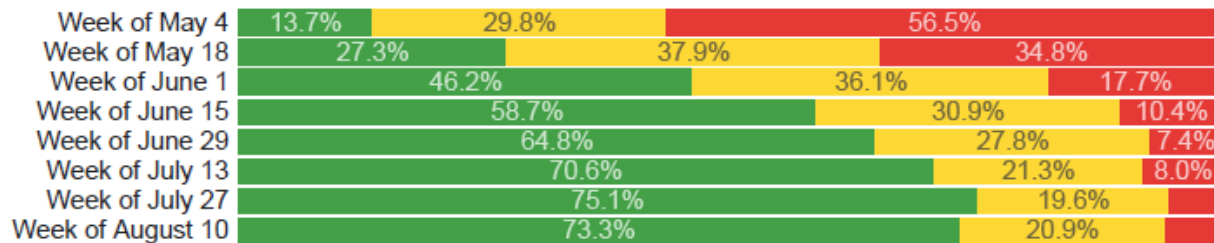
Is your dental practice paying staff this week?



Dentists in private practice – all

Employee dentists have seen the biggest lingering employment effect. About three quarters of employee dentists are now being paid fully.

[If non-owner dentist] Are YOU being paid this week?



Dentists in private practice – non-owner

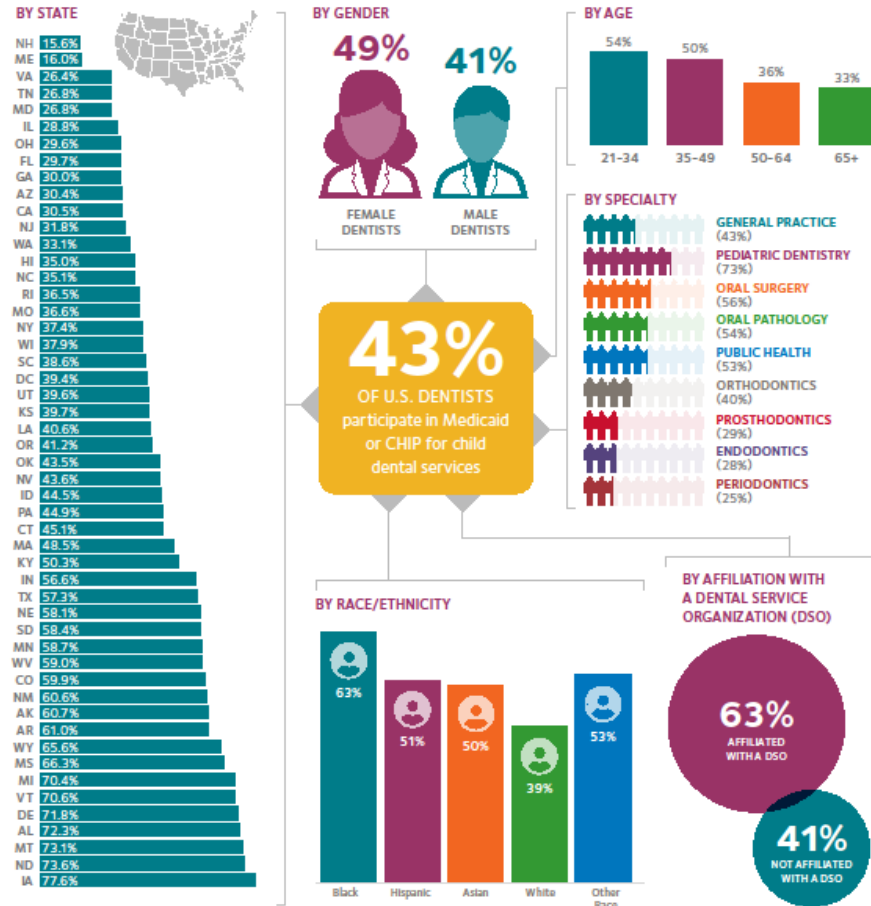
Dentist Participation in Medicaid or CHIP



Dentist Participation in Medicaid or CHIP

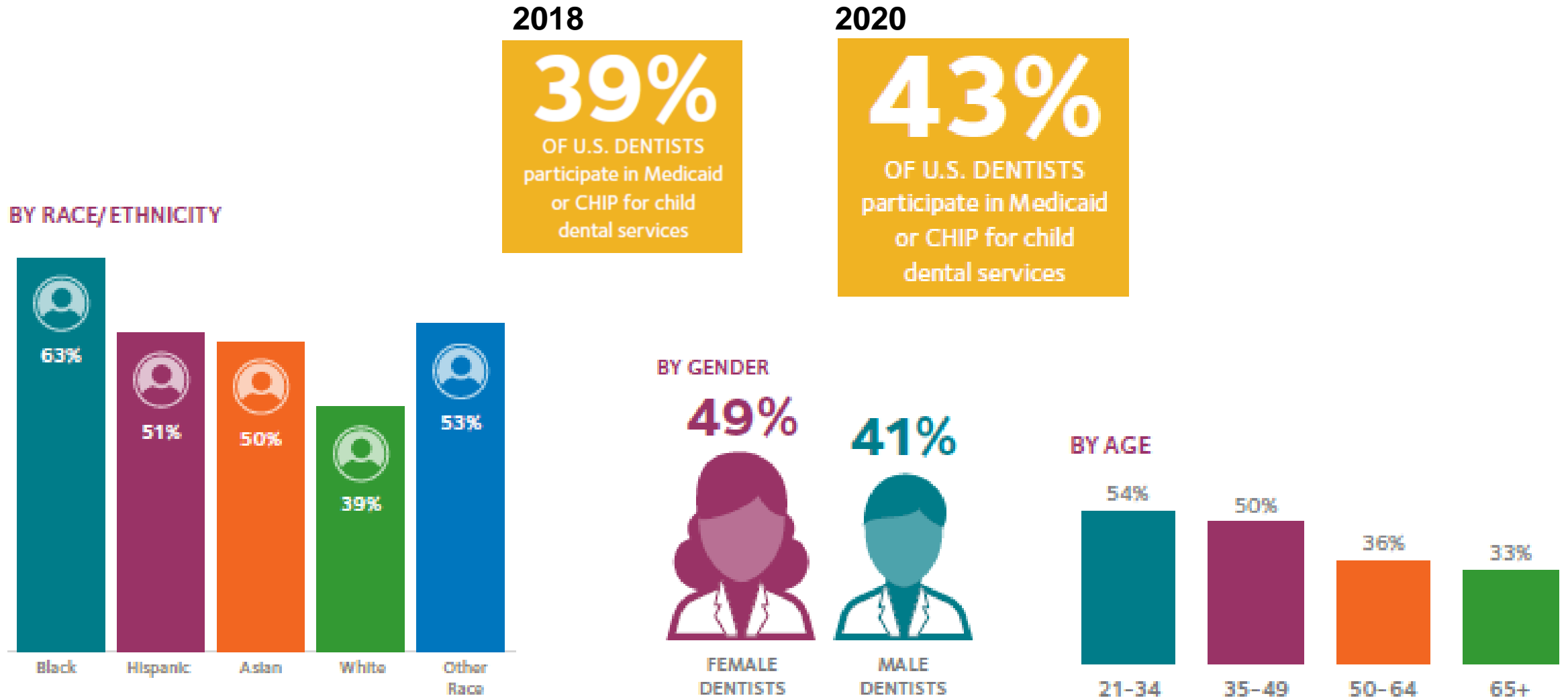
AUGUST 2020

ADA.org/HPI



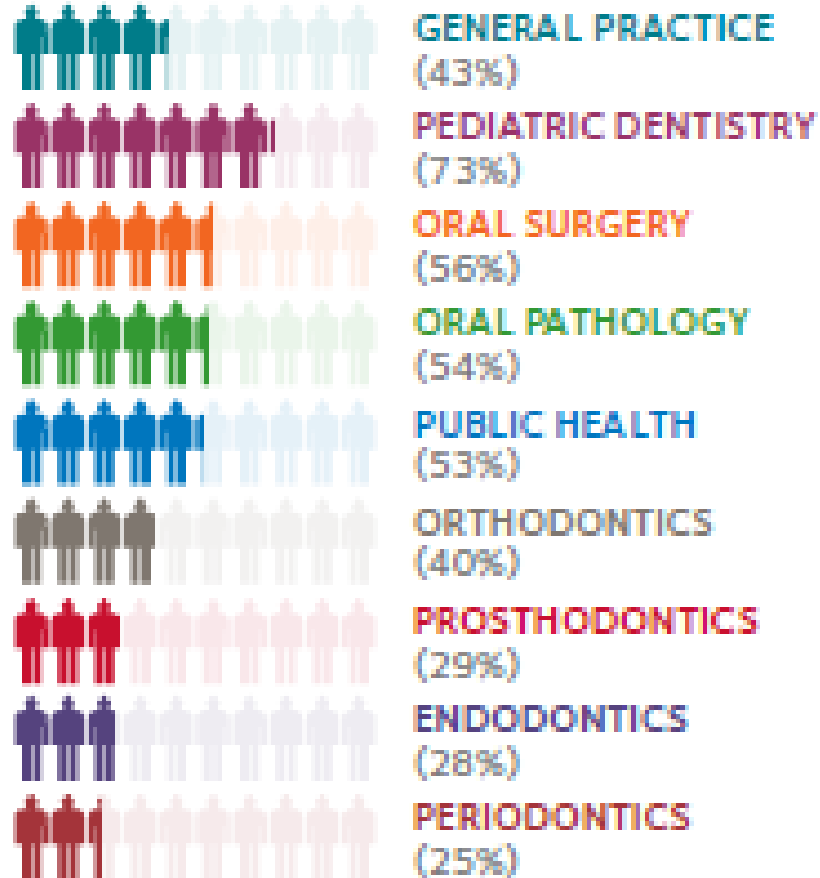
Sources: Analysis of the HPI's Office Database maintained by the American Dental Association (2019) and Insure Kids Now data (2019). Note: CHIP is Children's Health Insurance Program. For full methodology, please contact: hpi@ada.org.

Dentist Participation in Medicaid or CHIP

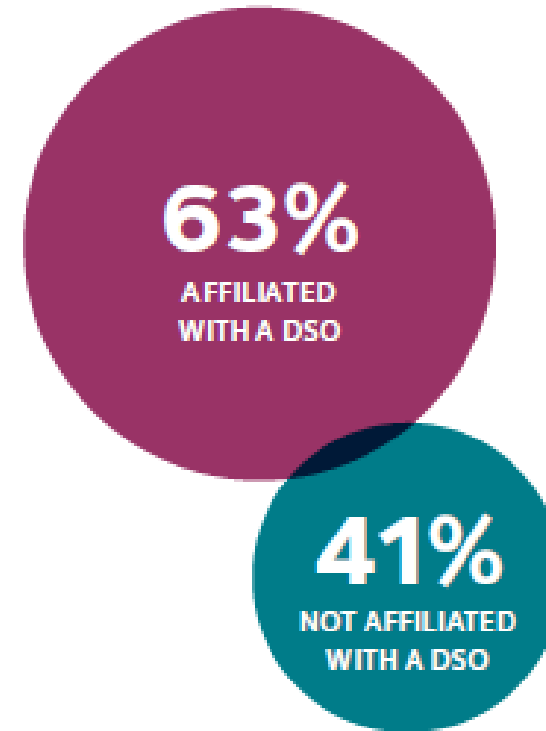


Dentist Participation in Medicaid or CHIP

BY SPECIALTY



BY AFFILIATION WITH A DENTAL SERVICE ORGANIZATION (DSO)



Dentist Participation in Medicaid or CHIP

BY STATE



NH	15.6%
ME	16.0%
VA	26.4%
TN	26.8%
MD	26.8%
IL	28.8%
OH	29.6%
FL	29.7%
GA	30.0%
AZ	30.4%
CA	30.5%
NJ	31.8%
WA	33.1%
HI	35.0%
NC	35.1%
RI	36.5%
MO	36.6%

NY	37.4%
WI	37.9%
SC	38.6%
DC	39.4%
UT	39.6%
KS	39.7%
LA	40.6%
OR	41.2%
OK	43.5%
NV	43.6%
ID	44.5%
PA	44.9%
CT	45.1%
MA	48.5%
KY	50.3%
IN	56.6%
TX	57.3%

NE	58.1%
SD	58.4%
MN	58.7%
WV	59.0%
CO	59.9%
NM	60.6%
AK	60.7%
AR	61.0%
WY	65.6%
MS	66.3%
MI	70.4%
VT	70.6%
DE	71.8%
AL	72.3%
MT	73.1%
ND	73.6%
IA	77.6%

Dentist Disenrollment from Medicaid

Has your practice disenrolled from Medicaid since the onset of the COVID-19 pandemic?

All respondents

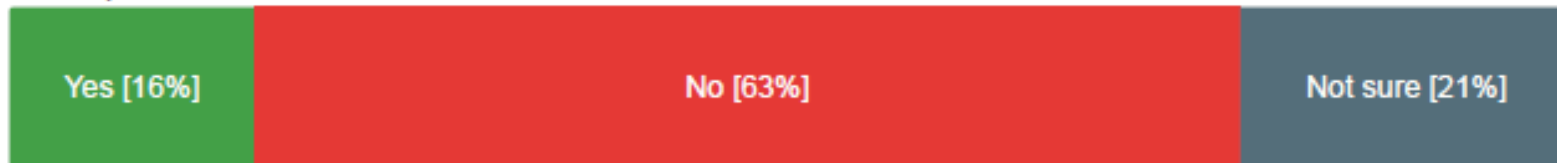


● Yes [6%] ● No [94%]



Is your practice considering disenrolling from Medicaid in 2020?

All Respondents

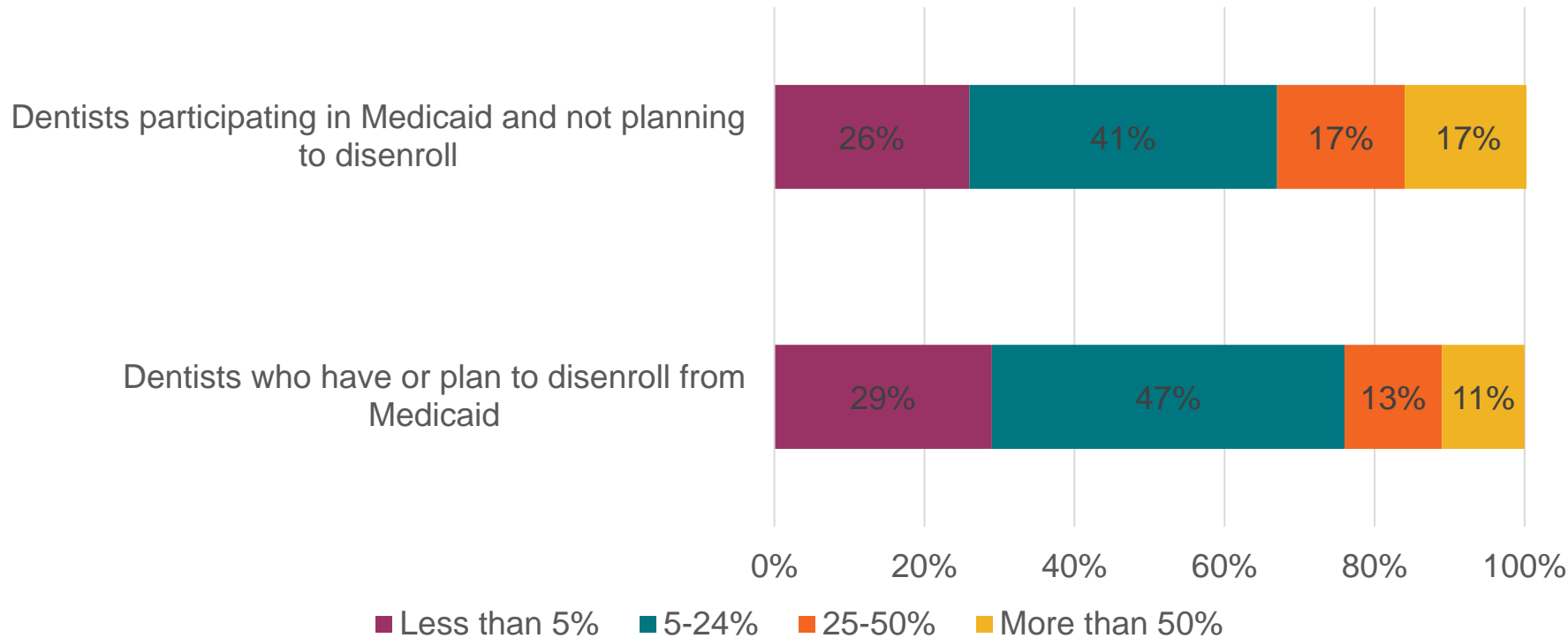


● Yes [16%] ● No [63%] ● Not sure [21%]

Insight: COVID-19 has caused 6% of Medicaid providers to disenroll from Medicaid. Another 16% are considering disenrolling by the end of the year.

Impact of Dentist Disenrollment

Estimated Share of Patients with Medicaid Coverage

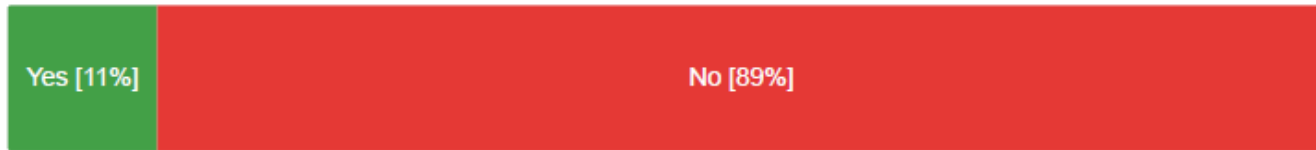


Insight: For the majority of Medicaid participating dentists in our panel, less than a quarter of their patient base are Medicaid enrollees.

Dentists who have or plan to disenroll from Medicaid did not have a greater share of patients covered by Medicaid in their practices compared to those who remain enrolled.

Operating Room Cases

Do you schedule cases for dental treatment under general anesthesia in a hospital and/or surgery center?



Dentists in public health settings

● Yes [11%] ● No [89%]



Dentists in private practice

● Yes [7%] ● No [93%]

By Practice Size



By Medicaid Enrollment



Insight: Large group practices and Medicaid providers are more likely to treat patients who require care in hospitals or surgery center settings.

Operating Room Cases

[If schedules cases] Prior to the onset of the COVID-19 pandemic, what was the approximate wait time for these cases to be scheduled in the hospital/surgery center?

15 Responses

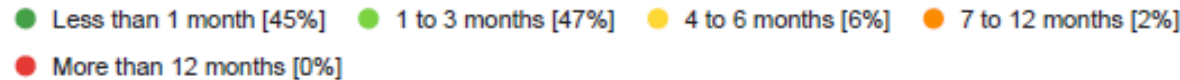


Dentists in public health settings

Insight: Medicaid providers generally have longer wait times for cases.



Dentists in private practice



By Medicaid Enrollment



Operating Room Cases

[If schedules cases] What is the current status of scheduling these cases in the hospital/surgery center, compared to before the COVID-19 pandemic?

15 Responses



Dentists in public health settings



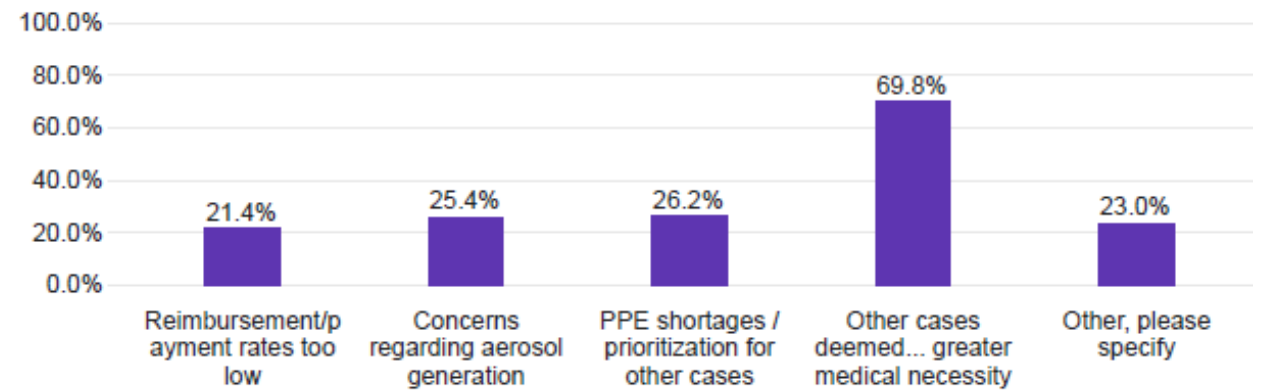
Dentists in private practice

- Cases are being scheduled the same as before
- Cases are scheduled on a more limited basis
- Cases are not being scheduled at all

Insight: The pandemic has led to more limited scheduling of cases for dentists in hospitals and surgery centers, largely due to other non-dental cases being deemed of greater medical necessity.

What reasons did the hospital/surgery center provide for the limited or denied procedure time? (Select all that apply.)

All Respondents



Insights from Consumer Polling

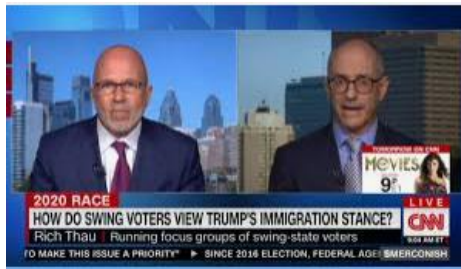


AMERICA STANDS AT AN INFLECTION POINT.

Consumers are now more concerned about the economy than the health crisis. What does that mean as our society attempts to go back to normal? We just completed the fourth wave of a twice-monthly tracking study that listens to the voice of the consumer.

Through surveys, in-depth interviews, social media analyses, and online dial tests, we address a variety of timely questions:

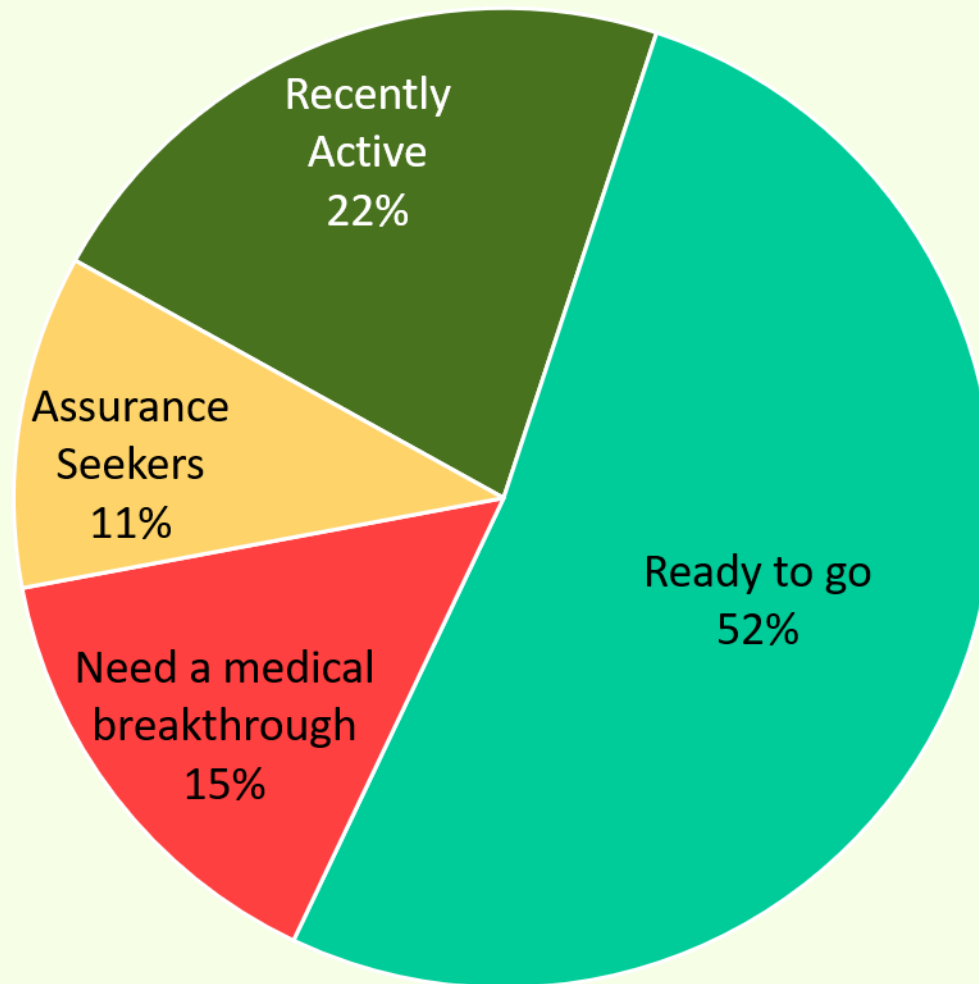
- **What's it going to take to bring consumers back?**
- **Where is the greatest pent-up demand?**
- **What will the new normal look like?**
- **How do employers and employees navigate a workplace return?**



We partnered with Engagious, a leading consumer research firm, to explore consumer sentiment toward visiting the dentist during the pandemic.

READY OR NOT: VISIT A DENTIST'S OFFICE

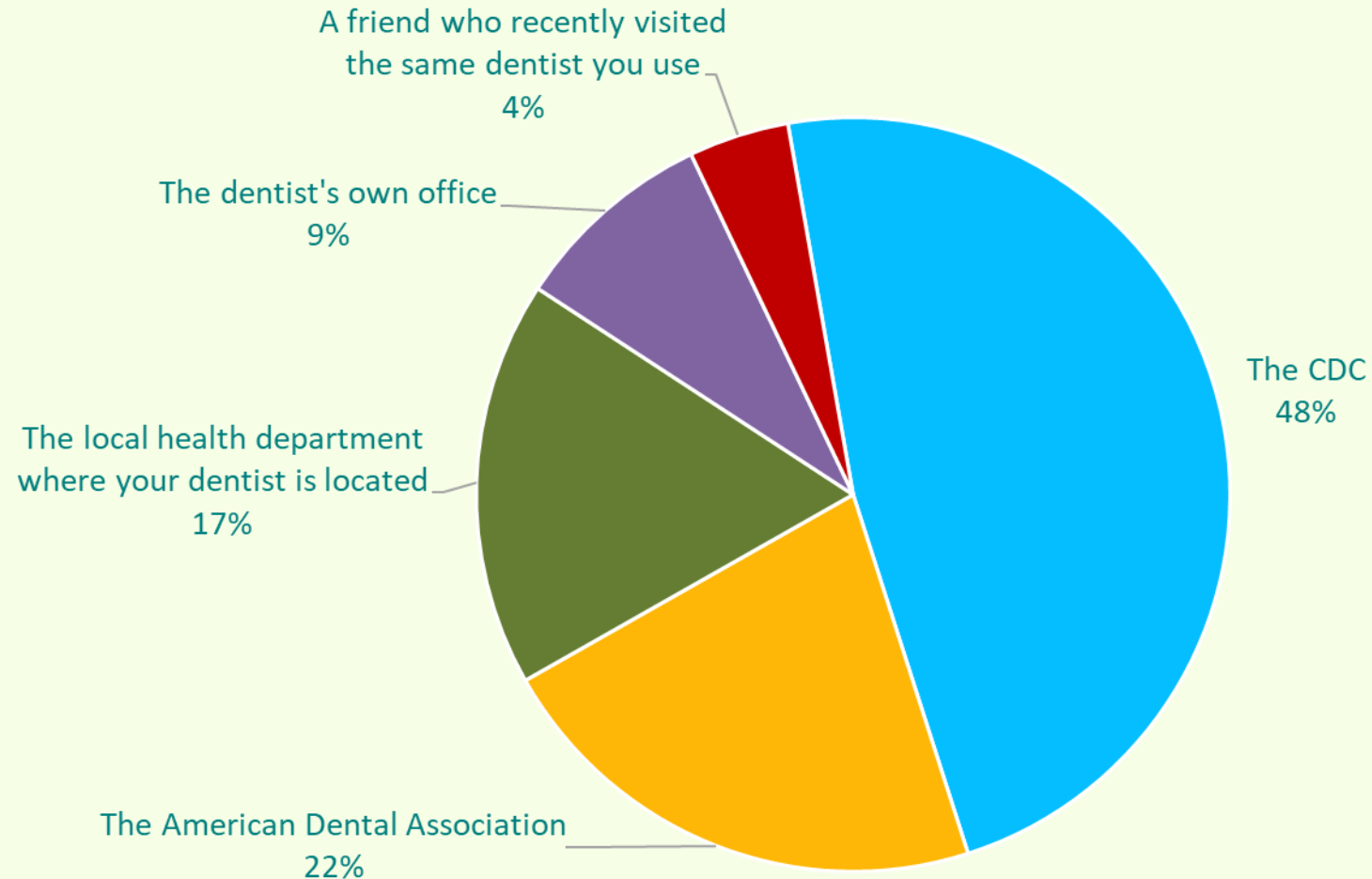
Which of the following conditions is closest to your current point of view... Visit a dentist's office



- Recently Active
- Ready to go
- I would not be comfortable resuming this activity unless there was an approved COVID-19 vaccine and/or a proven medical protocol to mitigate and remedy the effects of the virus.
- I would be willing to resume this activity, as long as a combination of local or national medical authorities, local or national government officials, and/or the location I am visiting provided assurances it is safe to do so.

CDC AND ADA MOST TRUSTED BY ASSURANCE-SEEKERS TO ACCEPT DENTAL VISITS ARE SAFE

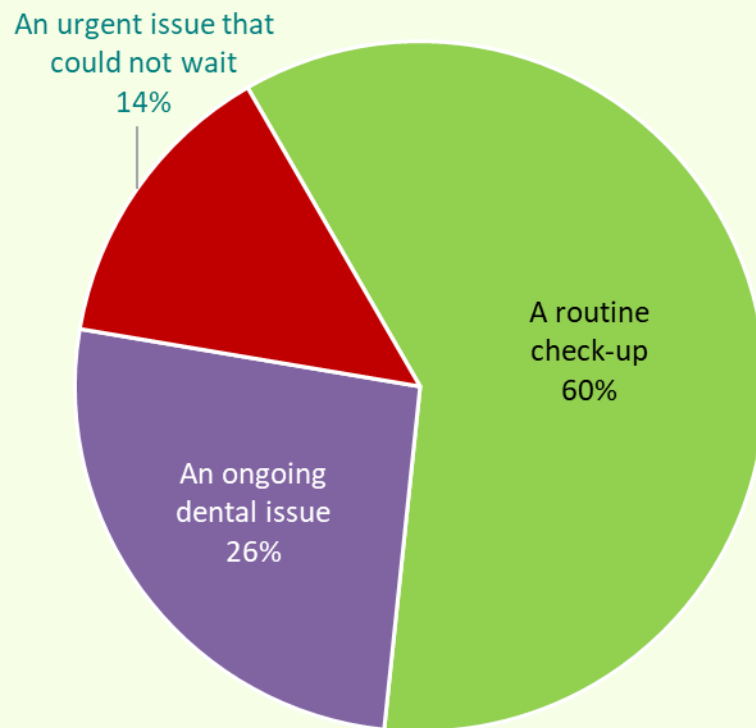
Which of the following entities would you trust the most if that entity declared it is safe to visit the dentist?



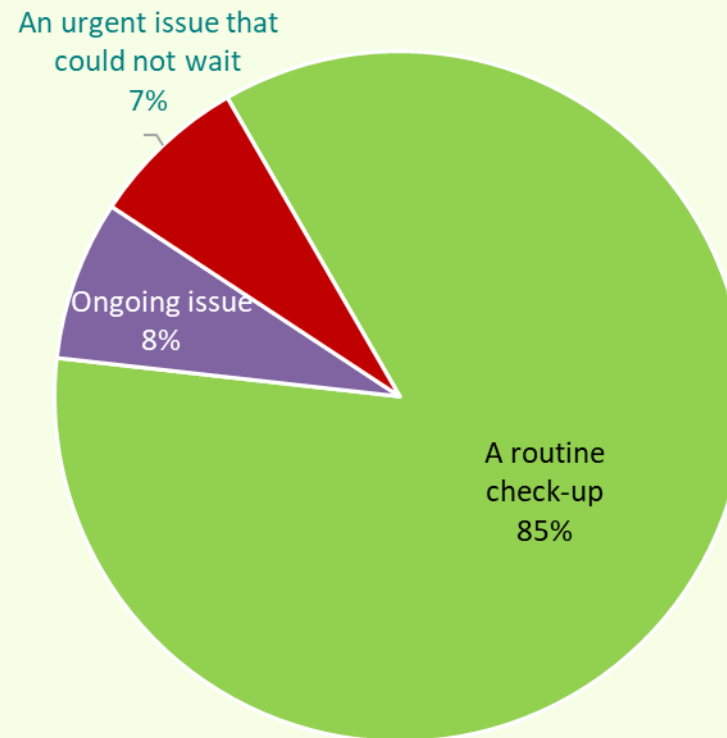
STILL WORKING THROUGH PENT-UP NEEDS

When you last visited the dentist, was it for...

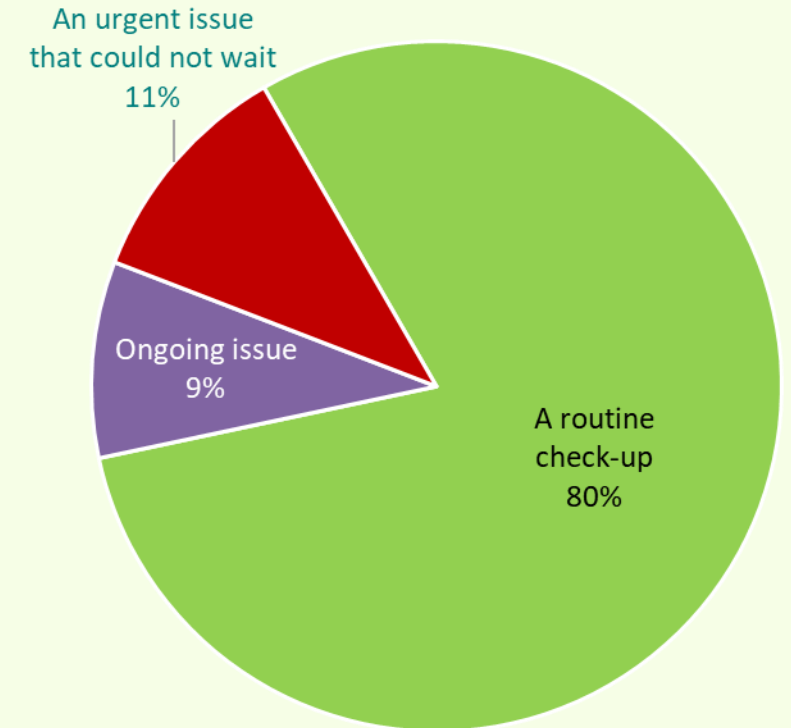
Within the past month



One to six months ago



Six to 12 months ago



Key Take-Aways from August 10th Data

- As of the week of August 10th, 98% of dental offices in the U.S. were open and patient volume was estimated at 73% of pre-COVID-19 levels. Staffing was at 94% of pre-COVID-19 levels. These values were roughly unchanged since our last wave of data collection and suggest we are reaching a “steady state” of economic activity in dental offices.
- The pandemic could potentially lead to reductions in dental safety net capacity. About 6% of Medicaid providers (in private practices) have disenrolled since the start of the pandemic and an additional 16% are considering disenrollment the end of the year.
- COVID-19 has led to more limited hospital/surgery center availability for dental cases, due mainly to the “surge” the pandemic has brought to hospitals.
- Consumer polling indicates that about three out of four people who visited the dentist last year are comfortable visiting the dentist right now. Another 11% would be willing to go if they had some assurances that it is safe and the remaining 15% are waiting for a vaccine or proven treatment for COVID-19. Accordingly, patient volume in dental offices likely has an upper bound of around 85% of pre-COVID-19 levels for now.

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Weddell Pediatric Dentistry

Thank You!



@ADAHPI

ADA.org/HPI

ADA.org/HPIConsulting

hpi@ada.org



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Provider Relief Fund

Provider Relief Fund application deadline extended to September 13: The deadline to apply for the Provider Relief Fund has now been extended to September 13th. In addition, information on the reporting requirements has now been delayed, but per HHS, this information will be released well in advance of the reporting system being available on October 1. HHS recently released a [simplified application](#) for provider relief funding. Instructions can be found [here](#).

HPI State Level Dashboard: www.ada.org/hpi

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**COVID-19's
 Impact on the
 Dental Care Sector**



State
 (All) ▼

Dentist Age Group
 (All) ▼

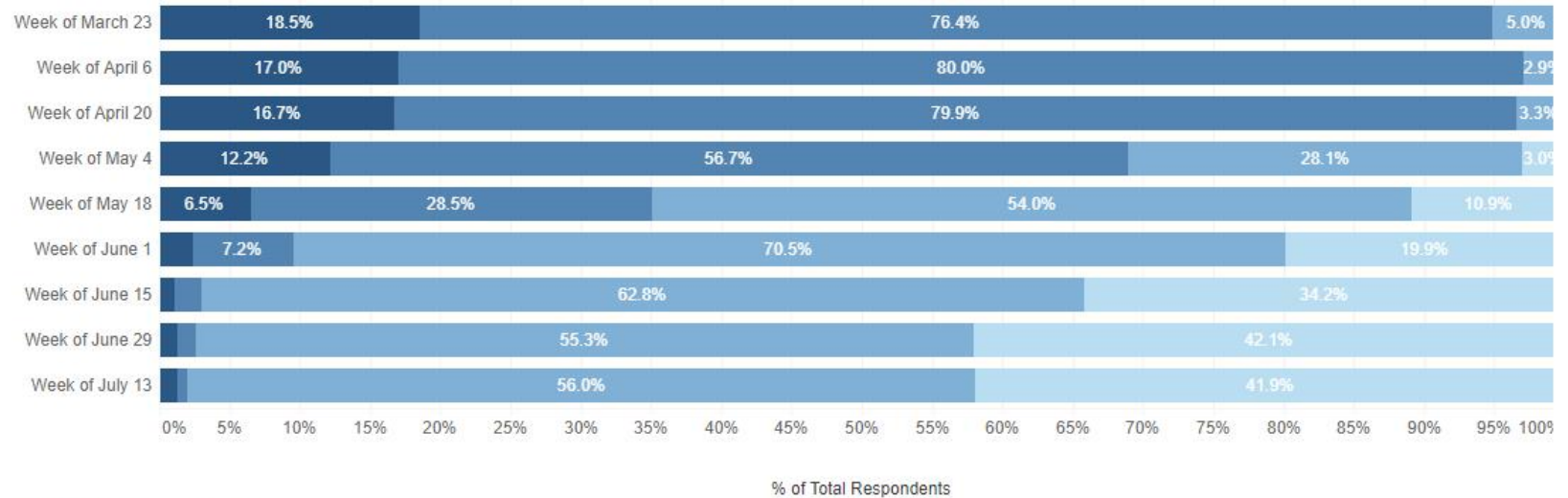
Specialty
 (All) ▼

DSO Status
 (All) ▼

Ownership Status
 (All) ▼

Number of Dentists in Practice
 (All) ▼

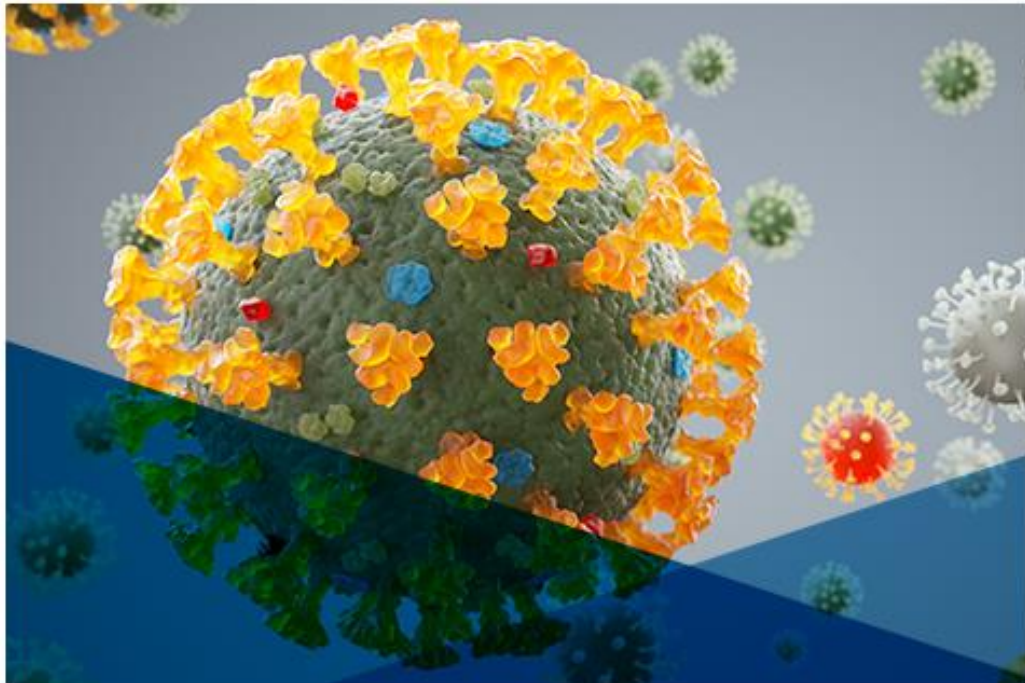
What is the current status of your dental practice?



- Open and business as usual
- Open but lower patient volume than usual
- Closed but seeing emergency patients only
- Closed and not seeing any patients

ADA Resources: www.ada.org/virus

[COVID-19 Center](#) | [SBA Loans](#) | [Digital Events](#) | [FAQ](#) | [Practice Resources](#) | [Safety & Clinical](#) | [Mental Health](#) | [Exclusive Offers](#) | [Patient Resources](#)



ADA Coronavirus (COVID-19) Center for Dentists

The COVID-19 outbreak and its impact on our daily lives is rapidly evolving. Here are some resources and guidance to help dentists navigate this unprecedented time for their practices, staff and patients.

Questions? [Contact ADA ▶](#)

You can also click the 'Live Chat' box on the right side of the screen between 7 a.m. and 6 p.m. (Central) Monday-Friday.

Navigating this crisis takes expert guidance, collective action and you. We're stronger together. [Join our dental community.](#)