

The Evolution of Provider Needs Assessments (PNAs)

Why are PNAs becoming more complex?

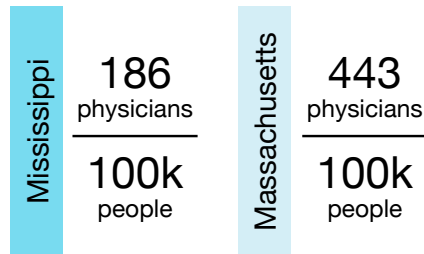
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Population Change



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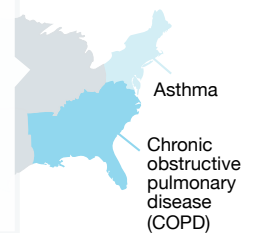
Physician Supply & Demand



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Regional Chronic Health Issues

Cases of COPD are significantly higher in the Southeast and Appalachian states, while New England leads the nation in reported cases of asthma



Key Factors in Physician Supply & Demand



Shifting Demographics

Over the next decade, the number of Americans under the age of 18 is projected to grow by just 3%, while the number of people over 65 will grow by about 50%.



Geography

Vast, sparsely populated areas like Montana face unique challenges. To meet the statewide demand for medical specialists, many community hospitals are now part of telemedicine networks that allow specialists in Los Angeles or Boston to see patients remotely.

Advanced Practice Providers (APPs)

APPs have boosted the provider supply pool. However, availability by service line varies, and APPs may be unable to provide the full range of services physicians can.



Patient Panel Size

Under value-based care, a primary care physician may have a smaller patient panel than in traditional fee-for-service models. Physician quality scores may also influence demand.



Conclusion

While PNAs still play an important role in provider resource and strategic planning, they also are playing an expanding and dynamic role in both fair market value assessments and commercial reasonableness opinions. Be prepared to provide your current PNA, or an applicable portion thereof, as part of information requested for these reviews. For more information on PNAs, contact Tynan Kugler at PYA, (800) 270-9629.