CareQuest Institute for Oral Health™

RESEARCH REPORT

A Difficult Path to COVID-19 Recovery

Challenges remain for dental providers

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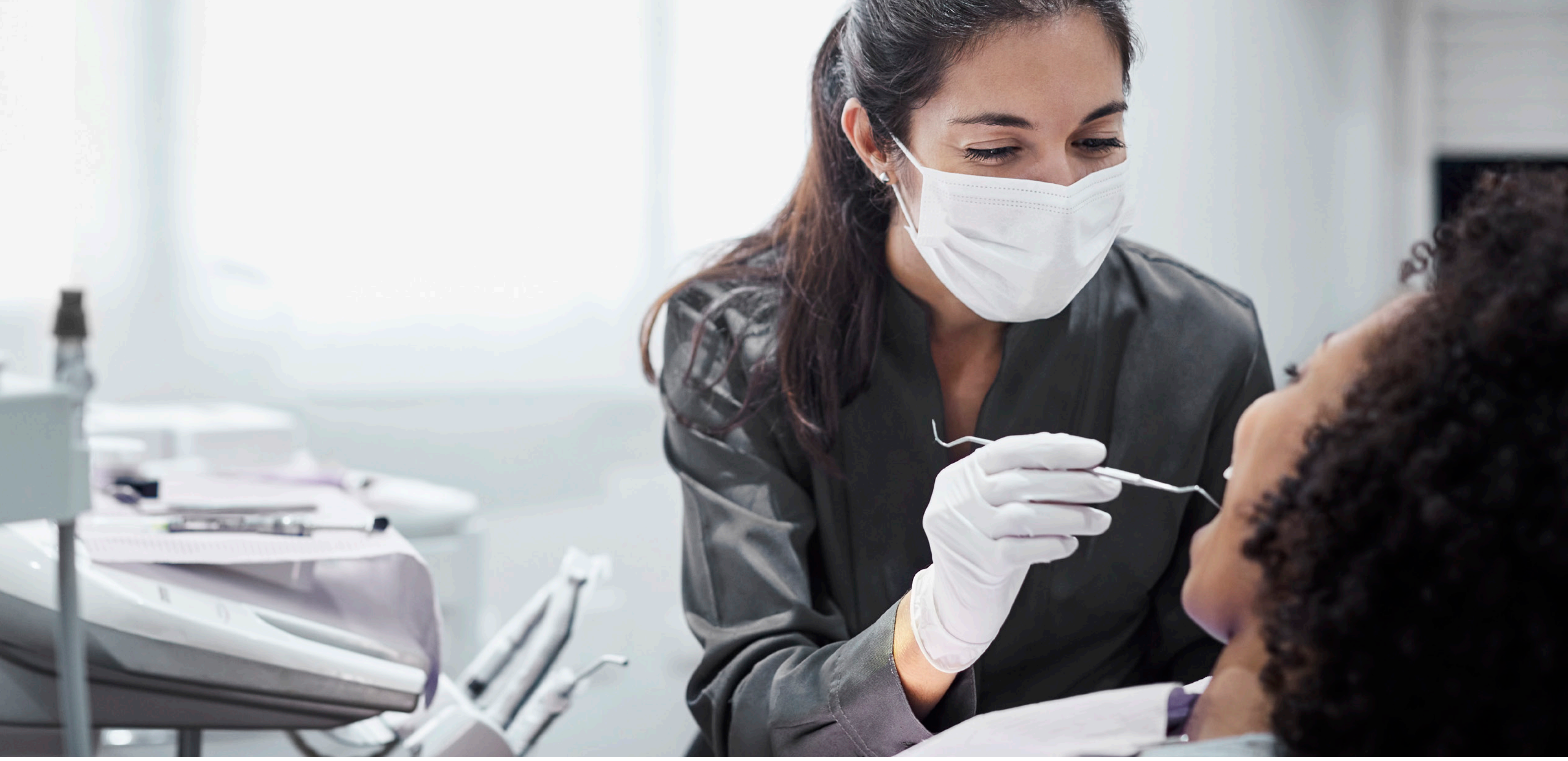


The vast majority of dental providers have reopened for business, resuming patient care with new protocols to enhance the safety of patients and the dental team. However, a new survey shows the COVID-19 pandemic remains a source of stress and uncertainty for providers, with potential long-term implications for the financial foundation for dentistry.

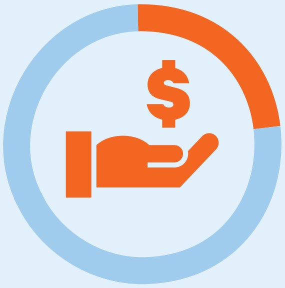
Results from a recent survey conducted by the DentaQuest Partnership for Oral Health Advancement in August 2020 show that the overwhelming majority of dental providers have reopened their offices/clinics and are providing care:

- 94% of providers are open for most services, including routine care.
- 4% of providers are open only for urgent or emergency oral health needs.
- The remaining 2% are closed and not seeing any patients through in-person or telehealth modes.

The DQP survey was completed by 2,767 dental providers in more than 20 states. Although DQP conducted a similar study in June, many dental offices were closed then. For this reason, the new survey offers dental providers' perspectives after resuming operations.

Even for dental offices that have reopened, the pandemic continues to pose financial and logistical challenges:

- 3 in 4 (76%) say the maximum number of patients they can see each day is reduced due to changes in treatment protocols, with 1 in 4 (25%) of those saying that they can see less than 50% of the normal patient volumes.



Only

35%

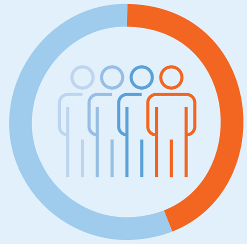
of dental providers say their practices or clinics **are experiencing normal or near normal levels of revenue**

- Only 18% say their daily patient volumes are more than 80% of their usual pre-pandemic total.
- Only 35% say their practices or clinics are experiencing normal or near normal levels of revenue.
  - There is significant geographic variability in the level of disruption, with providers in urban settings generally seeing more severe disruptions than providers in rural settings. States in the south and southeast are under more strain currently than those in the Midwest and Northeast.
- Only half of providers (52%) are confident that they can get the personal protective equipment (PPE) needed to keep staff and patients safe.

Ongoing Financial Disruption

Beyond the tasks involved in implementing and maintaining new infection control protocols, dental providers cite other factors that create challenges as they seek to provide care:

- **New patients:** Nearly half of dental providers (44%) reported seeing fewer new patients in a typical week than they did pre-COVID-19.
- **Lack of commercial insurance:** More than half (52%) of dental providers with knowledge of the insurance status of their patients say they have observed an increase in patients who have lost their commercial dental insurance because of a loss of employment associated with COVID-19.
- **Medicaid cuts:** Dental providers who see adult Medicaid patients may suffer revenue losses as states seek to close budget shortfalls. Colorado and Tennessee recently cut Medicaid dental benefits for some or all adults, and other states are likely to consider cuts in adult dental benefits or reimbursements.



44%

report seeing fewer new patients

52%

report seeing increase in patients who have lost their commercial dental insurance

Dentists rely on new patients who need dental treatment and returning patients with steady insurance coverage to maintain their practices. Long-term disruptions in these areas put significant pressure on the current fee-for-service reimbursement model that most dental practices rely on.

Once the pandemic has been brought under control, 62% of providers believe business will return to normal in less than one year. Some dental professionals are much less optimistic. While 15% are unsure when normal patient volumes will return, 5% say this will take more than two years, or think that pre-COVID-19 volumes may never return.

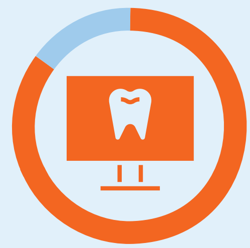
Dental providers expect the virus to create long-term changes in how dental care is provided and what care looks like. For example:

- Roughly half of providers (51%) expect enduring changes in infection control procedures.
- 47% expect to see long-term changes in the number of patients who can receive in-person care during an average day.
- 44% anticipate long-term changes in their dental team's concern about occupational hazards.
- One-third of dental providers (34%) anticipate an increased use of minimally invasive and/or limited aerosol-generating procedures.

Strategies To Weather The Storm

Providers increasingly recognize the need to consider new or better ways to adjust to the new normal of dentistry. Most significantly, this means offering safe and quality care in compliance with evolving infection control guidelines. In this uncertain climate, dental providers can also benefit from exploring other strategies for weathering the pandemic and the changes that are likely to endure well after it. DQP is working with diverse partners to inform dental providers of such strategies, including:

- The use of telehealth to minimize disruptions of care and/or to engage patients who may be hesitant to seek in-person care. In April 2020, a study by Advantage Dental and DentaQuest Partnership, researchers found that most (86%) of the patients were satisfied with their overall teledentistry experience, and nearly one-third (31%) reported they didn't need in-office care following their teledentistry visit.
- A greater focus on disease prevention and management, including more use of minimally invasive care. In June 2020, a webinar conducted by the DentaQuest Partnership, oral health experts explained how minimally invasive care could reduce aerosol risk and prevent and arrest caries lesions.
- Expanding revenues through using alternative payment models (APMs) or tapping into new patient populations. Studies have shown that APMs have the potential to reduce cost and increase dental utilization over a lifespan.



86%

of patients were **satisfied with their overall teledentistry experience**

Sustainability strategies should be aligned with the unique dynamics or assets of a care setting. In an August 2020 white paper, DQP explored how a value-based model could strengthen the sustainability of dental clinics embedded in Federally Qualified Health Centers (FQHCs). Because FQHCs typically have a higher degree of interoperability—meaning their electronic patient records can be shared across the sectors of medical, dental and behavioral health—health centers are in a better position to collect the outcomes and other information that is critical for a value-based model.

Methodology

The DentaQuest Partnership for Oral Health Advancement conducted this electronic survey from August 13 to September 1, 2020 by sending an emailed invitation and link to a list of 21,617 DentaQuest-enrolled dental providers in more than 20 states. Up to three reminders were sent to prompt completion. Respondents were only asked to complete the entire survey if they indicated having a high degree of familiarity with their dental office's patient volume, staffing, dental insurance carriers, treatment protocols, and the office's pre- and post-COVID finances. A total of 2,767 dental providers partially or fully completed the survey, for a response rate of 13%, and 2,299 passed the screening questions.

CareQuest Institute for Oral Health

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