

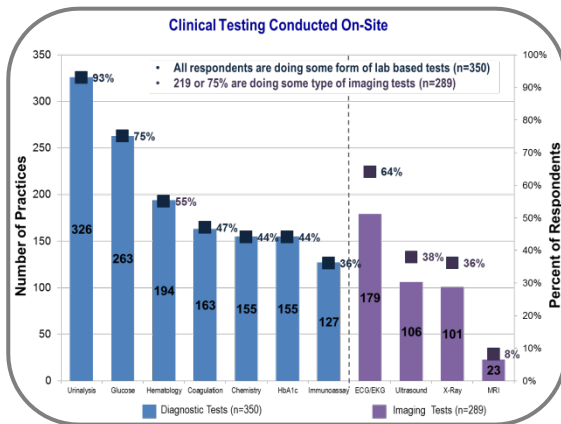
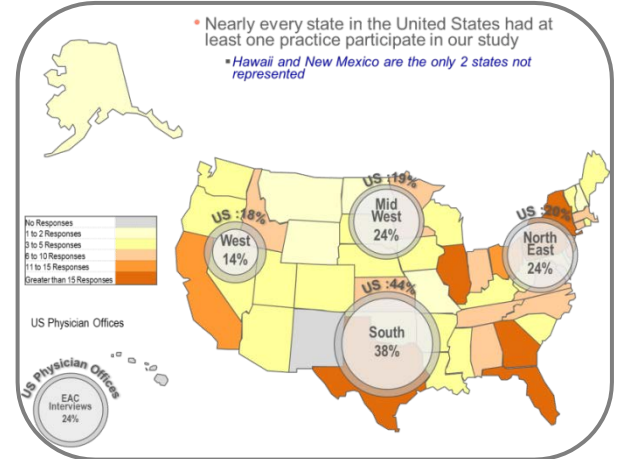


According to CMS, there are over to 120,000 Physician Office Laboratories currently operating in the United States. Enterprise Analysis Corporation (EAC) is increasingly asked for insights into this market regarding purchasing patterns, on-site testing, instruments in use, distribution channels and the likely impact of healthcare changes in the US Physician Office market.

In 2013, EAC<sup>1</sup> conducted 350 telephone interviews with Laboratory Testing and Office Managers in primary care and specialty practices of various sizes and accreditation levels throughout the United States to gain insights into this evolving market.

EAC's **US Physician Office Study** is intended to provide insight to those organizations that serve this market, including diagnostic reagent and instrument suppliers, distributors, and software vendors. Topics covered include provider demographics, network affiliations, types and volumes of tests run on-site and cost per test. See back page for a complete list of topics addressed in the report.

Furthermore, the report considers how products are getting into this market, identifies what products are being used and evaluates end user satisfaction.



**Tests covered in the report include:**

- Chemistry
- Coagulation (PT/INR)
- Glucose
- HbA1c
- Hematology
  - H&H
- Immunoassay
  - BNP
- Pregnancy
- Urinalysis
- Infectious Disease
  - Strep
  - Influenza
  - Mononucleosis
  - RSV
  - H. pylori
  - HIV
  - Chlamydia
- Imaging

Electronic (PDF) - Single User: USD 3,000

<sup>1</sup> Enterprise Analysis Corporation (EAC) offers knowledge-based strategic consulting and senior-level executive advisory services. EAC's consulting work is supported by its market research group, which conducts confidential studies and provides expert interpretation.

For 27 years, the company has specialized in clinical diagnostics, encompassing the overlap of diagnostics with pharma, life sciences and animal health. EAC's domain knowledge has enabled it to build a comprehensive database of international contacts and a market forecasting model. The company is headquartered in Stamford, Connecticut and serves clients in North and South America, Europe and the Pacific Rim.



## Topics Covered In US Physician Office Study

### Practice Information:

- Practice type: general or specialty
  - Specialties
- Number of locations
- Monthly patient visits
- Clinical staff employed
  - MD, PA, RN, LPN, MA
- Glove usage and availability

### Purchasing Decisions:

- Respondent purchasing authority
- IDN affiliation
  - Reason for affiliation
  - Physician affiliation with network or practice
  - IDN influence on practice
  - Future affiliation considerations
- Buying group participation
  - Buying group name
  - Buying group influence
- Purchasing direct or through distributor
  - Distributors used
  - Distributor preference

### Connectivity:

- Laboratory Information System (LIS) in use
- Result reporting: physician and patients
- Use of clinical support tools
- Electronic medical record adoption
  - EMR in use
  - EMR connection to network or local hospital
  - Availability of all patient medications
  - Cloud based EMR
  - EMR benefits
  - EMR obstacles
  - Why EMRs not in use
- Wireless network available
  - Open or secure
  - Plans to install wireless network
- Use of Physician Quality Reporting System (PQRS) program

### On-Site Testing:

- Lab hours of operation
- Level of lab accreditation and reasons why
- Specimen draws on premise
- Staffing:
  - Blood Draws: RN, LPN, MD or Phlebotomists
  - Running Tests: RN, LPN, MD, Phlebotomists or Lab Technicians
- In-Vitro and Imaging

### In-Vitro Testing:

- Products in use
- Units in use
- Weekly patient volumes
- Level of satisfaction
- Location of testing: dedicated lab area or with patient
- Acquisition of instrument: capital purchase, reagent rental, instrument lease, provided at no cost or other
- Reagent and consumable purchases: direct or distributor
- Time for daily QC and maintenance
- Data manager interface
- Cost per test

### Future Trends:

- Biggest challenges expected over next 12 months
- Impact of Affordable Care Act (ACA)
- Ways to improve quality of care
- Use of care teams for patients with chronic conditions