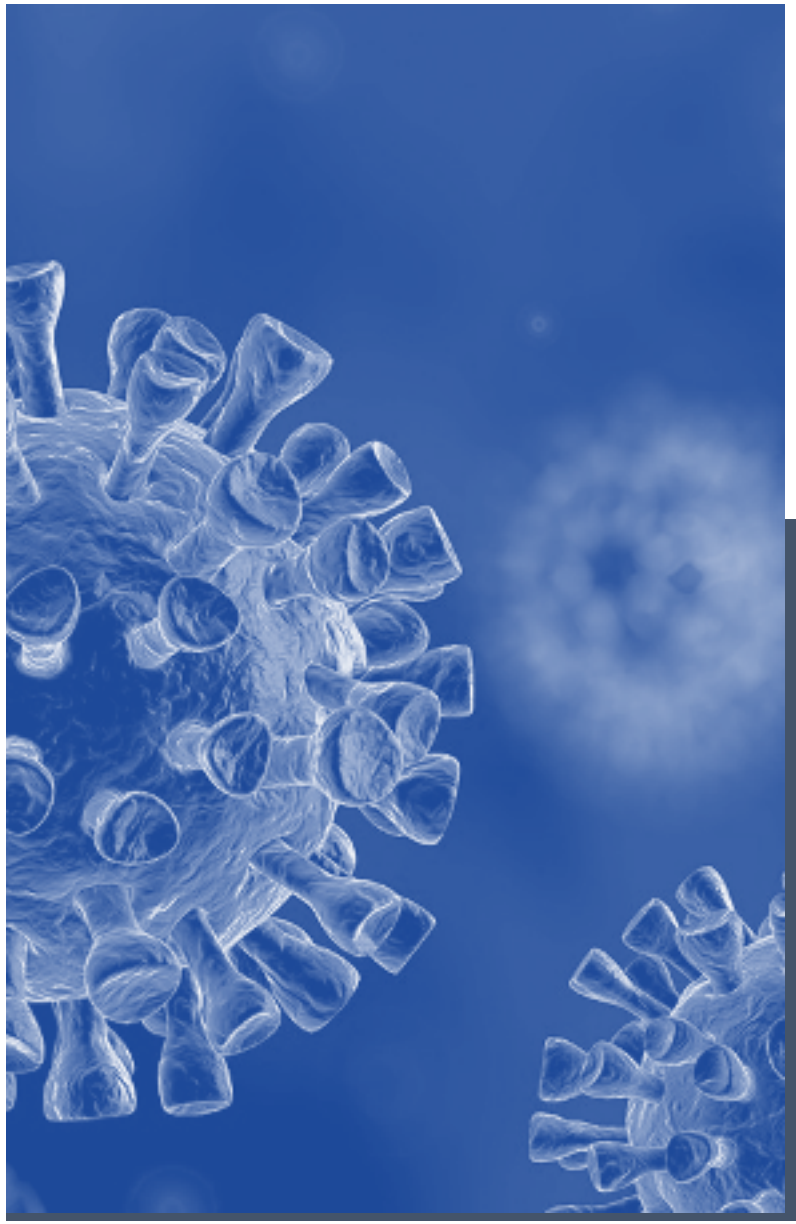




ASSESSING THE IMPACT OF COVID-19 ON SPECIALTY PRACTICES

NATIONAL PRACTICE SURVEY

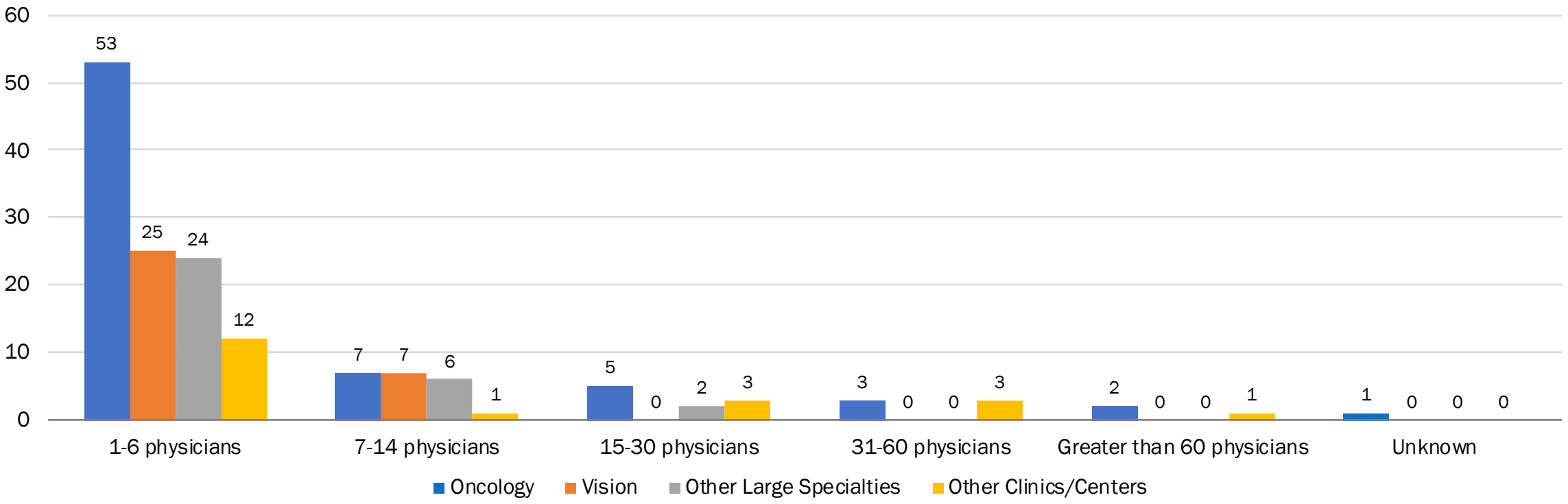
AUGUST, 2020

EXECUTIVE SUMMARY:

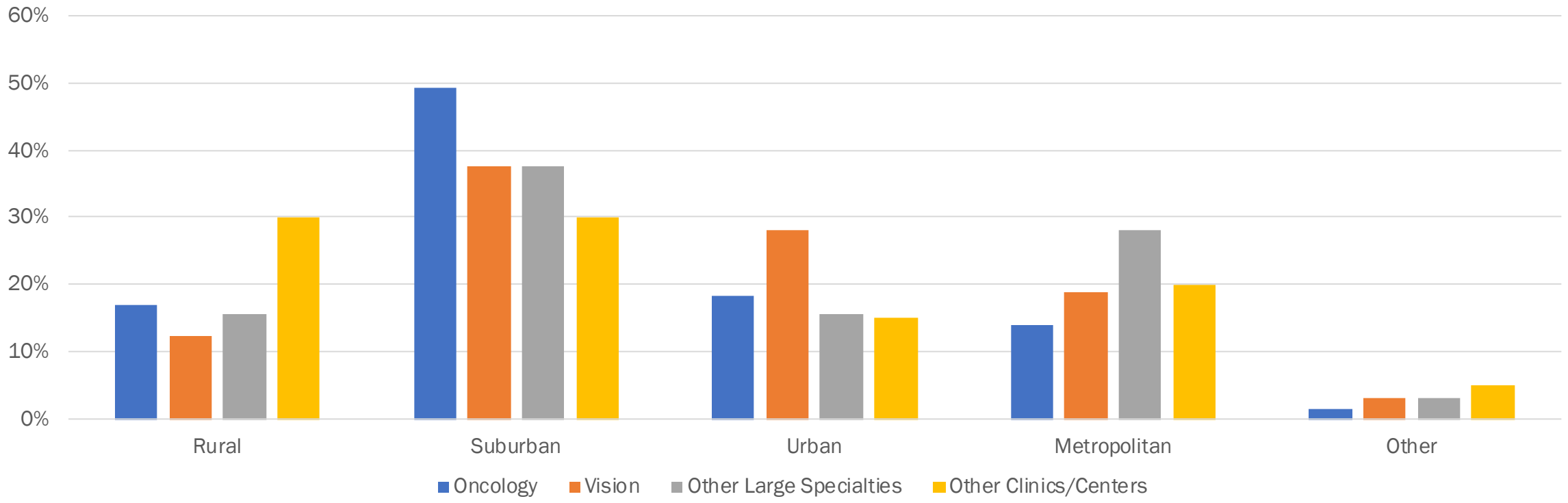
- 155 Specialty Practices
  - Oncology (46%)
  - Vision (21%)
  - Other Large Specialties (21%)
  - Other Independent Clinics and Surgical Centers (13%)
- Survey completed by practice administrators & managers
- Completed between July 31 and August 15, 2020

- This national specialty practice survey evaluated major aspects of how specialty practices have been impacted by the COVID-19 pandemic, how they have responded and leveraged available resources
  - Financial Impact
    - More than 50% of practices have seen more than a 30% reduction in total practice volume, driven by a reduction of new patient encounters between March 15th and May 15th, 2020
    - Approximately 71% of practices has seen an improvement in total practice volume since May 15th
  - Patient Impact
    - Clinical trial enrollment and visits are still heavily impacted with less than 40% improvement since mid-May
    - Approximately 62% expect moderate to significant impact to patient outcomes within the next 12 months
  - Telehealth Adoption & Utilization
    - Over 80% of practices implemented telehealth; 72% within the first 30 days of the pandemic
    - However, 62% of vision practices did not implement due to challenges in conducting necessary exams
  - Resources Utilized & Needs
    - At least 70% of practices participated in one or more federal programs offered in 2020
    - Only 30% would like to see one or more federal program options back in 2021
    - Overall, the top 3 needs moving forward are access to PPE and equipment, access to COVID-19 testing, and scientific information regarding vaccines advancements and clinical guidances
- Several participants mentioned the need for emotional stress management due to continuation of the pandemic. This may be an opportunity to provide access those types of programs for our practices.

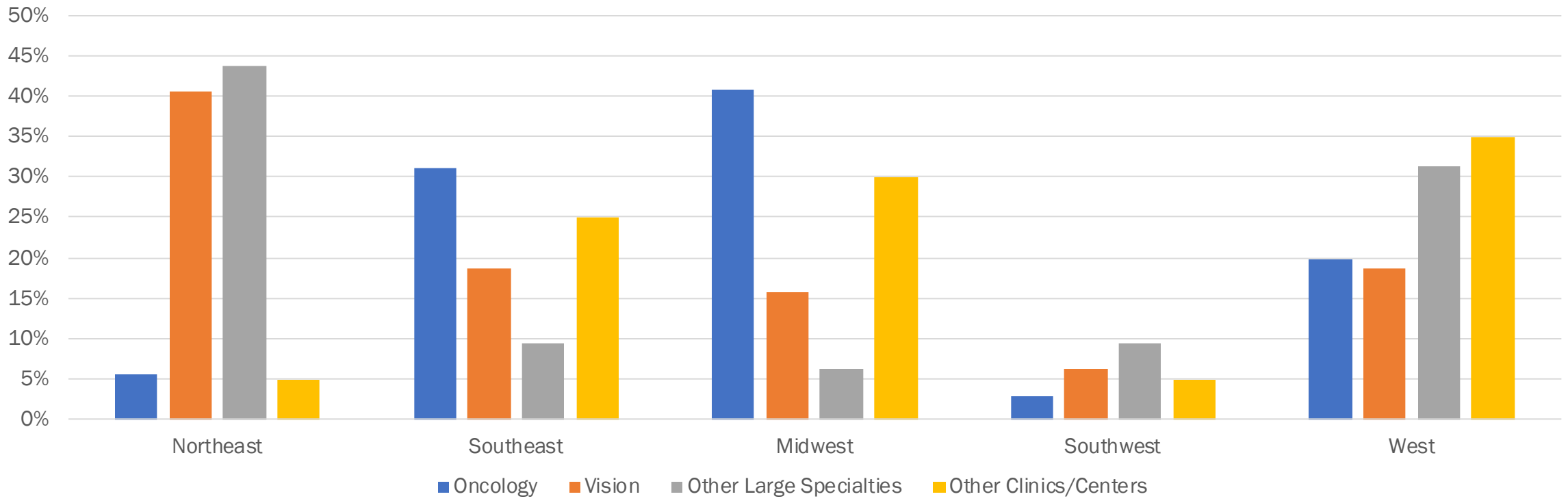
PRACTICE SIZE



PRACTICE LOCATION SETTING



PRACTICE GEOGRAPHIC LOCATION

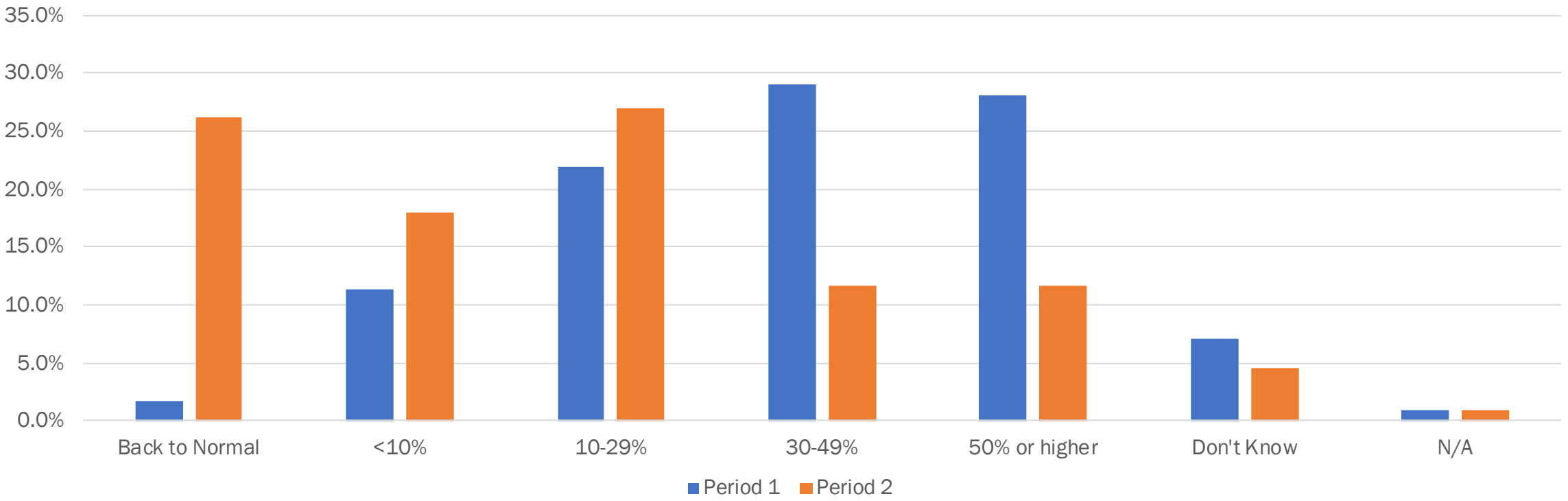


IMPACT ON THE SPECIALTY PRACTICE



DECLINE EXPERIENCED IN TOTAL VOLUME/FINANCIAL IMPACT: OVERALL RESPONDENTS

71.2% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

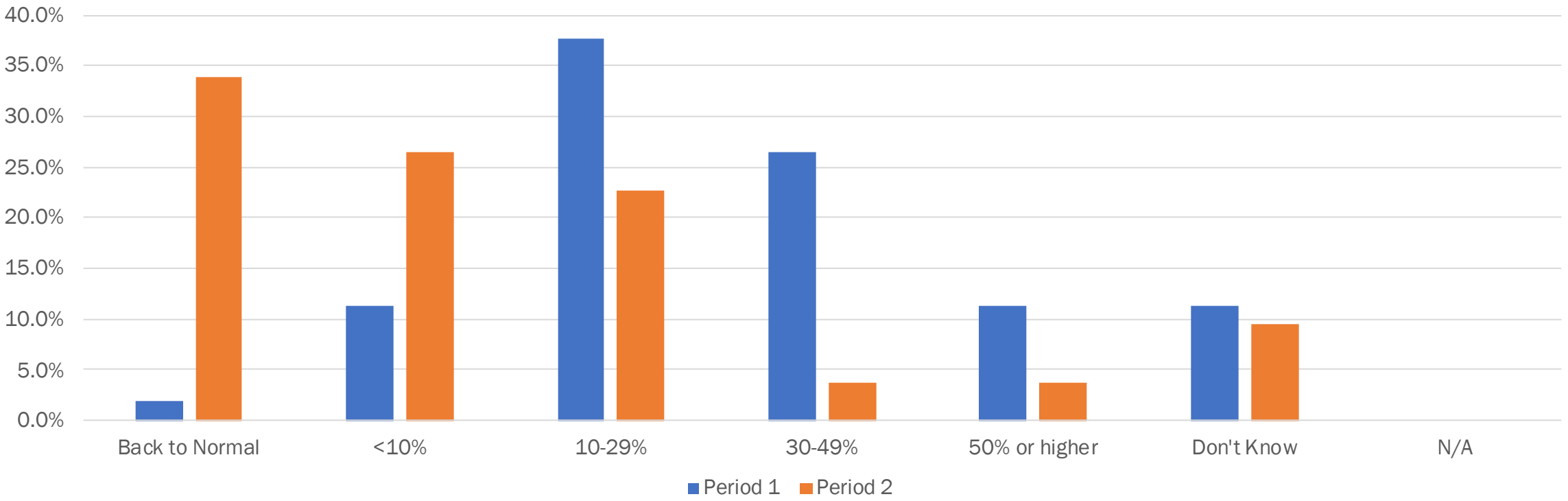


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN TOTAL VOLUME/FINANCIAL IMPACT: ONCOLOGY PRACTICES

77.4% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

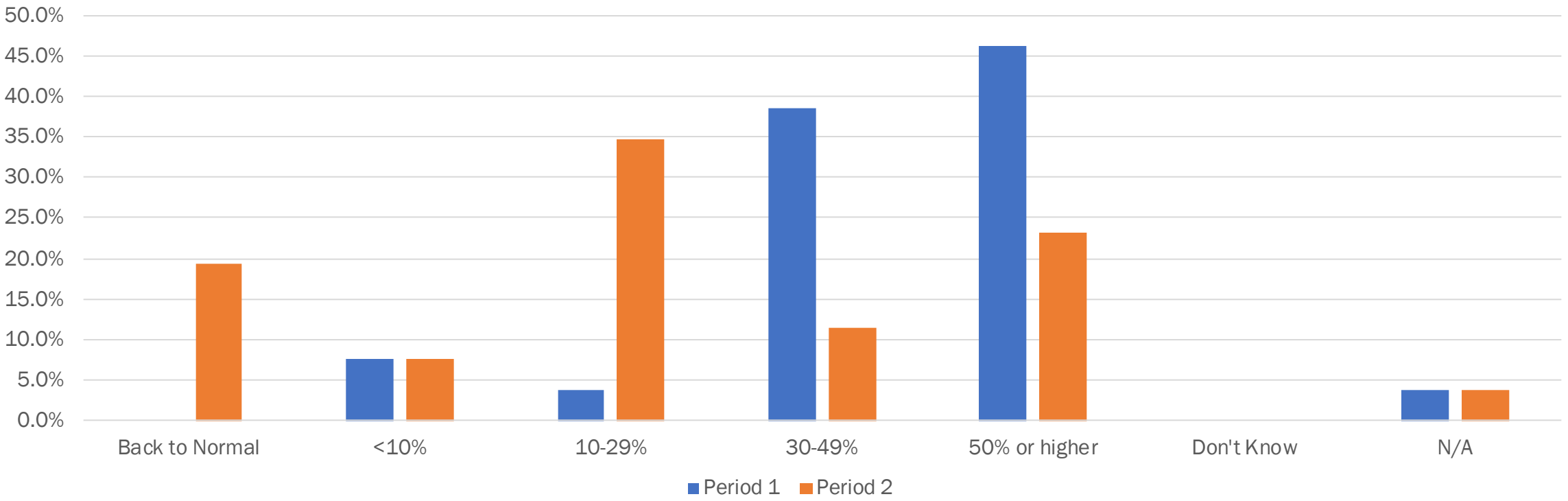


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN TOTAL VOLUME/FINANCIAL IMPACT: VISION PRACTICES

69.2% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

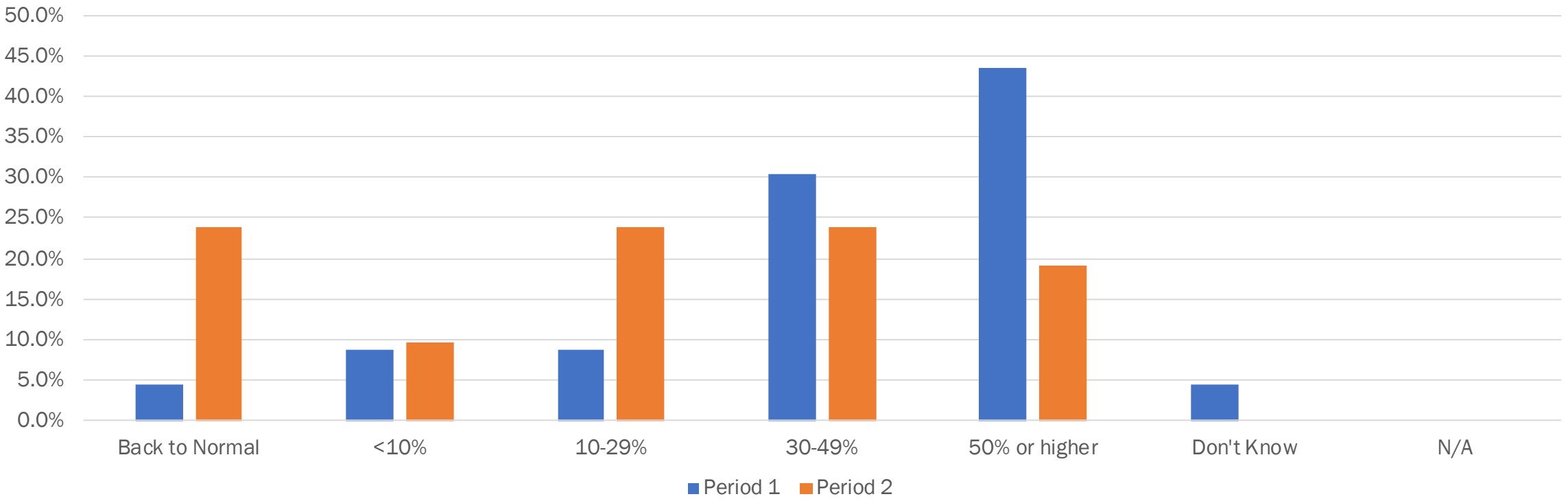


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN TOTAL VOLUME/FINANCIAL IMPACT: OTHER LARGE SPECIALTY PRACTICES

61.9% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

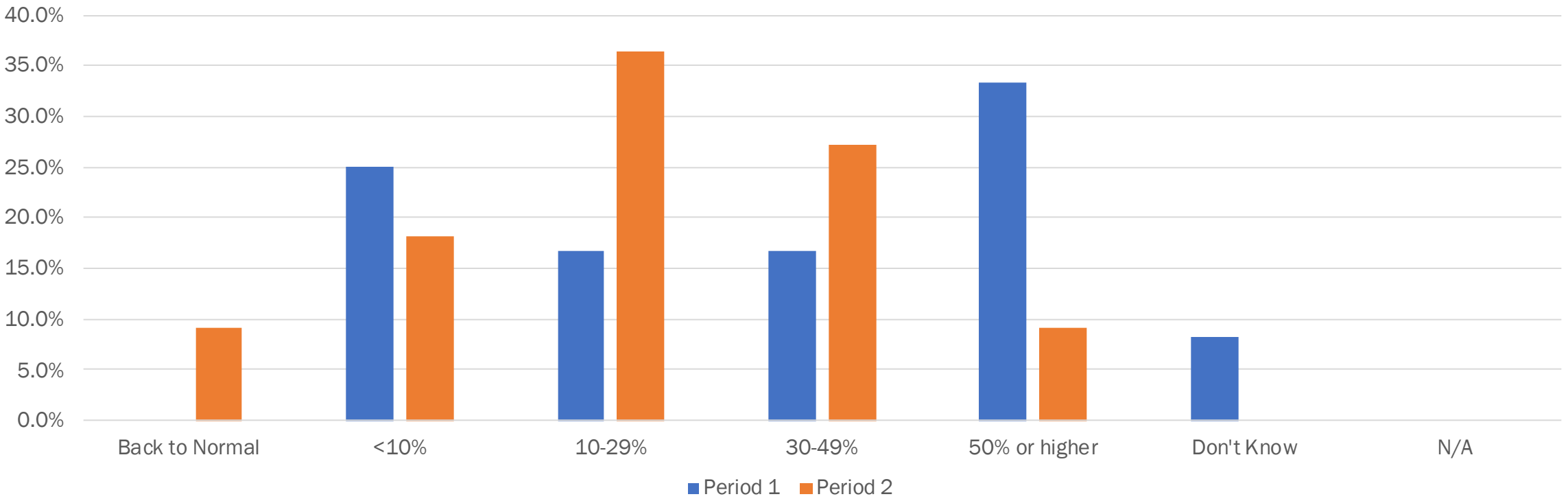


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN TOTAL VOLUME/FINANCIAL IMPACT: OTHER CLINICS

63.6% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



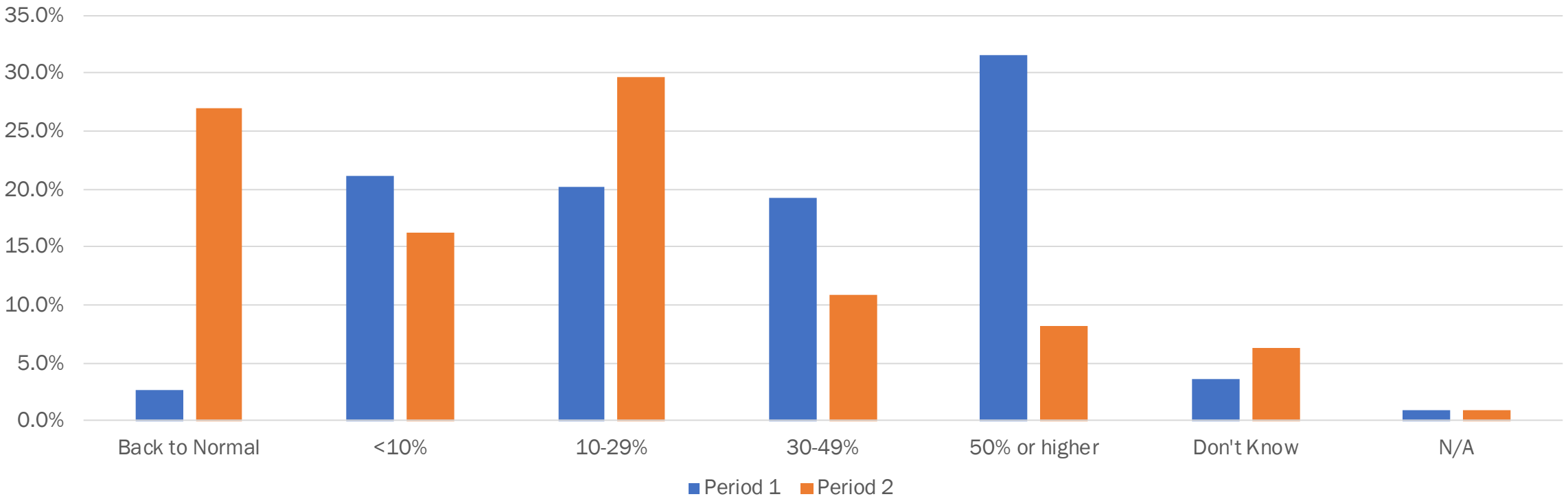
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE IN NEW PATIENTS

DECLINE EXPERIENCED RELATIVE TO NEW PATIENTS: OVERALL RESPONDENTS

66.4% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

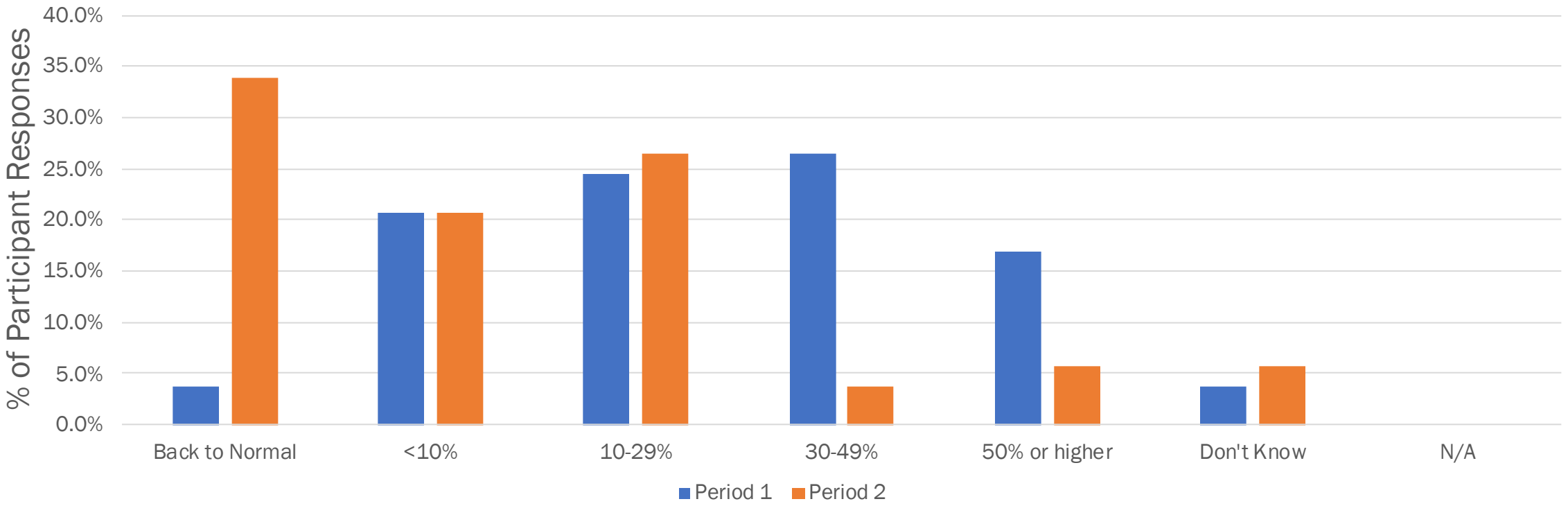


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO NEW PATIENTS: ONCOLOGY PRACTICES

76.5% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

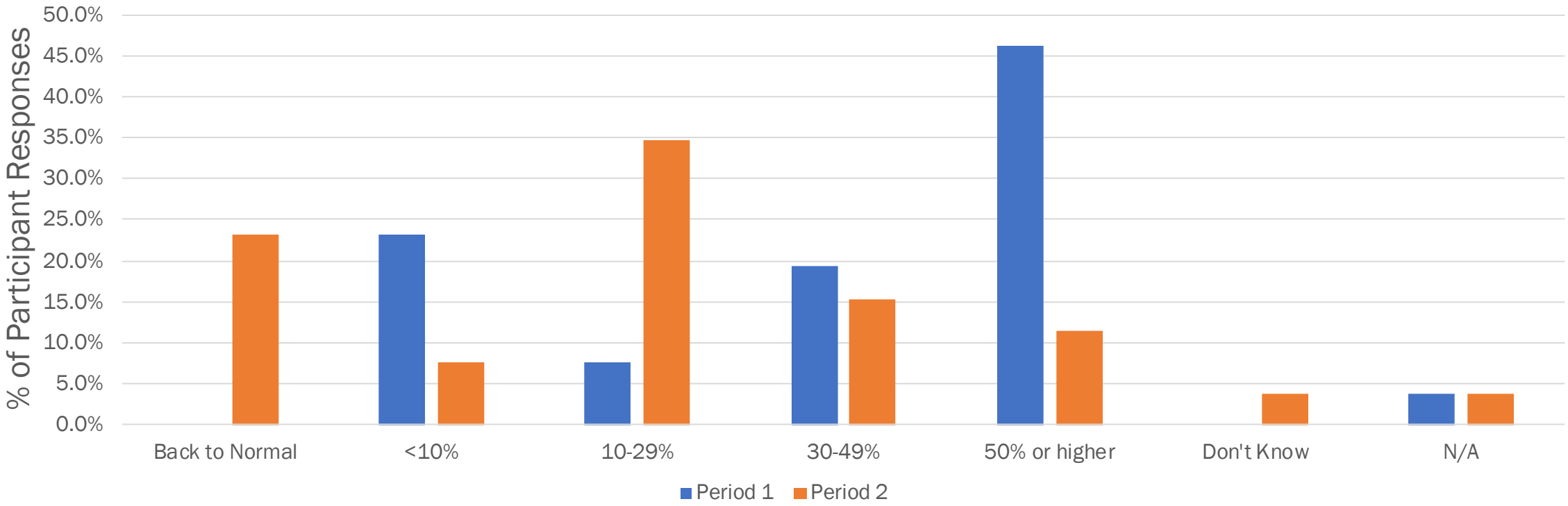


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO NEW PATIENTS: VISION PRACTICES

57.7% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

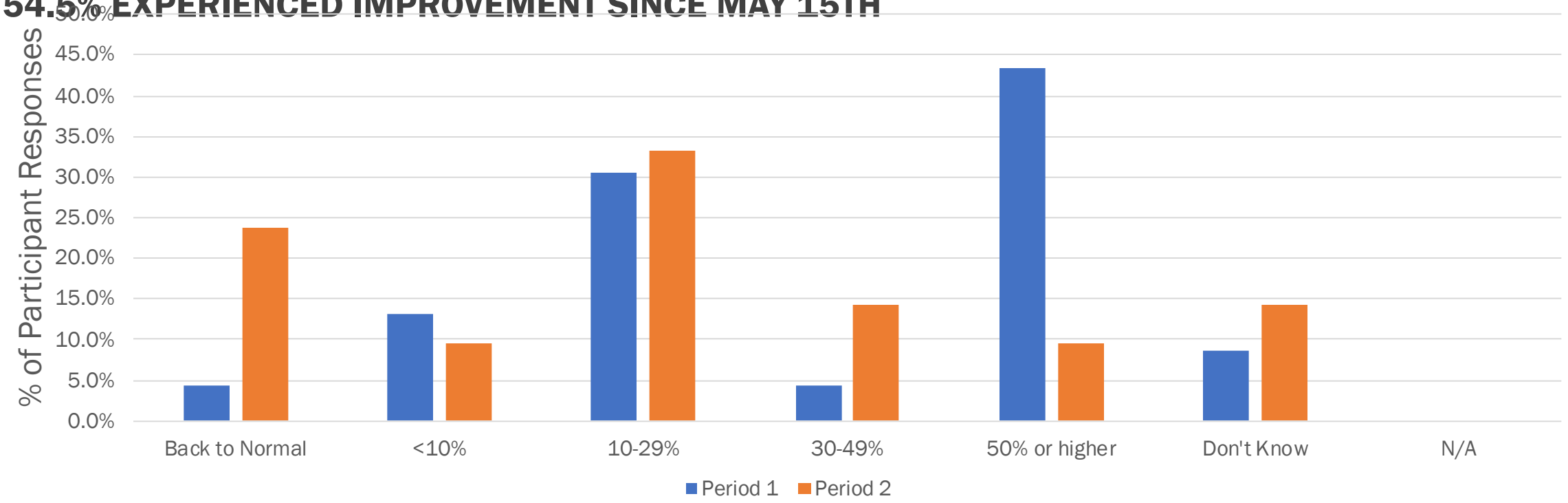


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO NEW PATIENTS: OTHER LARGE SPECIALTY PRACTICES

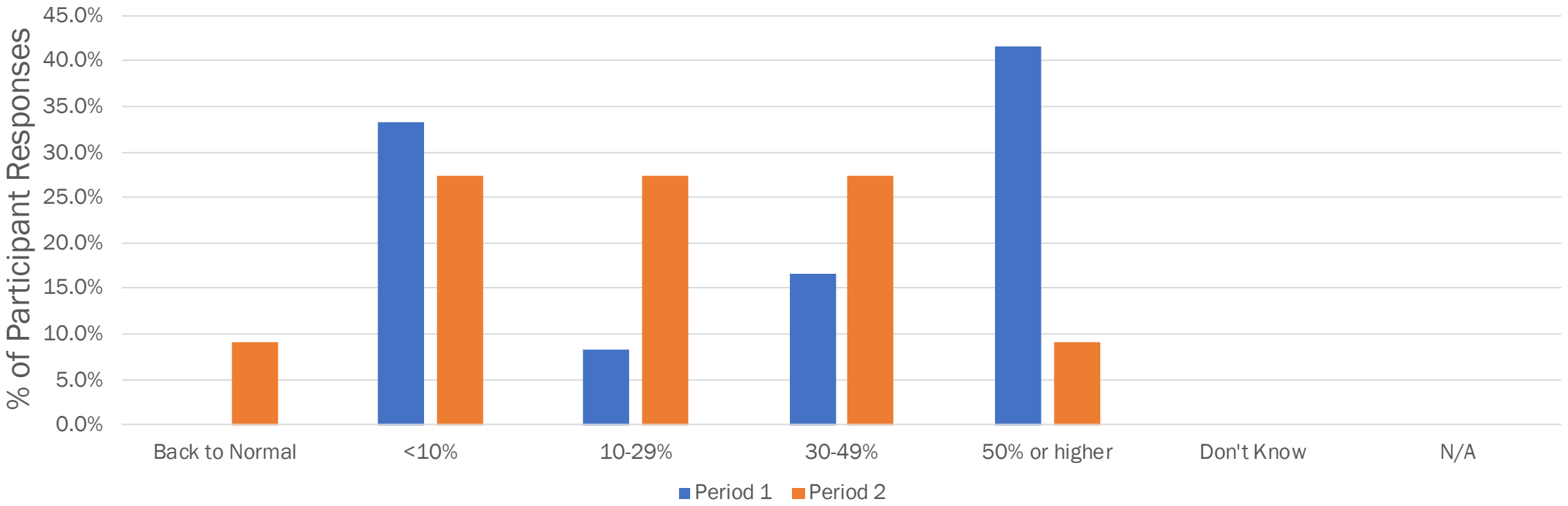
54.5% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO NEW PATIENTS: OTHER CLINICS
63.6% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



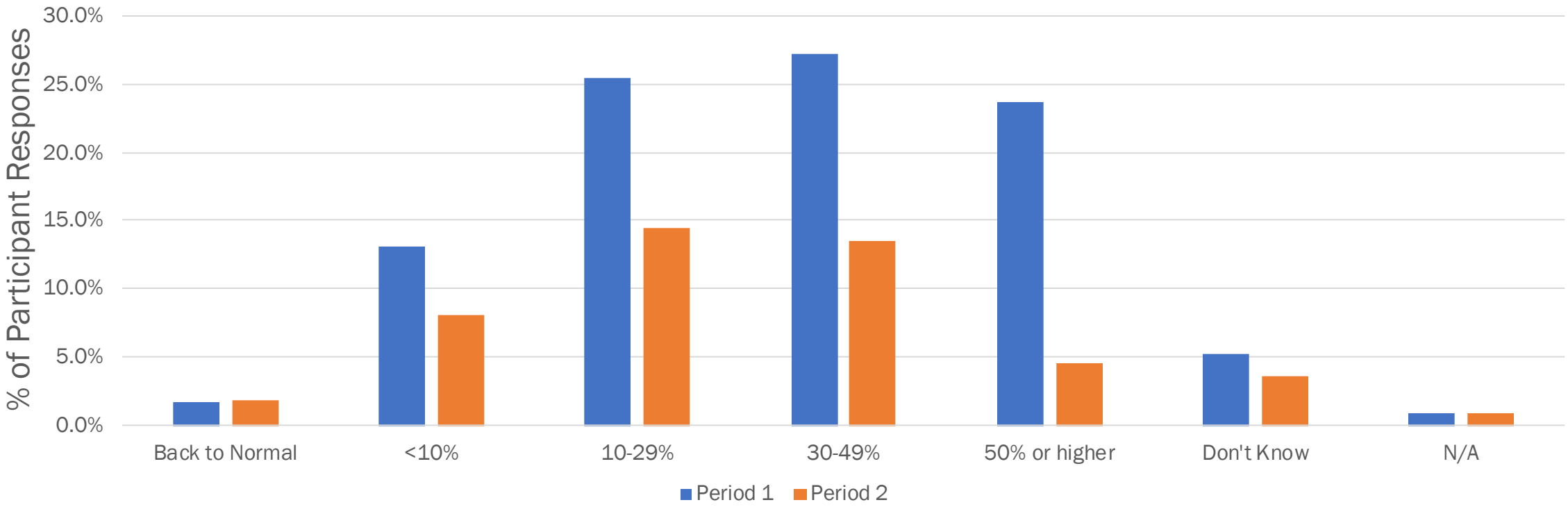
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE IN EXISTING PATIENT ENCOUNTERS

DECLINE EXPERIENCED RELATIVE TO EXISTING PATIENTS: OVERALL RESPONDENTS

67.9% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

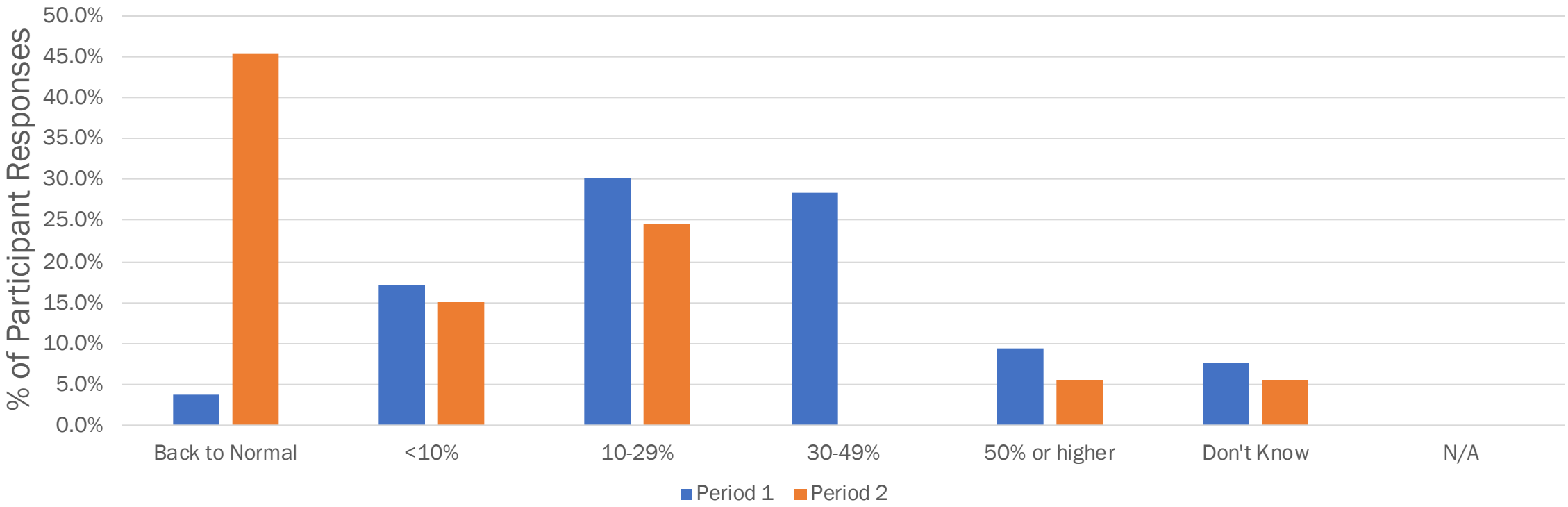


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO EXISTING PATIENTS: ONCOLOGY PRACTICES

72.5% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

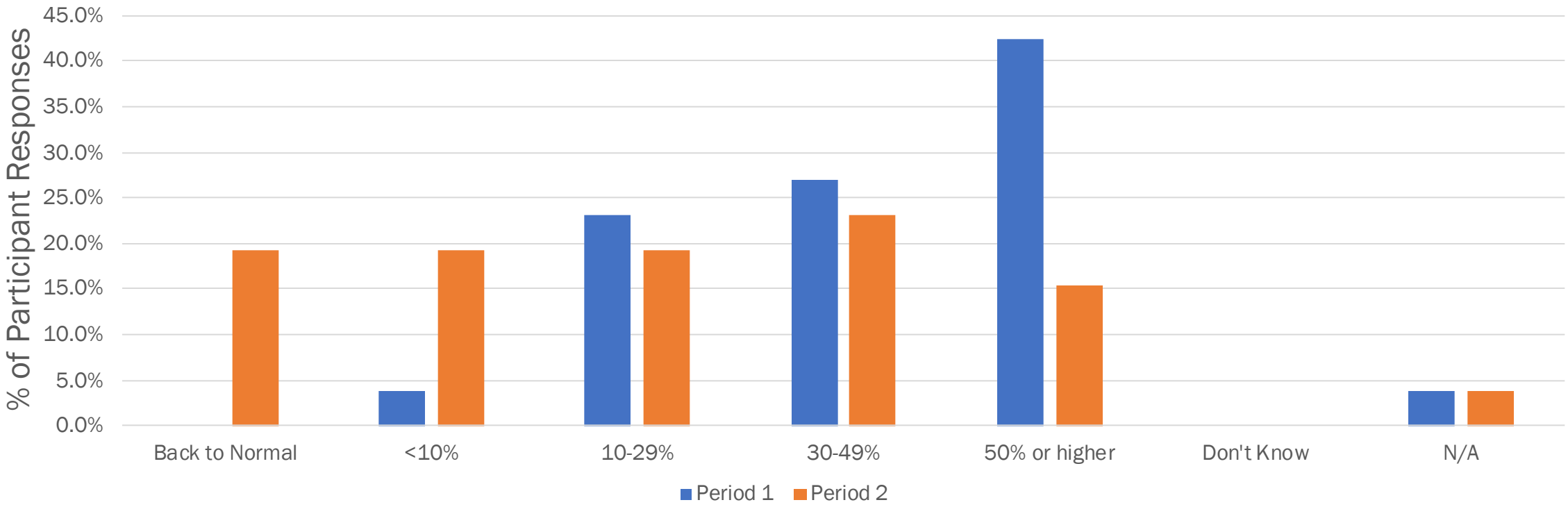


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO EXISTING PATIENTS: VISION PRACTICES

65.4% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

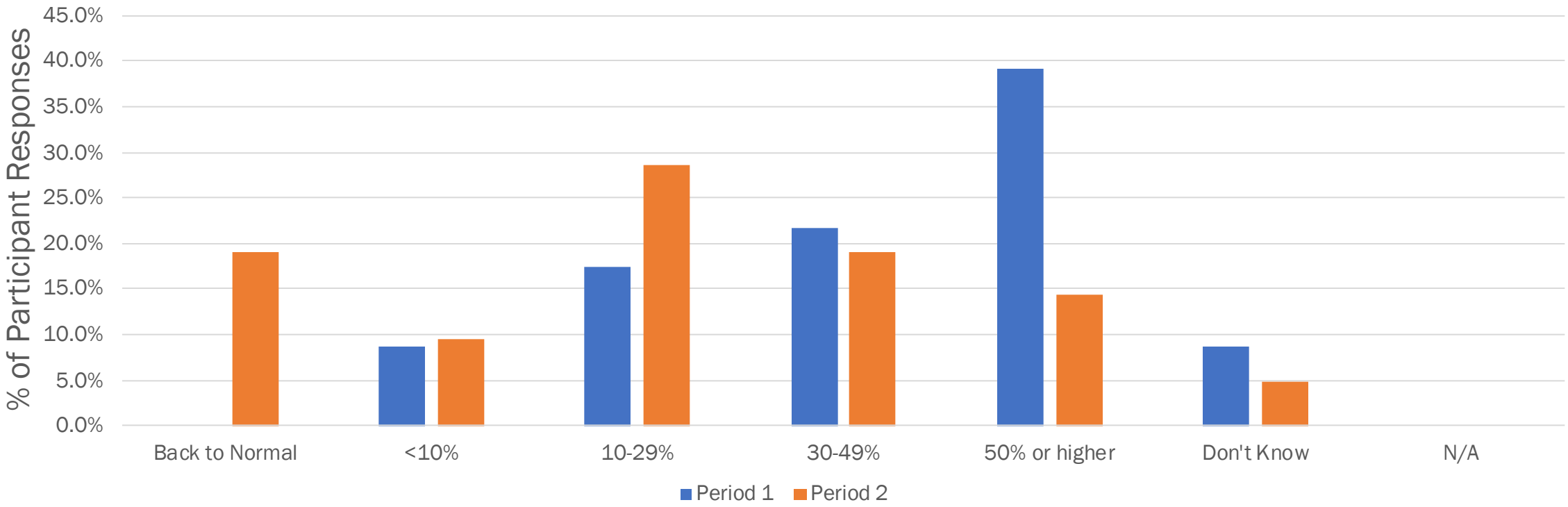


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO EXISTING PATIENTS: OTHER LARGE SPECIALTY PRACTICES

70% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

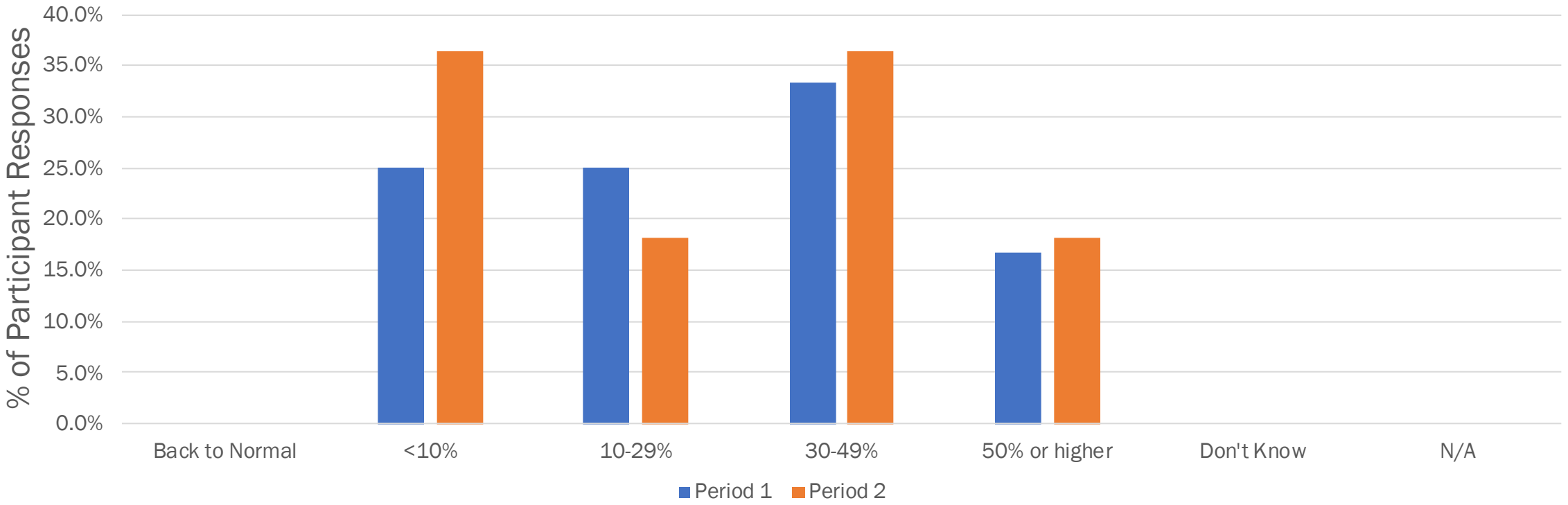


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED RELATIVE TO EXISTING PATIENTS: OTHER CLINICS

50% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



Period 1: Mid-March to Mid-May, 2020

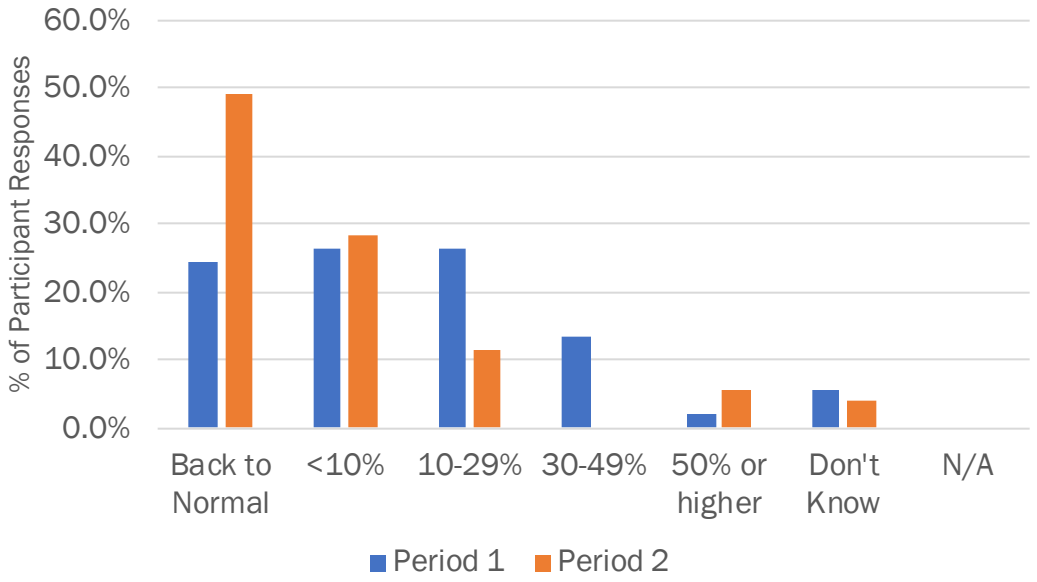
Period 2: Mid-May to Mid-August, 2020

IMPACT ON INFUSIONS

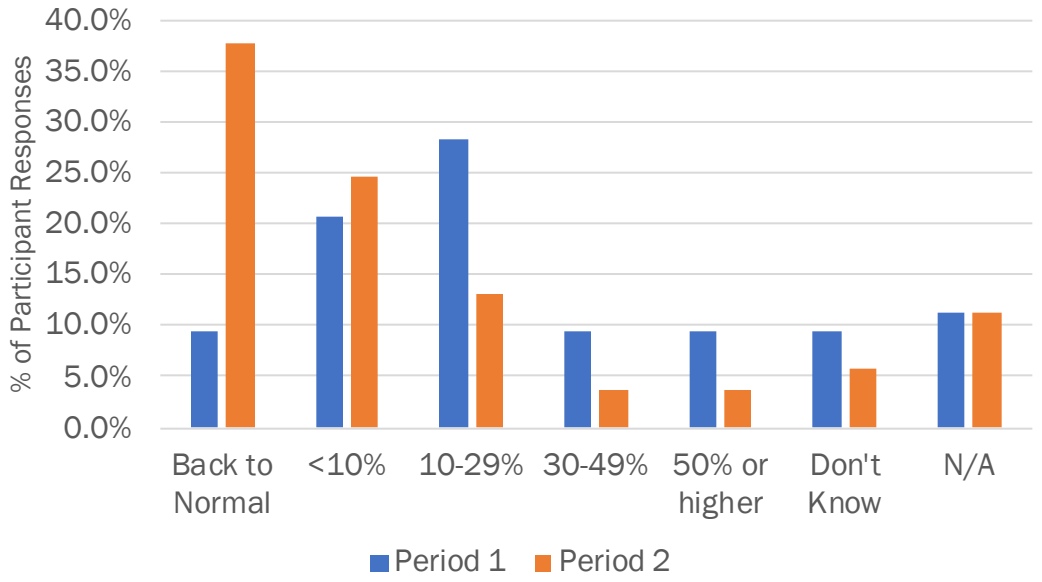
DECLINE EXPERIENCED RELATIVE TO ONCOLOGY & NON-ONCOLOGY INFUSIONS: ONCOLOGY CLINICS

46.2% AND 49.1% EXPERIENCED IMPROVEMENT IN ONCOLOGY AND NON-ONCOLOGY INFUSIONS, RESPECTIVELY, SINCE MAY 15TH

Oncology Infusions



Non-Oncology Infusions



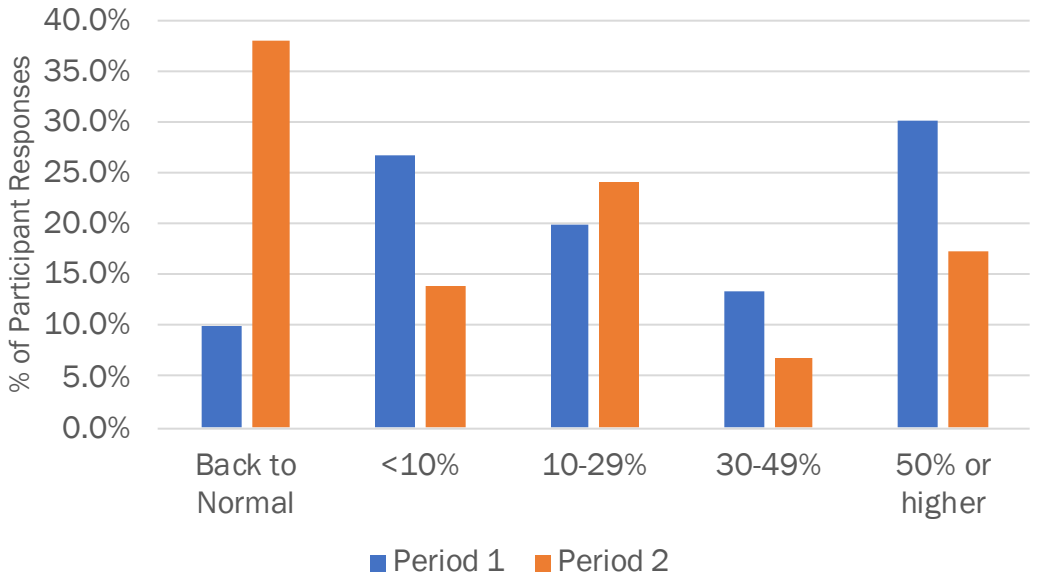
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

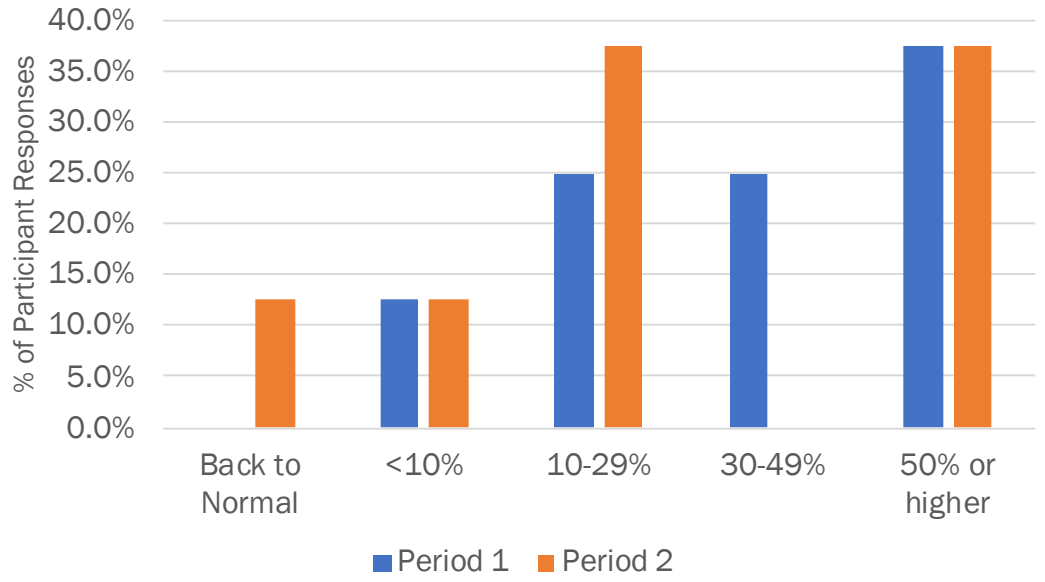
DECLINE EXPERIENCED RELATIVE TO MEDICATION INFUSIONS: NON-ONCOLOGY PRACTICES

OVERALL 65.5% EXPERIENCED IMPROVEMENT IN MEDICATION INFUSIONS, SINCE MAY 15TH WHILE ONLY 37.5% OF VISION PRACTICES EXPERIENCED IMPROVEMENT

Overall Non-Oncology Practices



Vision Practices



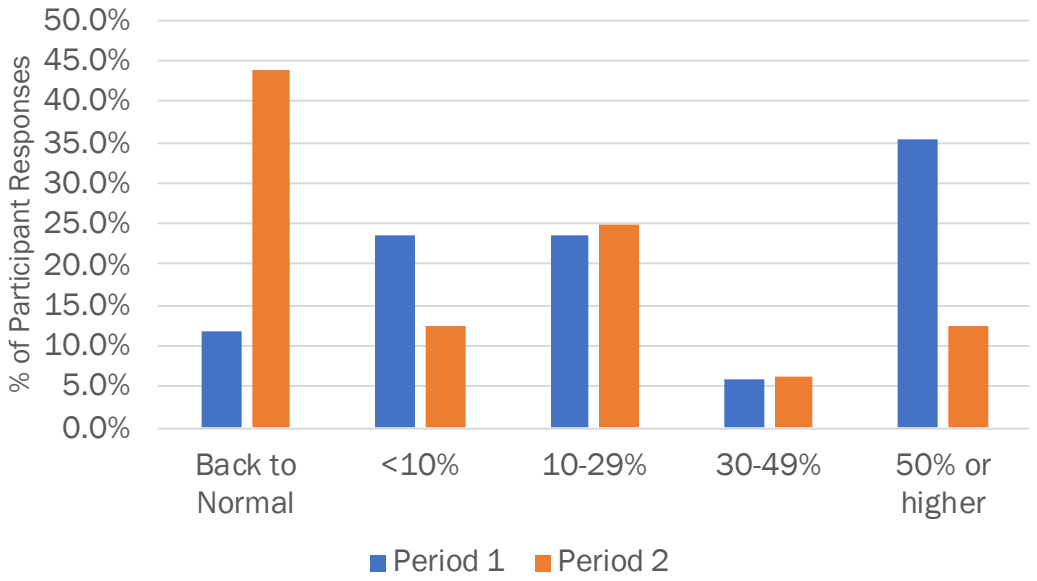
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

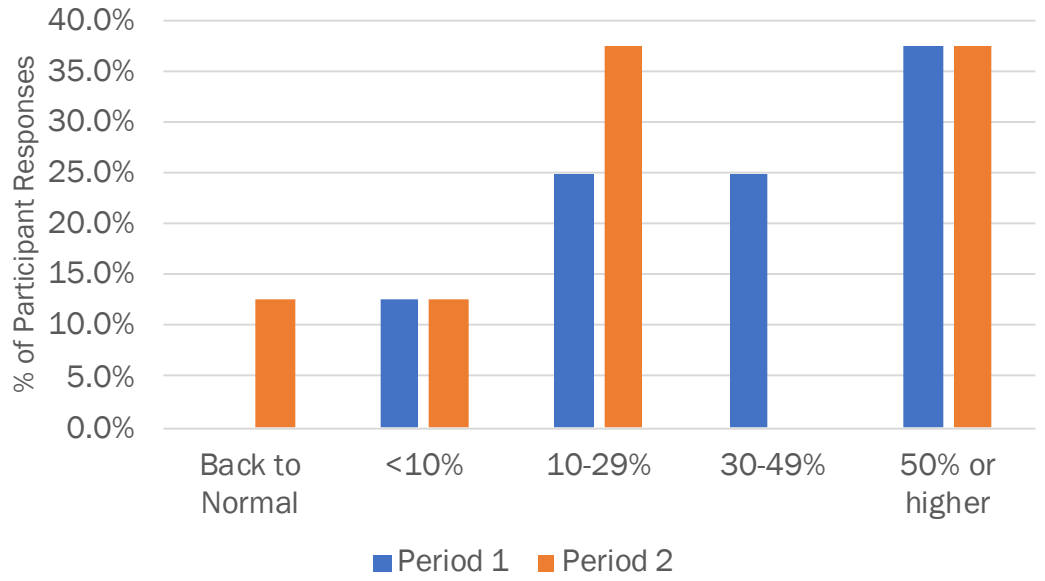
DECLINE EXPERIENCED RELATIVE TO MEDICATION INFUSIONS: NON-ONCOLOGY PRACTICES

75% AND 80% EXPERIENCED IMPROVEMENT FOR OTHER LARGE SPECIALTY PRACTICES AND OTHER CLINICS, RESPECTIVELY, SINCE MAY 15TH

Other Large Specialty Practices



Other Clinics



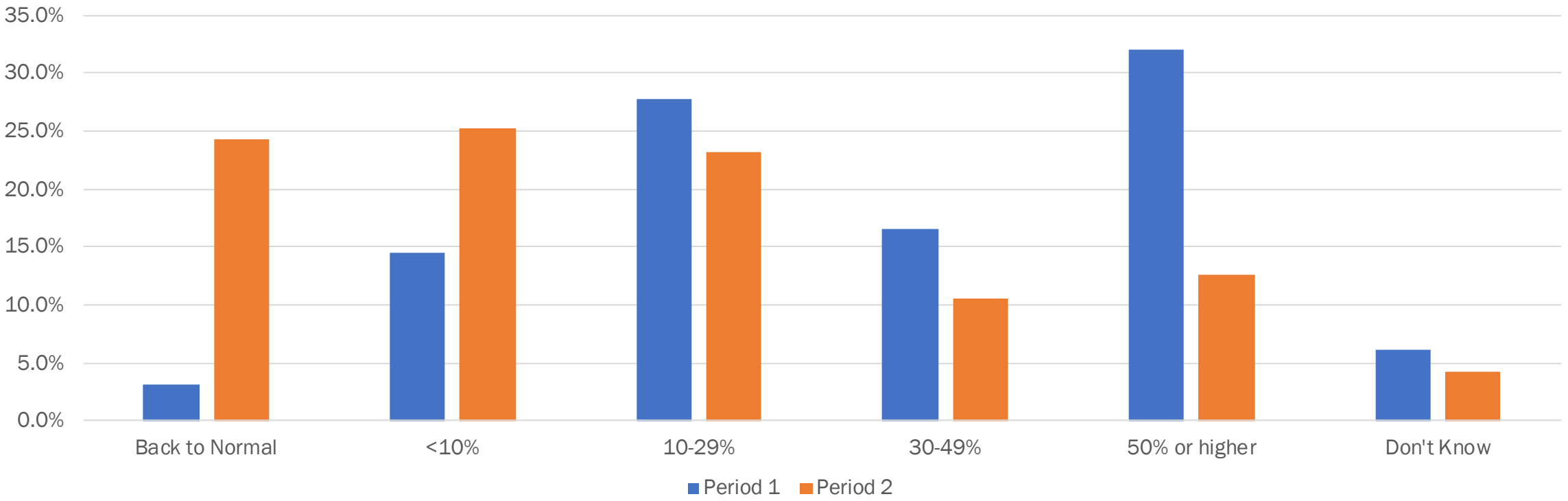
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

IMPACT ON MEDICAL & DIAGNOSTIC PROCEDURES

DECLINE EXPERIENCED IN MEDICAL & DIAGNOSTIC PROCEDURES: OVERALL RESPONDENTS

64.2% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

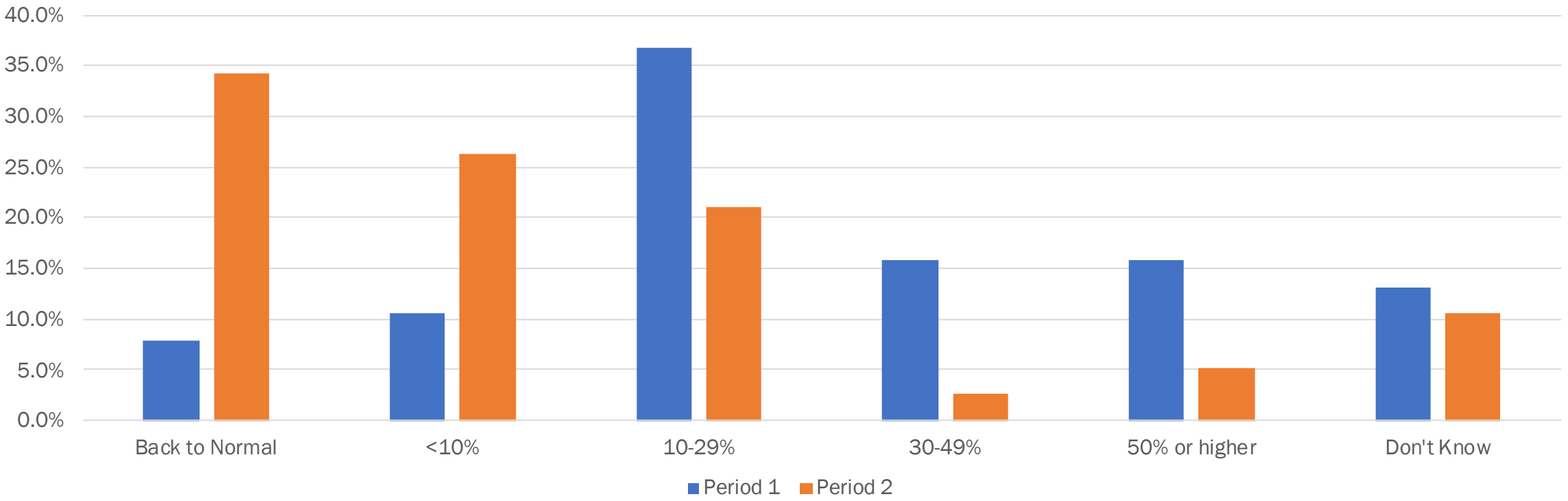


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN MEDICAL & DIAGNOSTIC PROCEDURES: ONCOLOGY PRACTICES

63.2% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

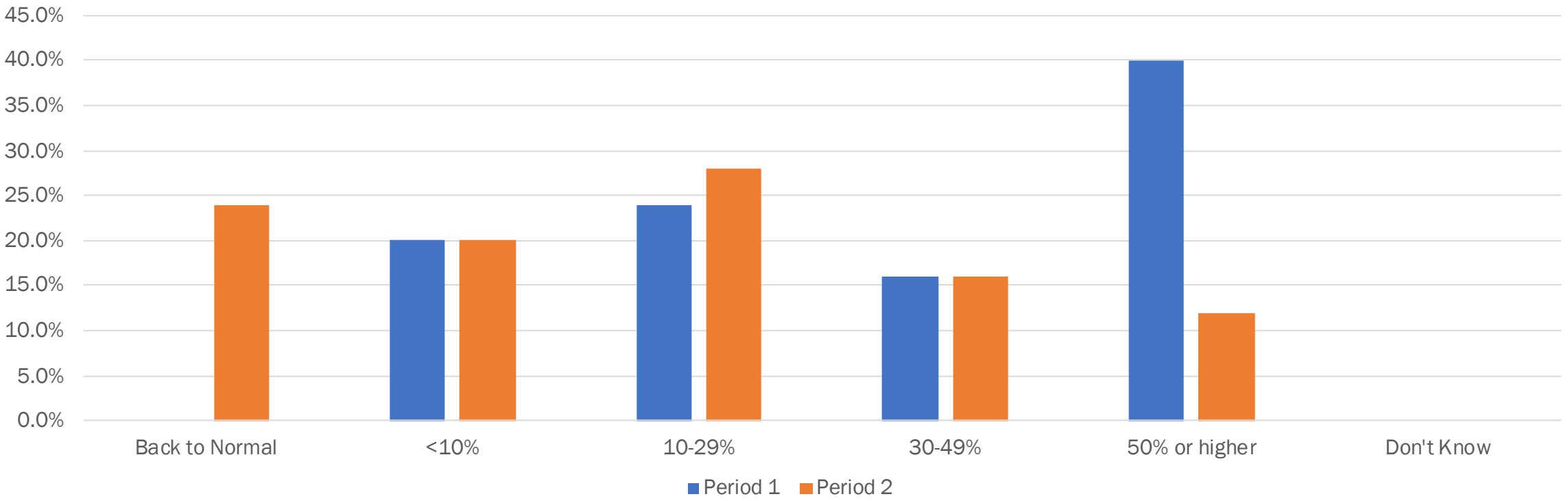


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN MEDICAL & DIAGNOSTIC PROCEDURES: VISION PRACTICES

68% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

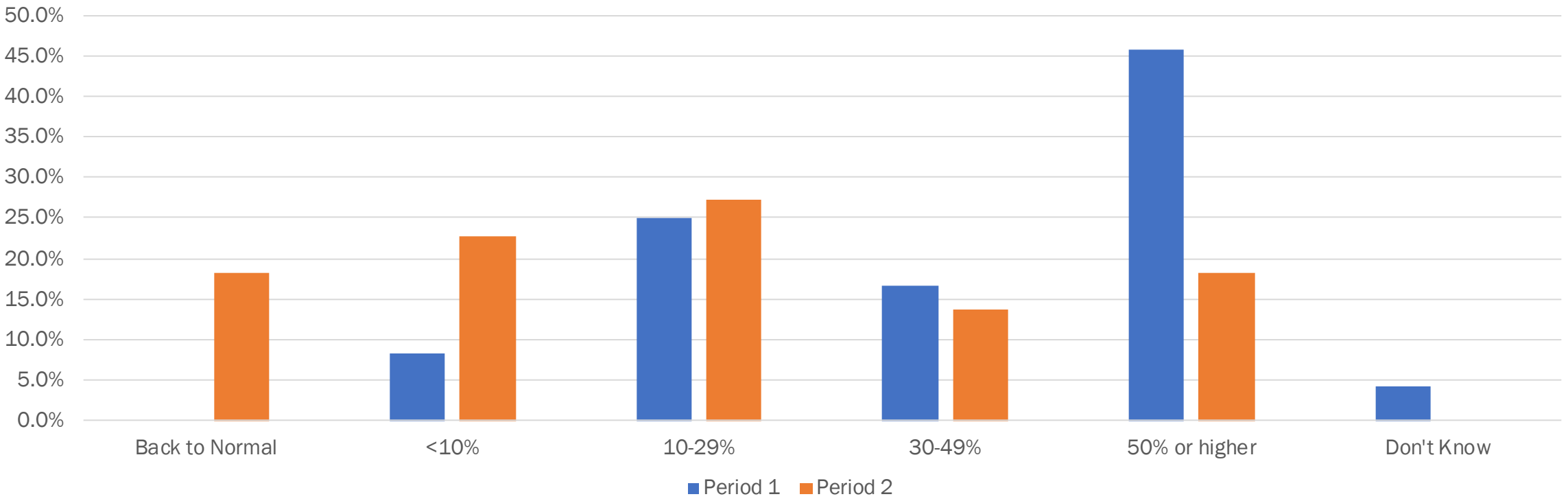


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN MEDICAL & DIAGNOSTIC PROCEDURES: OTHER LARGE SPECIALTY PRACTICES

72.7% EXPERIENCED IMPROVEMENT SINCE MAY 15TH

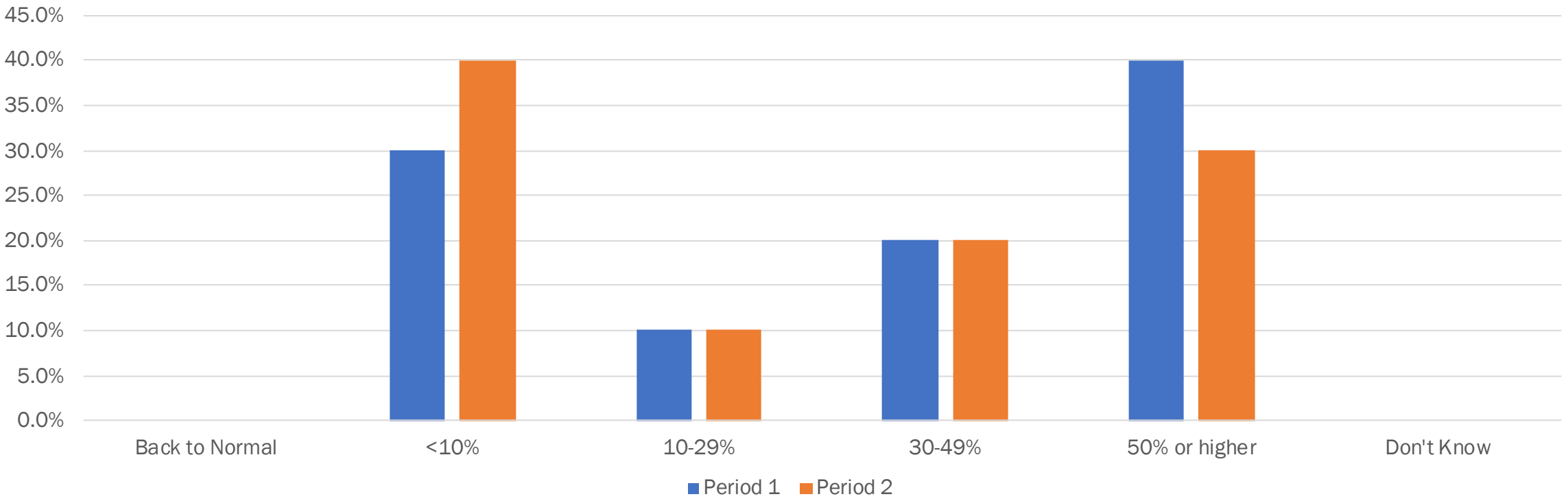


Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

DECLINE EXPERIENCED IN MEDICAL & DIAGNOSTIC PROCEDURES: OTHER CLINICS

40% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



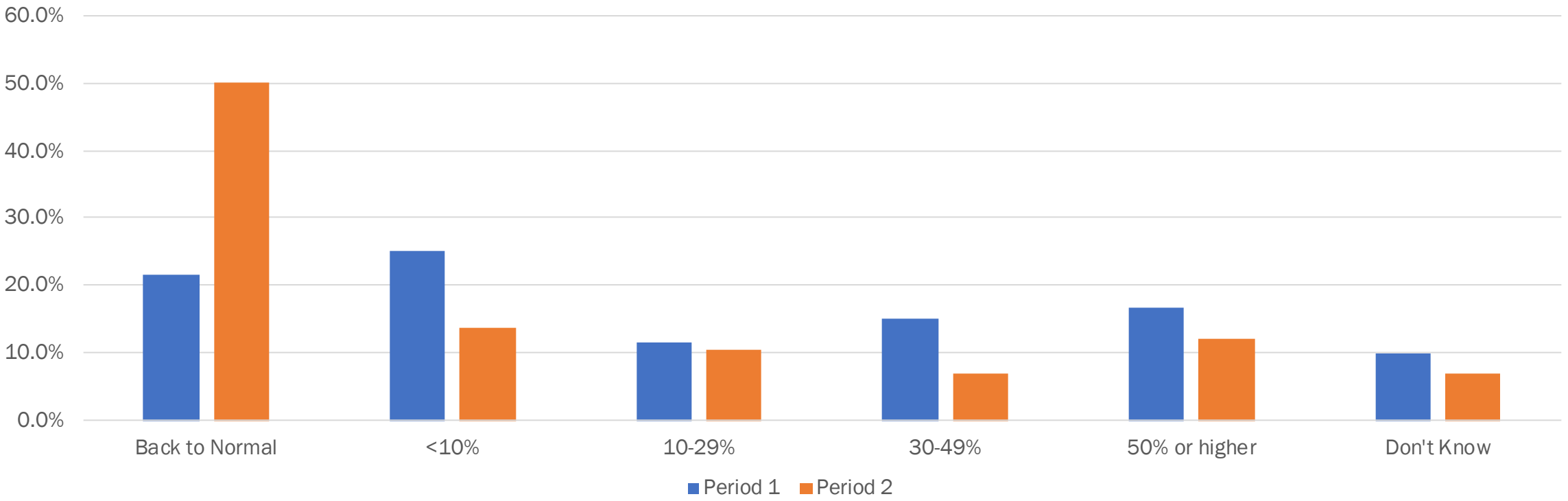
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

IMPACT ON IN-OFFICE DISPENSING

DECLINE EXPERIENCED IN IN-OFFICE DISPENSING: OVERALL RESPONDENTS

44.8% EXPERIENCED IMPROVEMENT SINCE MAY 15TH



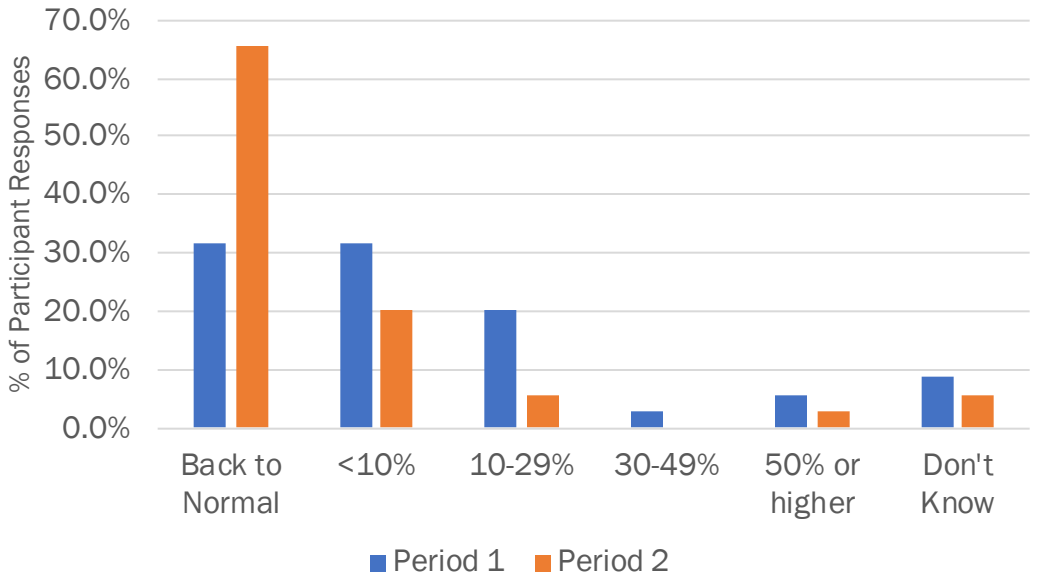
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

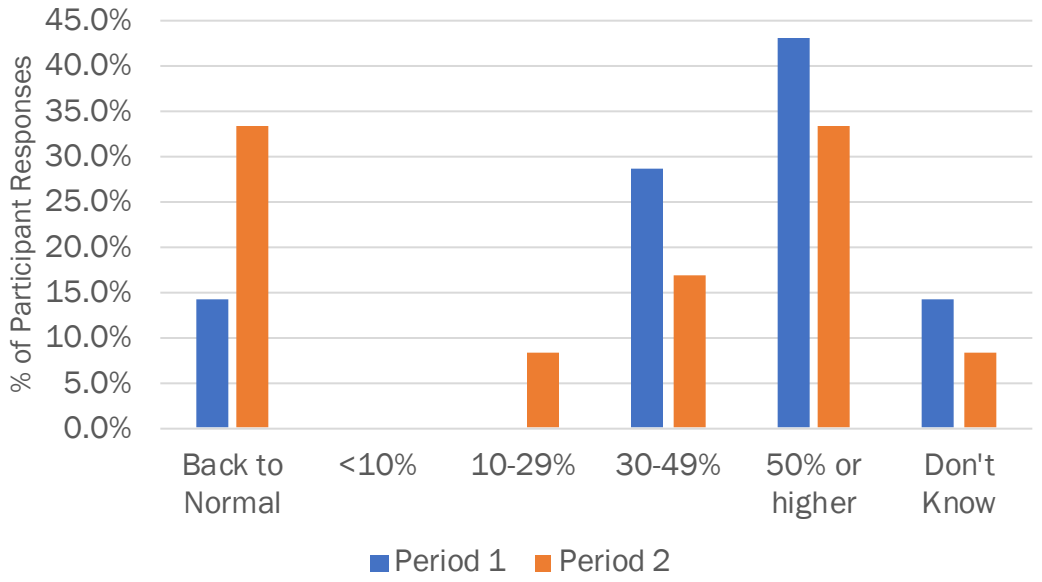
DECLINE EXPERIENCED RELATIVE TO IN-OFFICE DISPENSING: ONCOLOGY & OTHER LARGE SPECIALTY PRACTICES

45.7% AND 41.7% EXPERIENCED IMPROVEMENT IN IN-OFFICE DISPENSING, SINCE MAY 15TH, RESPECTIVELY

Oncology Practices



Other Large Specialty Practices



Period 1: Mid-March to Mid-May, 2020

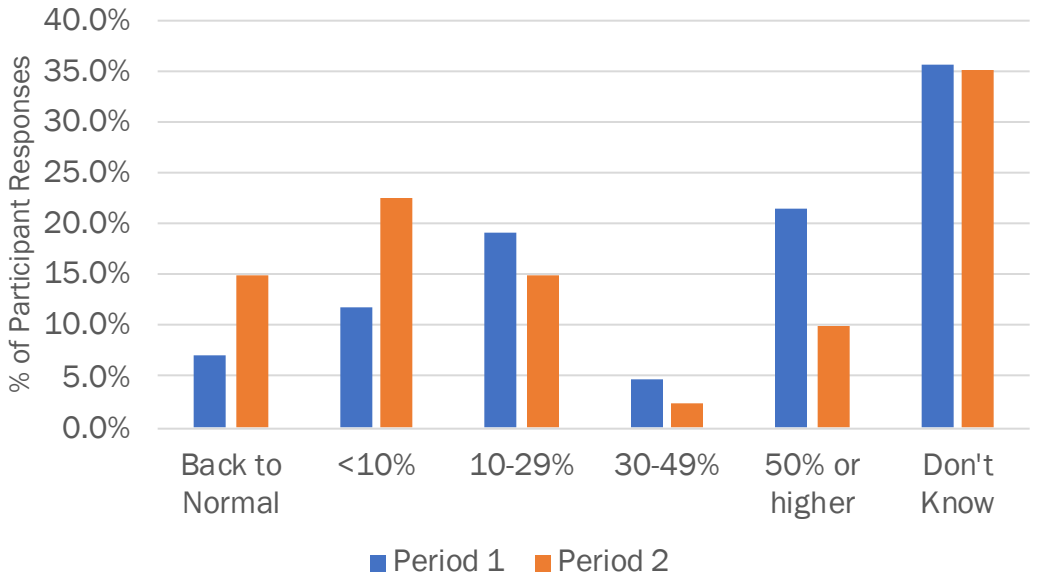
Period 2: Mid-May to Mid-August, 2020

IMPACT ON CLINICAL TRIALS

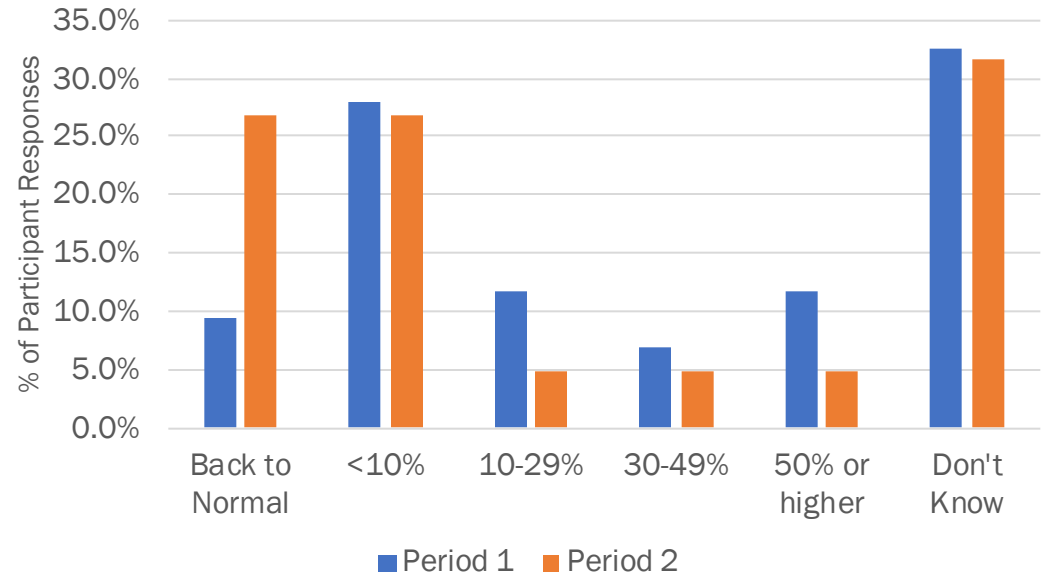
DECLINE EXPERIENCED RELATIVE TO CLINICAL TRIALS: OVERALL TRIAL ENROLLMENT & SCHEDULED ENCOUNTERS

35% AND 44% EXPERIENCED IMPROVEMENT IN ENROLLMENT & SCHEDULED ENCOUNTERS, SINCE MAY 15TH, RESPECTIVELY

Clinical Trial Enrollment



Clinical Trial Scheduled Encounters



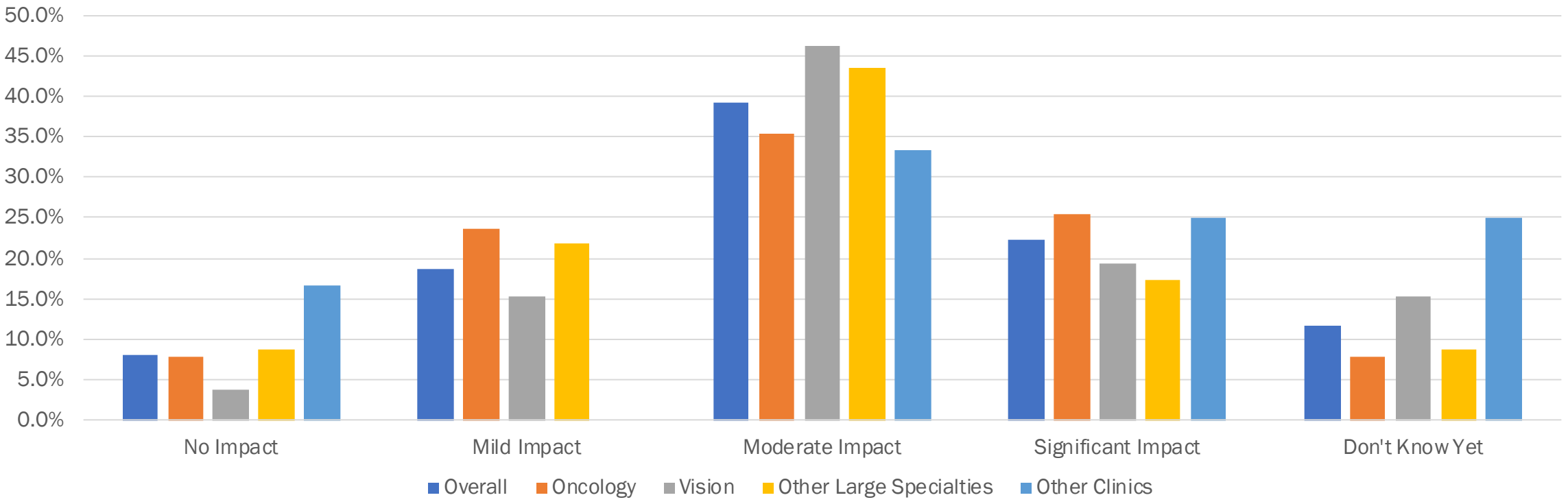
Period 1: Mid-March to Mid-May, 2020

Period 2: Mid-May to Mid-August, 2020

IMPACT ON PATIENT OUTCOMES

ANTICIPATED IMPACT ON PATIENT OUTCOMES:

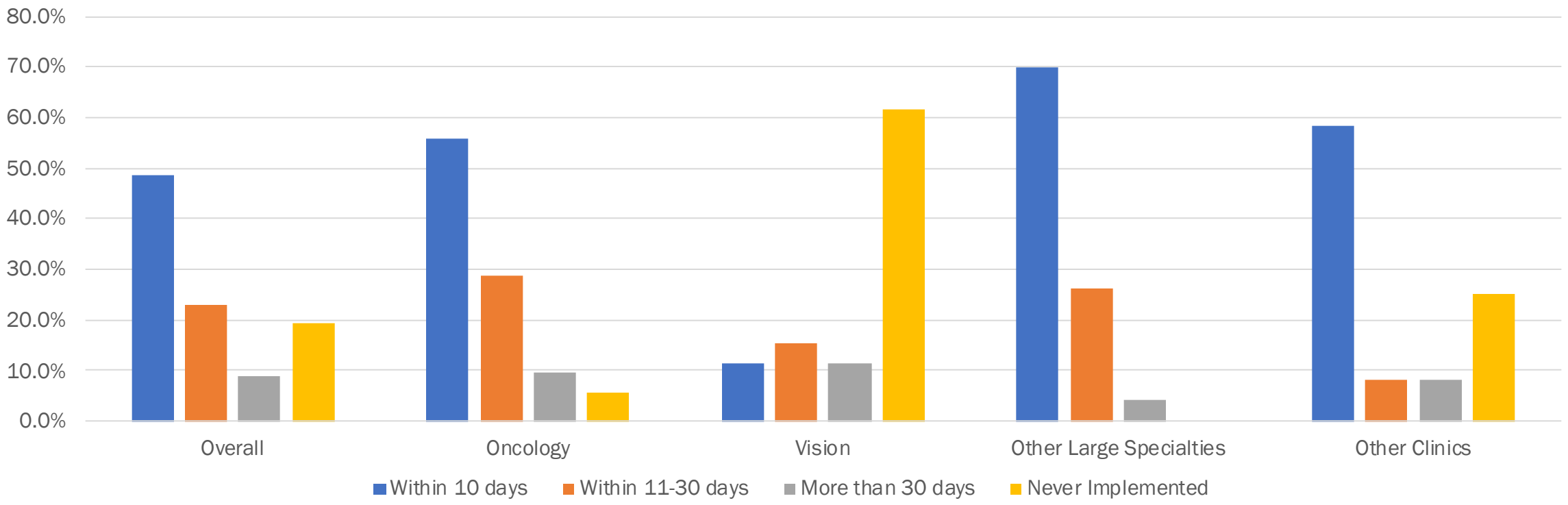
OVERALL 62% EXPECT MODERATE AND SIGNIFICANT IMPACT IN PATIENT OUTCOMES



TELEHEALTH ADOPTION & UTILIZATION

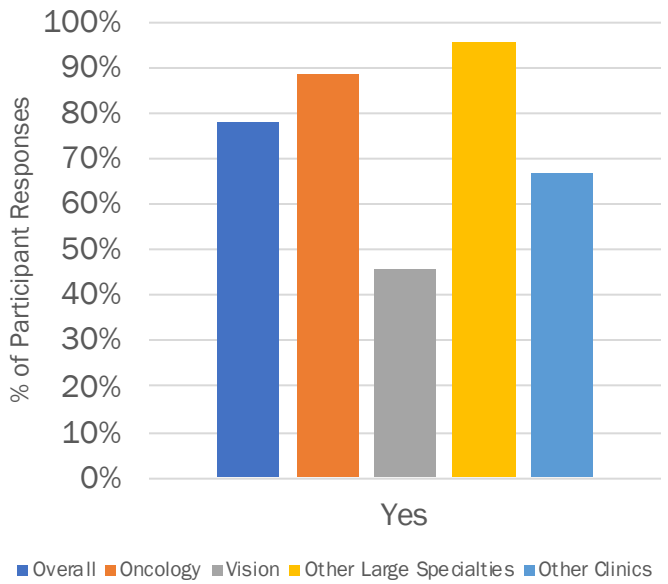
TIME TO DEPLOY TELEHEALTH:

OVER 80% OF PRACTICES IMPLEMENTED TELEHEALTH WITH 72% IMPLEMENTED WITHIN THE FIRST 30 DAYS WHILE ~62% OF VISION PRACTICES DID NOT IMPLEMENTED TELEMEDICINE

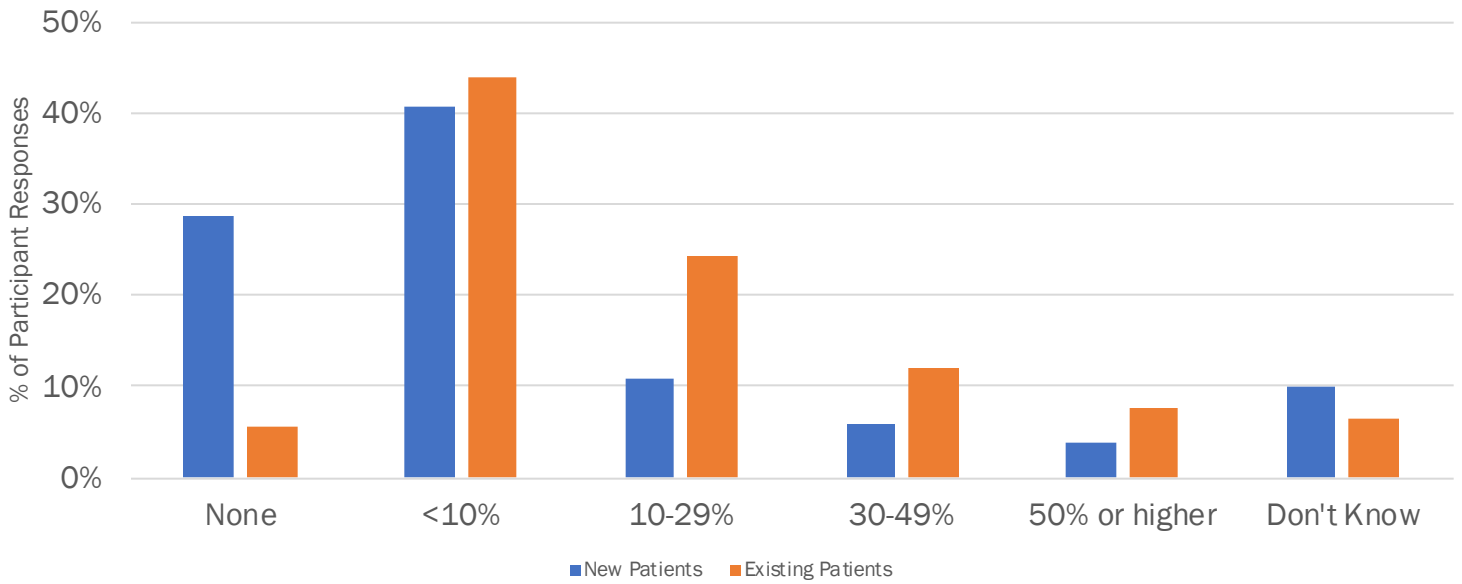


UTILIZATION OF TELEMEDICINE CAPABILITIES:
OF THOSE PRACTICES WITH THE CAPABILITY TO PROVIDE THESE SERVICES

Use of HIPAA Compliant Telemedicine Platform



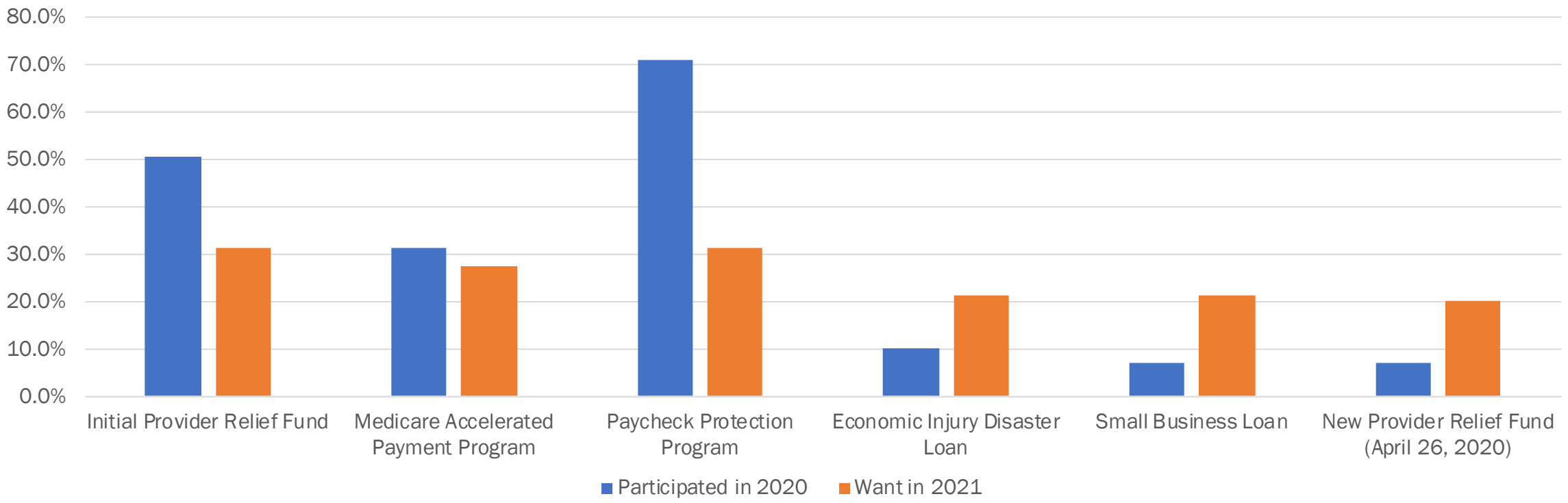
% of New & Existing Patient Visits Conducted Via Telehealth



FEDERAL STIMULUS PARTICIPATION

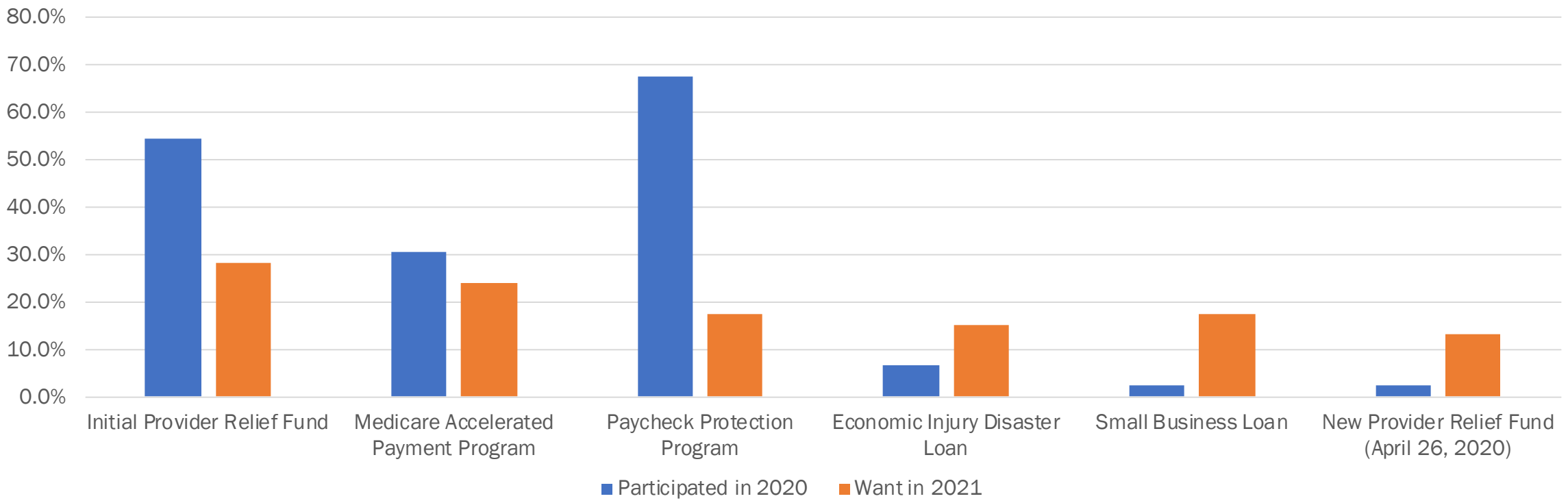
PARTICIPATION IN FEDERAL STIMULUS PROGRAMS: OVERALL

AT LEAST 70% OF PRACTICES PARTICIPATED IN ONE OR MORE PROGRAMS OFFERED IN 2020, BUT ONLY 30% WOULD LIKE TO SEE ONE OR MORE OF THOSE OPTIONS BACK IN 2021



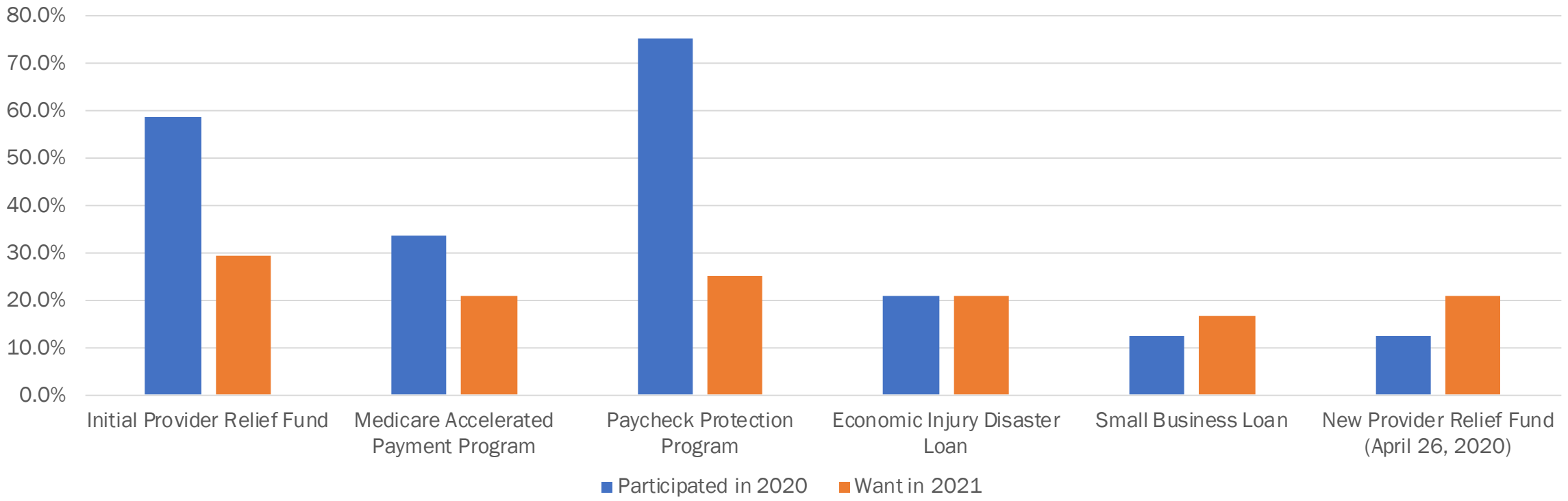
PARTICIPATION IN FEDERAL STIMULUS PROGRAMS: ONCOLOGY

AT LEAST 50% OF ONCOLOGY PRACTICES TOOK ADVANTAGE OF THE INITIAL PROVIDER RELIEF FUND AND PAYCHECK PROTECTION PROGRAM IN 2020; ONLY ~30% OF PRACTICES WOULD LIKE TO SEE PROVIDER RELIEF FUND IN 2021



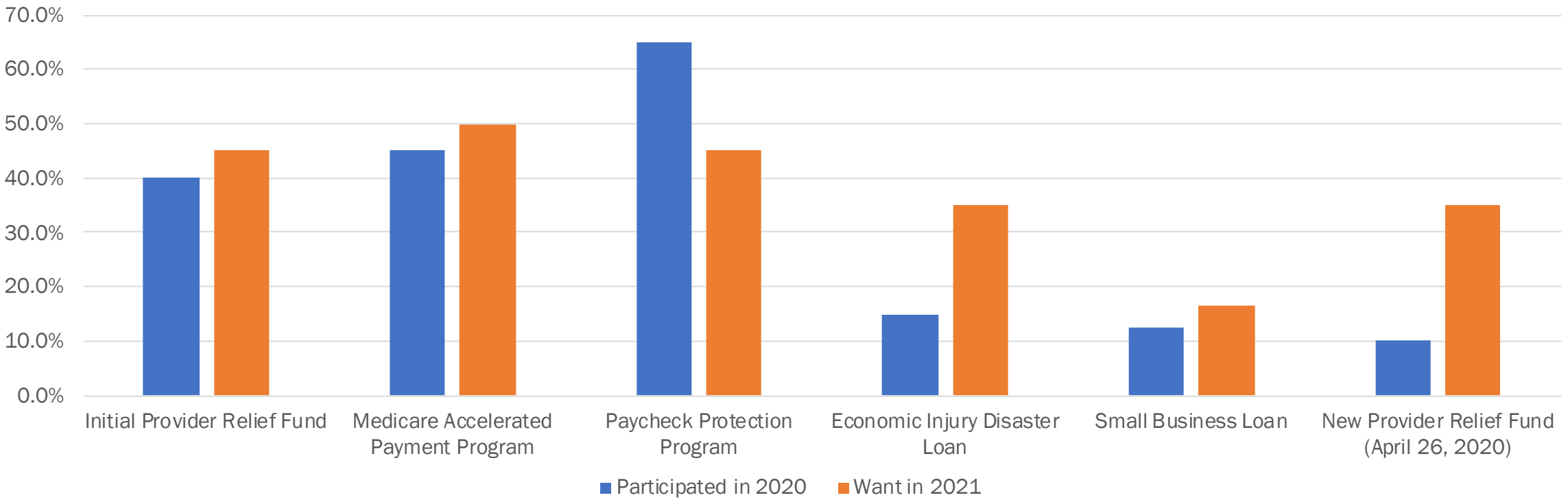
PARTICIPATION IN FEDERAL STIMULUS PROGRAMS: VISION PRACTICES

MORE THAN 75% OF VISION PRACTICES PARTICIPATED IN ONE OR MORE AVAILABLE PROGRAMS IN 2020; HOWEVER, LESS THAN 30% WOULD LIKE TO SEE THOSE PROGRAMS AVAILABLE IN 2021



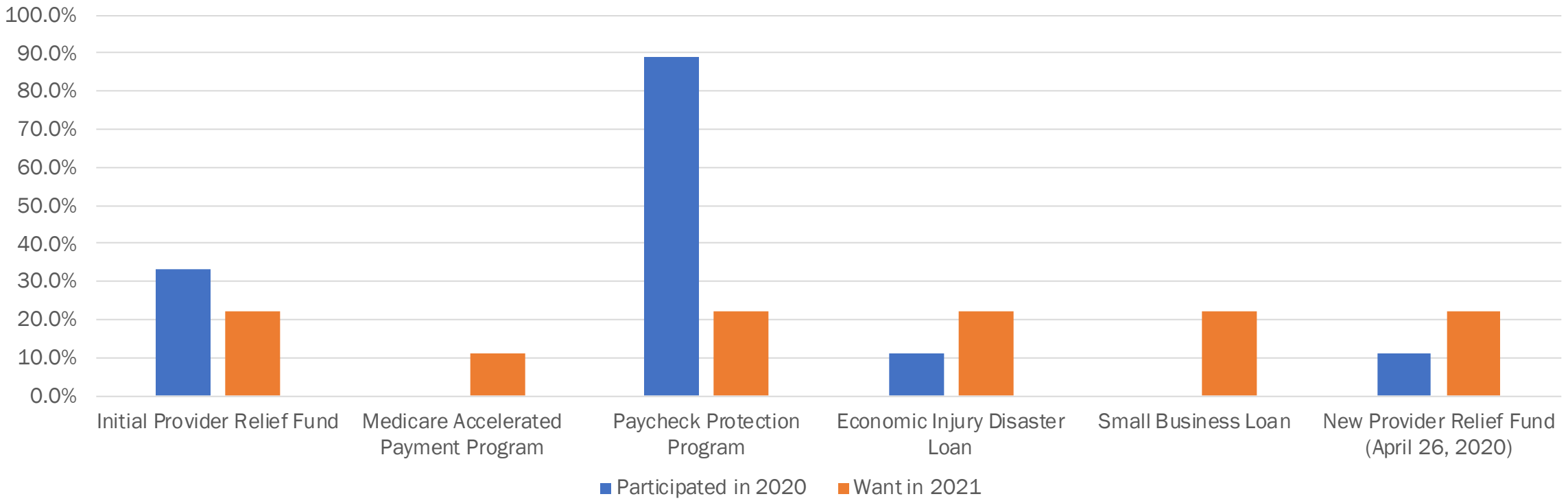
PARTICIPATION IN FEDERAL STIMULUS PROGRAMS: OTHER LARGE SPECIALTY PRACTICES

MORE THAN 65% OF OTHER LARGE SPECIALTY PRACTICES PARTICIPATED IN ONE OR MORE AVAILABLE PROGRAMS IN 2020; HOWEVER, MORE THAN 40% WOULD LIKE TO SEE THOSE PROGRAMS AVAILABLE IN 2021



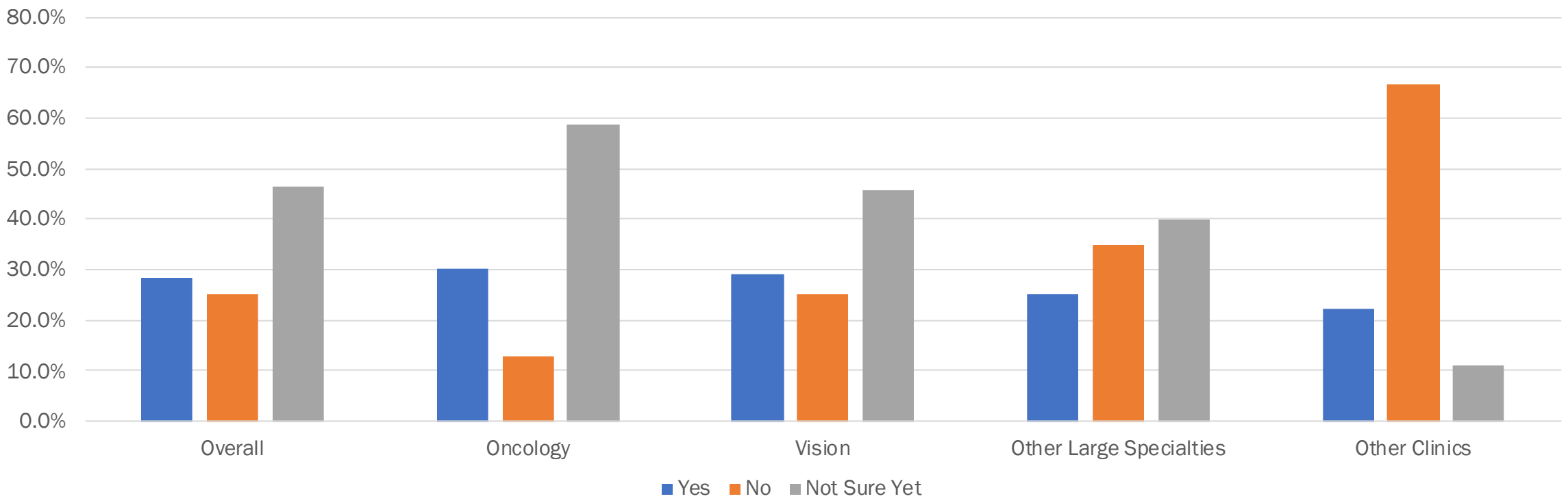
PARTICIPATION IN FEDERAL STIMULUS PROGRAMS: OTHER CLINICS

APPROXIMATELY 89% OF OTHER CLINICS PARTICIPATED IN ONE OR MORE AVAILABLE PROGRAMS IN 2020; HOWEVER, LESS THAN 20% WOULD LIKE TO SEE THOSE PROGRAMS AVAILABLE IN 2021



HAS THE TOTALITY OF THE FEDERAL STIMULUS PACKAGE THUS FAR BEEN ENOUGH FOR THE NEXT 6-9 MONTHS?

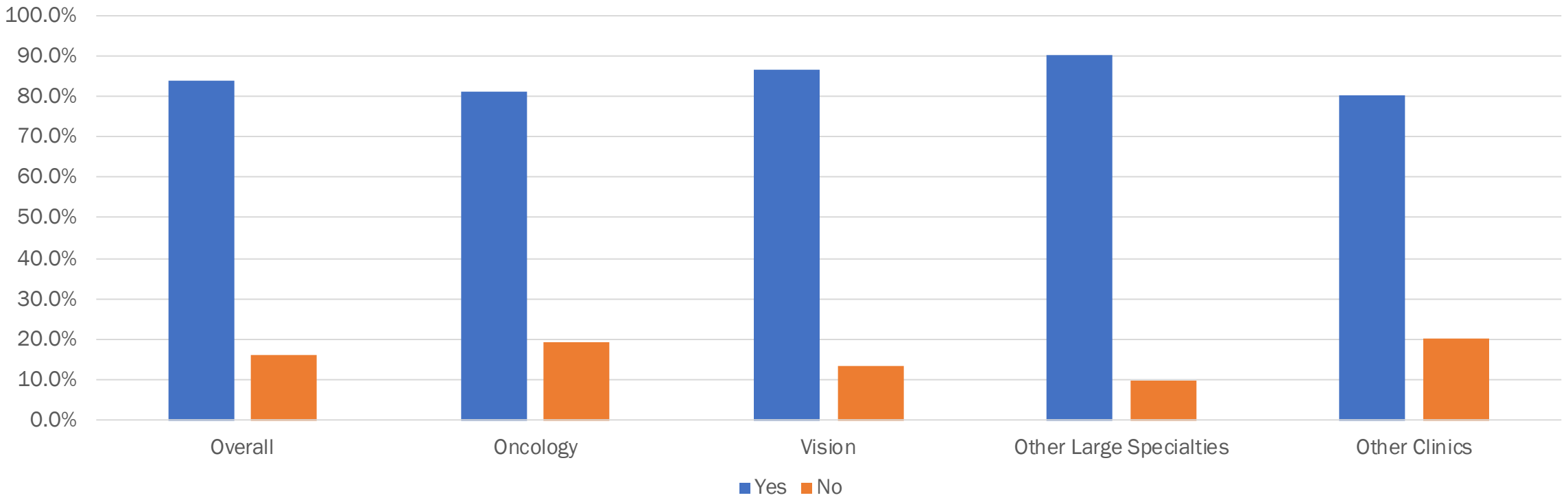
47% OF PRACTICES ARE NOT SURE YET WHILE 28% BELIEVE IT IS SUFFICIENT AND 25% KNOW IT IS NOT



PREPAREDNESS FOR RESURGENCE

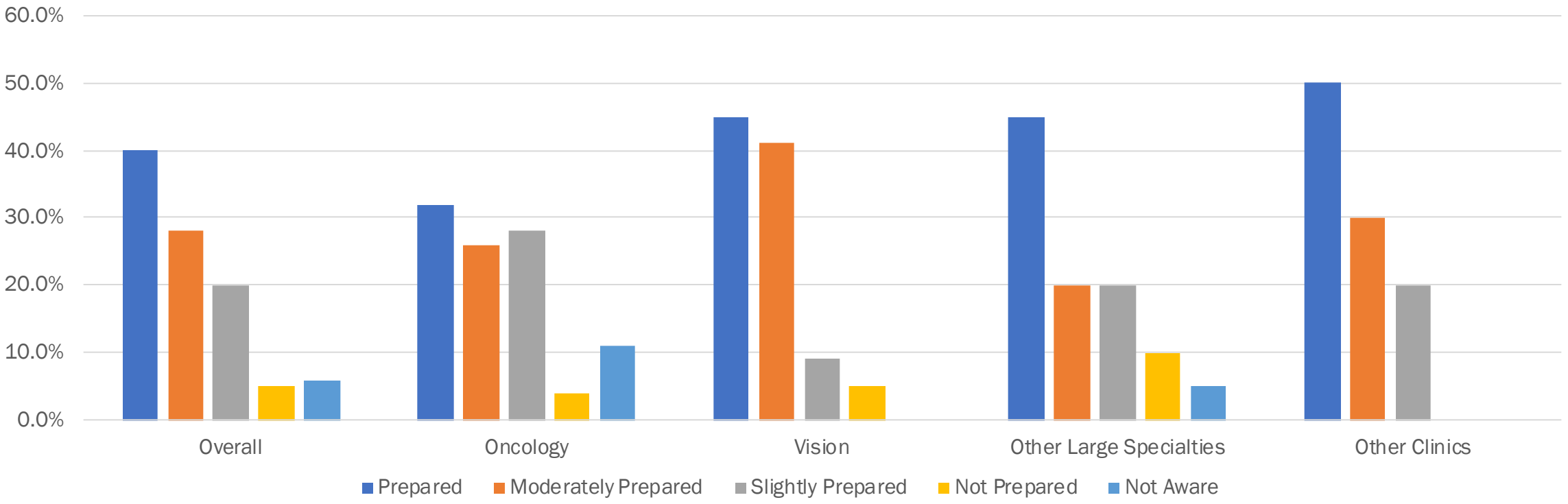
HAVE YOU IMPLEMENTED COVID-19 TESTING AND RETURN TO WORK PROTOCOLS FOR YOUR STAFF?

APPROXIMATELY 84% OF PRACTICES HAVE IMPLEMENTED THESE PROTOCOLS



PREPARED TO ADDRESS FFCRA REQUIREMENTS WITH THE RECENT RESURGENCE?

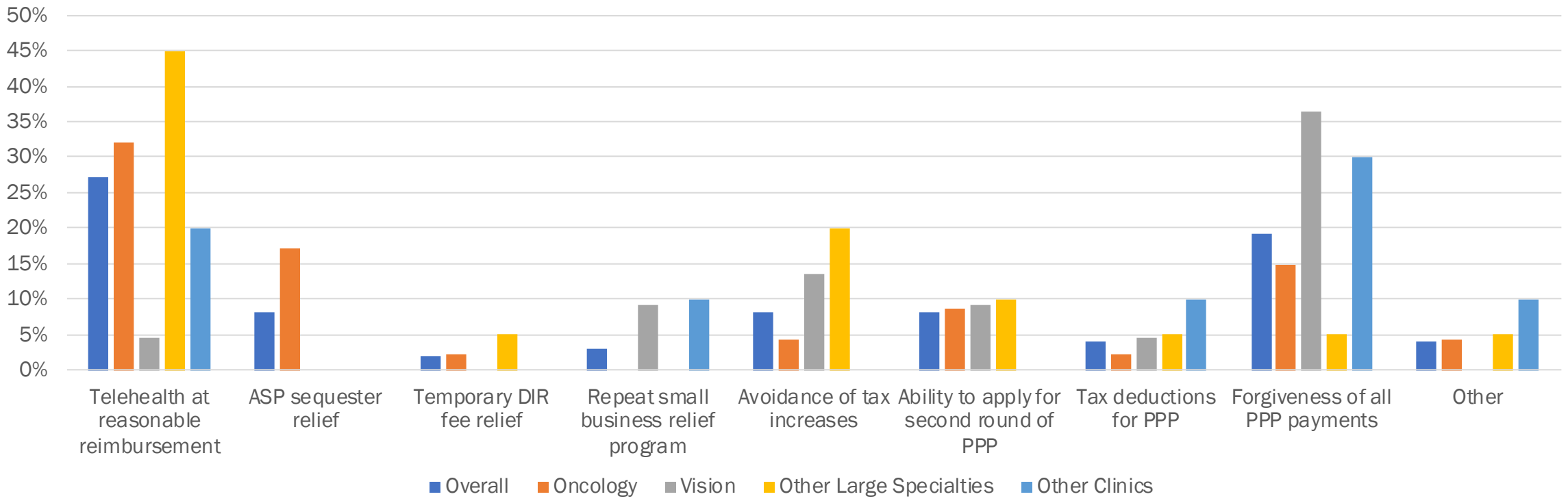
31% OF PRACTICES ARE SLIGHTLY OR NOT AT ALL PREPARED



MOST IMPORTANT ACTIVITY TO STAY IN PLACE IN 2021

MOST IMPORTANT ACTIVITY TO STAY IN PLACE IN 2021:

OVERALL THE AVAILABILITY OF TELEHEALTH AT REASONABLE REIMBURSEMENT FOLLOWED BY FORGIVENESS OF ALL PPP PAYMENTS

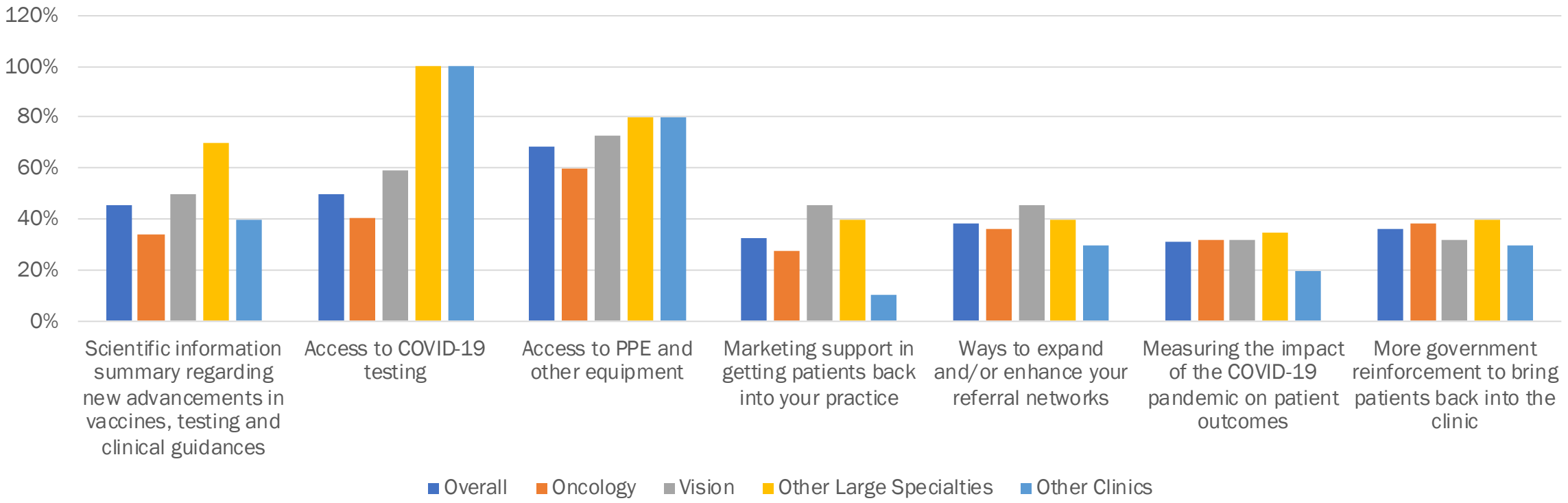


Note: When measured by average rank, forgiveness of all PPP payments was ranked higher overall and by the vision and other clinics while the reimbursed telehealth options were ranked higher for oncology and other large specialty practices.

ADDITIONAL RESOURCES THAT WOULD BE HELPFUL

ADDITIONAL RESOURCES THAT WOULD BE HELPFUL:

ACCESS TO PPE AND OTHER EQUIPMENT, ACCESS TO COVID-19 TESTING, AND SCIENTIFIC INFORMATION SUMMARY REGARDING NEW ADVANCEMENTS IN VACCINES, TESTING AND CLINIC GUIDANCES WERE THE TOP 3 NEEDS OVERALL



Note: The top 3 resources were the same across all of the specialty segments except for Oncology practices that would prefer more government reinforcement to bring patients back into the clinic than scientific information.