

N. CAROLINA

The Healthcare Openness and Access Project (HOAP) measures how open and accessible each state's healthcare system is to patient and provider preferences. The overall HOAP index is the average of 10 categories below, referred to as subindexes in the study, each of which is in turn an average of multiple indicators.

The HOAP index ranks North Carolina near the bottom of the 51 jurisdictions analyzed. Some of the state's highest scores are in the Public Health Subindex and the Direct Primary Care Subindex, and some of its lowest are in the Provider Regulation Subindex and the Corporate Subindex. North Carolina's score and rank in each subindex are given below.

| OVERALL RANK | SCORE | SCORE KEY |
|--|---|--|
| 38 | 2.98 US MEAN: 3.24 US MEDIAN: 3.23 | 1 ← → 5 WORST SCORE BEST SCORE |
| WWW.MERCATUS.ORG/HOAP | | |

#25

CORPORATE

5 = healthcare professionals and others have greatest flexibility with regard to ownership, business structure, and employment in healthcare sector

| | |
|-------------|-----------------|
| SCORE | US MEAN: 2.59 |
| 2.00 | US MEDIAN: 2.00 |

STUDY INDICATORS

- State allows the corporate practice of medicine
- State allows businesses to employ licensed healthcare professionals
- State allows nonlicensed individuals to own/operate medical entities
- State allows licensed individuals to split fees with nonlicensed individuals

#29

INSURANCE

5 = insurers have greatest flexibility to determine structure and pricing of health insurance policies

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.44 |
| 3.40 | US MEDIAN: 3.60 |

STUDY INDICATORS

- State mandates fewer health insurance benefits
- State mandates less rate review
- State does not expand on federal age rating limitations
- State does not expand on federal tobacco rating limitations
- State does not expand on federal geographic rating limitations

#43

OCCUPATIONAL REGULATION

5 = medical professionals have easiest access to licensure and employment and greatest discretion regarding services they offer

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.13 |
| 2.20 | US MEDIAN: 3.00 |

STUDY INDICATORS

- State allows medical licensure reciprocity with other states
- State has fewer continuing medical ed. requirements
- State allows nurse practitioners broad scope of practice
- State has fewer optician licensing requirements
- State allows direct-entry midwifery

#45

PROVIDER REGULATION

5 = healthcare providers have greatest flexibility to determine hospital and pharmacy operations

| | |
|-------------|-----------------|
| SCORE | US MEAN: 2.42 |
| 1.33 | US MEDIAN: 2.67 |

STUDY INDICATORS

- State has fewer certificate-of-need restrictions
- State puts fewer restrictions on compounding pharmacies
- State lacks burdensome prescription monitoring mandates

#48

TELEMEDICINE

5 = state's environment is most conducive for telemedicine practitioners

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.01 |
| 2.00 | US MEDIAN: 3.00 |

STUDY INDICATORS

- State reimburses Medicaid providers at parity for telemedicine
- State has less restrictive telepresenter requirements
- State reimburses Medicaid providers at parity for remote monitoring
- State allows online prescribing

Note: Order of subindexes does not reflect importance.

#8

DIRECT PRIMARY CARE

5 = state environment is most conducive to the establishment of direct primary care (DPC) practices as an alternative method of financing primary care

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.48 |
| 4.00 | US MEDIAN: 3.33 |

STUDY INDICATORS

- State has pro-DPC laws
- State has higher market demand for DPC
- State has more DPC practices per capita

#19

MEDICAL LIABILITY

5 = physicians and others are least constrained by threat of malpractice litigation

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.27 |
| 3.33 | US MEDIAN: 3.33 |

STUDY INDICATORS

- Physicians pay fewer malpractice actions
- Physicians pay lower malpractice premiums
- State has adopted more reforms to modulate malpractice litigation

#12

PHARMACEUTICAL ACCESS

5 = patients have easiest access to certain classes of drugs, including experimental and unconventional treatments

| | |
|-------------|-----------------|
| SCORE | US MEAN: 3.11 |
| 3.50 | US MEDIAN: 3.00 |

STUDY INDICATORS

- State allows greater access to experimental drugs
- State allows access to medical marijuana
- State allows easier access to pseudoephedrine
- State allows sale of oral contraceptives without physician prescription

#16

PUBLIC HEALTH

5 = residents have easiest access to substance abuse remedies and greatest discretion when offering medical assistance to others

| | |
|-------------|-----------------|
| SCORE | US MEAN: 4.22 |
| 4.33 | US MEDIAN: 4.33 |

STUDY INDICATORS

- State allows access to e-cigarettes
- State allows access to naloxone
- State has strong "Good Samaritan" protection

#18

TAXATION

5 = state imposes lowest burden of taxation for certain healthcare services, financing methods, and devices

| | |
|-------------|-----------------|
| SCORE | US MEAN: 4.23 |
| 3.67 | US MEDIAN: 4.33 |

STUDY INDICATORS

- State has fewer provider taxes
- State has fewer health savings account (HSA) taxes
- State has fewer medical device taxes

STATE RANKING BY OVERALL HOAP INDEX SCORE

| | | | | | |
|------------|------------------|---------------|-----------------|------------------|-------------------------|
| 1 WYOMING | 10 MISSISSIPPI | 19 ALABAMA | 28 OHIO | 37 ARKANSAS | 46 CONNECTICUT |
| 2 IDAHO | 11 WISCONSIN | 20 FLORIDA | 29 PENNSYLVANIA | 38 N. CAROLINA | 47 VERMONT |
| 3 MONTANA | 12 VIRGINIA | 20 OREGON | 30 WASHINGTON | 39 ILLINOIS | 48 DISTRICT OF COLUMBIA |
| 4 INDIANA | 13 S. DAKOTA | 22 TEXAS | 31 IOWA | 40 CALIFORNIA | 49 GEORGIA |
| 5 UTAH | 14 LOUISIANA | 23 NEW MEXICO | 32 MICHIGAN | 41 MARYLAND | 50 NEW YORK |
| 6 MISSOURI | 15 NEVADA | 24 N. DAKOTA | 33 MINNESOTA | 42 MASSACHUSETTS | 51 NEW JERSEY |
| 7 NEBRASKA | 16 NEW HAMPSHIRE | 25 MAINE | 34 TENNESSEE | 43 RHODE ISLAND | |
| 8 COLORADO | 17 ARIZONA | 26 KANSAS | 35 S. CAROLINA | 44 KENTUCKY | |
| 9 ALASKA | 18 HAWAII | 27 OKLAHOMA | 36 DELAWARE | 45 WEST VIRGINIA | |