AmerisourceBergen Pharmacy Check-Up: Activities and Barriers to Care Analysis

maru/matchbox

October, 2018

Background and Methodology

AmerisourceBergen partnered with Maru/Matchbox to conduct research that explores and quantifies the current challenges and barriers of pharmacy care providers.

A 10-minute survey was conducted online from August 27th – September 7th among those in the Pharmacy Industry.

252 surveys were completed. Quotas were set based on type of pharmacy; see table below:

Pharmacy Type	n=
Chain	71
Independent	68
Hospital System	73
Specialty	40
TOTAL	252

Occupation	n=
Pharmacy Owner	30
Pharmacy Manager	81
Director of Pharmacy	86
Other Pharmacy Occupation	11
Pharmacist	41
Pharmacy Technician	3

RPh
(Registered Pharmacists)
96%

**We will refer to the group of respondents as Pharmacists in this report.*

Respondents were screened based on the following criteria:

- Pharmacy related occupation
- Some involvement in decision making
- Tenure of 2+ years

Statistical testing was conducted across pharmacy types at a 95% confidence interval.

- Boxes note significance higher than remaining cohorts- dashed boxes note those significantly higher than two other cohorts
- Circles note significance lower than remaining cohorts- dashed circles note those significantly lower than two other cohorts

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Key Findings and Recommendations

- While it may come as no surprise that **filling prescriptions** is the activity pharmacists spend the greatest amount of time on, based on the *Pharmacy Check-Up: A Look at Activities & Barriers to Care*, Chain pharmacists spend the largest proportion of their time filling prescriptions compared to pharmacists within alternative sites of care (38% vs 24% Independent, 19% Hospital, 16% Specialty).

- On average, pharmacists across all sites of care also stated they're only able to spend 10% of their time counseling patients, primarily focused on providing education around how to safely and effectively take medication, potential side effects and compliance. However, this is the same task that pharmacists *feel* like they should spend more time devoted to, along with medication therapy management, which was most strongly felt by Chain Pharmacists.

    - And, across all sites of care, counseling patients was an area that all pharmacists believe they *will* spend more time on in the future, with Chain being the most pronounced (Counseling: 75% vs 57% Independent and 55% Specialty; MTM: 85% vs. 68%/62%/63% respectively).

    - They also feel they will spend more time caring for patients via preventative care screening, administering immunizations and urgent care/on-site clinic. This is particularly true for Chain. Hospital and Specialty pharmacists feel they will spend more time on data reporting in the future (47% Hospital, 65% Specialty vs. 24% Chain, 24% Independent)

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Key Findings and Recommendations

- On the flip side, pharmacists feel they should be spending ***less*** **time on insurance/reimbursement** related activities.
    - Chain pharmacists are more likely to think they should be spending less time on this activity compared to Hospital and Specialty pharmacists (70% vs 44%/40%).
    - In fact, Hospital and Specialty pharmacists spend the most time on insurance and reimbursement activities relative to their counterparts.
    - Specialty pharmacists also expect to be spending more time on insurance/reimbursement related activities as compared to Chain and Independent pharmacists (53% vs 25% and 31%).
- When it comes to significant barriers to good care, all pharmacists agree **reimbursement issues are a significant barrier**. For Chain, they are stymied by **staff resources** (73% significant barrier vs 29% Independent, 49% Hospital, 40% Specialty), while Independent and Specialty are particularly bogged down by **contracting with payers and manufacturers**.

Key Findings and Recommendations

- The majority also agree that **building relationships with prescribers** is a top way to overcome some of these barriers (76% for Chain, 72% for Independent, 71% for Hospital and 65% for Specialty), and that **inventory management tools** can help to better solve daily obstacles (62% for Chain, 47% for Independent, 52% for Hospital and 50% for Specialty).

- When it comes to barriers to running a successful business, pharmacists agree that **fair reimbursements** and **staff management/training are the largest barriers**

    - However, Chain and Hospital pharmacists are more likely than Independent and Specialty to cite staff management/training as a barrier (73% for Chain and 63% for Hospital vs 46% for Independent and 40% for Specialty).

- Finally, when looking ahead, all pharmacists outside of the hospital setting rank being able to play a greater role in patient care as what they are most excited about as the field of pharmacy evolves

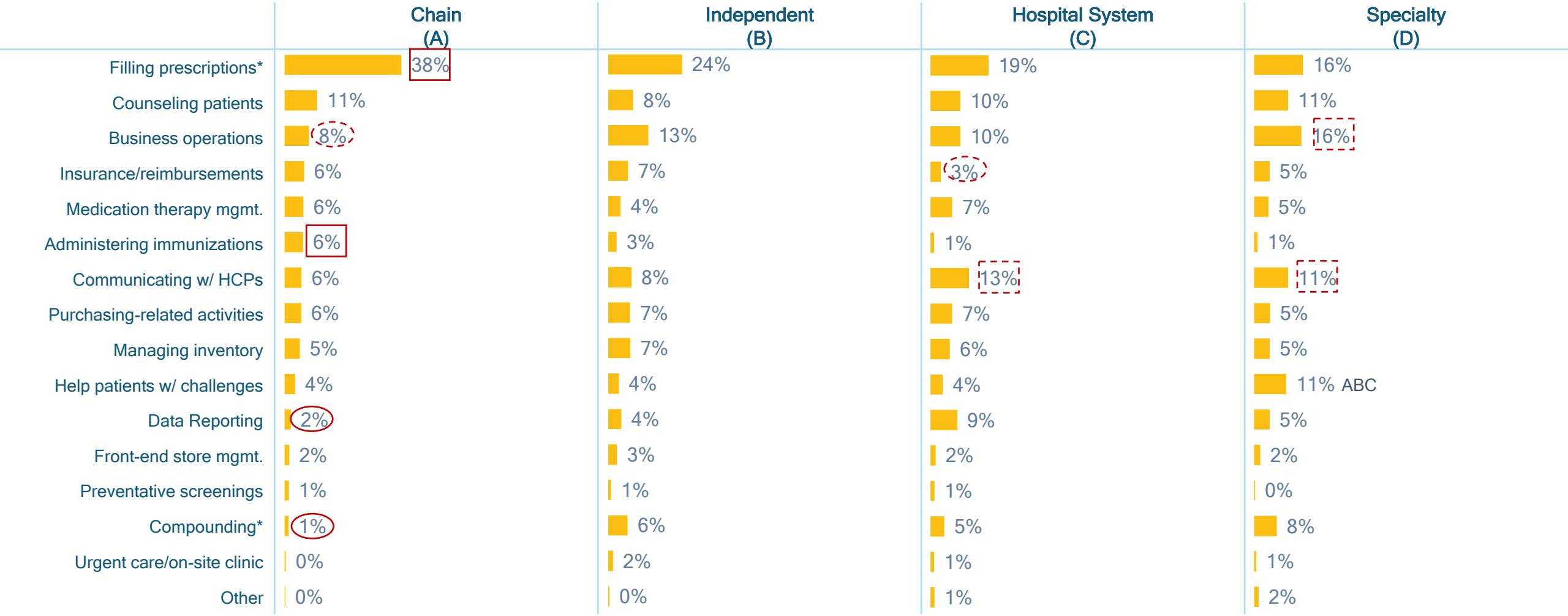
    - Hospital pharmacists most excited about the future of their overall role in healthcare and medication advancements.

Pharmacy Activities and Counseling

- Filling prescriptions is the top activity pharmacists spend their time on, with Chain spending more of their time filling than those employed at other pharmacy types. All pharmacists spend about a tenth of their time counseling patients but business operations follows filling prescriptions for both Independent and Specialty.

% Time Spent On Pharmacy Activities

(Typical Week - Mean)



**Registered Pharmacists Only*

Base: All Respondents (n=252); Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40) | Q201. In a typical week, what proportion of your time is spent on each of the following activities? | Base: All Respondents (n=206); Chain (n=66), Independent (n=56), Hospital (n=54), Specialty (n=30) | Q202. And what proportion of your time spent consulting with patients is devoted to each of the following topics?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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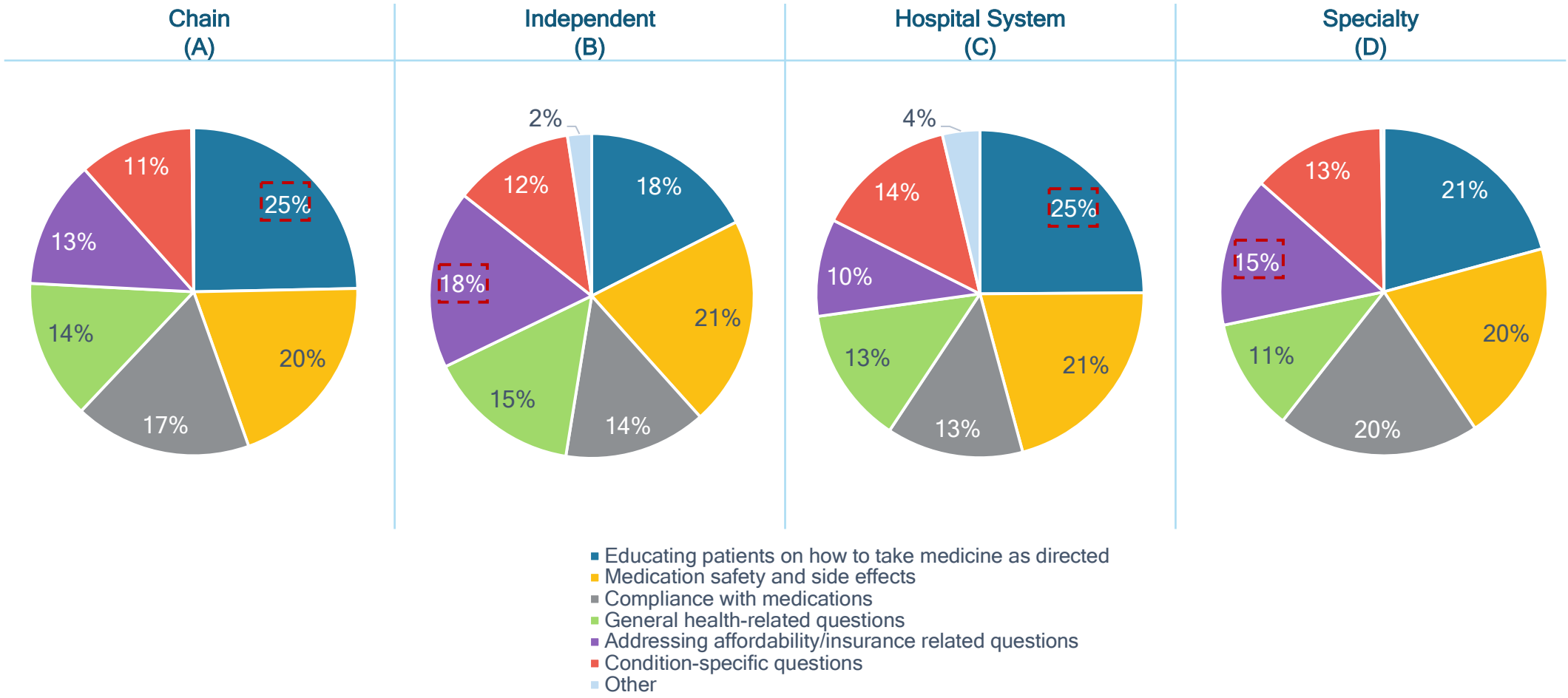
Pharmacy Activities and Counseling

- Top consulting topics at all pharmacy types are educating patients on how take medicine, medication safety and compliance; this was consistent across survey respondents.

% Time Spent Counseling Patients On…

(Typical Week - Mean)



Base: All Respondents (n=206); Chain (n=66), Independent (n=56), Hospital (n=54), Specialty (n=30)

Q202. And what proportion of your time spent consulting with patients is devoted to each of the following topics?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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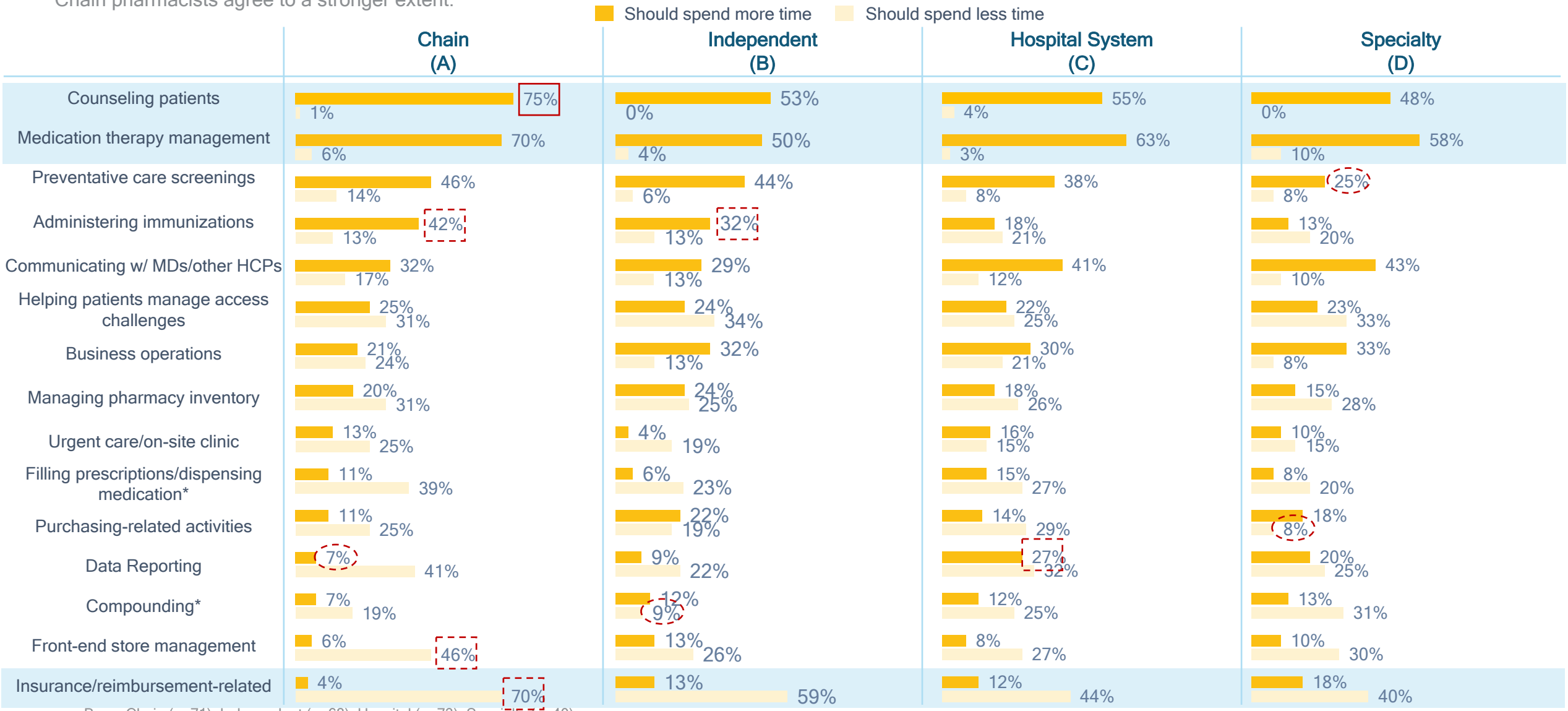
Time Should Spend on Activities

- Counseling patients and medication therapy management are top activities all pharmacists feel they should be spending more time, though Chain pharmacists are more likely to think they should be counseling patients. Pharmacists also agree that they should be spending less time on insurance/reimbursement related issues though Chain pharmacists agree to a stronger extent.



Base: Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40)

Q203. Using the scale below, please indicate whether you feel you should be spending more, less, or the same amount of time on each of the following types of activities in your current role.

*Registered Pharmacists Only

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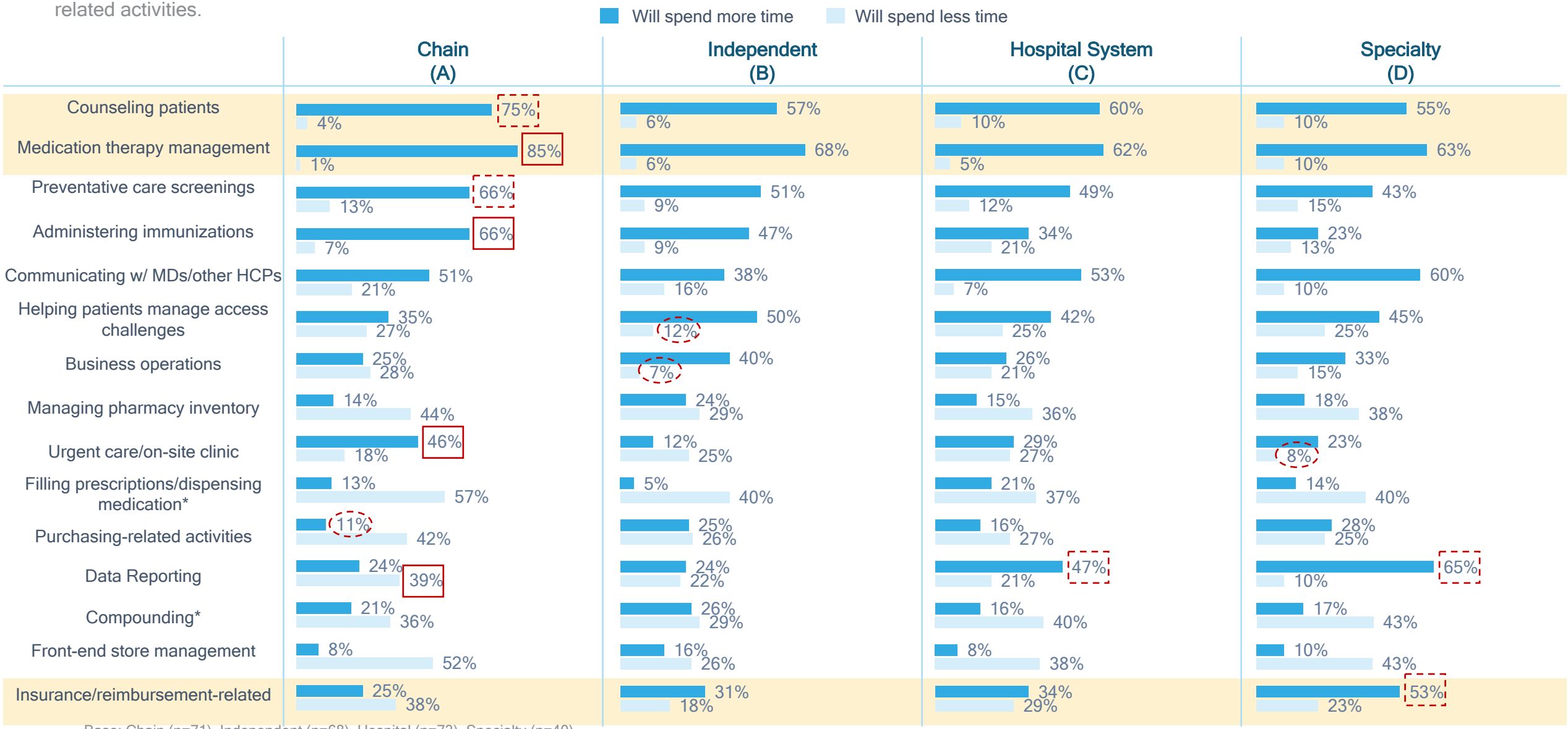
Time Expect to Spend on Activities in 5 Years

- Following suit, Pharmacists agree that they expect to be spending more time in the next 5 years on these key activities, counseling patients and MTM; though Chain pharmacists to a stronger degree. Specialty pharmacists expect to consult more with other HCPs but also plan to spend more time on data reporting and insurance related activities.



Base: Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40)
Q204. And now, thinking ahead to 5 years from now, how (if at all) do you think your time spent on the following activities will change?

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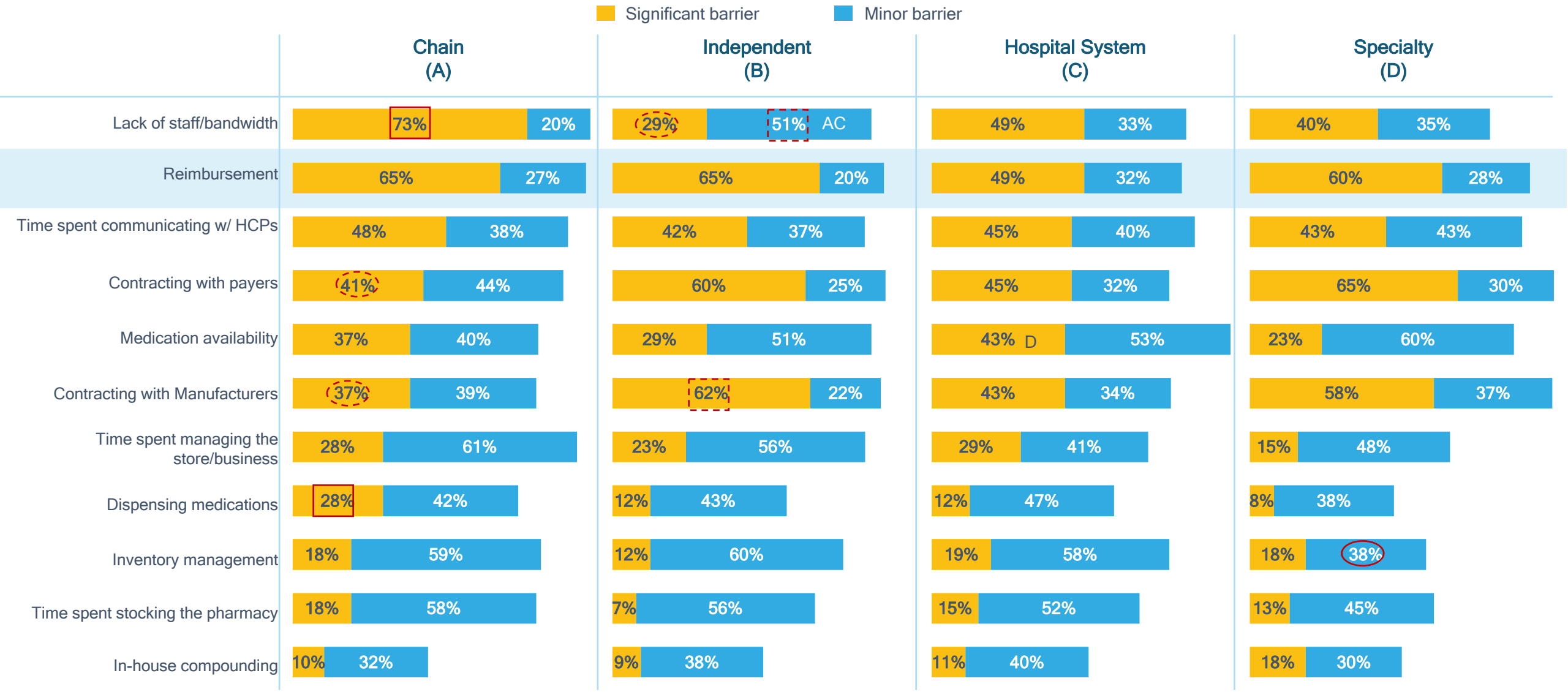
Barriers to Good Care

- Pharmacists feel that reimbursement is a top barrier to good care. Chain Pharmacists are more likely to see lack of staff and dispensing medications as significant barriers compared to all other pharmacist types.



*Responses <5% have been excluded from chart

Base: Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40) | Q300. Using the scale below, please indicate the extent to which each of the following are barriers to providing good care to your patients. |

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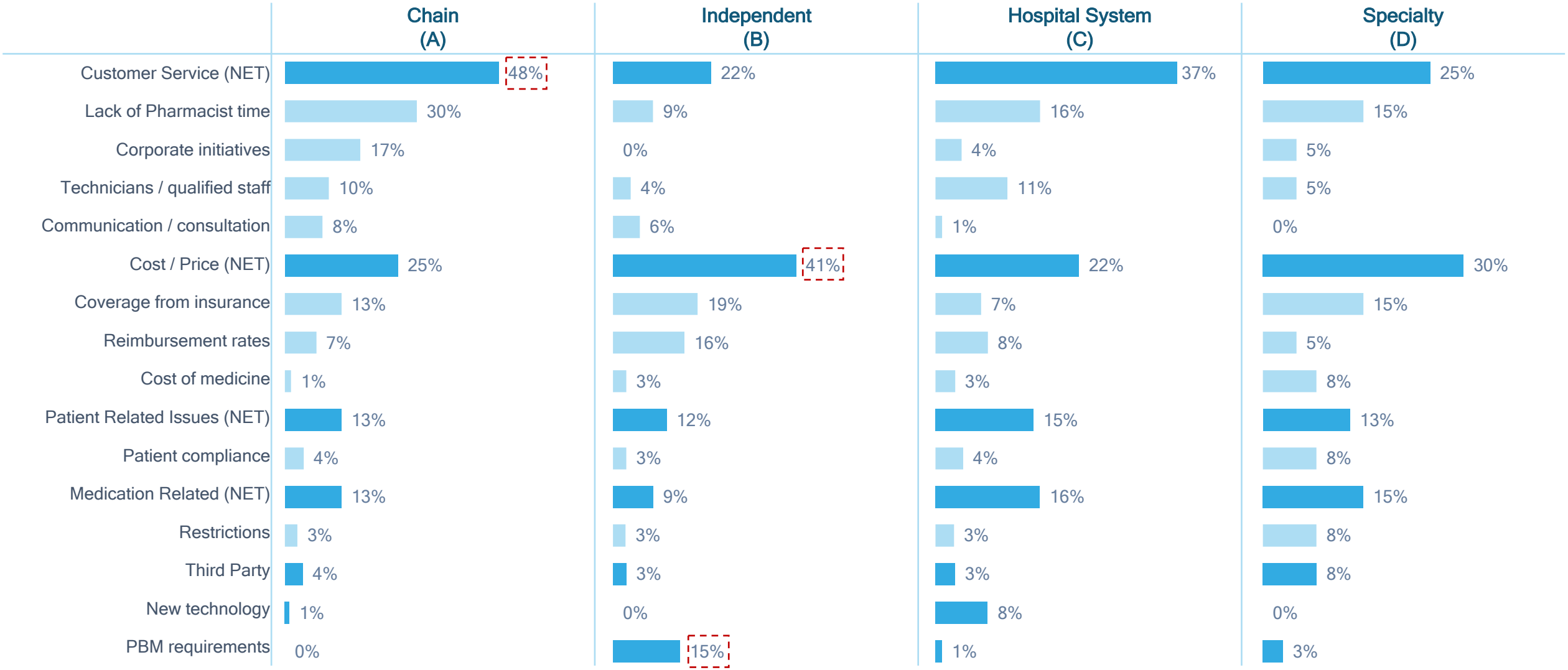
Other Perceived Barriers to Good Care

- Other barriers mentioned include customer service; specifically a lack of pharmacist time.



*Responses <8% have been excluded from chart

Base: Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40) | Q301. What else, if anything, do you perceive as barriers to providing good care to your patients?

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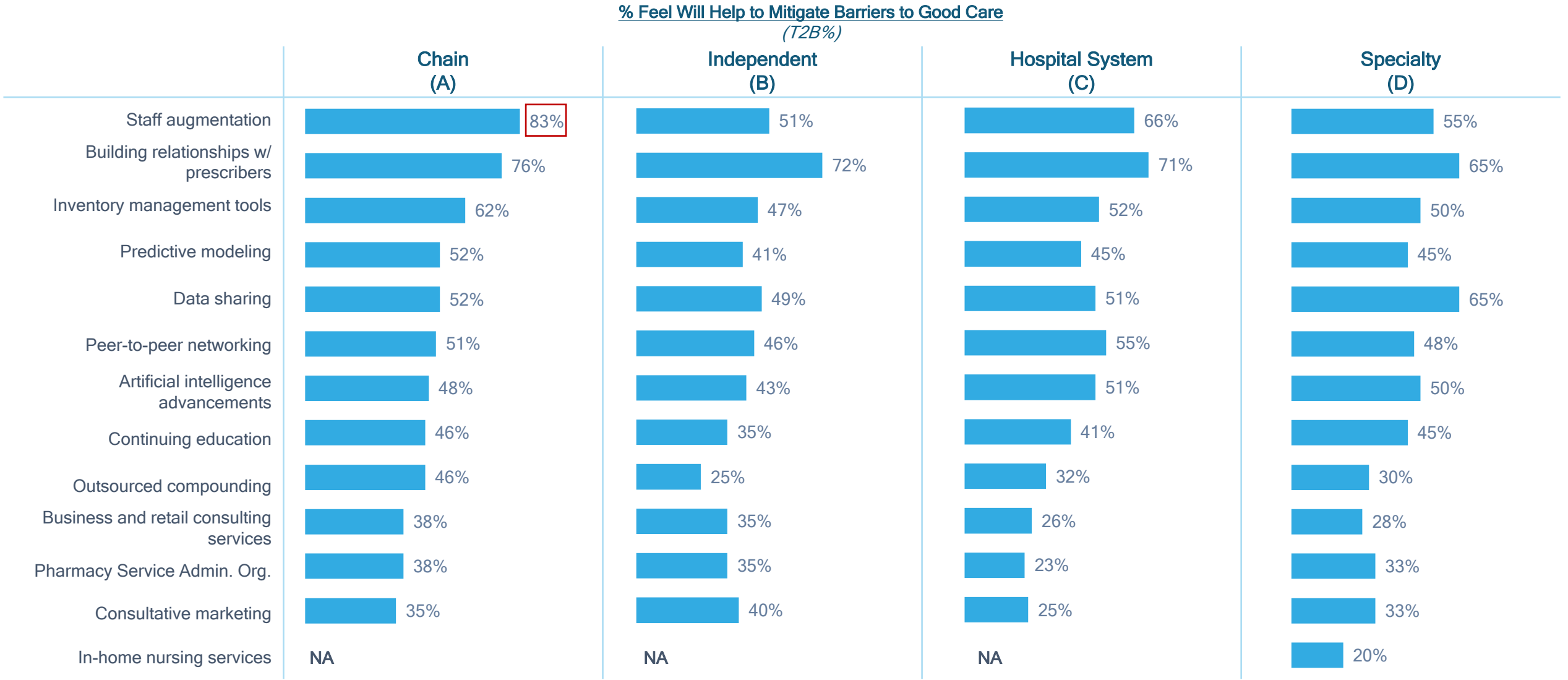
Ways to Overcome Barriers

- All pharmacy types feel that building relationships with prescribers would help to mitigate their barriers to good care. Chain pharmacists are more likely to turn to building staff while Specialty pharmacists think data sharing would help.



Base: All Respondents (n=252); Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40)

Q302. And to what extent do you feel the following resources and/or technology will help to mitigate these barriers to providing good patient care?

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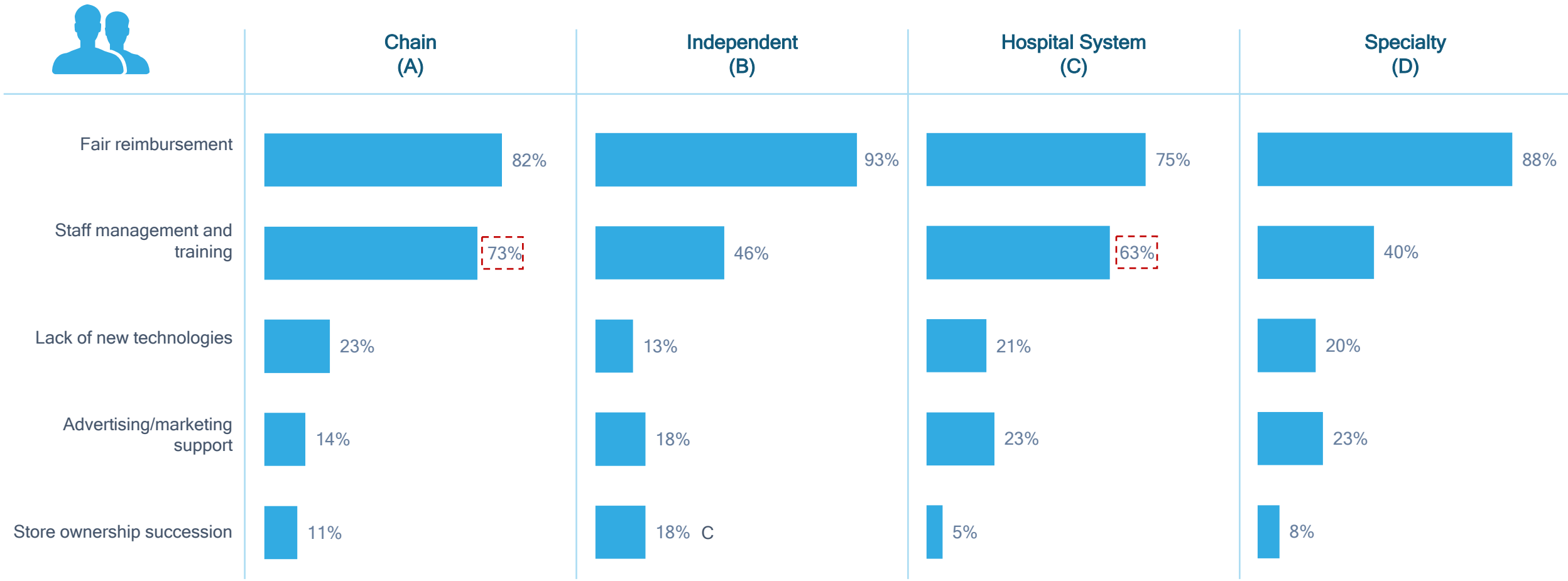
Barriers to a Successful Business

- Both Chain and Hospital pharmacists perceive staff management and training as a barrier although, fair reimbursement is, by far, the largest barrier to a successful business regardless of pharmacy type.



Base: All Respondents (n=252); Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40)

Q304. And lastly, what are perceived barriers to managing a successful business?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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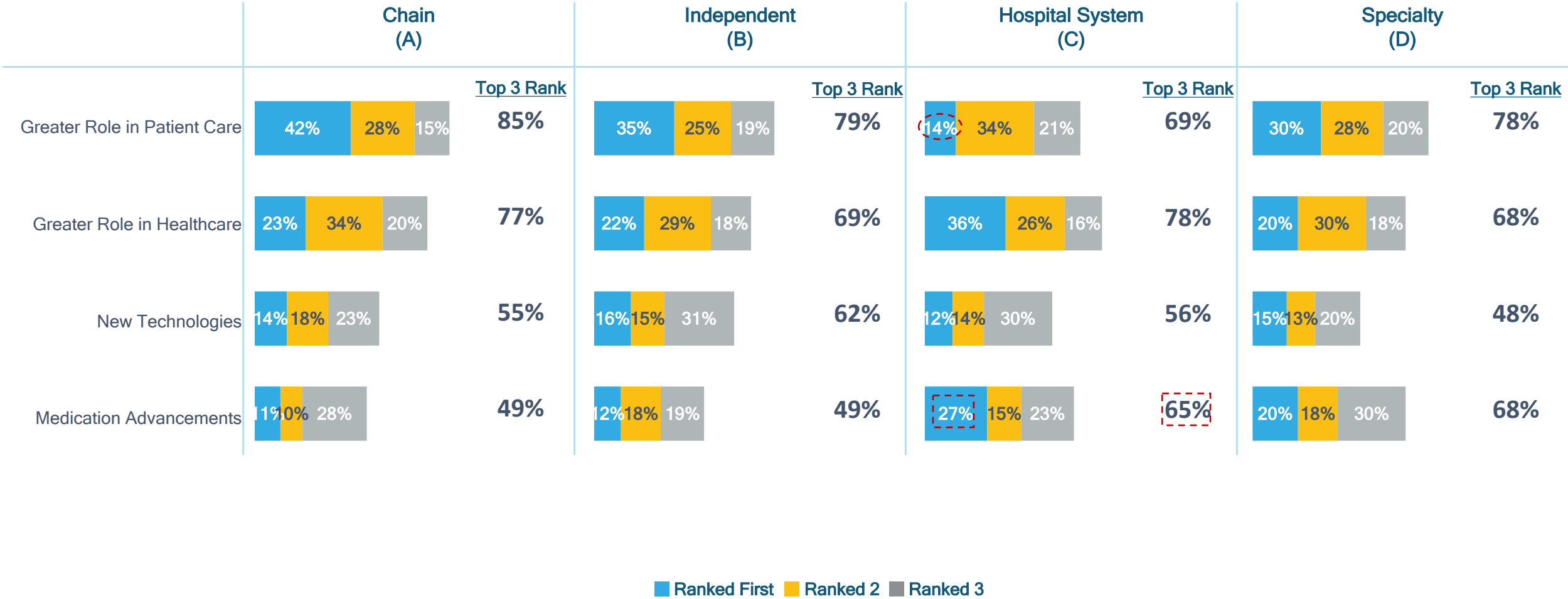
Looking Forward

- All cohorts outside of the hospital setting rank being able to play a greater role in patient care as what they are most excited about as the field of pharmacy evolves.

Most Excited About…
(Top 3 Rank)



*Responses <10% have been excluded from chart

14 Q303. Please rank each of the following based on what you are most excited about as the field of pharmacy evolves.

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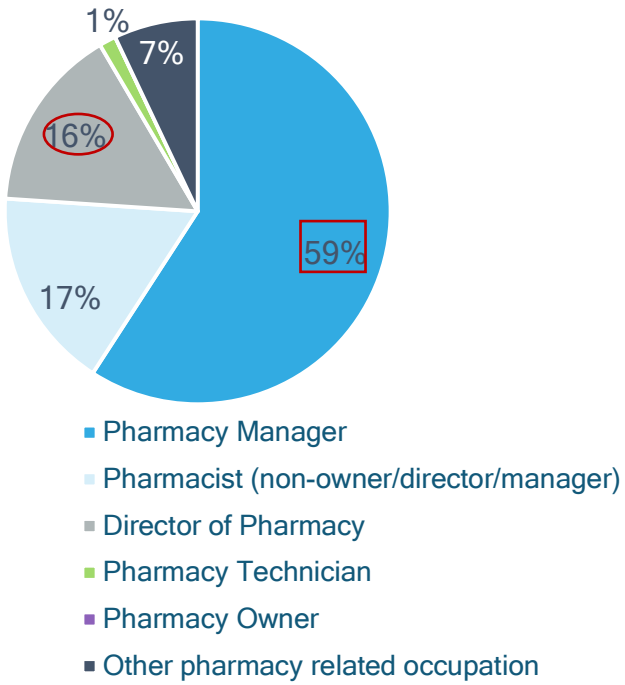
A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

Appendix

Occupation

Registered Pharmacists

94%



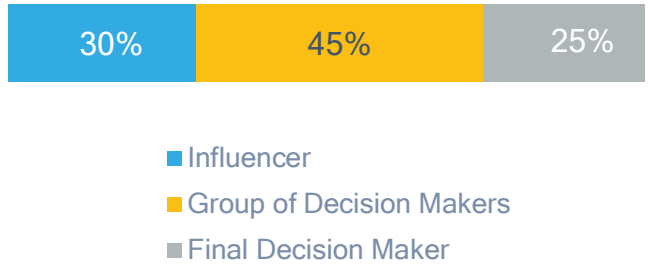
Pharmacist Profile

15 Avg. # years working in occupation

1,663 Avg. # patients in past month

5,842 Avg. # prescriptions filled in past month

Decision Making Authority



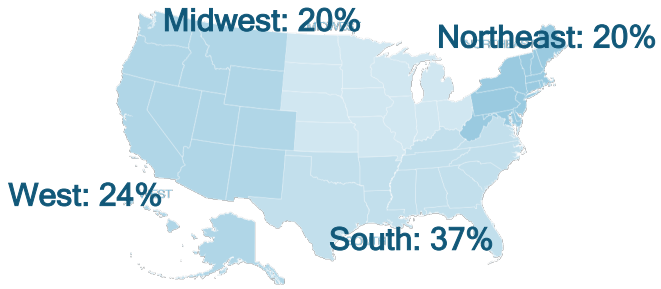
Setting

Urban: 32%

Suburban: 49%

Rural: 18%

Region



Base: Chain (n=71) | Q100. Which of the following best describes your occupation? | Q100a. Are you also a Registered Pharmacist (RPh)? | Q101. And which of the following best describes the type of pharmacy that you work in? | Q102. Which of the following Pharmacy Benefits Managers (PBMs), if any, is your pharmacy affiliated with…? | Q103. Which of the following best describes your decision-making authority with regards to drug stocking and purchasing decisions? | Q104. How many years have you been working as a [Occupation from Q100.]? | Q105. Approximately how many patients did you see in the past month? | Q106. And, thinking of the past month, how many prescriptions did your pharmacy fill? | Q401. In which state is your pharmacy located? | Q401. In which of the following types of settings is your pharmacy located?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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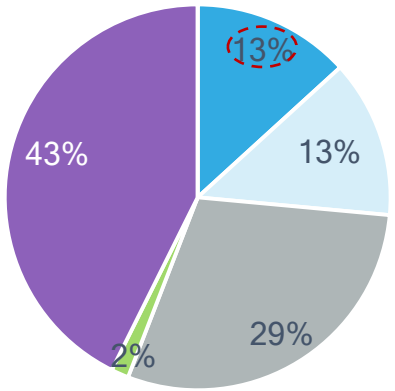
Occupation

Registered Pharmacists

96%



- Pharmacy Manager
- Pharmacist (non-owner/director/manager)
- Director of Pharmacy
- Pharmacy Technician
- Pharmacy Owner
- Other pharmacy related occupation

Pharmacist Profile

17 Avg. # years working in occupation

1,109 Avg. # patients in past month

4,364 Avg. # prescriptions filled in past month

Decision Making Authority

- Influencer
- Group of Decision Makers
- Final Decision Maker

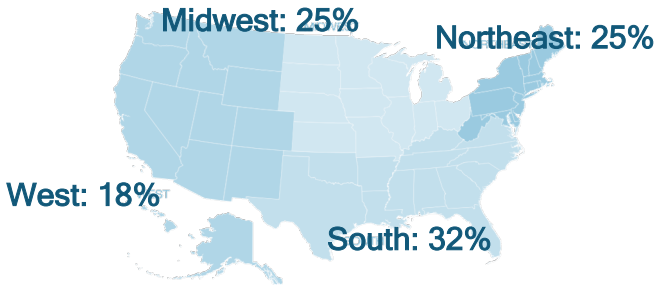
Setting

Urban: 25%

Suburban: 46%

Rural: 29%

Region



Base: Independent (n=68) | Q100. Which of the following best describes your occupation? | Q100a. Are you also a Registered Pharmacist (RPh)? | Q101. And which of the following best describes the type of pharmacy that you work in? | Q102. Which of the following Pharmacy Benefits Managers (PBMs), if any, is your pharmacy affiliated with…? | Q103. Which of the following best describes your decision-making authority with regards to drug stocking and purchasing decisions? | Q104. How many years have you been working as a [Occupation from Q100.]? | Q105. Approximately how many patients did you see in the past month? | Q106. And, thinking of the past month, how many prescriptions did your pharmacy fill? Q400. In which state is your pharmacy located? | Q401. In which of the following types of settings is your pharmacy located?

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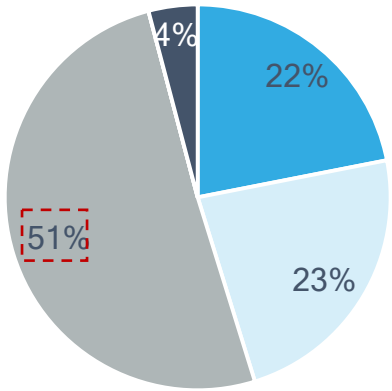
Occupation

Registered Pharmacists

100%



- Pharmacy Manager
- Pharmacist (non-owner/director/manager)
- Director of Pharmacy
- Pharmacy Technician
- Pharmacy Owner
- Other pharmacy related occupation

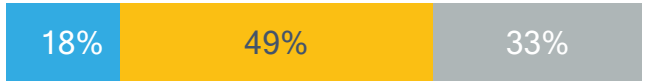
Pharmacist Profile

15 Avg. # years working in occupation

541 Avg. # patients in past month

3,972 Avg. # prescriptions filled in past month

Decision Making Authority



- Influencer
- Group of Decision Makers
- Final Decision Maker

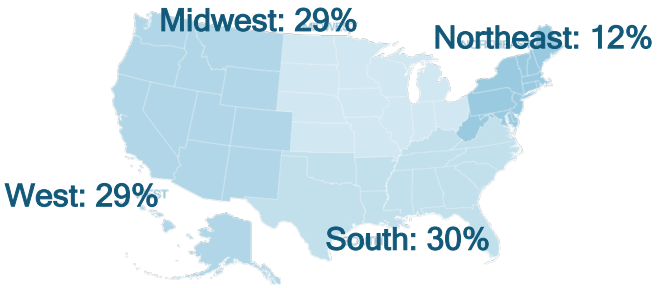
Setting

Urban: 48%

Suburban: 38%

Rural: 14%

Region



Base: Hospital (n=73) | Q100. Which of the following best describes your occupation? | Q100a. Are you also a Registered Pharmacist (RPh)? | Q101. And which of the following best describes the type of pharmacy that you work in? | Q102. Which of the following Pharmacy Benefits Managers (PBMs), if any, is your pharmacy affiliated with…? | Q103. Which of the following best describes your decision-making authority with regards to drug stocking and purchasing decisions? | Q104. How many years have you been working as a [Occupation from Q100.]? | Q105. Approximately how many patients did you see in the past month? | Q106. And, thinking of the past month, how many prescriptions did your pharmacy fill? Q400. In which state is your pharmacy located? | Q401. In which of the following types of settings is your pharmacy located?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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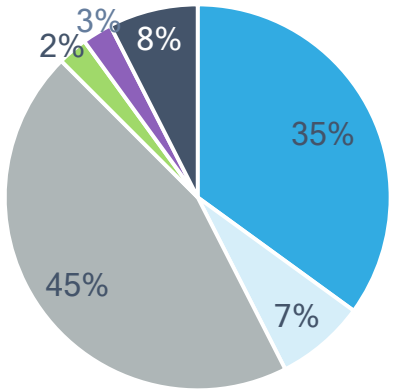
Occupation

Registered Pharmacists

88%



- Pharmacy Manager
- Pharmacist (non-owner/director/manager)
- Director of Pharmacy
- Pharmacy Technician
- Pharmacy Owner
- Other pharmacy related occupation

Pharmacist Profile

13 Avg. # years working in occupation

603 Avg. # patients in past month

3,148 Avg. # prescriptions filled in past month

Decision Making Authority

- Influencer
- Group of Decision Makers
- Final Decision Maker

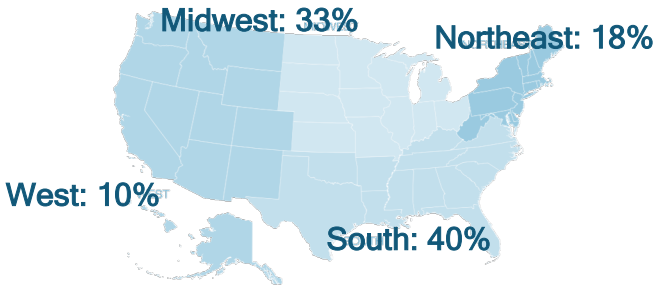
Setting

Urban: 50%

Suburban: 48%

Rural: 3%

Region



Base: Specialty (n=40) | Q100. Which of the following best describes your occupation? | Q100a. Are you also a Registered Pharmacist (RPh)? | Q101. And which of the following best describes the type of pharmacy that you work in? | Q102. Which of the following Pharmacy Benefits Managers (PBMs), if any, is your pharmacy affiliated with…? | Q103. Which of the following best describes your decision-making authority with regards to drug stocking and purchasing decisions? | Q104. How many years have you been working as a [Occupation from Q100.]? | Q105. Approximately how many patients did you see in the past month? | Q106. And, thinking of the past month, how many prescriptions did your pharmacy fill? Q400. In which state is your pharmacy located? | Q401. In which of the following types of settings is your pharmacy located?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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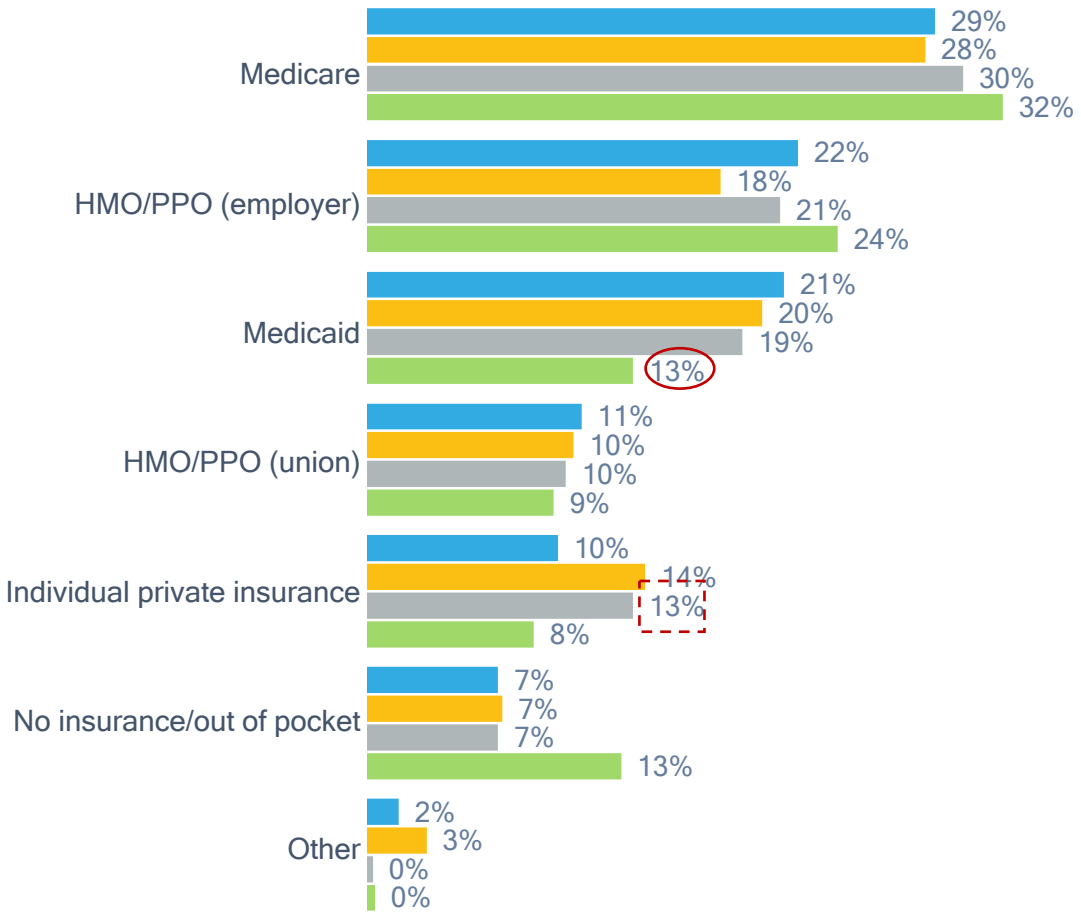
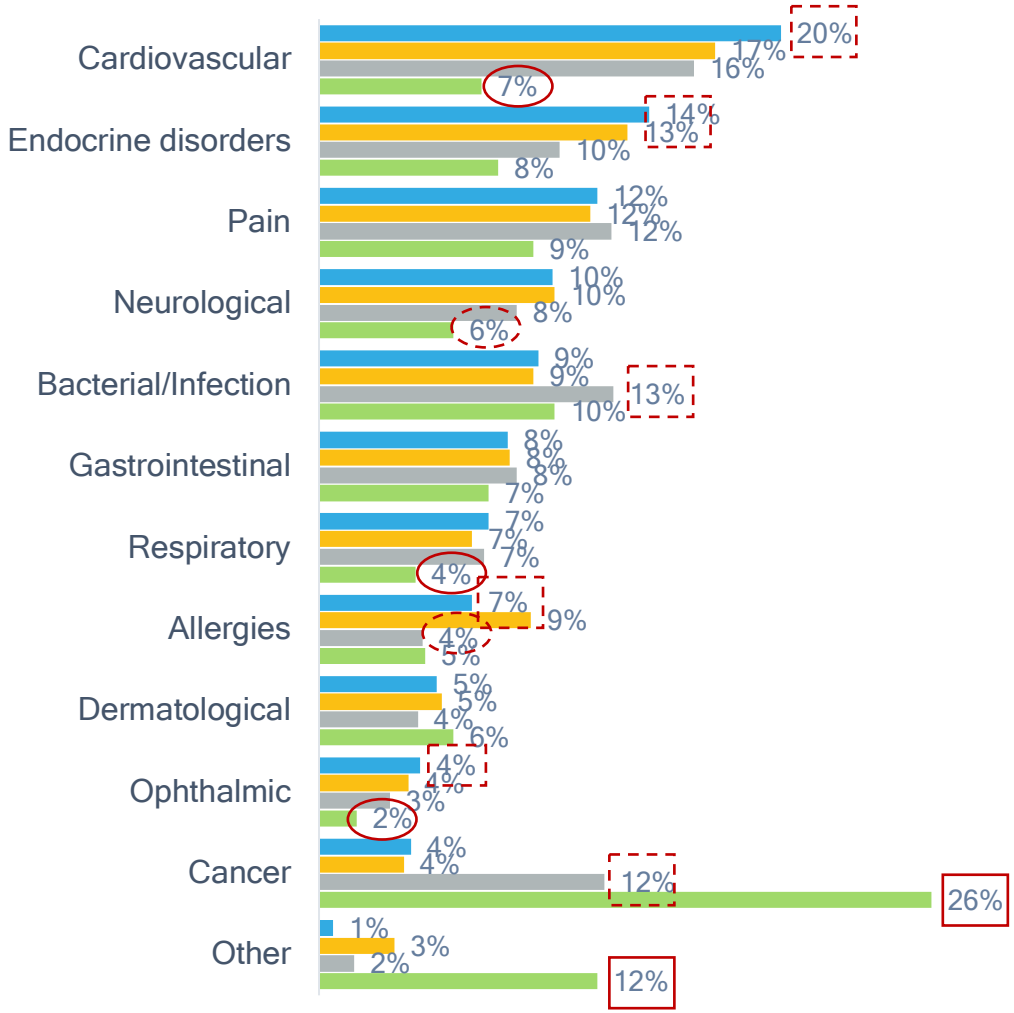
Types of Insurance and Prescriptions

Types of Insurance



Prescription Types

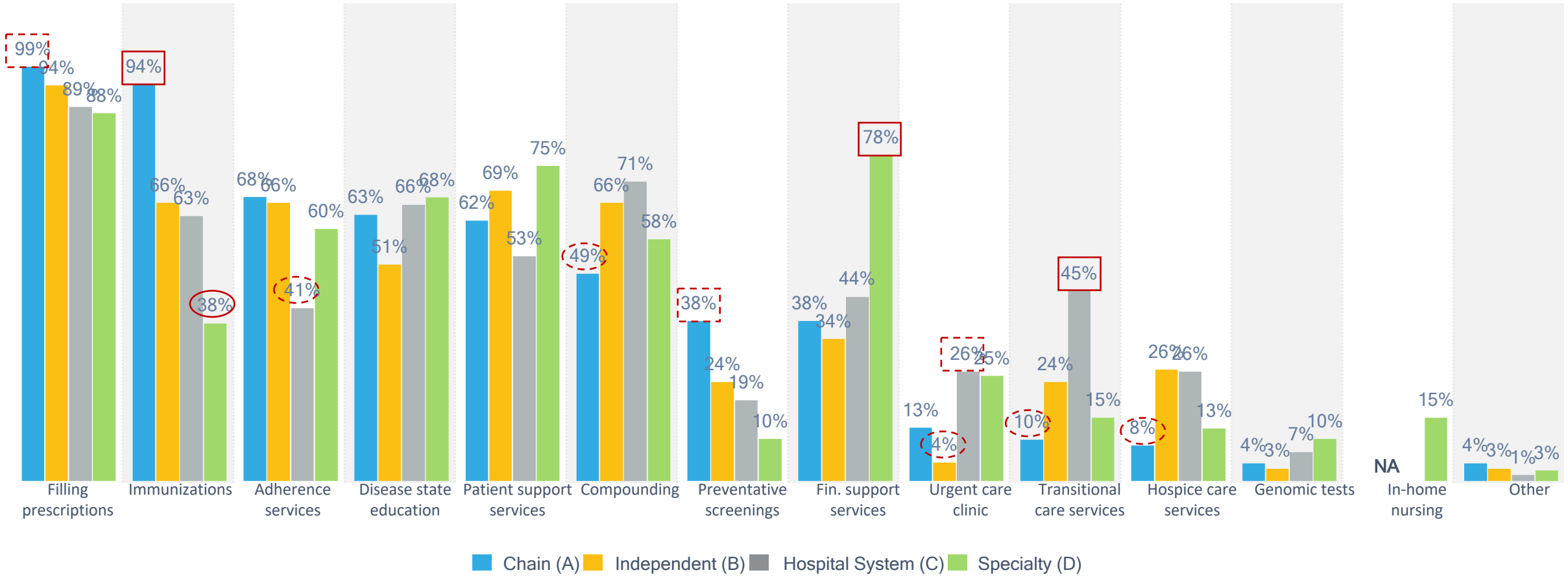


Chain | Independent | Hospital System | Specialty

Base: All Respondents (n=252); Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40) | Q402. Approximately what proportion of your patients have each of the following types of insurance. | Q403. And approximately what proportion of the prescriptions filled in your pharmacy in the past month were for…?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

Pharmacy Services Offered



Base: All Respondents (n=252); Chain (n=71), Independent (n=68), Hospital (n=73), Specialty (n=40) | Q200. Which of the following types of services does your pharmacy offer?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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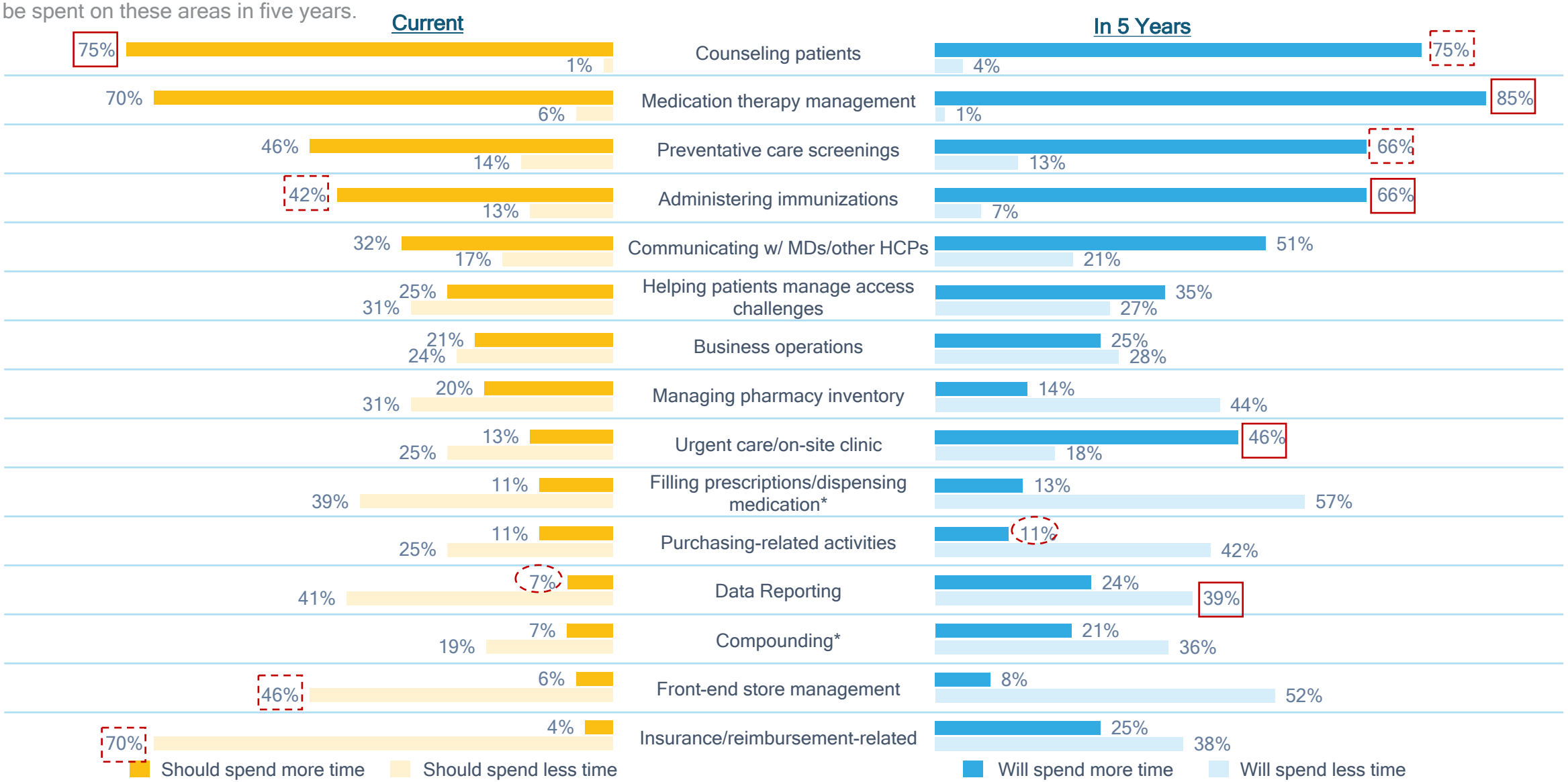
Time Should Spend/Expect To Spend on Activities

- The majority of Chain pharmacists feel they should be spending more time counseling patients and focusing on medication therapy management. Five years from now they expect to be doing so. Alternatively, Chain pharmacists feel they should spend less time in insurance/reimbursement related activities, though only 2-in-5 expect less time to be spent on these areas in five years.



Base: Chain (n=71) Q203. Using the scale below, please indicate whether you feel you should be spending more, less, or the same amount of time on each of the following types of activities in your current role. | Q204. And now, thinking ahead to 5 years from now, how (if at all) do you think your time spent on the following activities will change?

*Registered Pharmacists Only

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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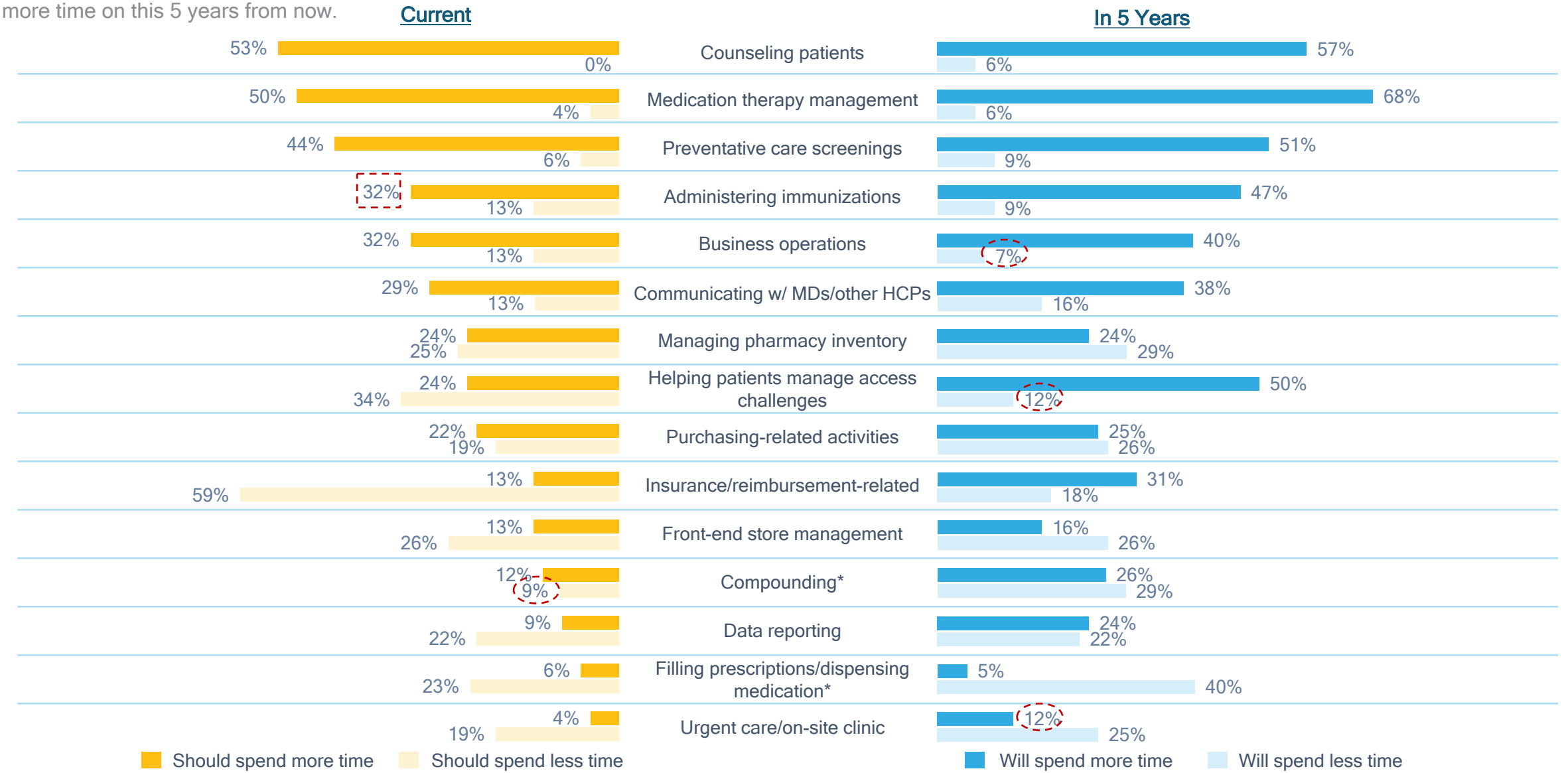
Time Should Spend/Expect To Spend on Activities

- A little over half of Independent pharmacists feel they should be spending more time counseling patients, followed by MTM and preventative screenings. However, they expect to spend more time on these in 5 years. Though a quarter say they should spend less time helping patients with access challenges, half say they will be spending more time on this 5 years from now.



Base: Independent (n=68) Q203. Using the scale below, please indicate whether you feel you should be spending more, less, or the same amount of time on each of the following types of activities in your current role. | Q204. And now, thinking ahead to 5 years from now, how (if at all) do you think your time spent on the following activities will change?

Registered Pharmacists Only

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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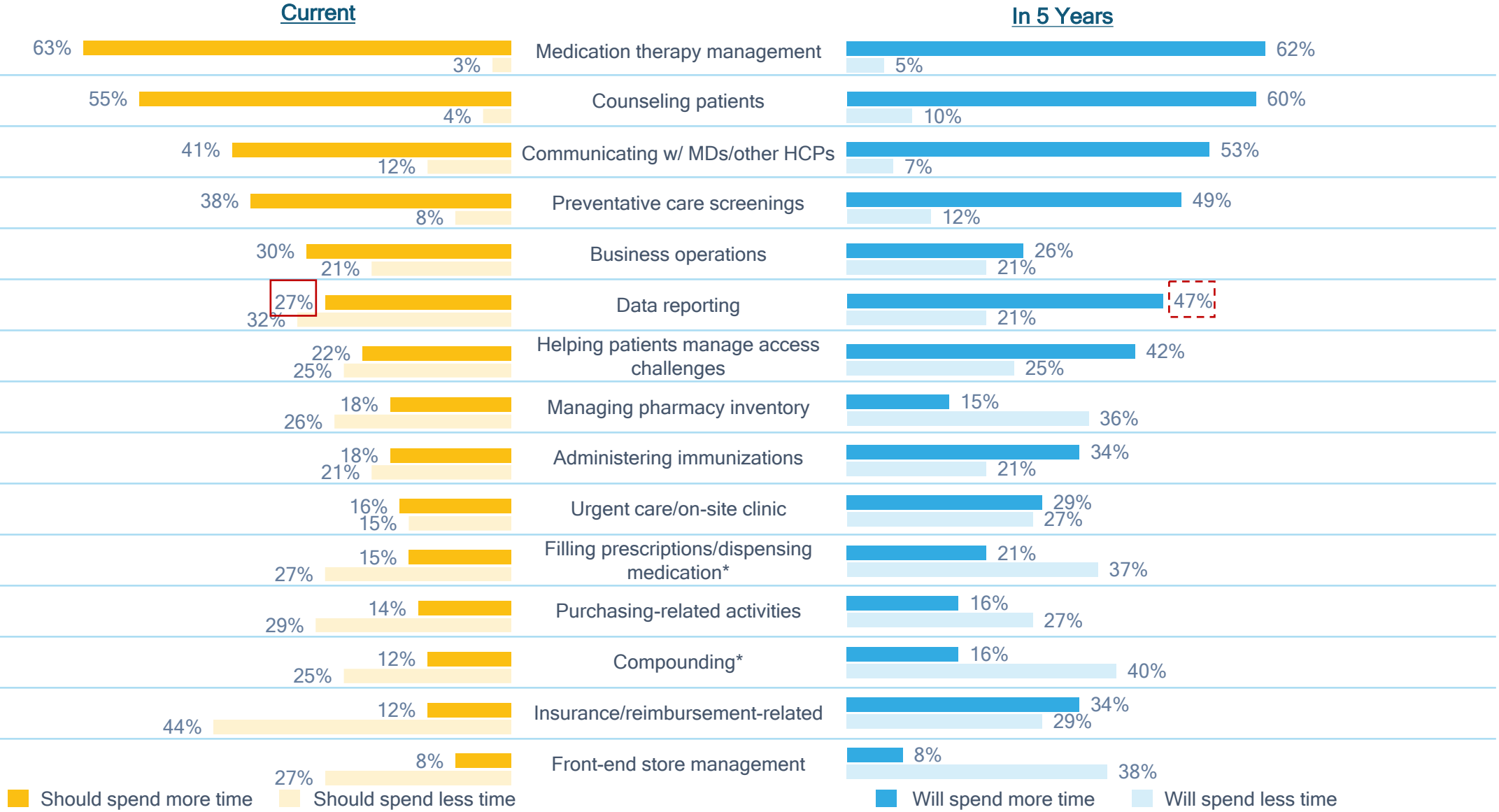
Time Should Spend/Expect To Spend on Activities

- Hospital pharmacists feel they should be spending more time on medication therapy management and counseling patients; they anticipate spending more time on these activities in five years. Almost half would like to spend less time with insurance/reimbursement related tasks but a third expect to be spending more time on those tasks in the future.



Base: Hospital (n=73) Q203. Using the scale below, please indicate whether you feel you should be spending more, less, or the same amount of time on each of the following types of activities in your current role. | Q204. And now, thinking ahead to 5 years from now, how (if at all) do you think your time spent on the following activities will change?

*Registered Pharmacists Only

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A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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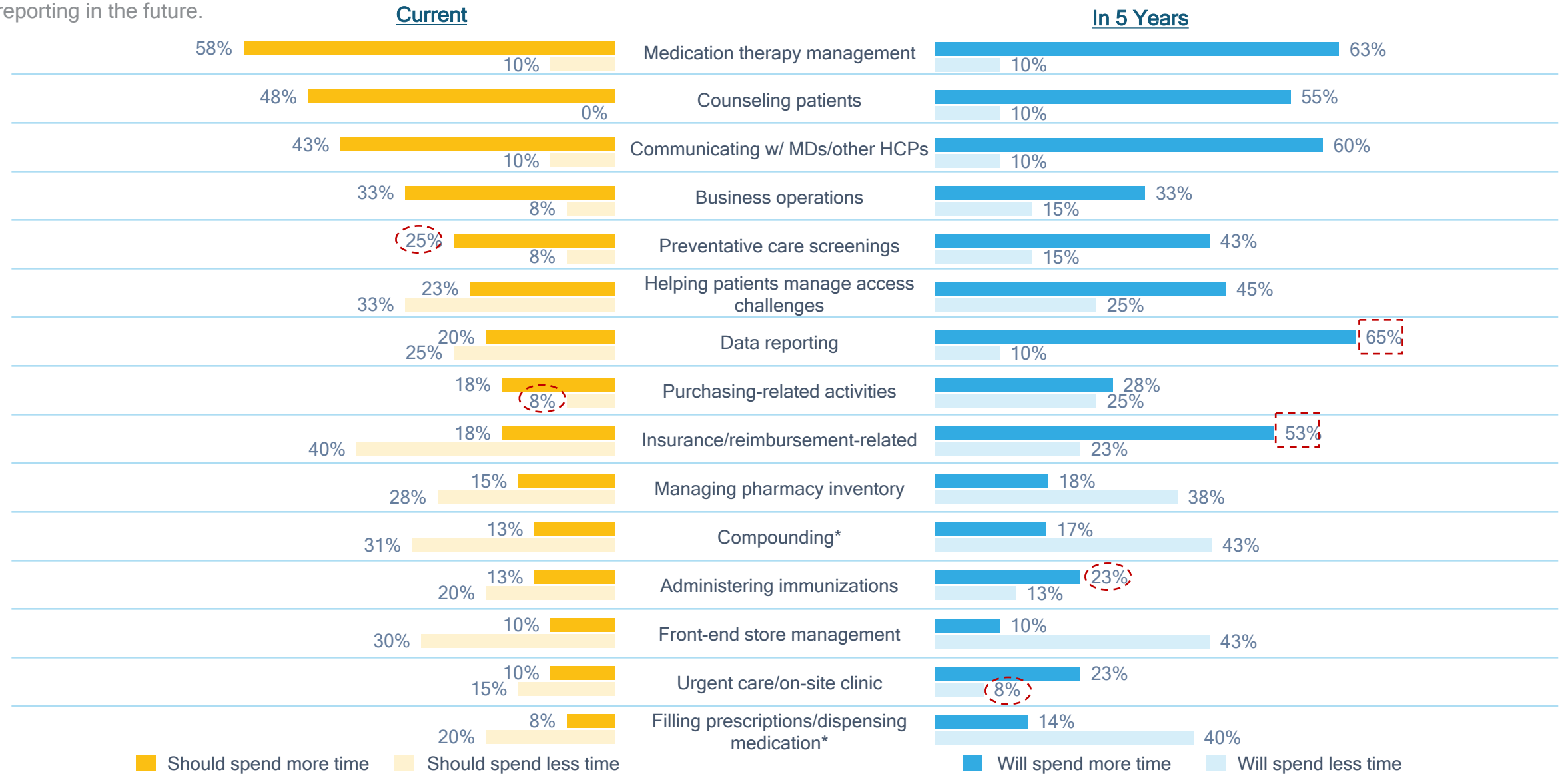
Time Should Spend/Expect To Spend on Activities

- Over half of Specialty pharmacists feel they should be spending more time on MTM and less time on insurance/reimbursement related issues. However, both are expected to increase in time spent 5 years from now. Specialty is more likely than both Chain and Independent to increase time spent on insurance issues and data reporting in the future.



Base: Specialty (n=40) Q203. Using the scale below, please indicate whether you feel you should be spending more, less, or the same amount of time on each of the following types of activities in your current role. | Q204. And now, thinking ahead to 5 years from now, how (if at all) do you think your time spent on the following activities will change?

Registered Pharmacists Only

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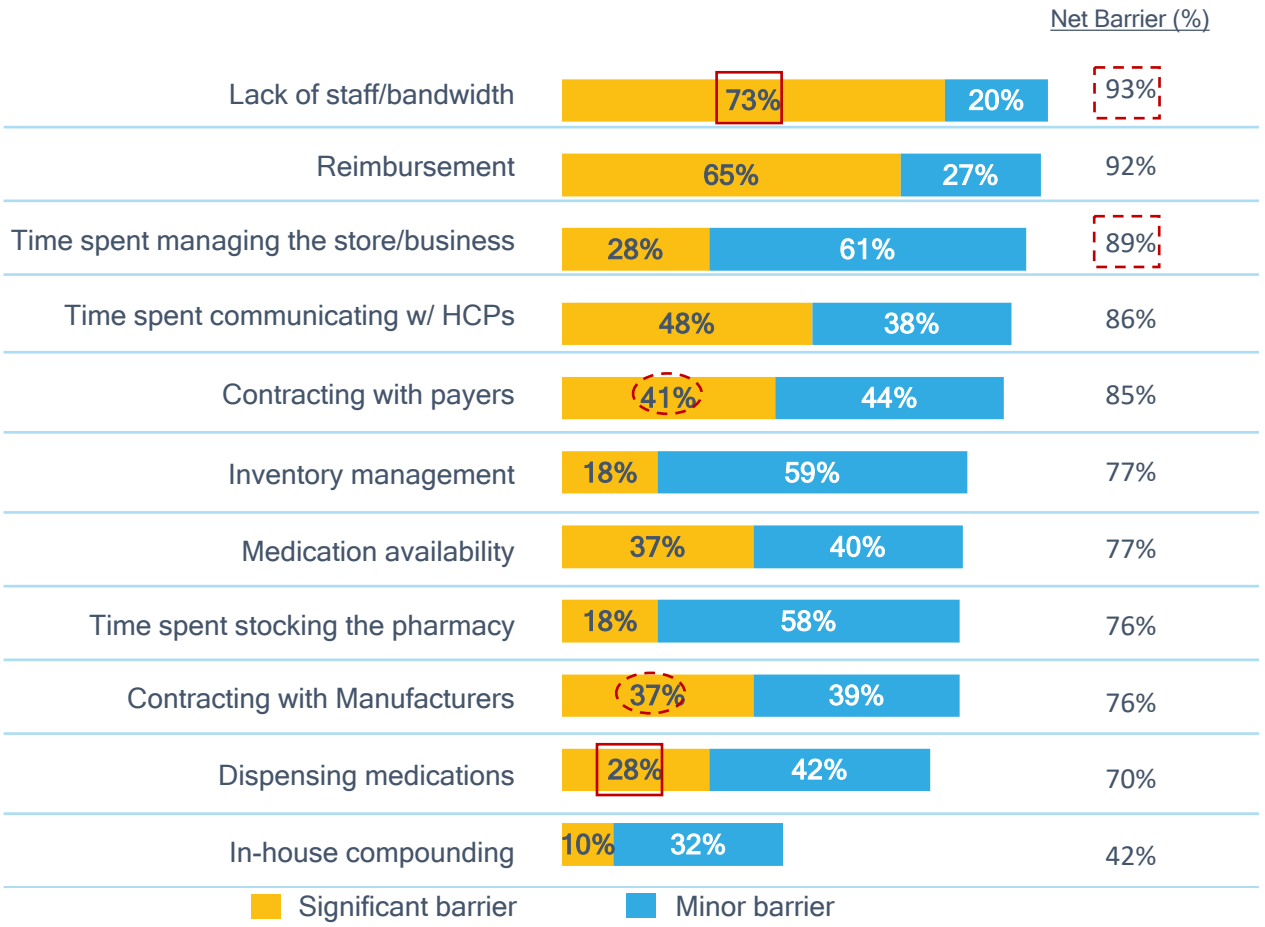
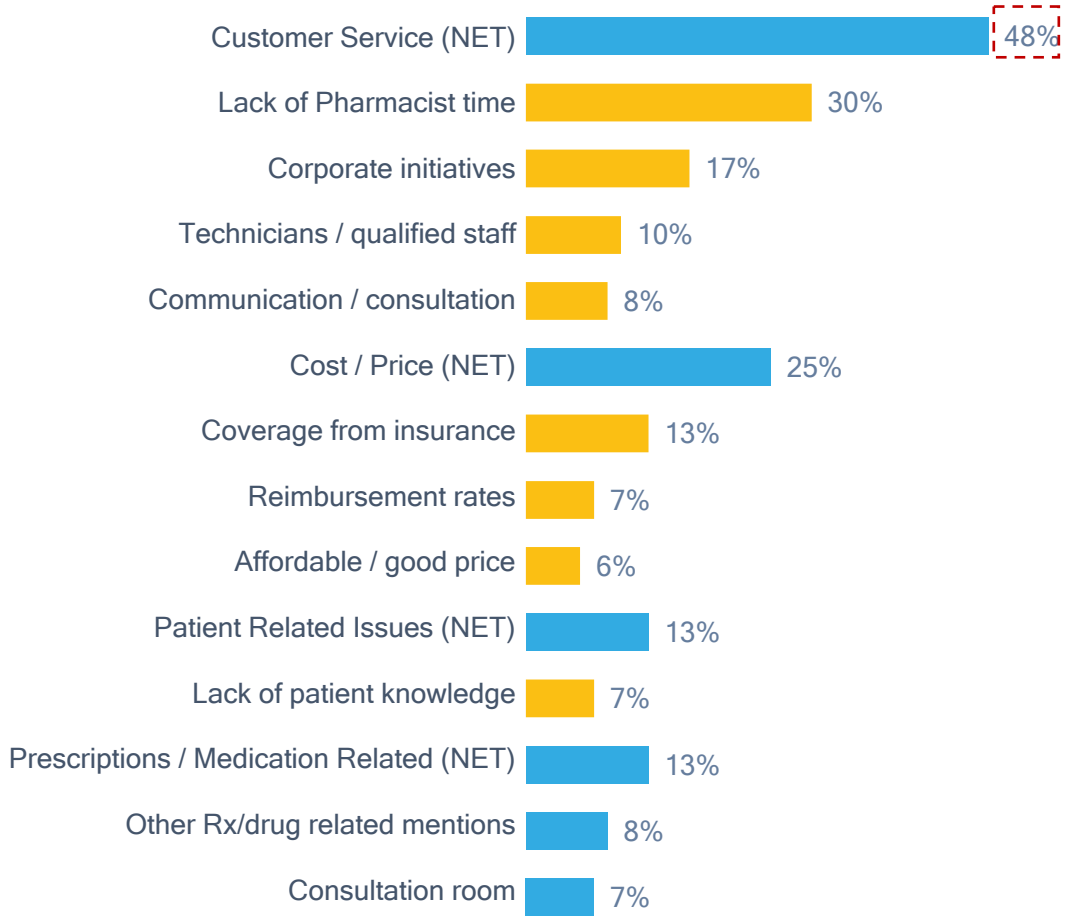
Barriers to Good Care

- Chain pharmacists feel that lack of staff/bandwidth is the top significant barrier to good care. They are more likely than Independent and Specialty to consider this a barrier. Other barriers mentioned include customer service; specifically a lack of pharmacist time.

Barriers to Good Care



Other Perceived Barriers to Good Care*



*Responses <5% have been excluded from chart

Base: Chain (n=71) | Q300. Using the scale below, please indicate the extent to which each of the following are barriers to providing good care to your patients. | Q301. What else, if anything, do you perceive as barriers to providing good care to your patients?

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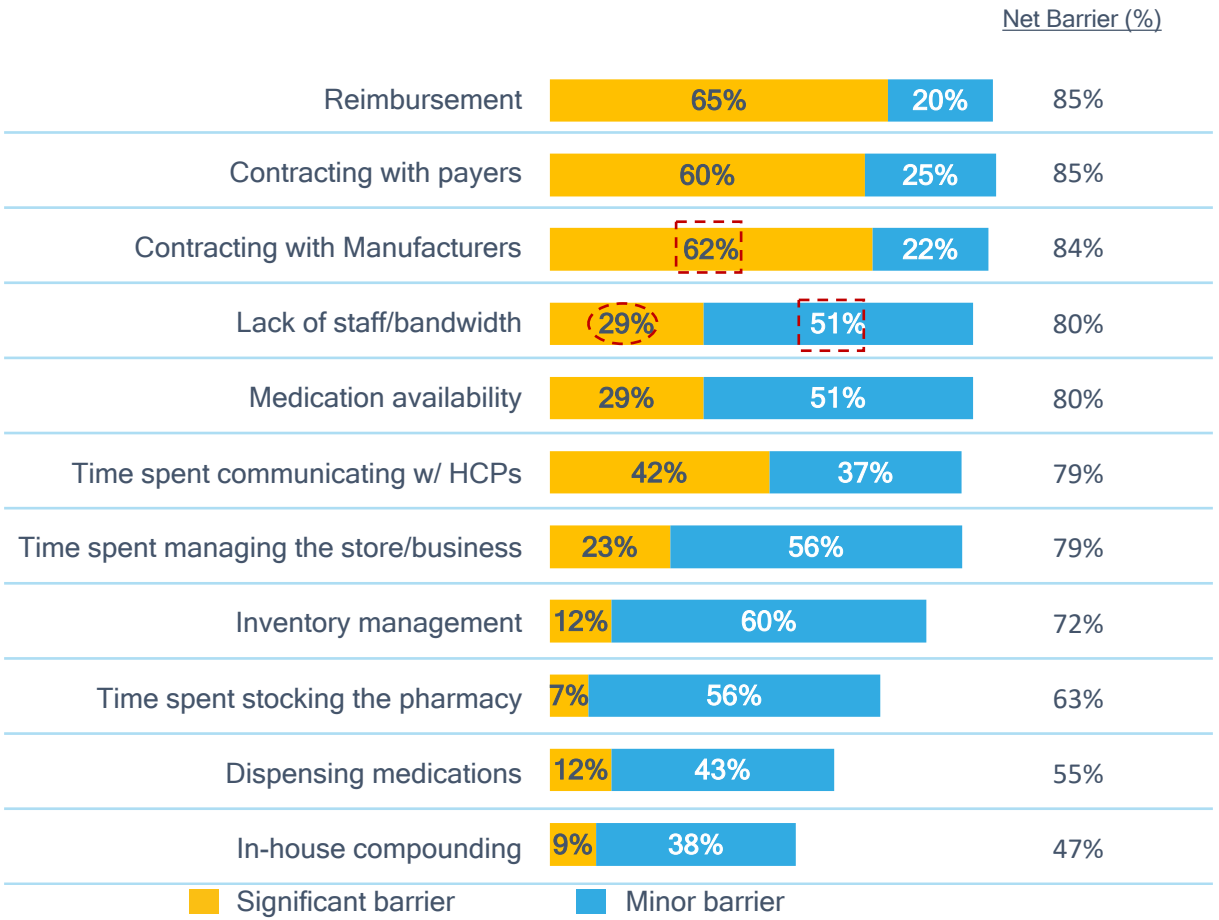
A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

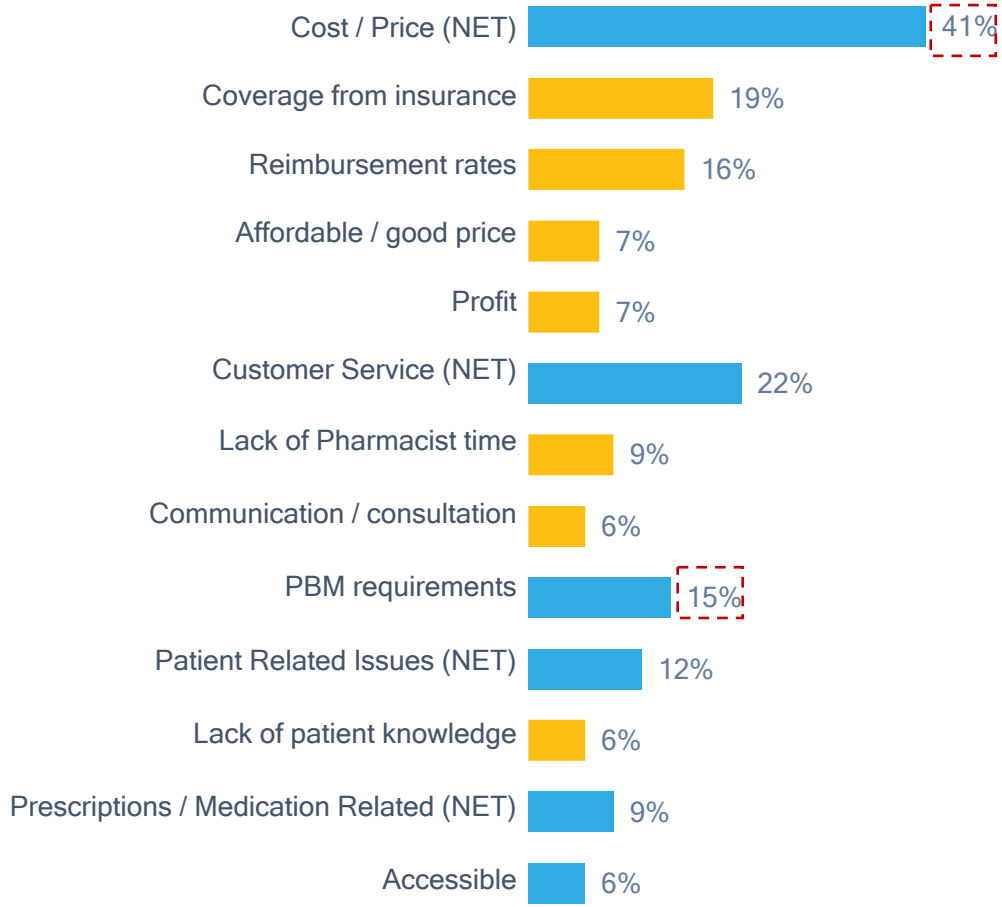
Barriers to Good Care

- Reimbursement and contracting with manufacturers/payers are top barriers to good care. While not a significant barrier, two-thirds of Independent pharmacists feel that inventory management is a minor barrier to care. Other barriers mentioned include the cost of providing care, which was mentioned significantly more among Independent pharmacists than Chain and Hospital.

Barriers to Good Care



Other Perceived Barriers to Good Care*



*Responses <5% have been excluded from chart

Base: Independent (n=68) | Q300. Using the scale below, please indicate the extent to which each of the following are barriers to providing good care to your patients? | Q301. What else, if anything, do you perceive as barriers to providing good care to your patients?

A/B/C/D = pharmacy type is rated significantly higher than noted pharmacy type

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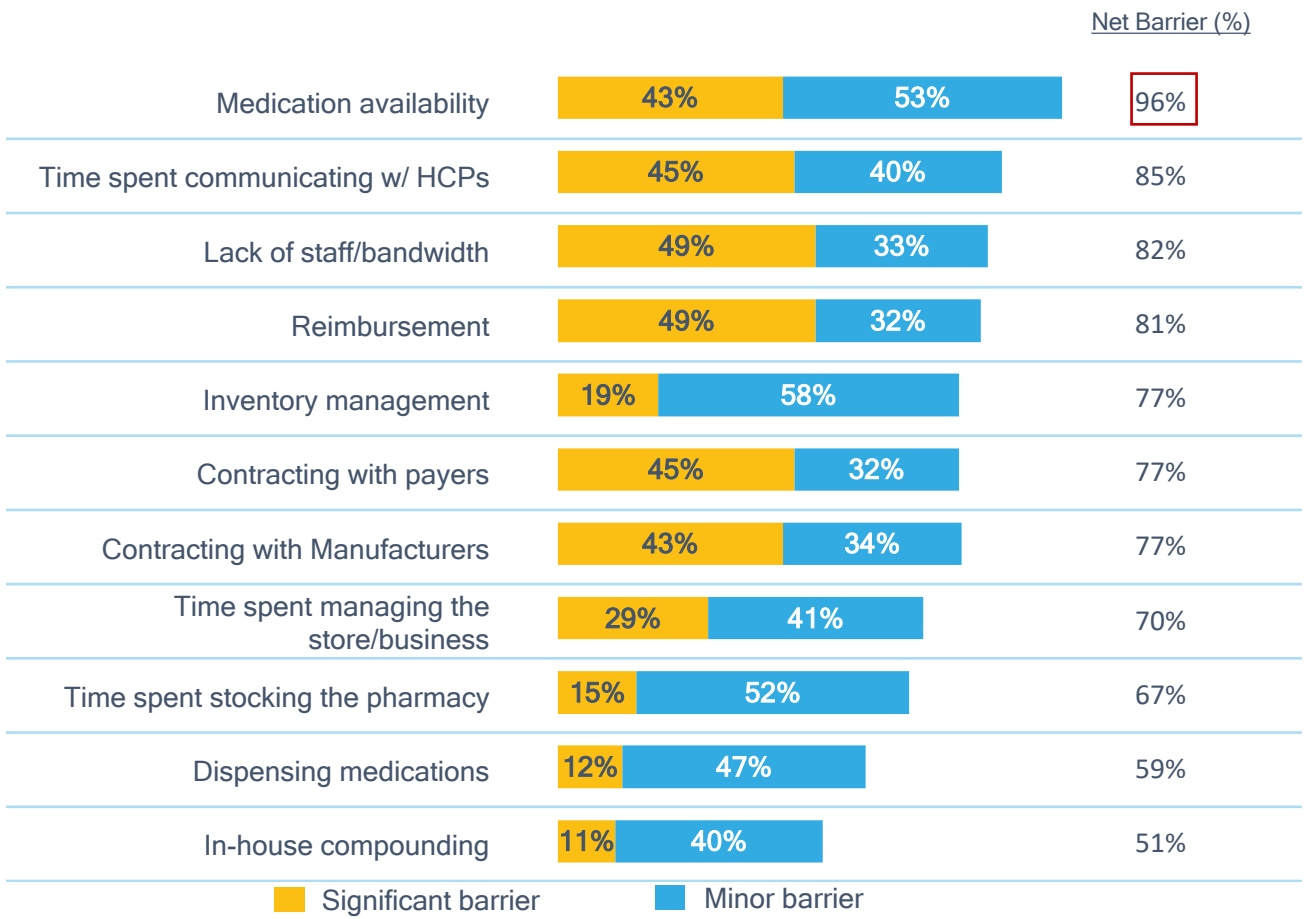
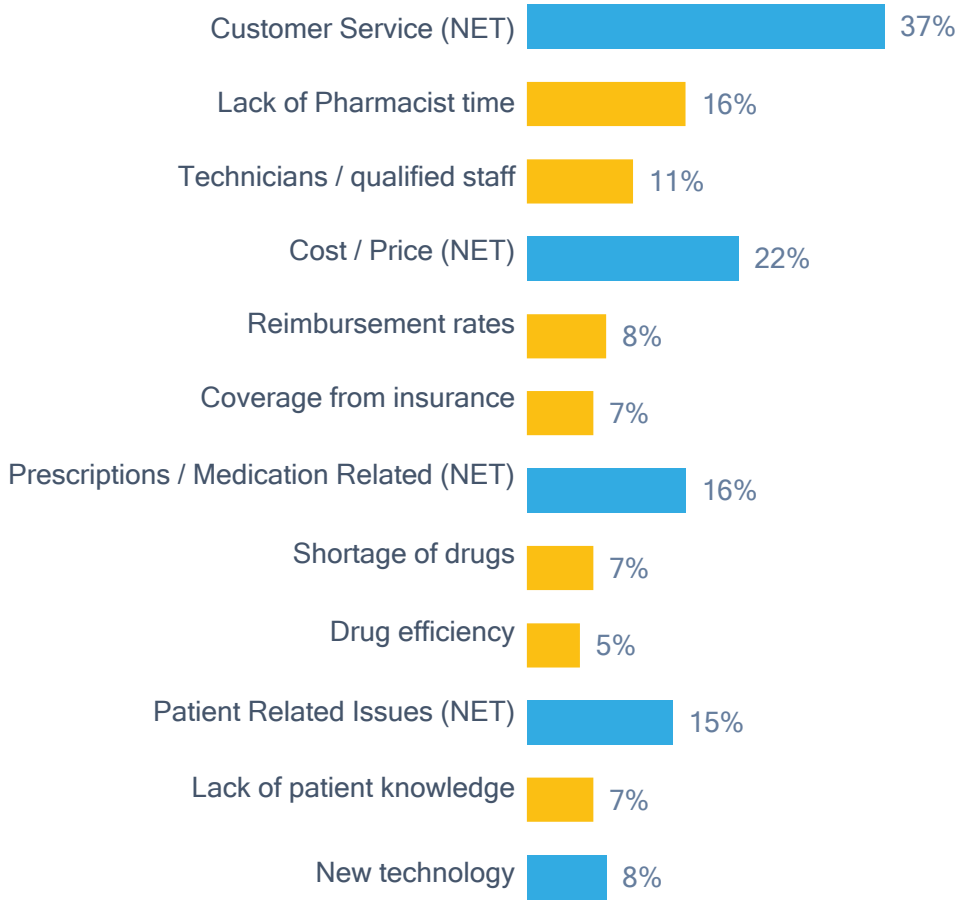
Barriers to Good Care

- Medication availability is the top barrier for Hospital pharmacists. While not a significant barrier, these pharmacists rate inventory management as a top minor barrier and are more likely to compared to Specialty pharmacists. Other barriers mentioned include customer service; specifically lack of pharmacist time and qualified staff.

Barriers to Good Care



Other Perceived Barriers to Good Care*



*Responses <5% have been excluded from chart

Base: Hospital (n=73) | Q300. Using the scale below, please indicate the extent to which each of the following are barriers to providing good care to your patients.
Q300a. What else, if anything, do you perceive as barriers to providing good care to your patients?

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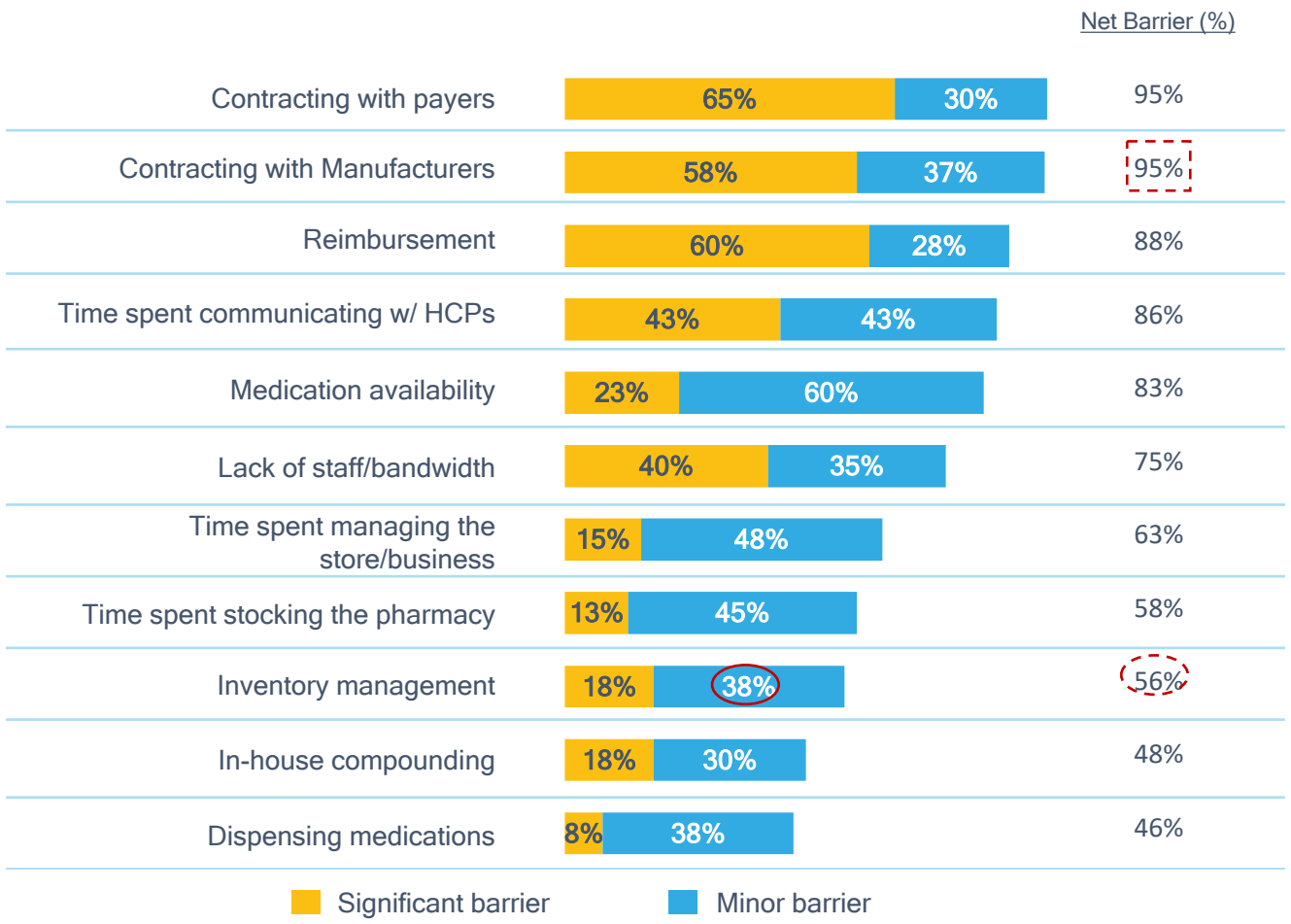
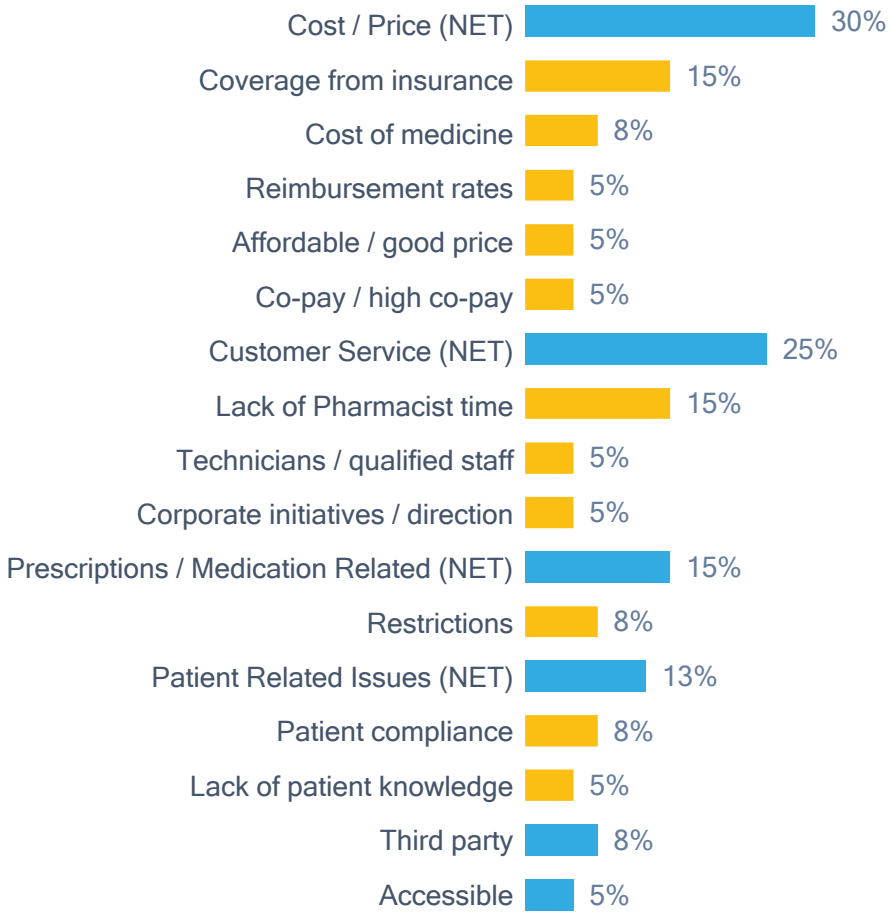
Barriers to Good Care

- Contracting with payers and manufacturers are the top barriers for Specialty pharmacists to provide good care. While not a significant barrier, medication availability provides a minor barrier to good care at these pharmacies. Other barriers mentioned include the cost of good care and customer service.

Barriers to Good Care



Other Perceived Barriers to Good Care*



*Responses <5% have been excluded from chart

Base: Specialty (n=40) | Q300. Using the scale below, please indicate the extent to which each of the following are barriers to providing good care to your patients? | Q301. What else, if anything, do you perceive as barriers to providing good care to your patients?

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