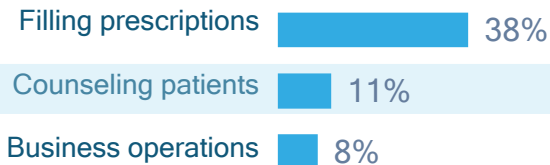Providing quality care to patients is of high importance to employees at Chain Pharmacies, however, due to staffing limitations and insurance related issues, they are unable to provide the quality care they would like to. Chain pharmacies, in particular, feel staff limitations are a huge barrier, That said, they feel the future is bright and anticipate the ability to spend more time counseling patients in the future, which is the #1 area they are most excited for as their pharmacy role evolves.

"The metrics imposed by many retail corporations are not conducive to quality patient care. Too much focus is being placed on numbers and patient care is suffering. Also, staff is being decreased while the workload is increasing." -Chain Pharmacist
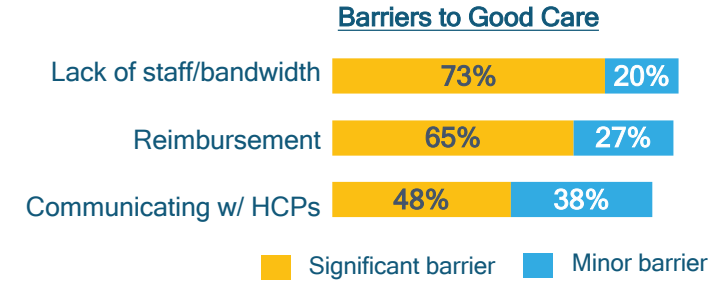
"It's the approval process once a medication comes in the pharmacy. Insurance wants a specific medication to dispense instead of the one prescribed. We must contact Dr. to let them know so they can start the PA or change to the preferred medication. This is time wasted between pharmacy, Dr. and insurance." -Chain Pharmacist

"Understaffed pharmacies with high pharmacy to tech ratios prevent primary focus on patients and patient care. Answering medication and/or health related questions, providing preventative screenings, MTM etc all require adequate staffing to allow pharmacists step away from their workflow" -Chain Pharmacist
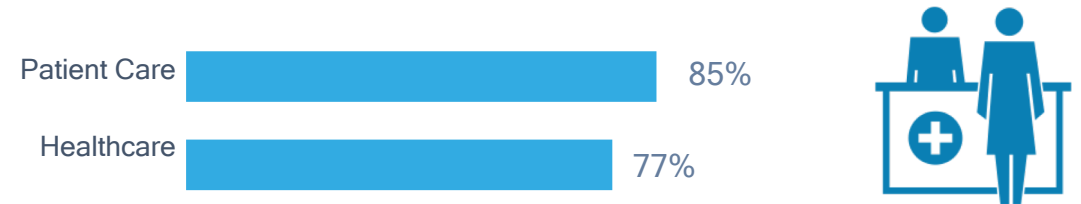
Barriers to Good Care

	Significant barrier	Minor barrier
Lack of staff/bandwidth	73%	20%
Reimbursement	65%	27%
Communicating w/ HCPs	48%	38%

% of Time Spent On…
(in a typical week)

- Filling prescriptions: 38%
- Counseling patients: 11%
- Business operations: 8%

25% spend time educating patients on how to take medicine as directed

% Looking Forward to a greater role in…

- Patient Care: 85%
- Healthcare: 77%

Time Should Spend/Expect To Spend on Activities

	Current		5 Years
Counseling patients	75%	1%	75% / 4%
Insurance/reimbursement-related	4% / 70%		25% / 38%

Current legend:
- Should spend more time
- Should spend less time

5 Years legend:
- Will spend more time
- Will spend less time
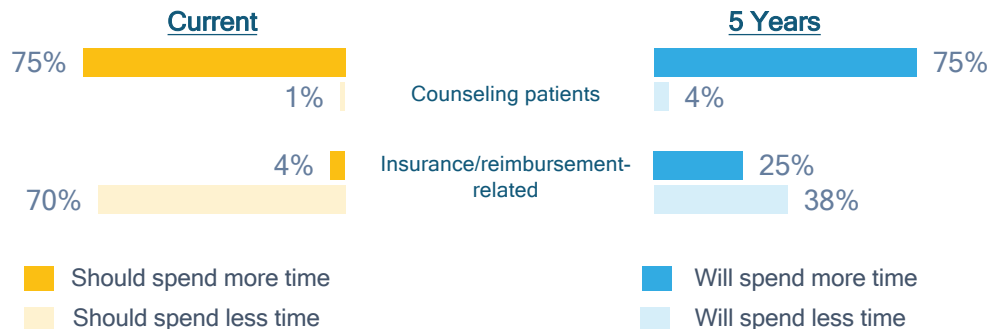
% Feel Will Help to Mitigate Barriers to Good Care
(T2B%)

- Staff augmentation: 83%
- Building relationships w/ prescribers: 76%

maru/matchbox

Occupation

Registered Pharmacists

94%

- 59% BCD
- 17%
- 16%
- 1%
- 7%
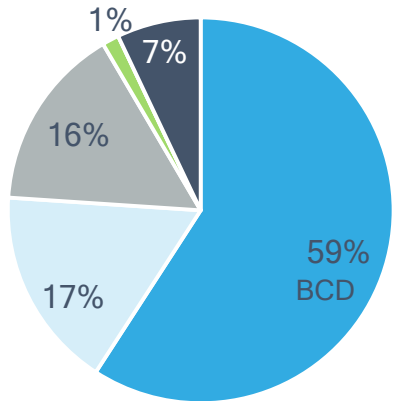
■ Pharmacy Manager
■ Pharmacist (non-owner/director/manager)
■ Director of Pharmacy
■ Pharmacy Technician
■ Pharmacy Owner
■ Other pharmacy related occupation

Pharmacist Profile

15 — Avg. # years working in occupation

1,663 BCD — Avg. # patients in past month

5,842 BCD — Avg. # prescriptions filled in past month

Setting

Urban: 32%   Suburban: 49%   Rural: 18% D

Decision Making Authority

30% B	45%	25%

■ Influencer
■ Group of Decision Makers
■ Final Decision Maker

Region
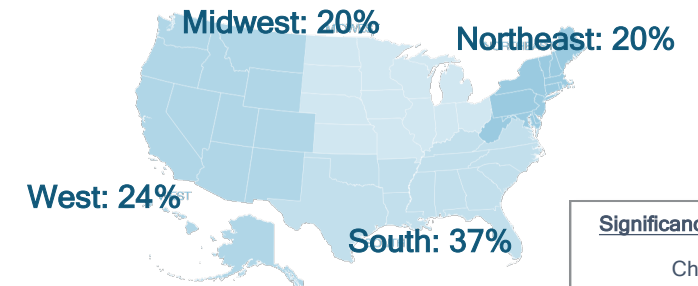
Midwest: 20%   Northeast: 20%

West: 24%

South: 37%

Significance Testing Key

Chain (A)

Independent (B)

Hospital (C)

Specialty (D)

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? In which state is your pharmacy located? | Q401. In which of the following types of settings is your pharmacy located?

maru/matchbox

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

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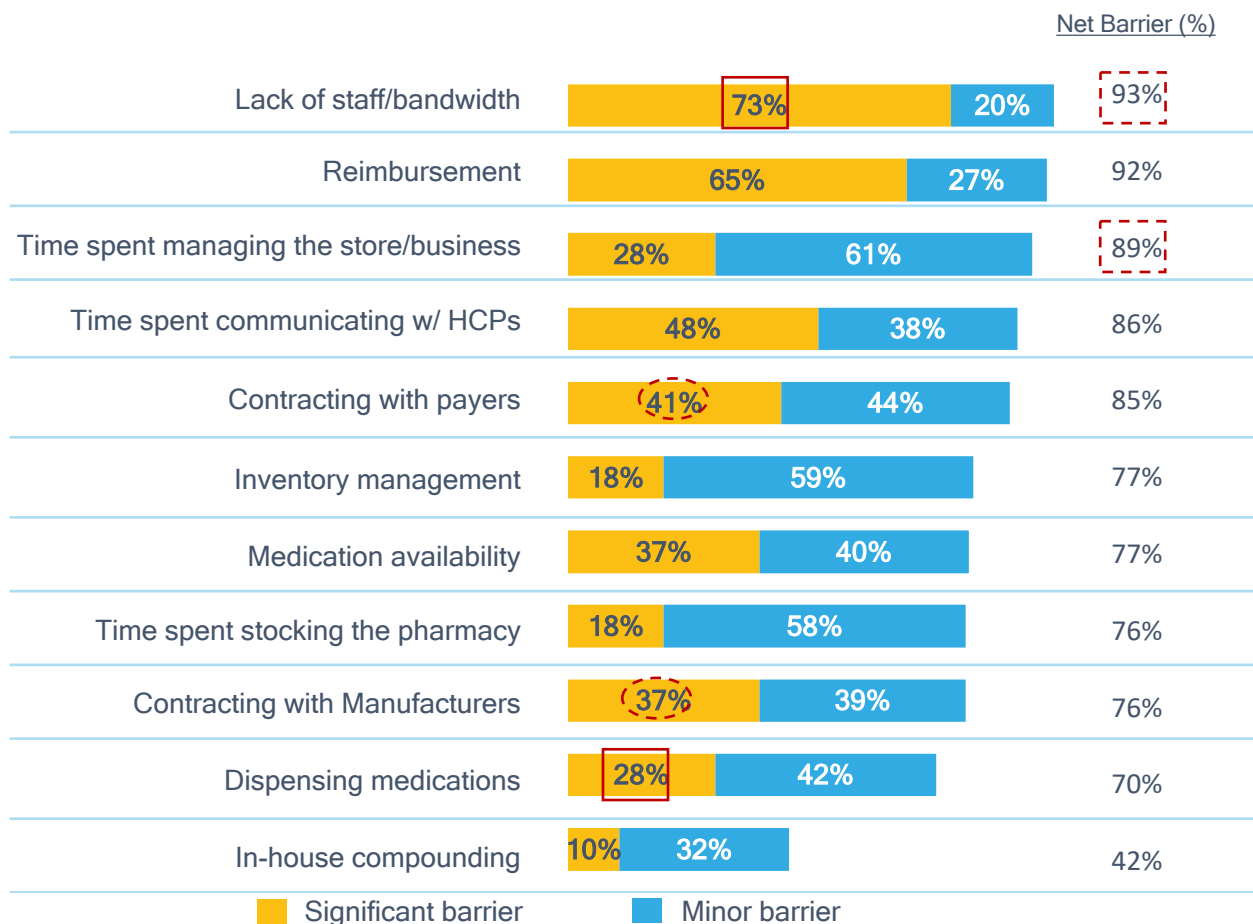y expect to be doing so. Alternatively, Chain pharmacists feel they should spend less time in insurance/reimbursement related activities, though only 2-in-5 expect less time to be spent on these areas in five years.

Current | **In 5 Years**

Activity	Should spend more time	Should spend less time	Will spend more time	Will spend less time
Counseling patients	75%	1%	75%	4%
Medication therapy management	70%	6%	85%	1%
Preventative care screenings	46%	14%	66%	13%
Administering immunizations	42%	13%	66%	7%
Communicating w/ MDs/other HCPs	32%	17%	51%	21%
Helping patients manage access challenges	25%	31%	35%	27%
Business operations	21%	24%	25%	28%
Managing pharmacy inventory	20%	31%	14%	44%
Urgent care/on-site clinic	13%	25%	46%	18%
Filling prescriptions/dispensing medication*	11%	39%	13%	57%
Purchasing-related activities	11%	25%	11%	42%
Data Reporting	7%	41%	24%	39%
Compounding*	7%	19%	21%	36%
Front-end store management	6%	46%	8%	52%
Insurance/reimbursement-related	4%	70%	25%	38%

Legend:
- 🟧 Should spend more time
- 🟨 Should spend less time
- 🟦 Will spend more time
- 🔵 Will spend less time

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

maru/matchbox

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

- 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

Net Barrier (%)

Barrier	Significant barrier	Minor barrier	Net Barrier (%)
Lack of staff/bandwidth	73%	20%	93%
Reimbursement	65%	27%	92%
Time spent managing the store/business	28%	61%	89%
Time spent communicating w/ HCPs	48%	38%	86%
Contracting with payers	41%	44%	85%
Inventory management	18%	59%	77%
Medication availability	37%	40%	77%
Time spent stocking the pharmacy	18%	58%	76%
Contracting with Manufacturers	37%	39%	76%
Dispensing medications	28%	42%	70%
In-house compounding	10%	32%	42%

Significant barrier ▮ Minor barrier ▮

Other Perceived Barriers to Good Care*

Barrier	%
Customer Service (NET)	48%
Lack of Pharmacist time	30%
Corporate initiatives	17%
Technicians / qualified staff	10%
Communication / consultation	8%
Cost / Price (NET)	25%
Coverage from insurance	13%
Reimbursement rates	7%
Affordable / good price	6%
Patient Related Issues (NET)	13%
Lack of patient knowledge	7%
Prescriptions / Medication Related (NET)	13%
Other Rx/drug related mentions	8%
Consultation room	7%

*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?

4

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