

## Uncommon Commonalities: Improving Patient Support Programs for Better Outcomes

(Source: An article by Dale Hanna for AmerisourceBergen Corp.)

Understanding the factors that lead patients to abandon their treatment regimens is key to closing medication adherence gaps. Each patient experiences a unique set of barriers at different points throughout their treatment journey. An effective adherence program can help patients overcome struggles with side effects, access, nuances, emotional distress and numerous other challenges.

A truly holistic and patient-centered support program requires considering a patient population's common link, irrational decision-making regarding adherence to therapy, along with the individual factors that impede adherence. The most innovative, effective patient support programs rely on three essential building blocks to address the multiple dimensions of non-adherence and transform outcomes:

1. *Proactive Identification of Patient Needs.* To address medication adherence issues, tools that help identify and assess patient-specific barriers to care are crucial. Through proactive needs assessment, predictive analytics, and segmentation, you can gain a more complete picture of the patient's journey and identify which patients are most at risk of non-adherence. Predictive analytics can enable support program providers to proactively identify the needs of patients and engage them with support services before adherence becomes a critical problem.

For example, let's say a patient named Sally is enrolled in a manufacturer-sponsored adherence program, and we want to make sure that Sally doesn't drop off of her therapy. How do we know the best way to keep Sally engaged in managing her treatment regimen? The most advanced predictive analytics engines will aggregate claims data, eligibility information, demographics, and even data on previous interventions with Sally, correlating potentially thousands of data variables with adherence to assign an adherence risk measure that is specific to Sally.

From early identification of at-risk patients to customized interventions, early action is an essential element of a tech-enabled adherence program. In fact, using data analysis to segment patients based on different factors and to tailor supportive interventions can improve adherence levels by 10 to 15 percent.

2. *Meeting patients where they are.* A truly patient-centered adherence program meets patients where they are in their treatment journey and in life. An individualized care plan is the first step to addressing predicted adherence risks. Each patient care plan should include short-term goals to remove barriers and incorporate the individual's long-term goals, values, and sources of motivation.

Risk assessment, motivational interviewing, and other early identification of patient needs will reveal a great deal about the type of education and support that will best engage individual patients. The patient should then receive education, clinical support, and technological resources to empower them to effectively manage

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## In Brief...

- ♦ **Walgreens** and **Kroger** will expand their partnership beginning this fall. The pilot program will include locations in Knoxville, TN. In total, 35 Walgreens locations will carry roughly 2,700 of Kroger's "Our Brand" products. Some locations will have a more limited selection of approximately 2,300 products. Separately, Walgreens' Boots Pharmacy Division in the U.K. is introducing a pilot program using electric vehicles to delivery prescriptions in certain areas of London. Should the program be successful, plans to expand the program to other regions will be initiated. In addition to electrifying their fleet, Boots U.K. also introduced measures to cut costs and improve their environmental footprint.

- ♦ **Bayer** (Germany) hired former **Johnson & Johnson** executive *Marianne De Backer* to manage acquisitions and licensing deals for its drug unit. De Backer will assume the role of Head of Business Development and Licensing at Bayer's pharmaceuticals division. While at Johnson & Johnson, De Backer lead business activities across different therapeutic areas and regions.

- ♦ Japan's **Ministry of Health, Labor and Welfare** announced new NHI prices, effective October 1, for a total of 16,510 products. Of these products, 6,121 will see a price increase compared with their current prices. The rates of the price raises vary by product, with a maximum rate of 1.85%. However, that could be a larger increase for some generics and designated "essential drug" products due to their unique price integration rules.

- ♦ The **U.S. Food and Drug Administration** granted **Mylan NV** tentative approval for its generic version of Eli Lilly's lung cancer drug *Alimta*. A tentative approval signals that the FDA has signed off on the company's marketing application, but that it cannot sell the medicine until the U.S. patents have

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## Asia-Pacific to Overtake Europe as The Second-Largest MedTech Market by 2022

(Source: A Report by Frost & Sullivan)

In a recent analysis by consulting firm Frost & Sullivan (Global Medical Technologies Industry Predictions, 2019) the Asia-Pacific region is emerging as a key growth region due to the rising adoption of new technologies, specifically in countries such as Japan, China, Singapore and India. The report analyzes 20 growth opportunities across four key areas: patient safety, monitoring, engagement, and care coordination – all totaling a combined incremental value of US\$64.10 billion. This number is over and above the traditional US\$413.9 billion market size in 2019. The estimates further peg the longer-term growth opportunity at up to US\$173.06 billion by 2024, with a healthy CAGR of 22% as compared to the traditional market, which is estimated to decrease from the current 5.8% to about 5.2% by 2024. This sets the Asia-Pacific market to account for approximately

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## Uncommon Commonalities (cont.)...

their own therapeutic outcomes. The overall objective of support program tools is to provide the necessary resources to help patients to adhere to prescribed therapies.

3. *The right blend of high tech and high touch.* As healthcare technology solutions continue to proliferate, personalized support and live outreach from nurse educators plays an essential role, providing the empathy and connection that patients need along their treatment journeys.

For optimal success, intervention strategies should incorporate the right blend of high-touch and high-tech to meet each patient's individual needs. While patient services should certainly leverage electronic communications to increase patient engagement via mobile applications, text messaging, live chat, or email, program sponsors shouldn't overlook the human element. Mobile technology, for example, enables the delivery of individualized content at the most appropriate time for a patient, but can a mobile device lend an empathetic ear?

Nurse educators play a critical role in providing support to patients. In fact, nursing services can improve adherence to prescribed therapies by 15 to 25 percent. And in-patient outcomes literature, patients who receive personalized outreach have a 72 percent decreased risk of therapy discontinuation.

Why nurses? These valuable members of the patient support program team often have both significant clinical experience in many therapeutic areas, as well as expertise in motivational interviewing and health coaching. They can use their clinical judgement to make appropriate decisions as it relates to coaching patients through a problem to ensure that, together, they're working through short-term and long-term goals to build the right skill, behavior change, or even the coincidence to be able to maintain their care plan. Nurses also have a natural affinity for providing holistic support and problem-solving skills that address the patient's needs beyond the pill in order to improve their therapeutic outcomes.

It is critical that we dig deeper in order to transform patient outcomes. Without a doubt, medication adherence is a cornerstone of improved health outcomes and lower healthcare costs. The most successful adherence services will incorporate both a proactive understanding of the factors that lead to non-adherence and a blend of high-tech and high-touch outreach to address those barriers, with nurses as a critical component of personalized support and live outreach. These elements can be transformative for a program and for adherence at large.

## Asia-Pacific (cont.)...

one-fourth of the global market in 2019 and overtake Europe as the second-largest market by 2022.

Medtech companies who have set their sights on this expanding market are adopting the following strategies to tap growth opportunities:

1. Focus on smartphone-based solutions, as they present a US\$2.11 billion opportunity by 2020. Technologies such as AI, machine learning, AR/VR, Internet of Things (IoT), and big data analytics, coupled with existing smartphone tools like cameras and external sensors, are transforming smartphones into powerful and cost-effective diagnostic tools.

2. Offer Software-as-a-Medical-Device (SaMD), which will become the foundation of platforms of care aimed at holistic

solutions for diagnosis, surgery, surgical navigation, treatment planning, and disease management.

3. Improve care coordination and information exchange for patients to enhance their outcomes. Medtech companies are building risk-sharing contracts that are enabled only by data-sharing models to understand the role of vendor solutions in care and outcomes management as a part of the overall strategy to become partners with hospitals.

4. Properly define the endpoints and measurement criteria to prevent disease adjacencies.

5. Foster partnerships with smart home ecosystem participants to aid early diagnosis and disease management, ensuring better outcomes. To learn more about the *Global Medical Technologies Industry Predictions, 2019* and access the report, please click [here](#).

## In Brief (cont.)...

expired. Lilly loses patent protection on its branded version of the chemotherapy drug, known generically as *pemetrexed*, in 2022.

- ♦ **Walmart** is rolling out its own digital healthcare site [www.walmarthealth.com](http://www.walmarthealth.com), giving customers access to web tools to book medical appointments to see a physician, mental health expert, dentist or eye doctor, and other services. The site includes 4,756 stores in the U.S. and offers medical services at a much cheaper rate. Customers will be able to book an appointment to see a physician for as little as US\$30, or US\$50 for a dental appointment. The site currently does not offer telehealth visits or post health content.

- ♦ **Amgen** is buying *Otezla (apremilast)* from **Celgene Corporation**. The divestiture will allow **Bristol-Myers Squibb Co.** to close its US\$74 billion acquisition of Celgene by the end of 2019. The transaction also comes at a crucial time for BMS and Celgene, which need the US Federal Trade commission (and others) to sign off on their merger.

- ♦ Plasma-derived protein therapeutics company, **Kamada** announced the extension of its strategic supply agreement with **Takeda** for *Glassia*. Kamada will continue to produce *Glassia* for Takeda through 2021. Projected total revenues from sales of *Glassia* to Takeda will range between US\$155 million to US\$180 million between 2019 and 2021. In turn, Takeda will pay royalties to Kamada at a rate of 12% on net sales through August of 2025, and a rate of 6% thereafter until 2040.

- ♦ U.S. medical business **Hentry Schein Medical** announced the expansion of its *SolutionsHub* with the addition of *CueSquared MobilePay*. The new platform enhances the collection of patient self-pay balances, enabling patients to access and pay their bills at any place and time. This initiative is expected to boost their payments and curb collection costs. It will also make the payment process virtually hassle-free for patients. CueSquared MobilePay reinforces existing self-pay collection strategies by converting patient statement data to SMS text-based statements, allowing for payments within hours of receiving the MobilePay statements.

(Sources: Digital Commerce 360, Pharma Japan, Reuters, Scrip and Yahoo Finance)