



# 2022 Medication Access Data Guide

covermymeds®

# Table of Contents



Introduction \_\_\_\_\_ 3

Conclusion \_\_\_\_\_ 26

Research Methodology \_\_\_\_\_ 27

4



Pandemic Ripple Effects:  
Digital Shifts, but Inequities Persist

11



Care Teams Are Addressing  
Holistic Patient Needs

15



Providers and Pharmacists  
Need the Right Data  
to Better Help Patients

21



Opportunities for Patient and  
Care Team Communications

23



Considerations for Complex  
Medication Access

## OUR SURVEYS

The CoverMyMeds 2021 suite of surveys helps tell the story of medication access in the United States from multiple perspectives of the healthcare network. From symptoms to solution, patients' best way forward to healthier lives vary by environment, social and financial security and even the resources available to their care team members.

### *Patients*

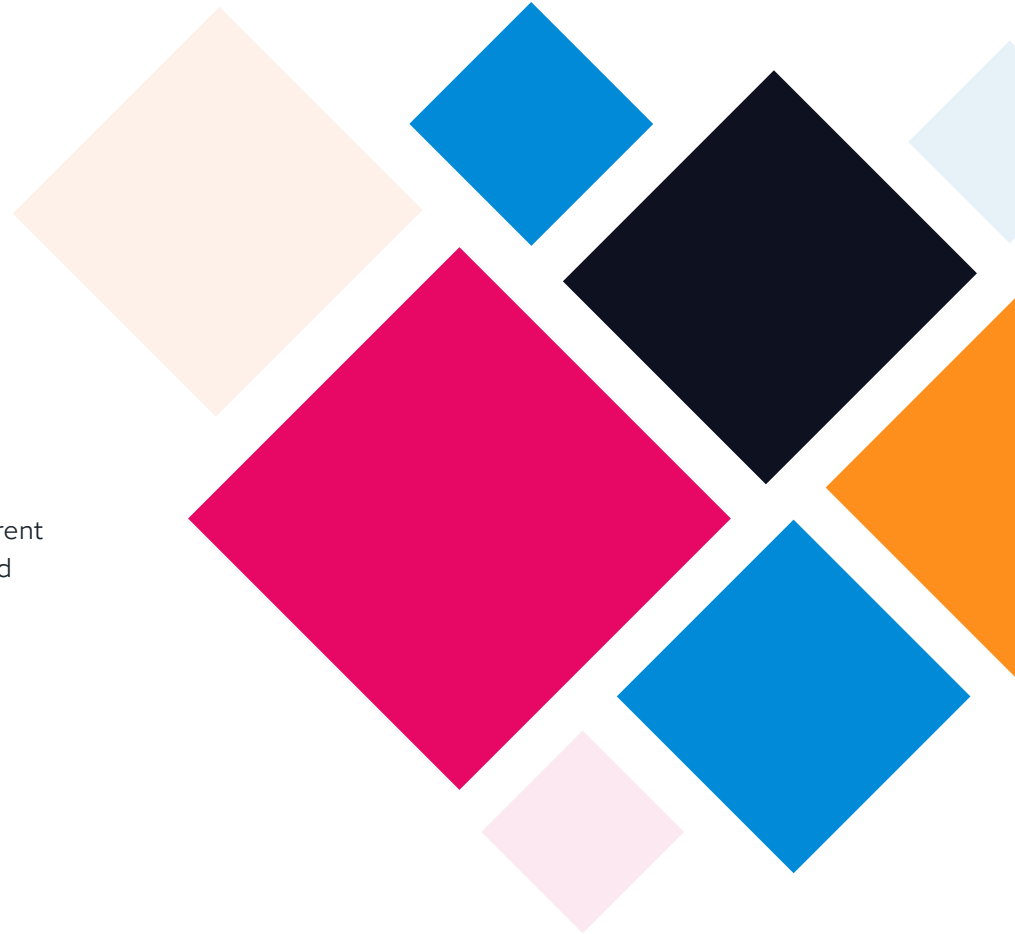
illuminate perspectives on medication access over the past year, inclusive of obstacles, successes and lifestyle considerations.

### *Providers*

give an idea of what patient interactions look like and how current technology allows them to address holistic patient needs — and what needed data may be missing from current workflows.

### *Pharmacists*

weighed in on their changing task load over the last two years as well as current and needed resources to continue serving in an elevated role on the patient care team.





BACK TO  
TABLE OF CONTENTS

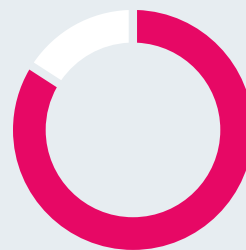


# Pandemic Ripple Effects: *Digital Shifts, But* Inequities Persist



# Patients faced healthcare access delays and mental health challenges in 2021

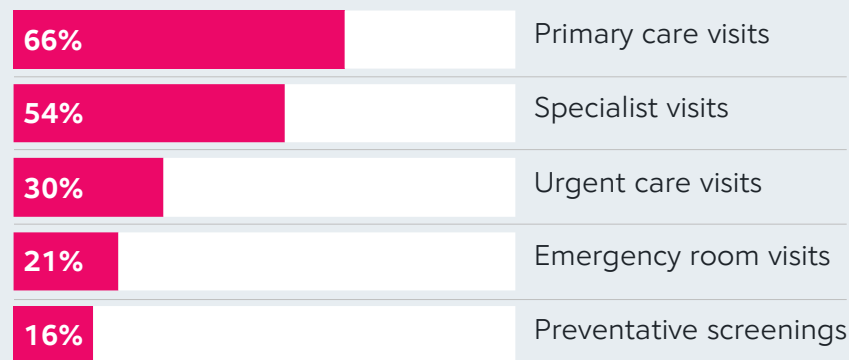
The effects of the COVID-19 pandemic took a toll on physical health and mental wellness. From medication access to urgent care, here's how patients were affected over the past 12 months.



**84%** of patients had to **delay or forgo in-person healthcare visits**

## Missed or delayed appointments included urgent, emergency and preventative care

Visits delayed or forgone over the last 12 months:



n = 1,000

Respondents could select all reasons that applied

The majority of patients reported delays for primary care and specialist appointments but nearly **1 in 3** patients avoided or delayed urgent care and **1 in 5** emergency room care.

**16%** of patients delayed or missed preventative care appointments, where diseases and conditions can be caught in earlier stages.

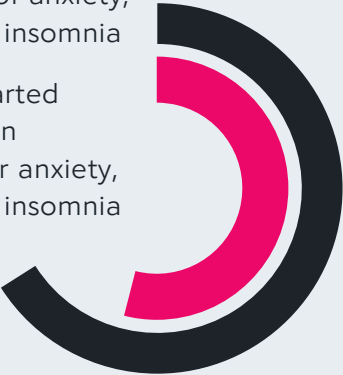
# Patients and care team members felt *the strain* of the pandemic

## Patients experienced worsening states of mind

Over the last 12 months:

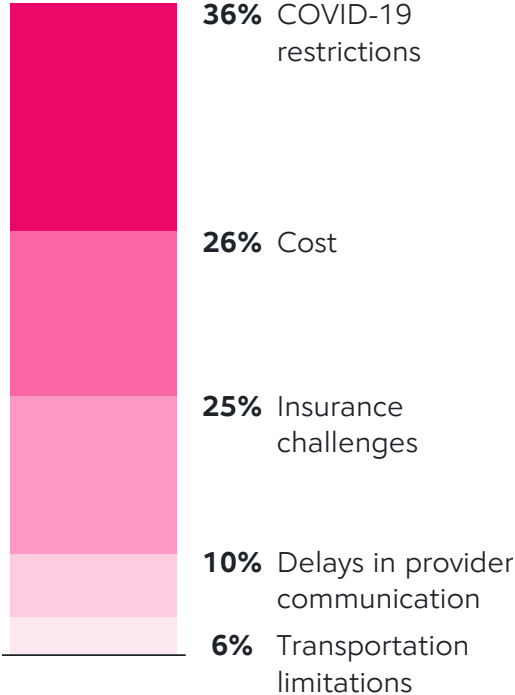
**66%** of patients experienced an increased level of anxiety, depression, and/or insomnia

**54%** of patients started taking a prescription medication for their anxiety, depression, and/or insomnia



**82%** of patients reported experiencing **delays in accessing medications**

For patients who experienced medication delays, the reasons they cited were:



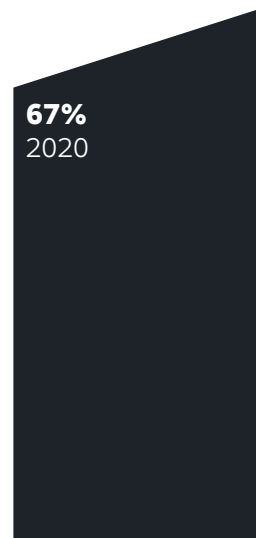
n = 820  
Respondents could select all reasons that applied

Source: CoverMyMeds Patient Survey, 2021

# More patients are making sacrifices to afford medications

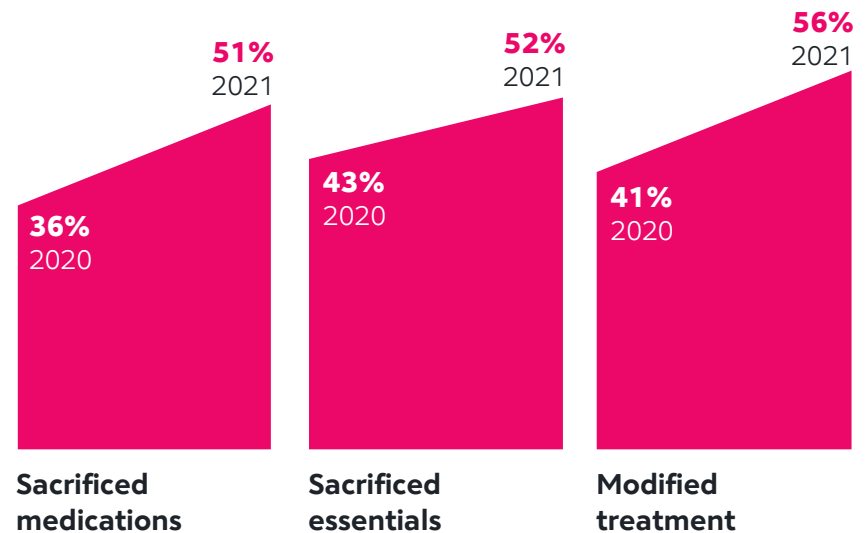
The COVID-19 pandemic threw open the curtains on unaddressed patient inequities and vulnerabilities, some of which worsened over the last 12 months.

Many patients made difficult decisions this year that may have affected their health and safety.



**79%** of patients have gone to pick up their prescription and found out it **cost more than they expected**, up from 67% a year ago.

Compared to 2020, more patients made sacrifices related to their medications and essential items in 2021



n = 1,000

Source: CoverMyMeds Patient Surveys, 2020 and 2021

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**90%** of patients in the last 12 months said they **took proactive steps to better afford their medications:**

**Patients are reaching out to care teams and biopharma for affordability answers**

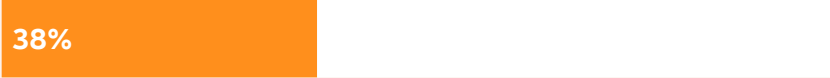
Talked to my provider about affordability options



Talked to my pharmacist about affordability options



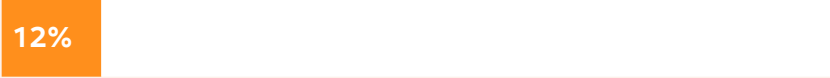
Used a cash discount card



Used a copay card/coupon from the biopharma company



Enrolled in a patient assistance program



n = 1,000  
Respondents could select all reasons that applied

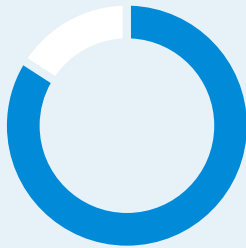


# Patients embraced digital healthcare

Patients are now accessing healthcare more digitally with a wider range of options for care and medications, though the industry has work to do to ensure patients have equitable access to digital resources.

After soaring in 2020, telehealth use settled down since office visits returned, but virtual healthcare access is here to stay. Here's how it's being used and by whom.

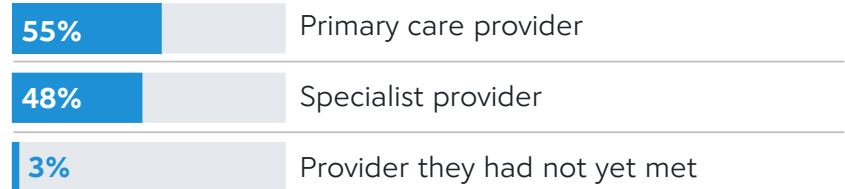
**84%**  
of patients  
**participated**  
**in a telehealth**  
appointment  
in the last  
12 months



n = 1,000

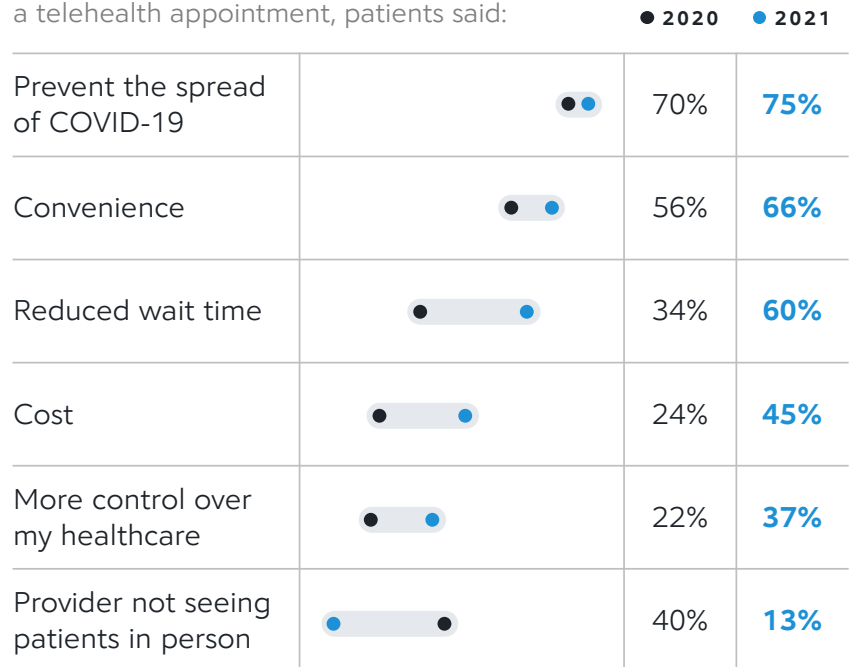
## Most patients used telehealth with established providers

Provider seen by patients who participated in telehealth:



## Patients are using telehealth by choice for speed and convenience

When asked why they chose to participate in a telehealth appointment, patients said:

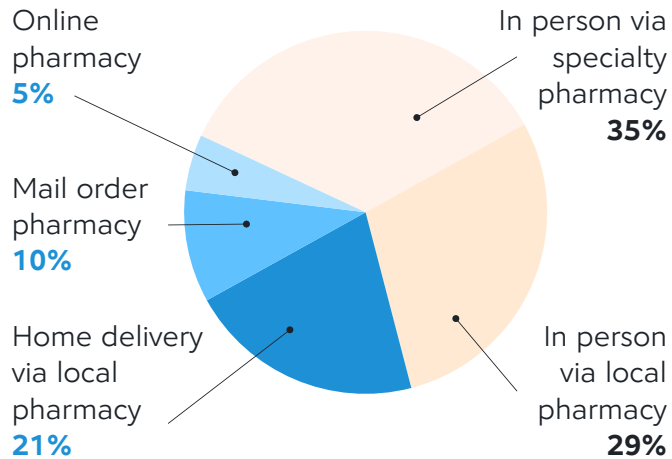


n = 841 | Respondents could select all answers that applied

Source: CoverMyMeds Provider Surveys, 2020 and 2021

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## Patients exercised choice in how they receive their medications, including remote resources



n = 1,000

Source: CoverMyMeds Patient Survey, 2021

# 36%

of patients said they are most often using mail order, home delivery or online pharmacies to receive their medication

## Patients can access and easily share medical records

With momentum toward more digital patient records and communication, most patients have electronic access to their clinical data and are able to share it.



# 90%

of patients said they have electronic access to medical labs, tests, data, etc.

# 86%

can easily share this data with providers, specialists and pharmacists

↑  
BACK TO  
TABLE OF CONTENTS

# Care Teams Are Addressing *Holistic* Patient Needs

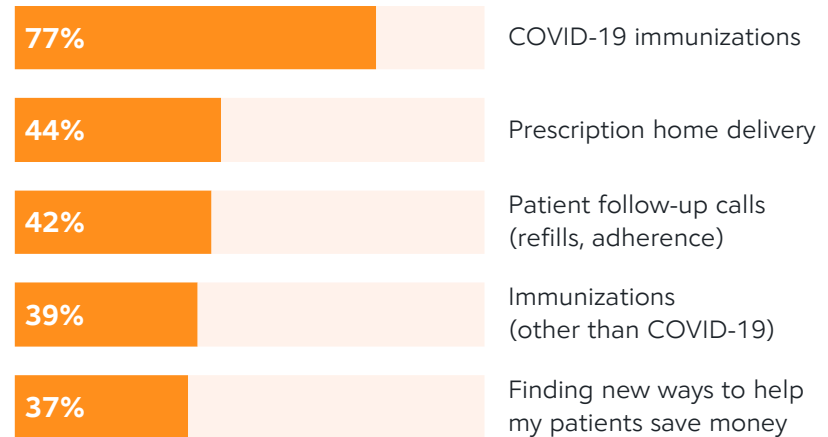


# Pharmacists are a *more prominent* part of the patient care team

In addition to advising patients on unexpected prescription costs and providing vaccination and testing services, here's how pharmacists are expanding their roles as care providers.



## Pharmacists have taken on new responsibilities since the COVID-19 pandemic

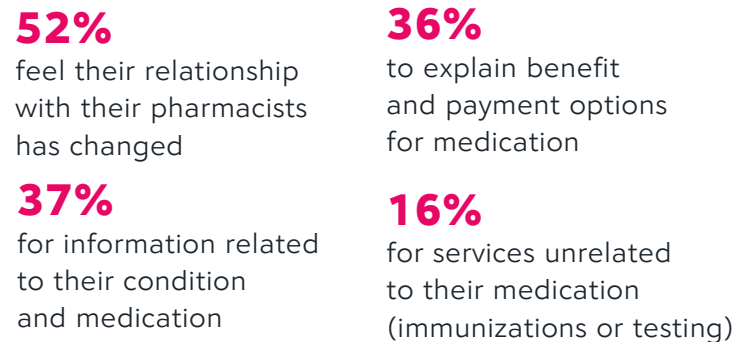


n = 1,000 | respondents could select all that applied

Source: CoverMyMeds Pharmacist Survey, 2021

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## Patients relied more on pharmacists in the last 12 months than before



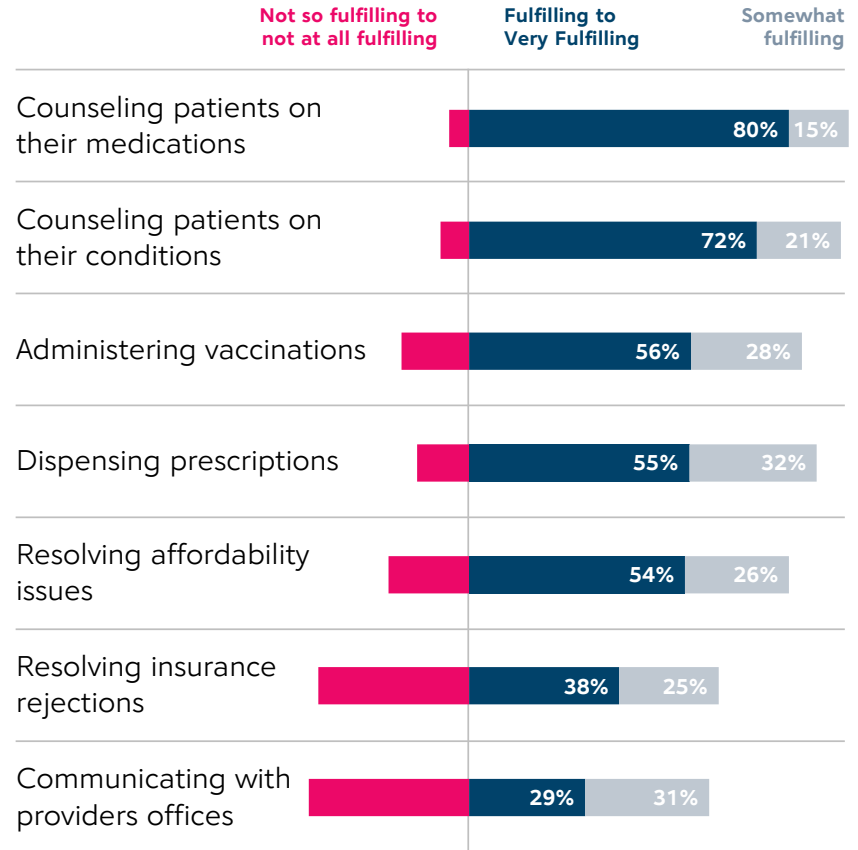
n = 1,000

Source: CoverMyMeds Pharmacist Survey, 2021

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# Pharmacists find the most fulfillment in patient counseling tasks

As a growing part of the patient care team, pharmacists find fulfillment in tasks that allow them to practice at the top of their license



n = 1,000 | Respondents could select all answers that applied

Source: CoverMyMeds Pharmacist Survey, 2021

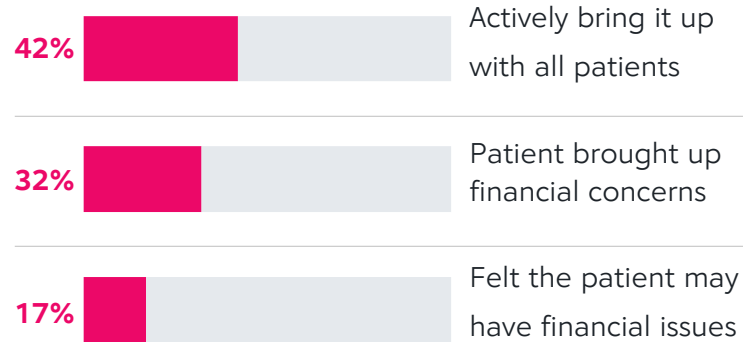
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# Providers are holding timely medication conversations

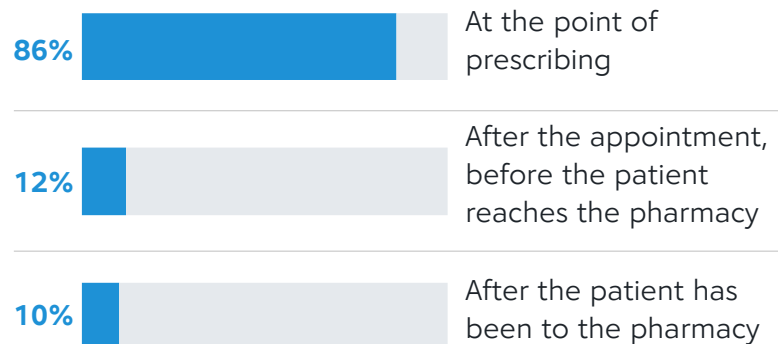
Having real-time access to benefit and medication information allows providers to help patients make informed decisions about their prescriptions.

Most providers are willing to talk about medication affordability but not all bring it up with every patient

## Why providers bring up affordability with patients



## When providers discuss affordability with patients



n = 1,000 | respondents could select all that applied

Source: CoverMyMeds Provider Survey, 2021

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BACK TO  
TABLE OF CONTENTS

# Providers and Pharmacists Need The *Right* Data To Better Help Patients

When medications become unaffordable, patients lean on their providers and pharmacists for answers to affordability questions. This is why it's critical for care teams to have patient-specific benefit and out-of-pocket cost information within workflow to help provide equitable medication access for all patients.



# Providers need actionable data at the point of prescribing

Real-time medication information and affordability options at the point of prescribing can help improve the overall quality of care.



**83%** of providers have access to medication-specific information within their EHR

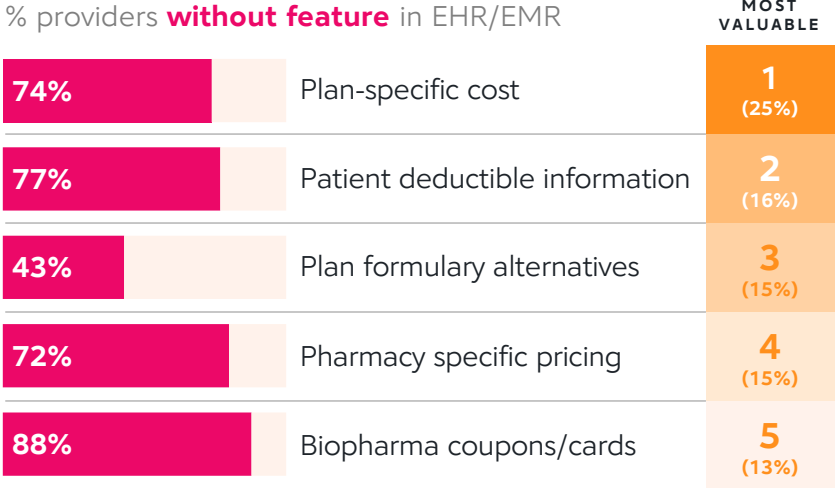


**73%** of providers have access to formulary alternative information within their EHR

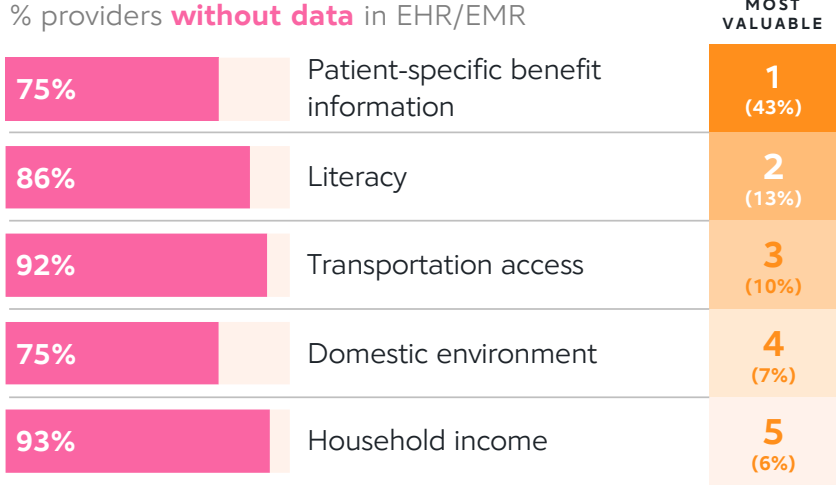


**23%** of providers can surface medication cash price information within their EHR

## Many providers don't have the most valuable prescribing features or patient data in their EHR/EMR



Answers below 10% not shown



Answers below 5% not shown

Respondents **selected all that applied** ■■  
 Respondents **selected most valuable** ■

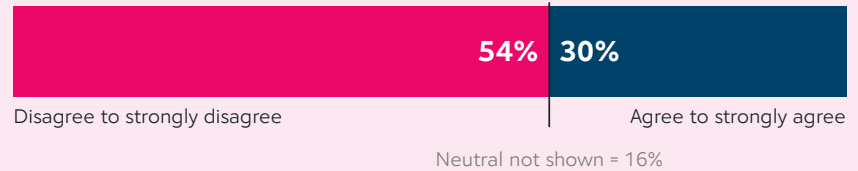
n = 1,000



# Technology could help pharmacists find time

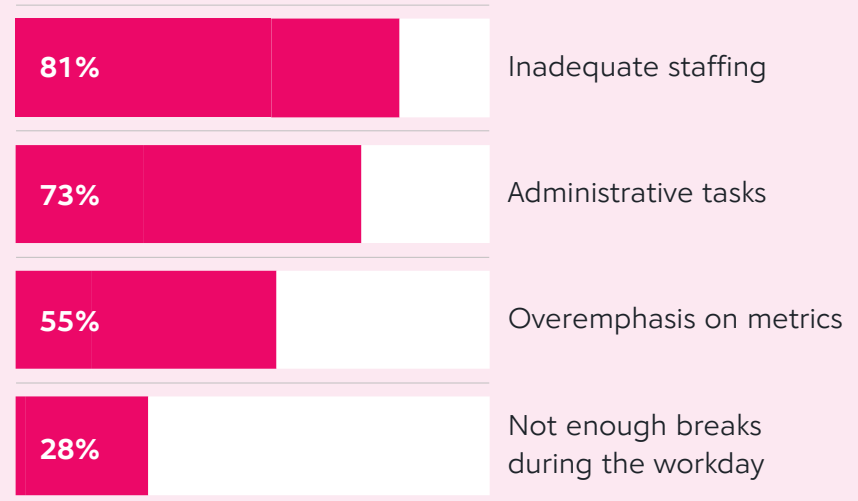
Pharmacists with limited time can benefit from technology that frees them from manually completing tasks that can be automated.

Level of agreement with the statement 'Most days, I feel I have adequate time to complete my job effectively'



**54%** of pharmacists felt they didn't have enough time to adequately complete their job

**Among the reasons why pharmacists felt they didn't have time to adequately complete their job:**



n = 1,000 | respondents could select all that applied

Source: CoverMyMeds Pharmacist Survey, 2021

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# Pharmacists need patient-specific benefit data to support patients

Patients are often leaning on pharmacists for help with affordability and benefit questions. Many pharmacists don't have this information in workflow, creating delays and inefficiencies.



**64%** of providers don't have patient-specific benefit information in their pharmacy system

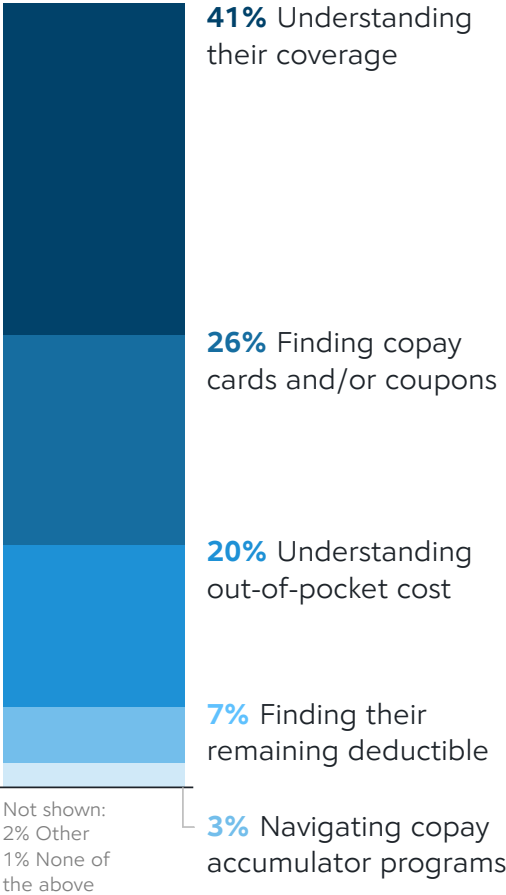


**35%** of providers use tools outside their pharmacy system to look up benefit information

# 84%

of pharmacists are helping patients with benefit information in a given week

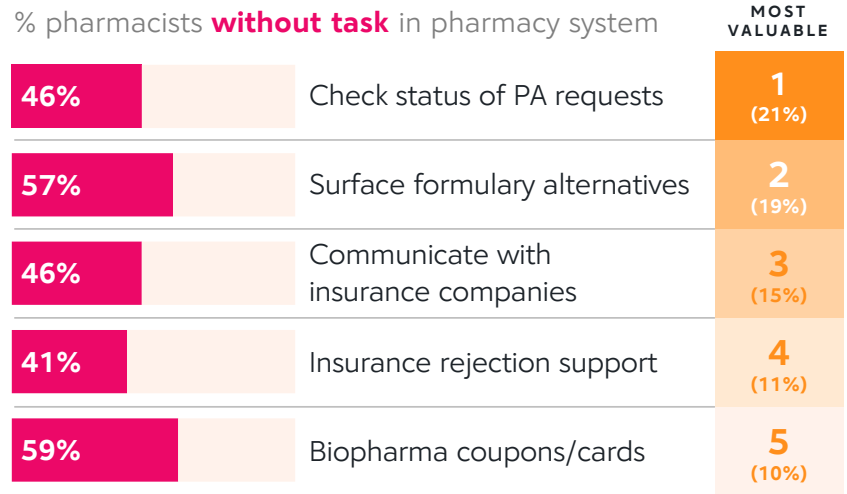
When asked the benefit-related tasks they spend the most amount of time helping patients with pharmacists responded:



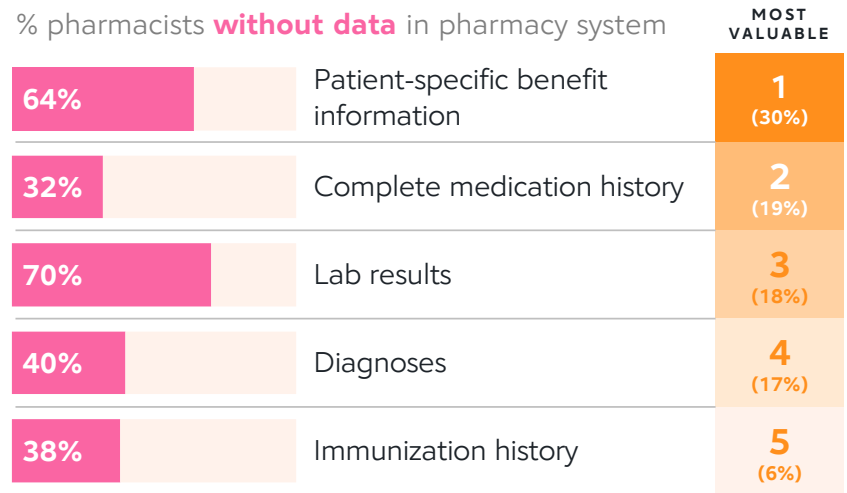
n = 1,000 | respondents could select all that applied

**21%** of pharmacists listed checking PA status as the most valuable task they can't currently complete within their pharmacy system – the most-selected of all tasks.

**Many pharmacists don't have the most valuable tasks or patient data in their pharmacy system**



Answers below 10% not shown



Answers below 5% not shown

Respondents **selected all that applied** ■■

Respondents **selected most valuable** ■■

n = 1,000

Source: CoverMyMeds Pharmacist Survey, 2021

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# Technology can help improve the PA process

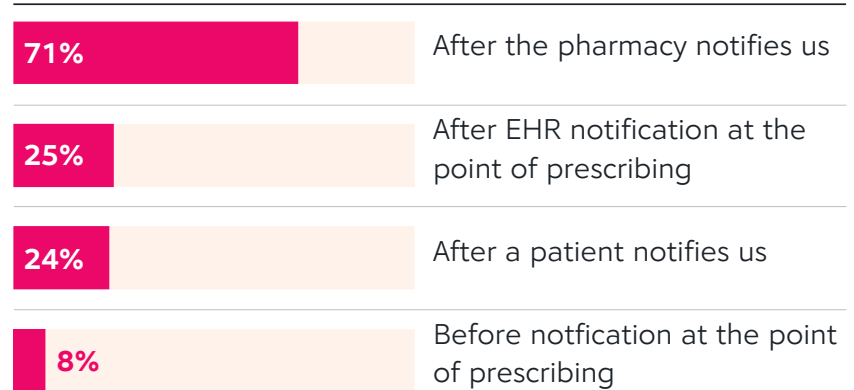
In-workflow technology solutions automate and simplify the prior authorization (PA) process, which can help patients get medications faster.



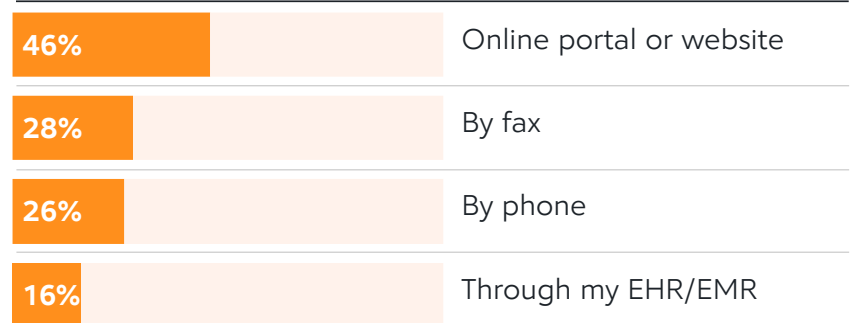
**21%** of patients experienced a delay in receiving medication over the last 12 months due to insurance processes

**Most providers complete PAs retrospectively, after the pharmacy indicates one is needed, which delays time to therapy for patients**

**When** providers are submitting PA requests



**How** providers are submitting PA requests



n = 1,000 | respondents could select all that applied

Source: CoverMyMeds Provider Survey, 2021

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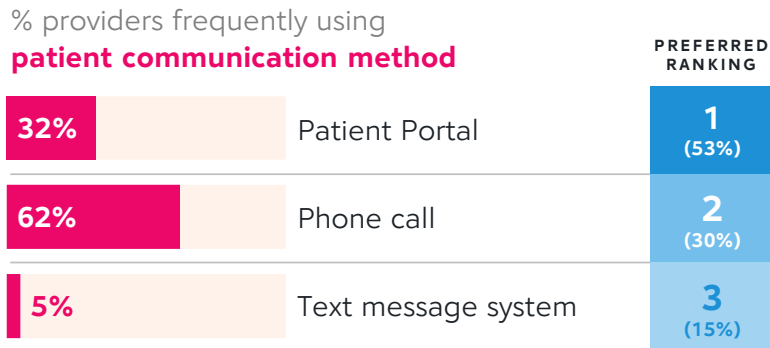
↑  
BACK TO  
TABLE OF CONTENTS

# Opportunities for Patient and Care Team Communications



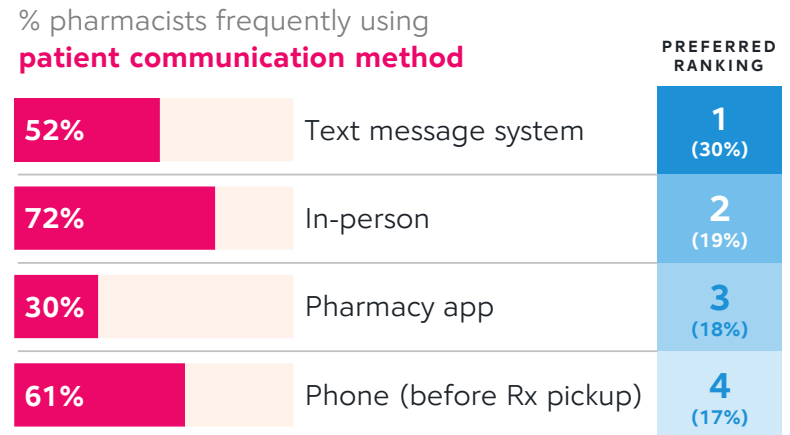
# Providers and pharmacists prefer digital communication with patients

Care teams, experiencing staffing shortages and a strained healthcare system, would prefer to communicate with patients digitally, through asynchronous methods.



Other = 1% not shown

Outside of appointments, most providers are communicating with patients through phone calls, but many would prefer digital communication methods.



Other = 1% not shown

While most pharmacists are doing their communications with patients while they're in front of them at the pharmacy, given any choice, pharmacists prefer digital communication.

Respondents **selected all that applied**

Respondents **selected preferred method**

n = 1,000

Source: CoverMyMeds Provider and Pharmacist Surveys, 2021 ©2022 CoverMyMeds LLC

↑  
BACK TO  
TABLE OF CONTENTS

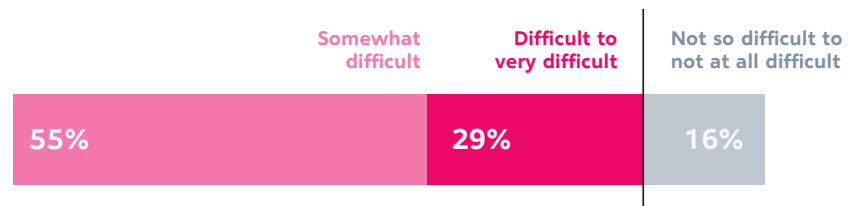
# Considerations for Complex Medication Access

Starting patients on specialty medications can be challenging and time consuming for both providers and patients. Providers want complete, transparent access to patient benefit information and medication affordability options when prescribing complex therapies.

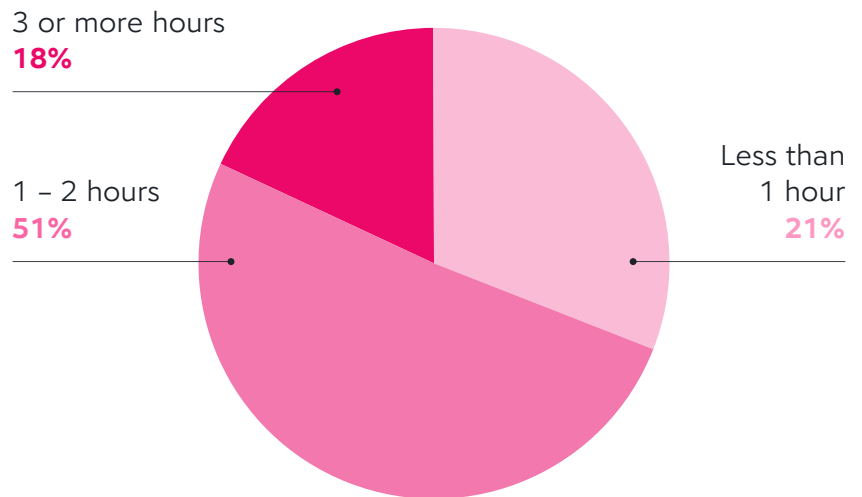


# Providers experience difficulty starting patients on complex medications

**84%** of providers experience some level of difficulty starting patients on complex medications



Most providers are spending at least an hour per patient when starting them on complex therapies



N = 876

Source: CoverMyMeds Provider Survey, 2021

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# Technology could help support providers and speed the specialty medication process for patients

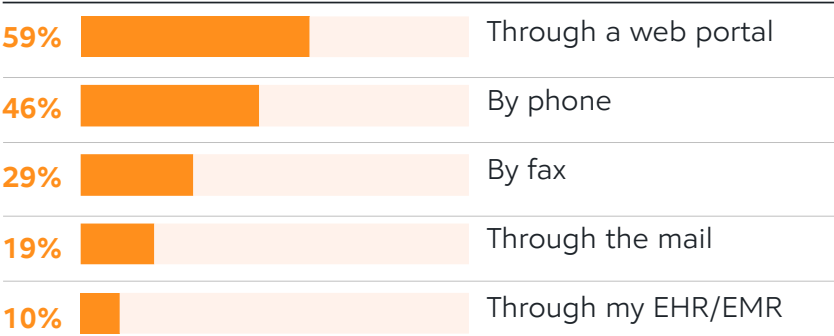


**49%** of providers felt they didn't have necessary benefit information they need to start patients on specialty/complex therapies

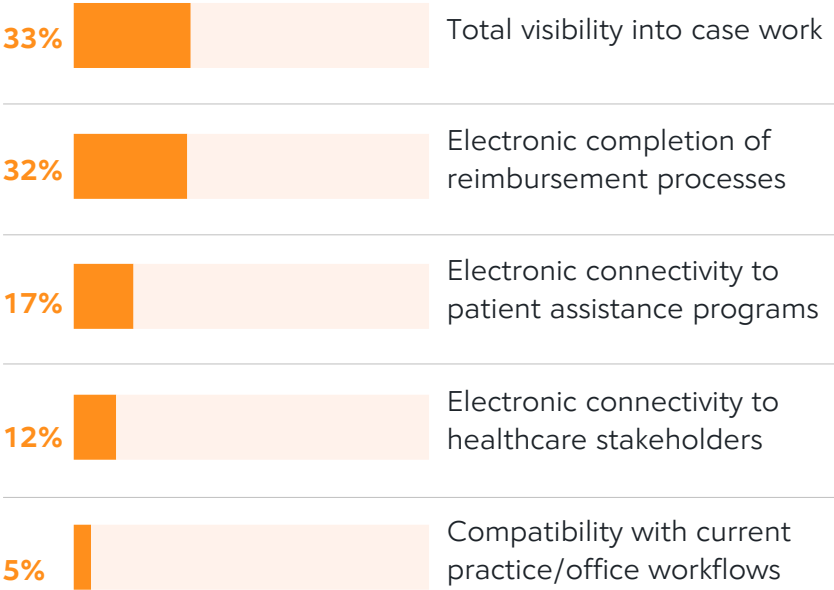


**61%** of providers said they interact with patient support services for complex/specialty medications

## Many providers still use manual methods to enroll patients in patient support services



## In a specialty support platform, providers value automation and transparency



n = 1,000 | respondents could select all that applied

## CONCLUSION

Momentum generated in 2021 has drastically shifted and diversified the ways patients receive their medication and their healthcare in general.

The COVID-19 pandemic forced an acceleration of change toward less manual, and more technology-supported interactions, yet some patients still struggle to find equity in healthcare on top of other challenges in life.

By embracing interoperable technology, health systems and healthcare leaders could help providers and pharmacists better address patients holistically, to help improve patients access, affordability and adherence challenges. Stakeholder commitment to data fluidity and improved workflows can help the industry build on patient-centered momentum gained over the last two years, instead of retreating to its previous state.

The convergence of technology can help shift from reactive sick care to proactive healthcare, create opportunities at every part of the patient journey to advance outcomes, develop an affordable medication plan and sustain adherence so patients can continue to live their healthiest lives.



## **RESEARCH METHODOLOGY**

All surveys were conducted in September 2021 and participants were asked to voluntarily give perspectives from the previous 12 months. The survey results mentioned herein are results that were compiled from all participants who agreed to participate in the CoverMyMeds' surveys.

### **Patient Survey**

The patient survey leveraged Snow Companies to better reach patients with diseases more likely to take specialty medications. Of participants surveyed, 40 percent were patients living with a chronic condition, 40 percent were patients with an acute condition over the last 12 months and 20 percent were caregivers. Patients represented the general population, including age, race, insurance type and area of living demographics.

### **Provider Survey**

The provider survey was conducted through SurveyHealthcare Globus and included roles of physician, nurse practitioner, nurse, physician assistant and medical assistant. Provider areas of medicine were representative of CoverMyMeds user segmentations, including 24 different specialties.

### **Pharmacist Survey**

The pharmacist survey was also conducted through SurveyHealthcare Globus and included roles of pharmacist-in-charge, staff pharmacist, clinical pharmacist, clinical pharmacy manager, pharmacy technician, infusion pharmacist and pharmacy intern. Work settings represented chain retail, hospital, independent retail, specialty and small representations from infusion, health system affiliated, long-term care facility, provider office and mail-order pharmacies.