

WHITE PAPER

Tackling Today's Biggest Market Challenges

Key insights and actionable takeaways from leaders across specialty pharma



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Introduction

The specialty pharmaceutical market continues to look for opportunities to innovate to overcome patient access, affordability and adherence challenges and provide their patients, healthcare providers (HCPs) and caretakers the best-in-class experiences that drive improved clinical outcomes. While nuances exist, many of the same challenges and evolving market dynamics impact patient support initiatives across therapeutic areas, benefit types, administration methods and patient and HCP populations.

Life sciences organization leaders are in search of opportunities to eliminate manual processes, gain new levels of transparency and evaluate and act upon data. Identifying the right balance of technology and talent to support medical benefit therapies – a significant portion of the drug pipeline – or the shift to insourcing some PSP operations can be especially challenging.

As part of AssistRx’s annual Solution Summit, we dove into the industry’s biggest challenges, participants’ experiences with these challenges and actionable takeaways that can be applied across the specialty therapy spectrum.

About the AssistRx Solution Summit: Tackling Today’s Biggest Market Challenges

The summit, Tackling Today’s Biggest Market Challenges, **brought together leaders from life sciences organizations, pharmaceutical consulting firms and patient solutions providers (PSPs) for five think tank breakouts.** Each breakout focused on a top market trend with participants sharing their best practices, lessons learned or factors to consider.

Breakouts included:

The Rising Demand for Digital Intake

The market is saying it’s time to eliminate the enrollment form. With much of the space still on paper and fax, is this possible and how can we get there?

Challenges at the Pharmacy Counter

From tweener drugs to ultra-rare/complex therapies, products still face therapy switching, little visibility and script abandonment. How can we address these issues at scale?

The Need for Transparency and Making Data Actionable

The industry went from a sparse amount of data to an overabundance. How can we determine which data matters most and how to use it throughout the product lifecycle?

Growth of Medical Benefit Drugs & Complex Therapies

Knowing the drug pipeline is full of medical benefit therapies, is the market ready with sufficient e-medical benefit and buy & bill solutions? If not, how can we get there?

Evolving PSP Models - A Shift from Fully Outsourcing

As life sciences organizations seek to take some or all PSP operations in-house, which factors should be considered and what are the pros and cons of various models?

At the close of the summit, breakout leads shared specific insights and actionable takeaways uncovered during their session. Insights spanned therapy, patient and HCP profiles, as wells as organizational size and culture.

Participant overview

Solution Summit participants included access and patient assistance program leaders supporting rare and specialty therapies across therapeutic areas and disease states. Attendees shared their perspectives supporting access and affordability for oral-, injection- and infusion-administered therapies, coverage across both pharmacy and medical benefit and patient support services spanning from tech-first digital PSPs to full-service PSPs.



The Rising Demand for Digital Intake

Breakout Description: The market is saying it’s time to eliminate the enrollment form. With much of the space still on paper and fax, is this possible and how can we get there?

FINDINGS

Differing definitions

While some believe digital intake means digitizing the enrollment form, others see it as triggering e-support services via receipt of an e-prescription. Knowing the prescription contains all the information needed to initiate access and patient support services, some reason that digital intake means eliminating the enrollment form altogether — even kicking off e-support services at the pharmacy.

Ultimately, the group concluded that a digital intake approach must at the minimum meet the following requirements:

An electronic, **automated trigger** of some or all **therapy initiation e-services** at the point of **prescription receipt**.

Differing experiences

Participants from multiple life sciences organizations delivering tweener therapies to the market saw success after implementing a digital intake approach via the EHR — similar to AssistRx’s CoAssist model.

For one participant, dispense turnaround time (TAT) was reduced from weeks to days and PSP staff were able to refocus efforts from chasing down patient consents and missing information to providing value-add patient interactions.

Other participants experienced less success when implementing a digital intake approach. One participant saw a decrease in support program enrollments, as the therapy’s HCP population preferred traditional paper and fax methods. Another participant saw a similar decrease, as their therapy supported a transient patient population that had little to no access to a computer or smartphone.

In both instances, **the brand team needed to respect their customers’ unique needs or preferences**.

ACTIONABLE TAKEAWAYS

Consider all end users’ touchpoints

Ensure your digital intake model meets end users (e.g., HCPs, patients, pharmacies) in their preferred workflows. Think through how these touchpoints fit into the model — including the pharmacy counter.

Recognize that this shift will take time

Achieving this model won’t happen overnight. You’ll need a digital transformation initiative to support end user behavior change.

A digital transformation in the form of technology-first services involves encouraging patients and HCPs to adopt digital methods throughout the therapy journey and the product lifecycle.

Whether launching a new product, innovating at mid-lifecycle or facing loss of exclusivity (LOE), technology-first solutions improve efficiencies for patients and HCPs, increasing the likelihood of adoption for both the product and the technology.

For one multi-indication blockbuster drug, AssistRx’s digital intake approach eliminated manual, time-consuming faxes and calls. Patient outreach TAT decreased from 19 minutes to 12 seconds, and 50% of PA responses were returned within 1 hour.

Ultimately, utilizing CoAssist increased speed to therapy from 12.2 days to 3.7 days, getting patients the medications they need faster and enabling better results.

12 seconds

Patient outreach TAT decreased from 19 minutes to 12 seconds

1 hour

50% of PA responses were returned within 1 hour

3.7 days

CoAssist improved speed to therapy from 12.2 days to 3.7 days

Growth of Medical Benefit Drugs & Complex Therapies

Breakout Description: Knowing the drug pipeline is full of medical benefit therapies, is the market ready with sufficient e-medical benefit and buy & bill solutions? If not, how can we get there?

FINDINGS

Growth in digital, automated access solutions

Access solutions for therapies covered under the medical benefit are becoming more and more sophisticated. Participants shared their experiences with multiple PSPs that use new or enhanced technologies to identify coverage and submit PAs. Some PSPs leveraged direct connectivity to payers, some used artificial intelligence (AI), and others used a combination of the two.

All approaches have their pros and cons. Direct connectivity facilitates more accurate results because the data is up-to-date and delivered from the source. AI typically delivers higher return rates because it isn't dependent on payer electronic capabilities. However, AI returns may be less accurate, as AI often leverages historical claim data. **Using a solution that encompasses both direct connectivity and AI is the ideal option.**

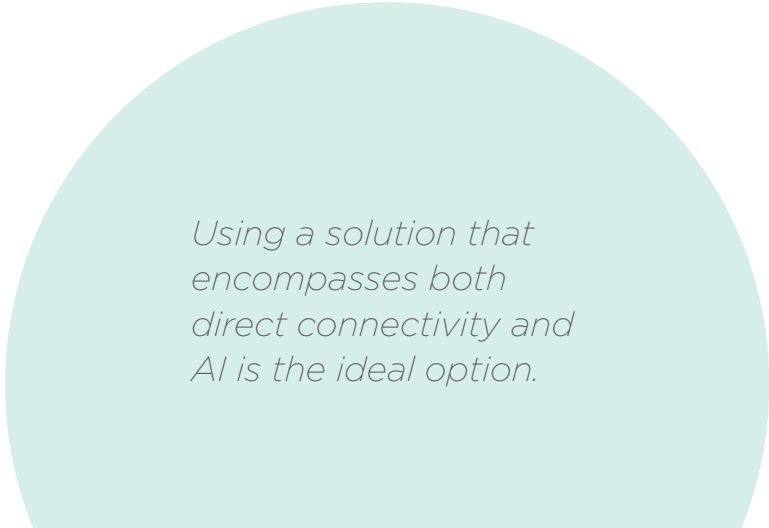
The need for talent intervention

Participants' therapy profiles varied greatly, including a cell & gene therapy administered in academic centers, an infusion therapy administered in-office or in-home, and a vaccine therapy that requires two-week consecutive infusion cycles.

All participants' programs used technology for access, affordability and adherence solutions to some extent. However, all agreed talent with relevant expertise and strong soft skills are just as important as the technology.

Some participants shared the invaluable effect nurses and case managers can have on patients. Although the impact is difficult to quantify, solutions like AssistRx Patient Solutions' AI sentiment analysis tool can demonstrate the effectiveness of strong talent delivering on frontend support.

While technology can and should be integrated where possible, many medical benefit and complex therapies will always require talent intervention for office education, billing and coding bundling components, patient adherence support, ever-evolving payer utilization management tools and more.



Using a solution that encompasses both direct connectivity and AI is the ideal option.

ACTIONABLE TAKEAWAYS

Build confidence in your therapy with tech-enabled access

When implemented in the right place and in the right way, technology can improve the perception of timely access among HCPs. By empowering HCPs with Advanced eServices such as Advanced Benefit Verification (ABV), eMedical Benefit Verification (eMedBV), Advanced Prior Authorization (APA), etc., HCPs can help their patients overcome access hurdles quickly and efficiently, building their confidence in prescribing your therapy. When HCPs also understand that informed, tech-enabled talent will intervene when technology can only go so far, their perception of access improves further. For example, AssistRx's patient solutions staff uses ABV to confirm whether a PA is required and on file in under 15 seconds rather than spending hours calling back and forth to the patient's payer.

Optimize the processes that positively impact the majority of cases

Knowing HCPs have differing workflow needs and preferences, focus your efforts on supporting 80% of the HCP population, rather than the 20% of special cases. With so much education and coordination required for medical benefit drugs and complex therapies, solving for the 100% can rapidly drain your PSP resources.

Alleviate burden on HCPs with materials that further streamline their processes

Provide offices with succinct, easily comprehensible access and reimbursement guides, letter of medical necessity templates and PA/appeal checklists. Use program data to educate offices on best practices, payer activity, efficiencies gained through use of technology and more.

Streamline the reverification process for medical benefit drugs

Medical benefit information is less digitally accessible than its pharmacy counterpart, making real-time, accurate coverage results harder to deliver. AssistRx's eMedBV solution leverages a three-pronged approach to this challenge.

eMedBV first uses direct connectivity with payers to return J-code specific coverage information in under 20 seconds for 70% patient inquiries, followed by AI-powered payer outreach, and then offramps to talent. These medical benefit experts use already gathered data to swiftly collect remaining information.

Through this tech-first approach, life sciences organizations can eliminate the flurry of activity that accompanies blizzard season and enable reverification to be conducted throughout the year.

Challenges at the Pharmacy (Retail to Specialty)

Breakout Description: The “pharmacy counter” could be at a retail setting, specialty pharmacy, academic medical center and more, so how are brands supporting patients in retail and specialty scenarios? How can we solve for issues like therapy switching, the buydown paradox and script abandonment at scale? Which models can solve for these issues and what are the pros and cons of each?

Continued patient access and adherence challenges at the pharmacy

For the most part, today’s PSPs continue to receive 30% - 40% patient volume, while pharmacies — specialty pharmacies, academic centers, retail pharmacies — support the remaining 60% - 70% of patients. Participants agreed that although this ratio varies by therapeutic area, product profile and pharmacy setting, patients supported by the pharmacy exhibit lower pull-through and higher prescription abandonment rates across the board.

Models to address challenges at the pharmacy

There are three main approaches to mitigating patient access and adherence challenges at the pharmacy. These approaches are a shadow hub, a digital hub and the point of pharmacy claim model. All have pros and cons based on the product profile and patient and HCP populations.

ACTIONABLE TAKEAWAYS

Pros and cons of each model:

MODEL	Shadow hub More and more specialty pharmacies are offering enhanced patient support services, such as BVs and PAs. Some life sciences organizations have opted to contract with these specialty pharmacies as their shadow hub, rather than insourcing or outsourcing PSP components.	Digital hub Combining a technology platform with a pharmacy is another approach to reduce switching and prescription abandonment. Several participants shared their experience with using a digital hub over a traditional PSP. Digital hubs like CoAssist digitally intake the e-prescription from the EHR, triggering Advanced eServices that identify the patient’s coverage and optimal affordability option, then route the prescription to the appropriate in-network pharmacy.	Access at the pharmacy claim A new model gaining traction in the market is initiating access services at the point of the pharmacy claim. A first-of-its kind solution, AssistRx’s Advanced Access Anywhere (AAA) facilitates this model. HCPs simply give patients a service card to provide to their pharmacy, the pharmacy uses the card to run the claim, and the claim immediately triggers Advanced eServices to access therapy and support services.
PROS	Participants reported seeing success with this model when a therapy has an exclusive distribution network or when the life sciences organization doesn’t have a PSP.	Accelerating speed to therapy to as little as four hours reduces prescription abandonment, while using a selective pharmacy network upholds the prescriber’s clinical decision and reduces switching.	Participants agreed that this model takes the burden off the HCP and pharmacy, enables them to remain in their workflows, and meets the patient where they are and when they are ready to take action.
CONS	Contracting with multiple pharmacies can be costly. Additionally, capturing, tracking and analyzing data from multiple, disparate sources can be difficult to manage from a patient visibility and reporting standpoint.	Therapies requiring patient support beyond what can be completed electronically, such as site of care coordination or alternative coverage research, should have a talent offramp staffed with therapy experts. While CoAssist offers this offramp, many digital hubs do not.	Through a 61,000 nationwide pharmacy network, AAA enables patient access to medication anywhere. However, this model may not be as effective for patient populations that are unmotivated or unlikely to fill their prescription in the first place.

Advanced Access Anywhere Case Study

Challenge

A life sciences organization manufacturing a retail antiviral drug was facing long dispense TATs, low patient enrollment and lack of visibility to the script.

Solution

AssistRx implemented Advanced Access Anywhere (AAA), which triggers Advanced eServices like eConsent, eEnrollment and ABV at the pharmacy claim. AAA streamlined the process by working in the background to kickoff Advanced eServices in under 7 seconds.

Results

AAA reduced dispense TAT to a matter of minutes. 98% of patients enrolled in the drug’s PSP received their medication within one day — many same-day. The solution met patients where they are, enabled HCPs and pharmacists to stay in their workflow, and facilitated patient visibility.

7 seconds

Advanced eServices triggered in under 7 seconds

1 day

98% of patients received their medication within 1 day

Shifting from Fully Outsourced Models

Breakout Description: Battling lack of visibility and control over the patient experience, life sciences organizations are taking some or all PSP operations in-house or re-evaluating their PSP partners. What are the pros and cons for outsourcing PSP components vs. insourcing vs. hybrid? What should be expected from PSP partners?

FINDINGS

Differing approaches to PSP models

This breakout's participants represented vastly different life sciences organizations and therapies. From emerging pharma to top biotech companies, participants' brands included a variety of tweener diabetes therapies, rare hemophilia therapies and specialty oncology therapies. Some managed outsourced PSPs and others managed fully insourced or hybrid PSPs. **While the difference between an in-house PSP versus an outsourced PSP are clear, hybrid models can take many forms.**

While the difference between an in-house PSP versus an outsourced PSP are clear, hybrid models can take many forms.

Some hybrid models are based on the role of the FTE and leverage in-house staff for patient- and HCP-facing touchpoints while outsourcing all backend payer- and pharmacy-facing functions to PSP partners. Others outsource all frontend and backend touchpoints for access and affordability services and insource all adherence services.

Other hybrid models are based on which party's technology is used. Some life sciences organizations leverage a PSP provider's technology, such as one-off e-BV and e-PA tools integrated into the organization's systems, or CRM instead of in-house systems.

Shared challenges

All participants agreed that the specialty space is shifting from fully outsourced models, as more life sciences organizations seek greater control over the patient and HCP experience and program data. Organizations are either bringing a portion of their PSP operations in-house and/or consolidating PSP vendors to achieve this.

The problem is, **decisions to shift away from fully outsourced models require organizational alignment and understanding of what's ahead.** Decisions can be made without fully understanding what the organization is trying to solve for, the level of effort required to make this change, and the organizational alignment necessary to succeed. One participant's brand team wanted to shift outsourced operations in-house, but realized they didn't have sufficient internal systems and resources to do so. The team ultimately partnered with a PSP provider that supported them while they built the in-house infrastructure. Another participant engaged a consultative partner after failing to gain leadership buy-in. The partner achieved alignment by identifying the optimal hybrid model, demonstrating the justification for the change and building a corresponding transition plan.

ACTIONABLE TAKEAWAYS

Ensure alignment before undertaking the transition to in-house or hybrid

You need to know what you're solving for and whether the new PSP model fully addresses this challenge, if the organization is ready to support the model and undertake a transition, and whether all stakeholders are aligned on the plan and expected outcomes.

Weigh the pros and cons

When considering a shift in a PSP model, first ask yourself how well the new model addresses the challenge and if the pros of the new model outweigh the cons of organizational lift and disruption to program performance.

Prioritize internal cross-functional alignment

After deciding to move forward, align cross-functionally on whether all required technology infrastructure, compliance guardrails, and operational resources and expertise are in place. All stakeholders must be aligned on the path forward and the desired outcomes.

You will also need to consider the legal and compliance risks that come with owning the Protected health information (PHI) data required to support an insourced PSP model. Outsourced PSP partners regularly invest in their security, compliance and regulatory systems specifically to protect PHI exchanged by the PSP. An outsourced PSP also provides a degree of separation between the PHI data and the life sciences organization. By bringing PSP operations in house, life sciences organizations take on higher risks and costs to safely protect and exchange PHI.

Define expectations of external partners

Once aligned on the plan, define what you expect from a strategic partner and/or PSP provider that will guide you through the shift.

Understand how your partners handled similar transitions

When considering partners, vet their experience with similar transitions and duration of the engagement, how they handled inevitable snafus in implementation, and their willingness to support your organization's goals even at expense to their potential revenue.

Life sciences organizations need to fully understand what they are solving for, the level of effort required to make this change and the organizational alignment necessary to succeed.

Making Data Actionable

Breakout Description: *There's an abundance of data from point of prescription to dispense to ongoing therapy. Which data matters most at launch to build patient, HCP and field team trust; mid-lifecycle when you want to improve program performance; and end-lifecycle when an abundance of data may not equate to optimized margins?*

FINDINGS

The real obstacle to making data actionable

Representing both large and small life sciences organizations and therapies spanning high-volume specialty self-injectables to rare complex therapies, participants agreed that teams across their organizations want all the data all the time. This can be a challenge for brand teams trying to uncover a holistic narrative while pulling data from multiple sources with their own data standards and single view of the patient journey. Participants shared that one of the biggest hurdles they face in effectively actioning data is a lack of data ecosystem management.

When asked how to overcome this challenge, several participants stated it starts at program design. For example, at the design phase, AssistRx consults clients to look beyond designing access channels and patient and HCP experiences to define how they'll capture, validate, standardize and analyze program data to inform program decisions — and how their data strategy should evolve over the life of the program.

AssistRx also encourages clients to vet partners for data/analytics technology, expertise and collaboration.

AssistRx consults clients to define how they'll capture, validate, standardize and analyze program data to inform program decisions.

ACTIONABLE TAKEAWAYS

Understand the why

Consider whether the recipient can action the data or use the data to better understand the customer or program performance. If the data isn't meaningful in the moment, it may just lead to analysis paralysis.





Arm field access/reimbursement teams with data that can change HCP behavior for the better

Beyond using daily reports to drive enrollment pull-through, arm your field teams with trending data to demonstrate how certain behaviors and technologies improve patient access or the office workflow. One participant educated offices on how using AssistRx's iAssist therapy initiation platform for digital PA submissions resulted in a 250% increase in PA approvals.

Exercise patience to avoid acting on anomalies

The phase between evaluation to action should always include time to confirm the data is representative of the whole and immune to outside factors. From allowing "real-time" data to go through QA before analyzing it, to giving newly integrated technology time to demonstrate its utility, patience prevents acting on anomalies. You should always be evaluating spikes or dips in enrollments, refills, etc., but be careful of knee-jerk reactions.

Brands should select partners that:

-  *Have a strong quality assurance infrastructure*
-  *Are willing to share data*
-  *Can align on data standardization*
-  *Have the expertise to establish the right benchmarks and KPIs*

The Perfect Blend of Tech + Talent

For each of these market challenges, the perfect blend of tech and talent — crafted to meet the unique needs of the program — is necessary to meet HCPs and patients in their workflows and lifeflows. Life sciences organizations requiring specialty services can leverage technology to automate and gain visibility into as much of the access journey as possible so talent can step in where needed to meet the nuanced needs of patients and HCPs.

AssistRx Business Solutions					
BUSINESS SOLUTION	AssistRx Patient Solutions	iAssist	CoAssist	Advanced Access Anywhere (AAA)	Advanced Gateway
DESCRIPTION	<p>Patient and HCP support solutions include tech + talent-enabled therapy access and affordability support, tailored engagement and adherence, comprehensive program analytics, and free drug dispense.</p> <p>Our non-commercial pharmacy, ARx Patient Solutions Pharmacy delivers free drug programs and services through its state-of-the-art facility and talented pharmacy team.</p>	<p>The only platform that delivers comprehensive, real-time specialty therapy initiation solutions to simplify the process of getting patients on therapy.</p> <p>iAssist enables HCPs to perform all steps needed to initiate therapy proactively, electronically and all in one place. Advanced eServices available in iAssist workflows include: ePrescribe, eEnrollment, APA, eCoverage Solutions, Financial Assistance Access, Status Messaging and more.</p>	<p>True tech-first patient access and fulfillment solution. Triggered from the EHR, automated therapy initiation solutions drive fulfillment to the best affordability option for the patient’s prescribed therapy.</p> <p>Only CoAssist has the real-time Advanced eServices, innovative pharmacy model, and scalable tech + talent-enabled delivery to simplify a complex system and enable better results for today’s patients.</p>	<p>First-of-its-kind solution that delivers rapid therapy initiation and enrollment into available support programs at the point of the pharmacy claim.</p> <p>Combining proprietary technology with a 61,000-nationwide pharmacy network, AAA eliminates the enrollment form, accelerates speed to therapy and facilitates access from anywhere. HCPs simply e-prescribe to the pharmacy, the pharmacy submits the claim, and the patient gains access to their medication and available support services.</p>	<p>Single API integration that rapidly deploys comprehensive tech-first, self-service patient and HCP access solutions. Through one integration and under the therapy’s branded experience, life sciences organizations gain standardized, actionable program data, while no longer needing multiple vendor partnerships to power the patient journey.</p>
BEST FOR	Specialty brands seeking access and clinical teams to create tailored programs to drive the experiences and outcomes their patients deserve.	Specialty brands seeking to reduce therapy delays, enable patient adherence and give HCPs visibility into the patient journey from prescription through therapy access.	Specialty-lite and retail brands seeking an innovative pharmacy model to meet the unique needs of the therapy and their HCP and patient populations.	Specialty and retail brands under the pharmacy benefit seeking more patient support program enrollments, faster dispenses and greater visibility into the patient journey.	Specialty and retail brands seeking to quickly implement tech-first patient support solutions that are modular, scalable and integrated into frontend access channels and backend operations.

Conclusion

The most prevalent market disruptors and challenges to the specialty pharmaceutical market invite life sciences organizations to consider how both technology and talent can address a complex and siloed healthcare ecosystem, as well as provide the high-touch support needed to provide best-in-class experiences.

Across all think tank breakouts, two themes emerged again and again from life sciences organization leaders’ actionable takeaways:

Consider the end-user

Regardless of the challenge or market dynamic specialty pharma is trying to overcome, meeting HCPs, patients and pharmacies in their established workflows is critical. By remaining in established channels, specialty pharma removes many of the barriers to adopting new solutions or processes. In some cases – such as with AssistRx’s Advanced Access Anywhere – end-users may not even be aware of the new technology in place, as it causes no disruption to the prescribing process.

Some patients and HCPs require high-touch support. For these cases, it is important to alleviate their respective burdens by providing them with the materials that streamline their processes – backed by program data. Understanding what resources will positively impact the majority of cases will ensure high-touch, talent-backed support is utilized where its most needed.

Understand the why

When implementing any new solution or change in strategy, understanding the why ensures the changes and investments are meaningful from both an end-user and organizational perspective. Knowing precisely what you are solving for, the pros, cons and resources required, as well as the impact the change will have on HCPs and patients will support organizational alignment and higher return on investment.

AssistRx provides life sciences organizations with the perfect blend of technology and talent to improve patient uptake, visibility and outcomes. By combining tech-first solutions that meet patients, HCPs and pharmacies in their workflows with high-touch, data-backed talent solutions and a consultative approach, AssistRx optimizes program performance to deliver informed touchpoints and simplify a complex system.



Why Life Sciences Organizations Choose AssistRx



Balanced and Unique

Solutions align with current communication preferences and deliver informed connectivity to improve program experience and outcomes.



Innovative and Interoperable

Flexible and scalable platform works seamlessly with systems and processes that support a successful patient journey.



Proven and Performance-minded

Independent provider of an integrated solution with the stability of a mature company that delivers with a responsive attitude.



Informed access. Improved outcomes.

AssistRx has engineered the perfect blend of technology and talent to provide an advanced therapy initiation and patient support solution to improve patient uptake, visibility and outcomes. Our solution integrates technology and therapy expertise to advance patient therapy in a more efficient and effective manner—delivering informed touchpoints that simplify a complex system to enable better results for today's patients.



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