



Optimizing Health by Advancing the Quality of Medication Use

PQS Trend Report in Pharmacy Quality for 2022

February 16, 2023

Webinar Logistics

- **Send us your questions.** Use the “Q&A” feature at the bottom of the screen to send speakers your questions to the throughout today’s presentation.
- **Today’s forum is being recorded.** A copy of the slides and recording will be shared with PQA members within a week.
- **Give us your feedback.** A quick survey will launch at the end of today’s webinar.

THANK YOU!

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Today's Presenter

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Senior Manager, Data Analytics
Pharmacy Quality Solutions





What is the Trend Report?

Ch 1: Consumer Survey

Ch 2: Pharmacy Survey


Ch 3: Health Plan Survey

Final Thoughts

2022 INDUSTRY TREND REPORT in Pharmacy Quality



- First published in 2019
- Created to provide insights on industry trends and support our customers in crafting strategy
- 2019, 2020, and 2022 focus on surveys of consumers, health plans, and pharmacies
- 2021 focused on medication trends related to the COVID-19 pandemic



- What is the Trend Report?
- Ch 1: Consumer Survey
- Ch 2: Pharmacy Survey
- Ch 3: Health Plan Survey
- Final Thoughts

Consumer Survey – Focus Areas



Consumer
perceptions of
pharmacy



Utilization of
pharmacy



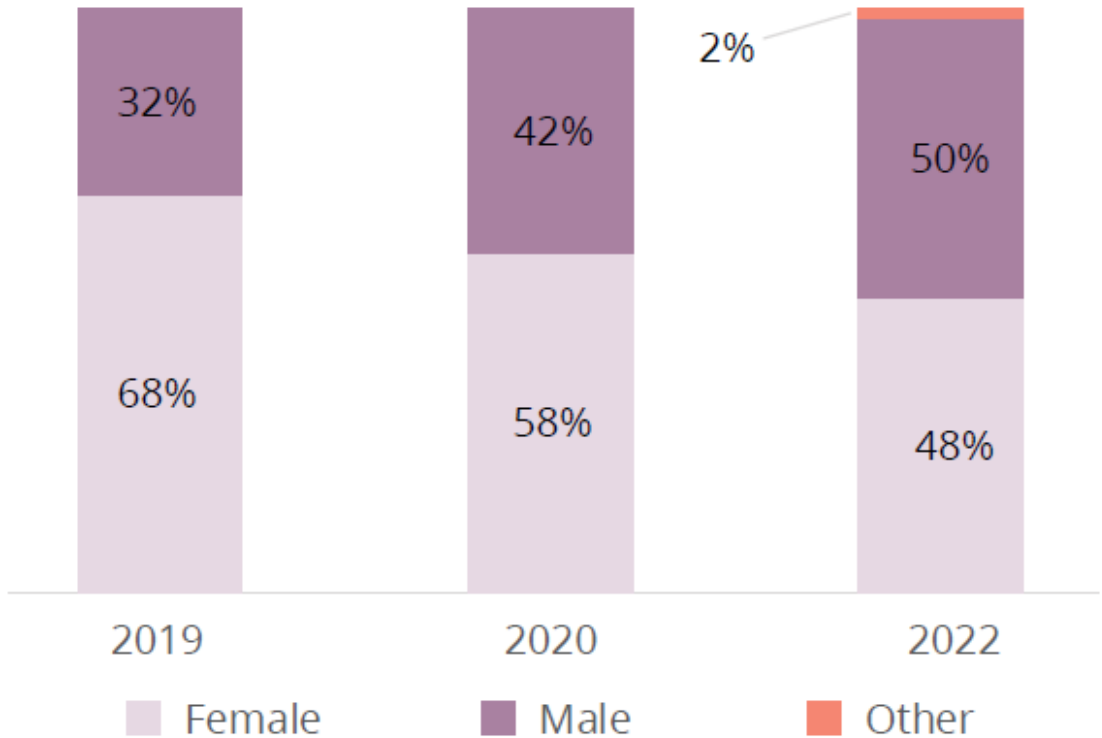
Utilization of
specific
pharmacy
services

Consumer Panel

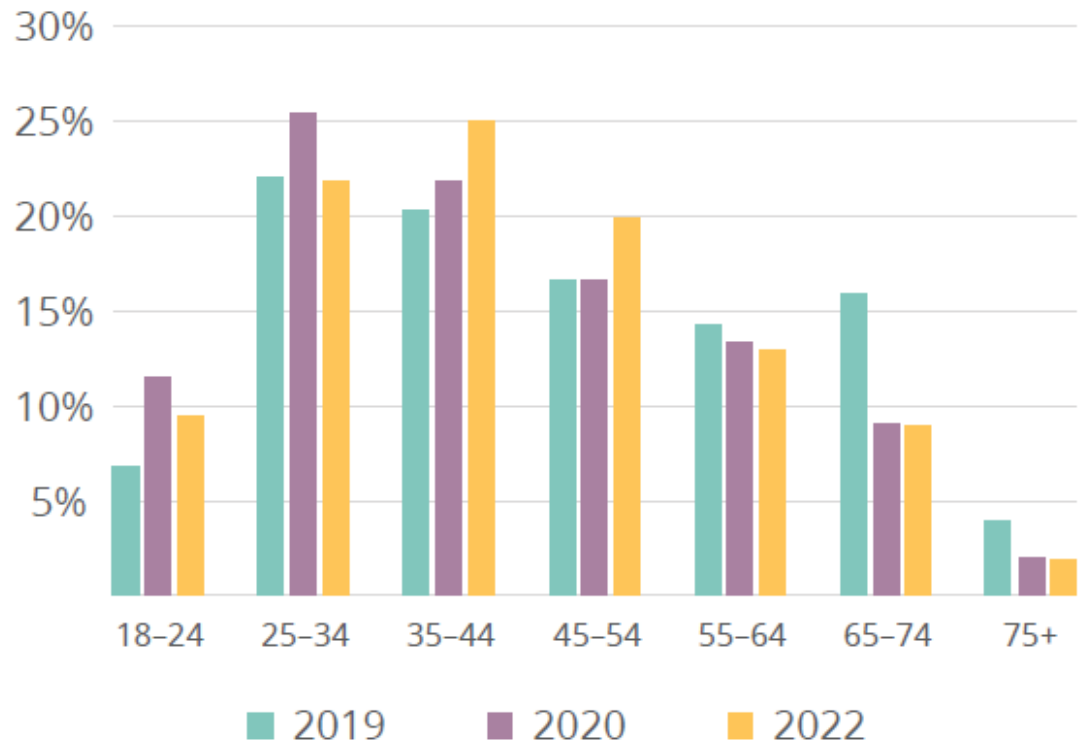
- Worked with market research group and existing consumer panel
- Electronic survey
- Only fully completed responses were accepted
- Respondents were surveyed in March 2022
- Tested survey with smaller tranches, then deployed full survey and received 800 complete responses
- Some responses removed if strong evidence of lack of data integrity

Consumer Panel - Demographics

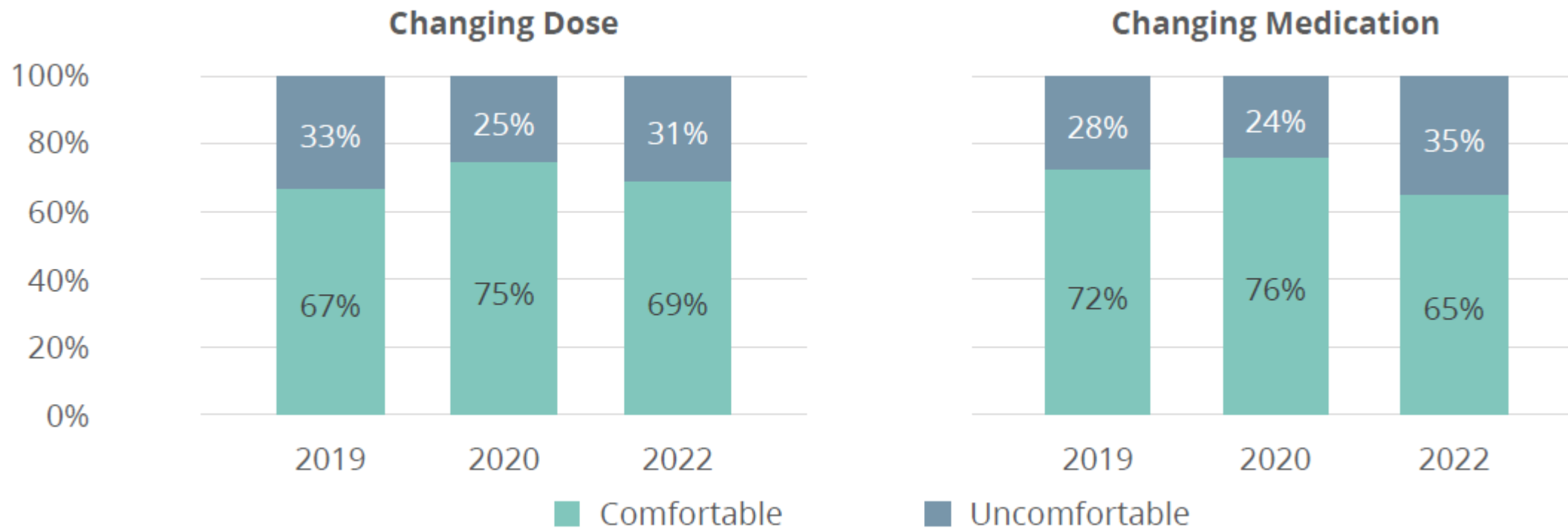
GENDER



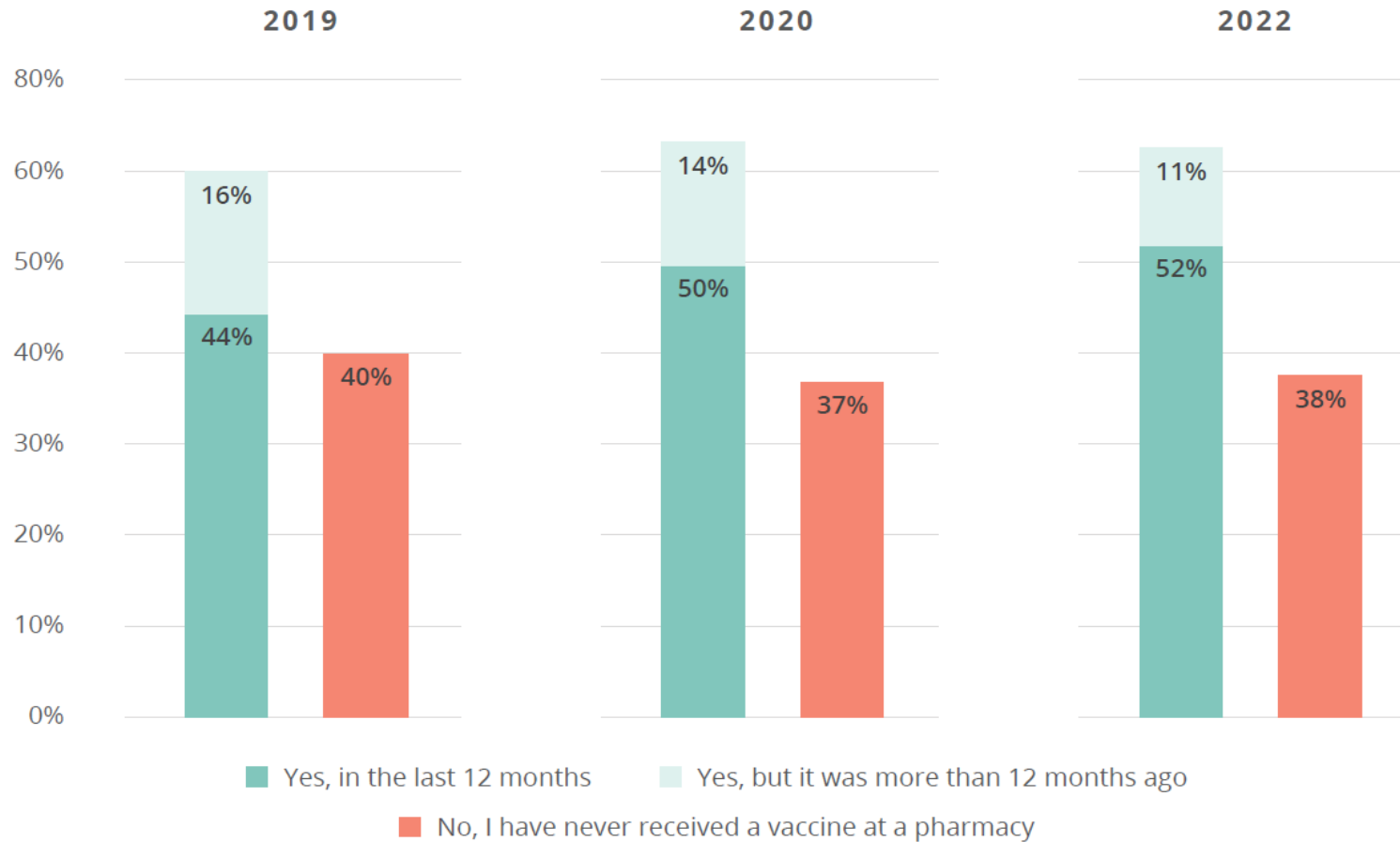
AGE



Level of comfort with a pharmacist working with a patient's provider on clinical interventions when clinically appropriate

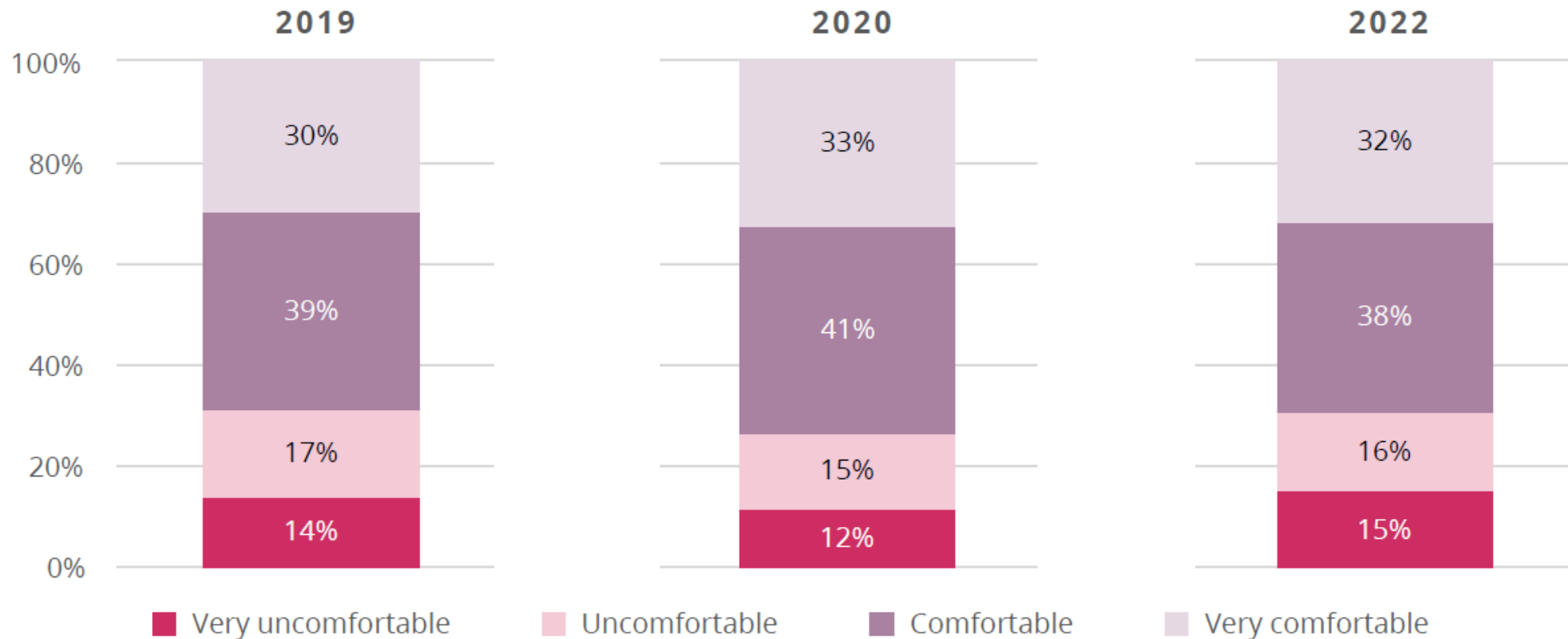


“Have you received a vaccine, such as a flu shot or COVID vaccination, at a pharmacy?”



Beginnings of a trend toward increased immunization in pharmacy settings

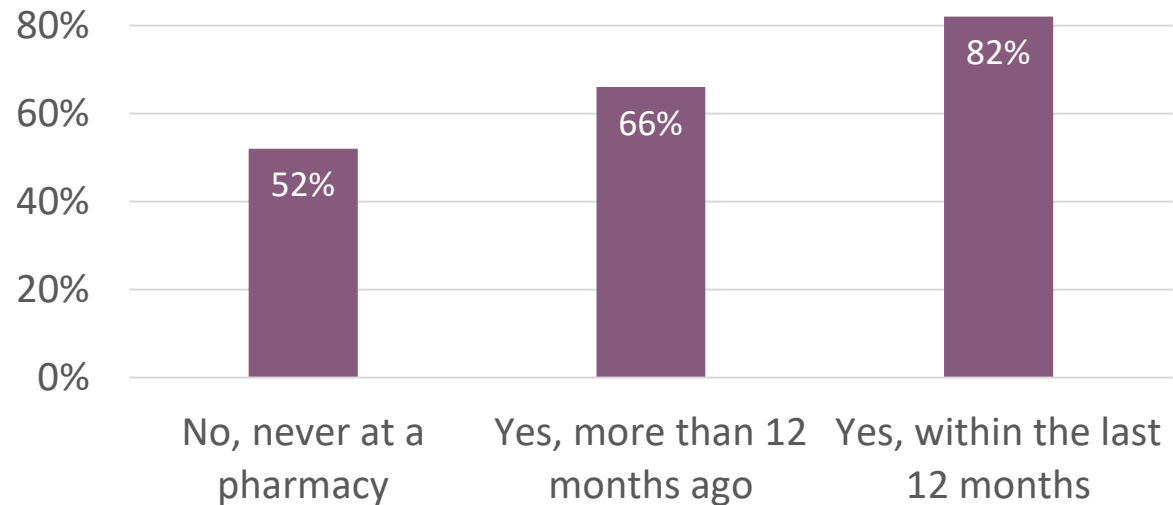
“How comfortable are you with receiving injections from a pharmacist?”



“How comfortable are you with receiving injections from a pharmacist?”

- Focused on those who said they would be ‘very comfortable’ or ‘comfortable’ with receiving injections
- These responses were stratified by their response to whether they had received a vaccination in a pharmacy setting and the timing of the vaccine

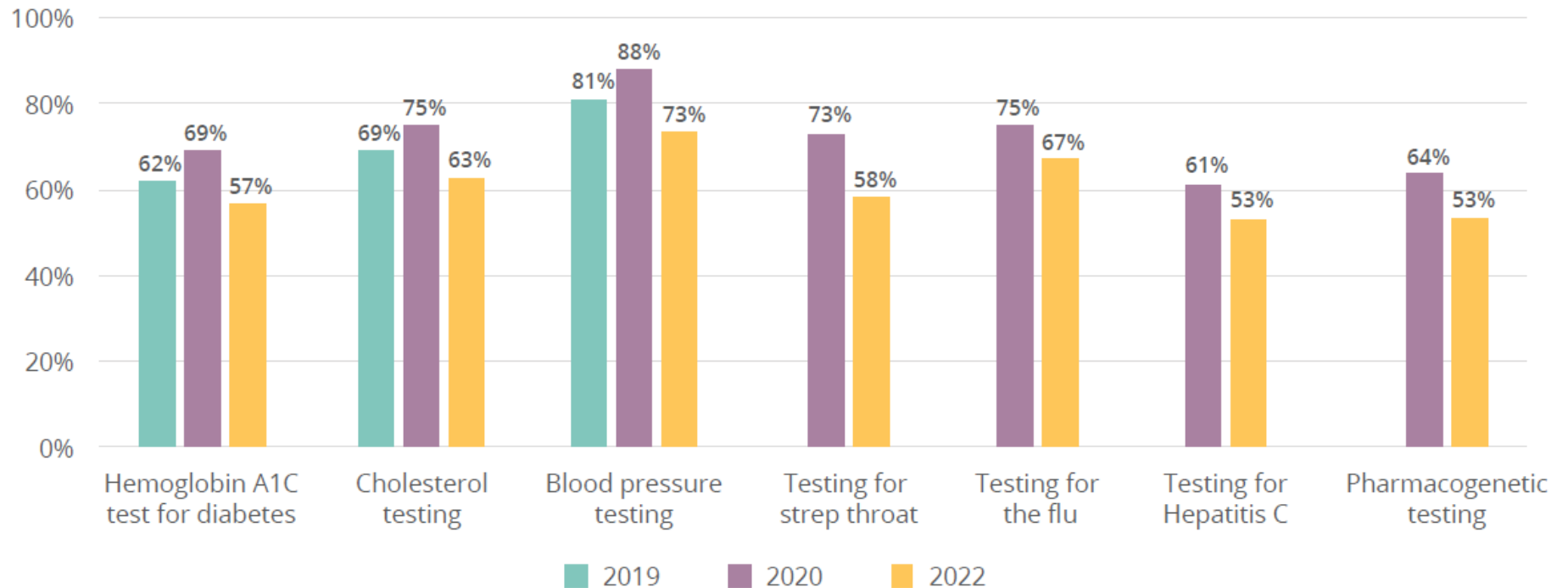
Very Comfortable / Comfortable, Stratified by Receipt of Vaccination in a Pharmacy



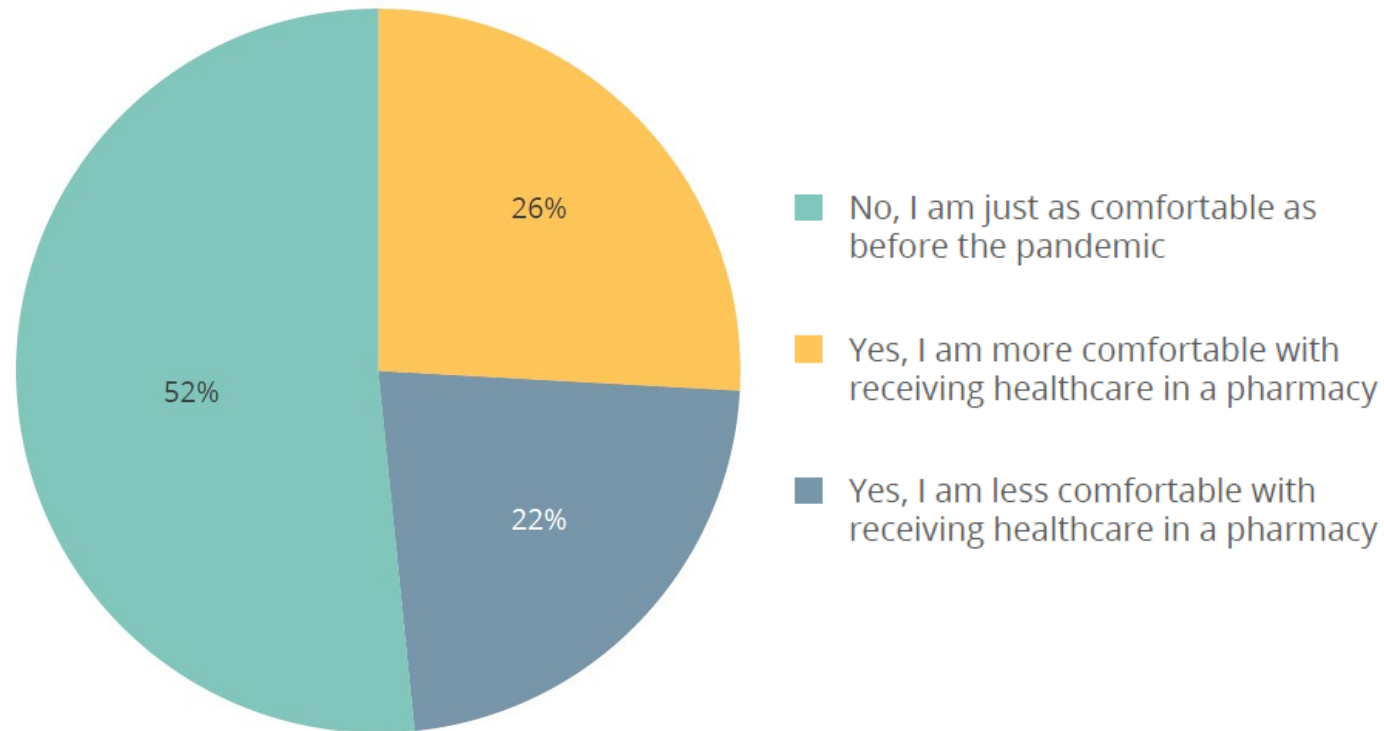
Even among respondents who had never received a vaccination, comfort with receiving injections from a pharmacist exceeded 50%

“How likely would you be to have a pharmacist perform the following tests if you need them?”

Greater than 50% would be likely or very likely to receive any of these tests from a pharmacist

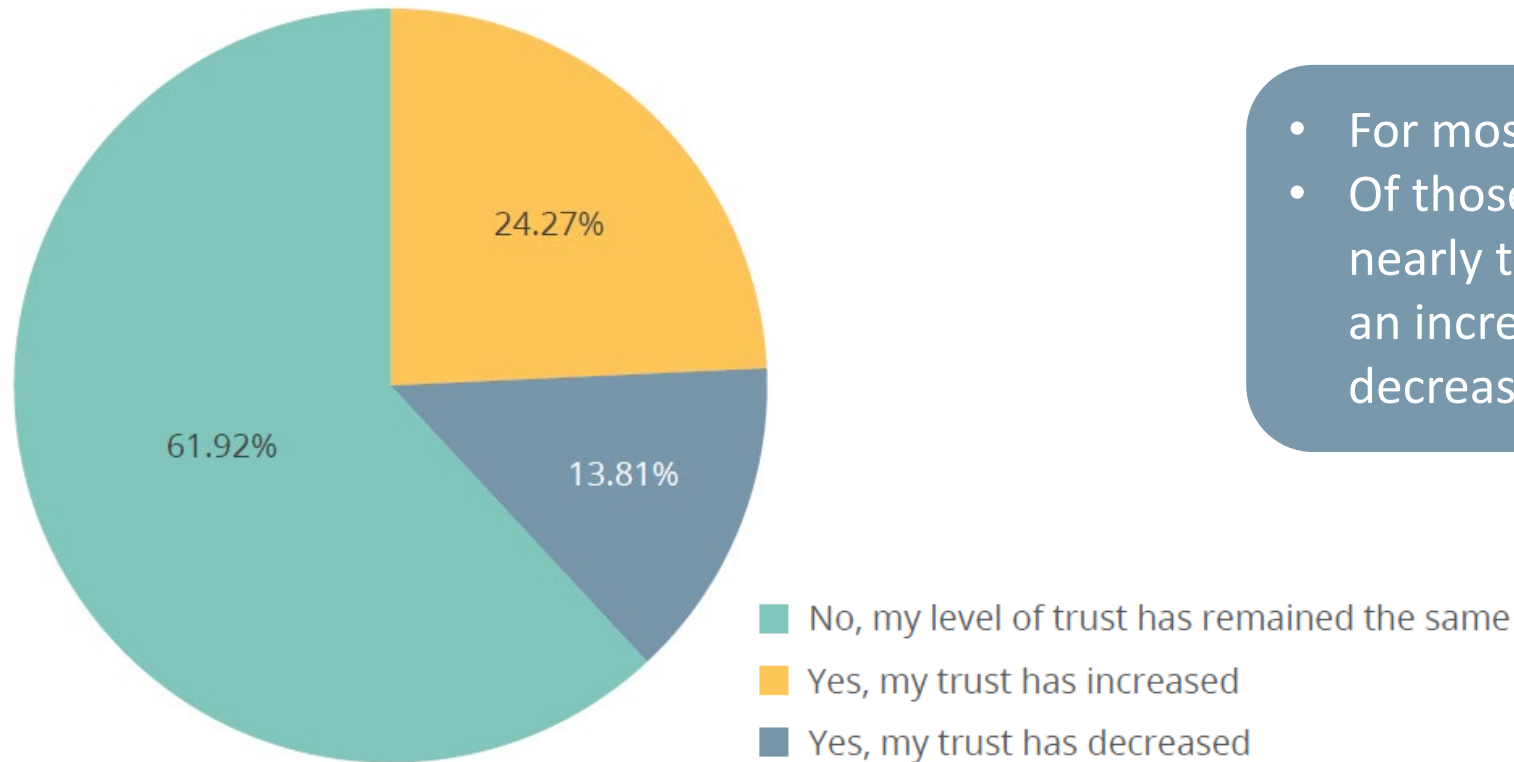


“Since the start of the COVID-19 pandemic, has your level of comfort with receiving healthcare in a pharmacy changed?”



- Roughly half were unchanged
- The other half were influenced by the changes of the pandemic, with slightly more of those changed endorsing a change towards increased comfort

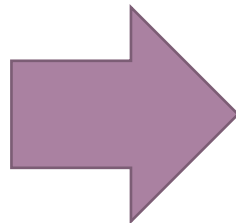
“Has your trust in healthcare providers (doctors, nurses, pharmacists, etc.) been impacted in any way due to COVID-19?”



- For most, trust level did not change
- Of those who endorsed changes, nearly twice as many experienced an increase in trust compared to a decrease in trust

“Has your trust in healthcare providers (doctors, nurses, pharmacists, etc.) been impacted in any way due to COVID-19?”

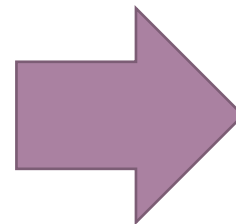
"[Yes, my trust has increased] ... I was previously ill-informed. Now I am better informed on the qualifications of a pharmacist and trust them more with a variety of situations."



Education on what pharmacists can do increases trust and positive opinion

“Has your trust in healthcare providers (doctors, nurses, pharmacists, etc.) been impacted in any way due to COVID-19?”

"[Yes, my trust has increased] ... Pharmacies particularly have become useful and convenient places for excellent and quick care options. I have gotten COVID-19 testing and vaccines at local pharmacies that have been fast and services at reasonable prices."



Good service that meets patients' needs increases trust and engagement

Ch 1: Summary

- Hundreds of consumers surveyed on perceptions and utilization of pharmacy services
- Most results not dramatically changed from 2019 and 2020 consumer surveys
- Majority of patients express comfort with utilizing advanced pharmacy services, whether or not they have used these services
- Consumer responses indicate a great deal of trust in pharmacy

A gap exists between the expressed comfort with services and actual utilization of services



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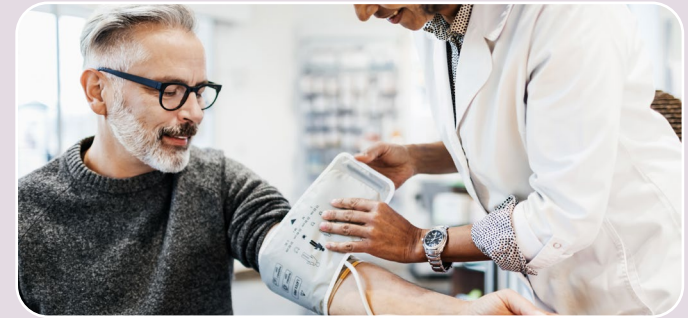
Pharmacy Survey – Focus Areas



Reimbursement



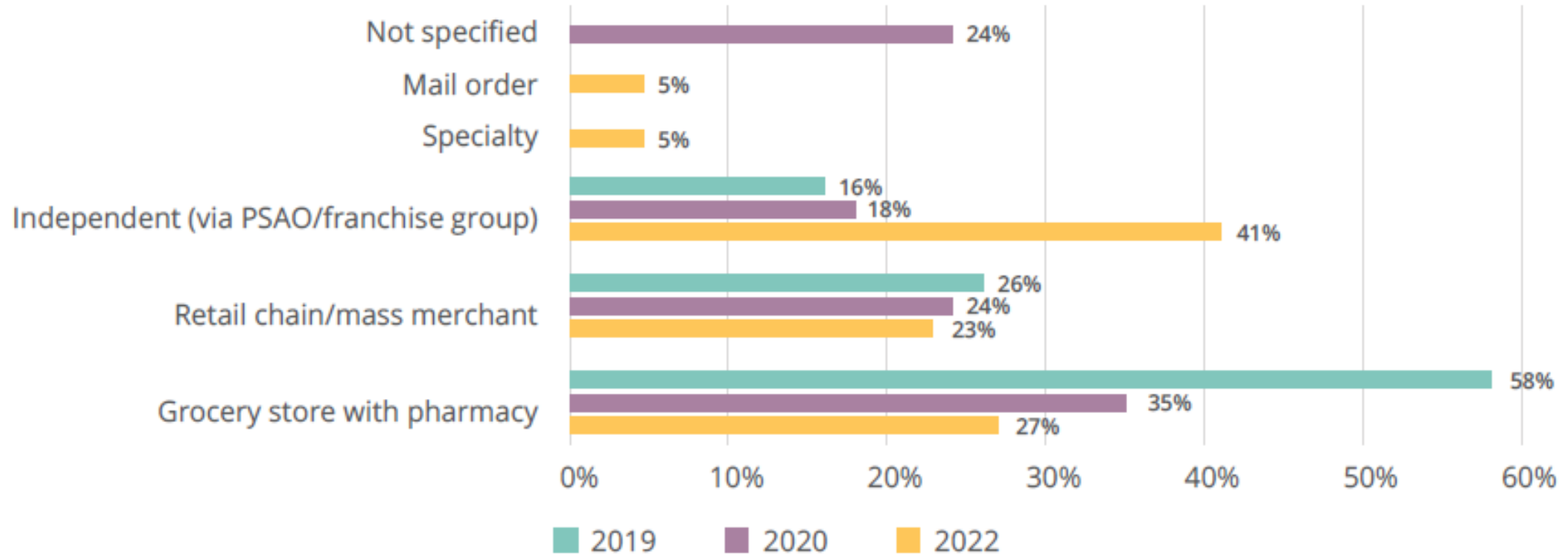
Capabilities to track lab values



Capabilities to support outcomes-based initiatives and other testing

Pharmacy Panel – ‘Demographics’

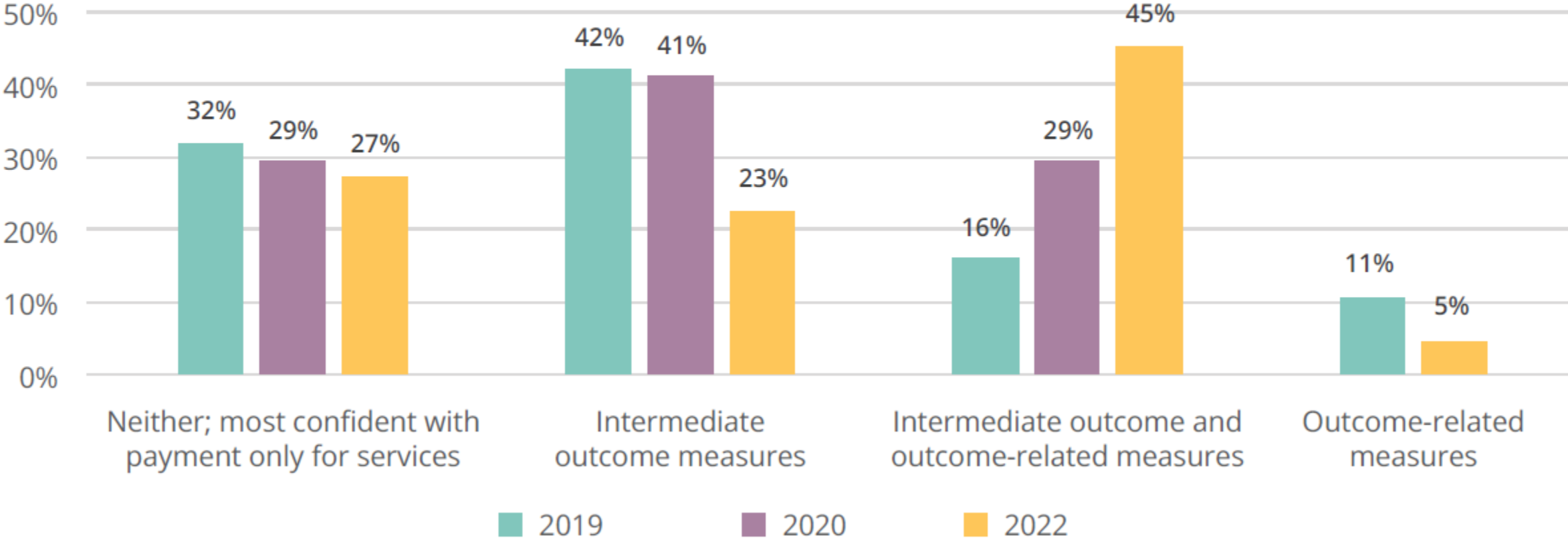
TYPES OF PHARMACY ORGANIZATIONS COMPLETING SURVEY



Note: Specialty pharmacy was not an option in the 2019 Pharmacy Survey.

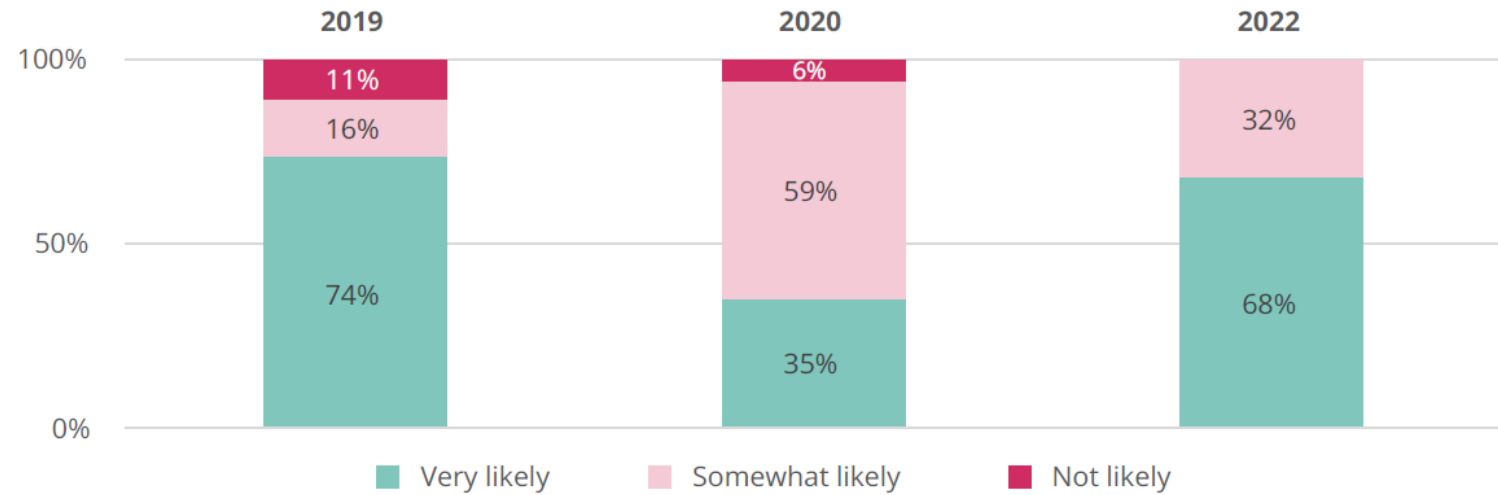
CONFIDENCE IN LINKING PERFORMANCE TO REIMBURSEMENT

If your pharmacy organization were to be held accountable on the basis of quality measures, which option would you feel most confident linking to reimbursement?

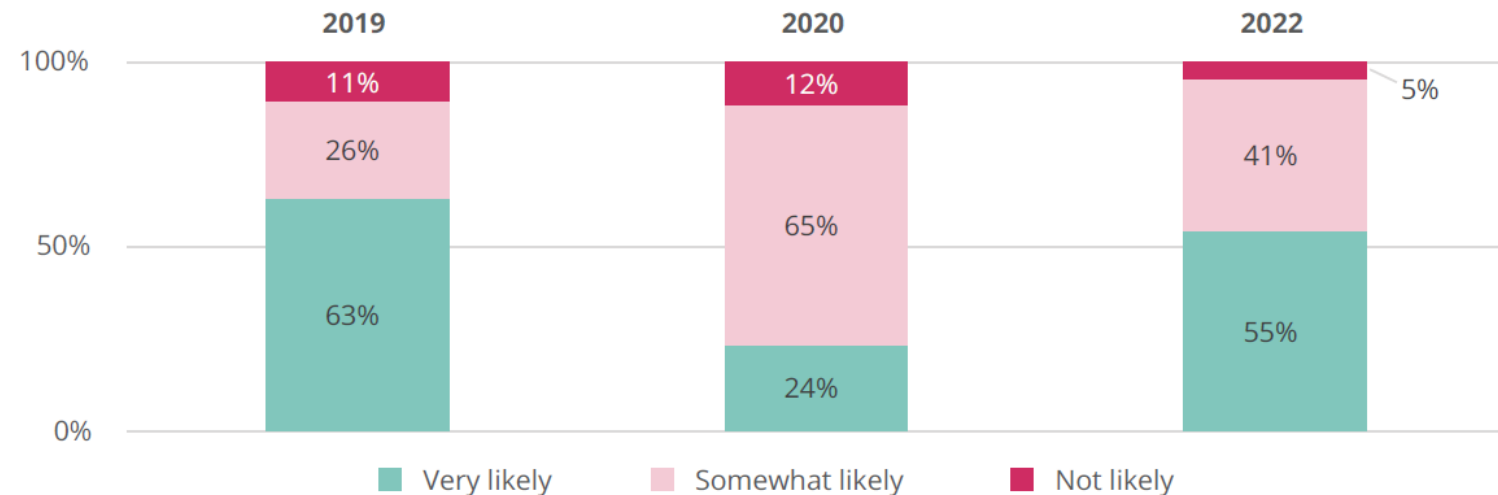


Likelihood of Contracting With Payers

Intermediate outcome-related quality measures

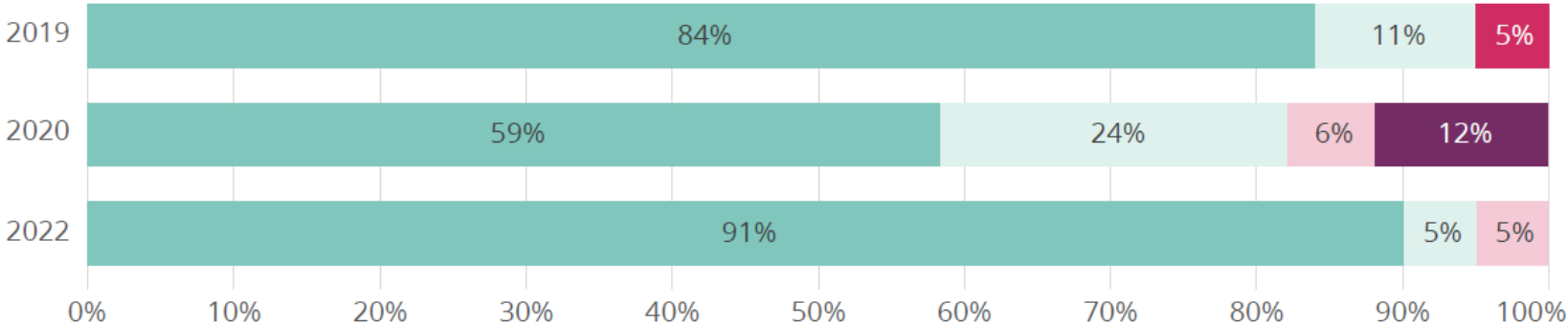


Outcomes-related quality measures



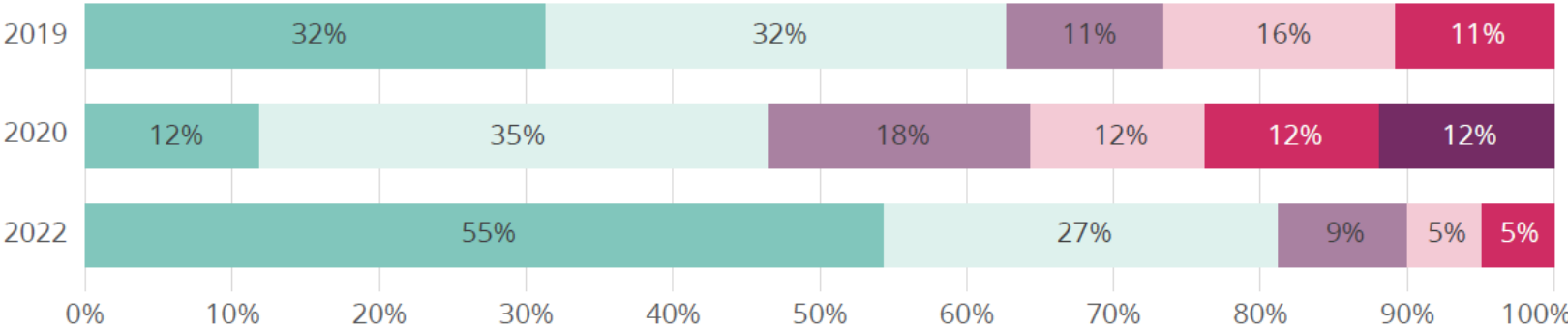
Timeliness to Support New Performance-Based Initiatives

Intermediate outcome-related quality measures



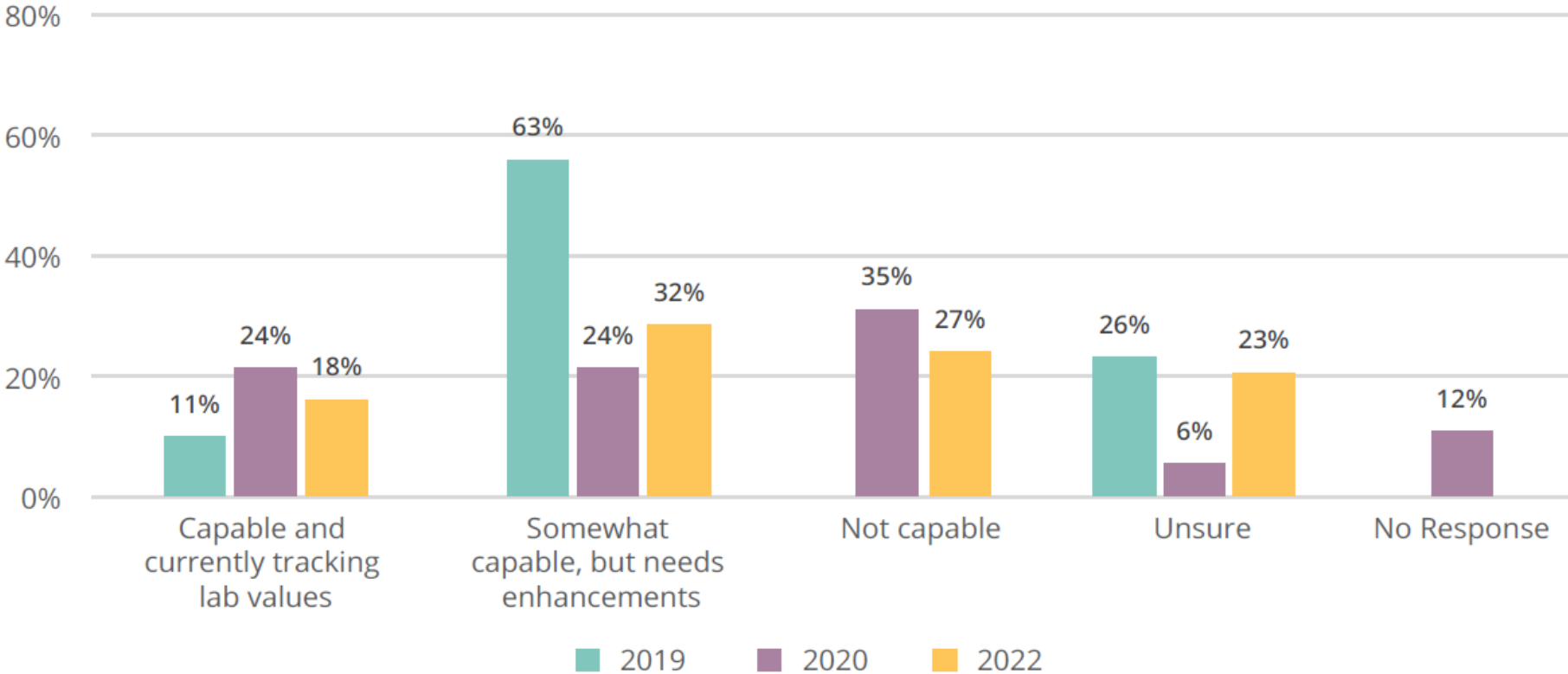
- Currently have ability to support
- Currently no ability, estimate 6 months to support
- Currently no ability, estimate 12 months to support
- Currently no ability, estimate 12-24 months to support
- Currently no ability, and no ability in next 24 months
- No response

Outcomes-related quality measures



Capability and Training Needed

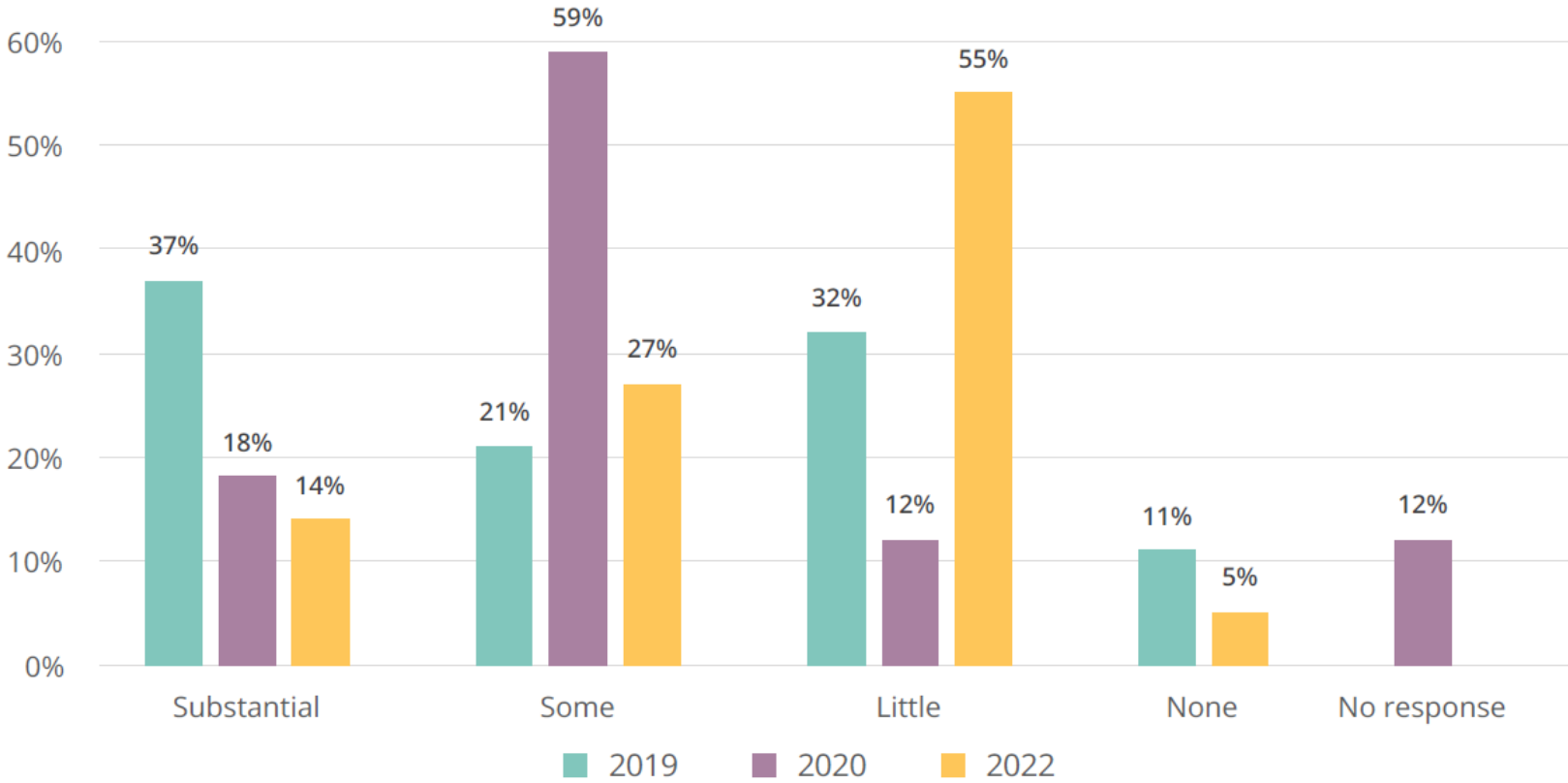
How capable is your current dispensing software system to record and track lab values that may support outcome-related performance measures?



Gaps in software capability may need to be overcome

Capability and Training Needed

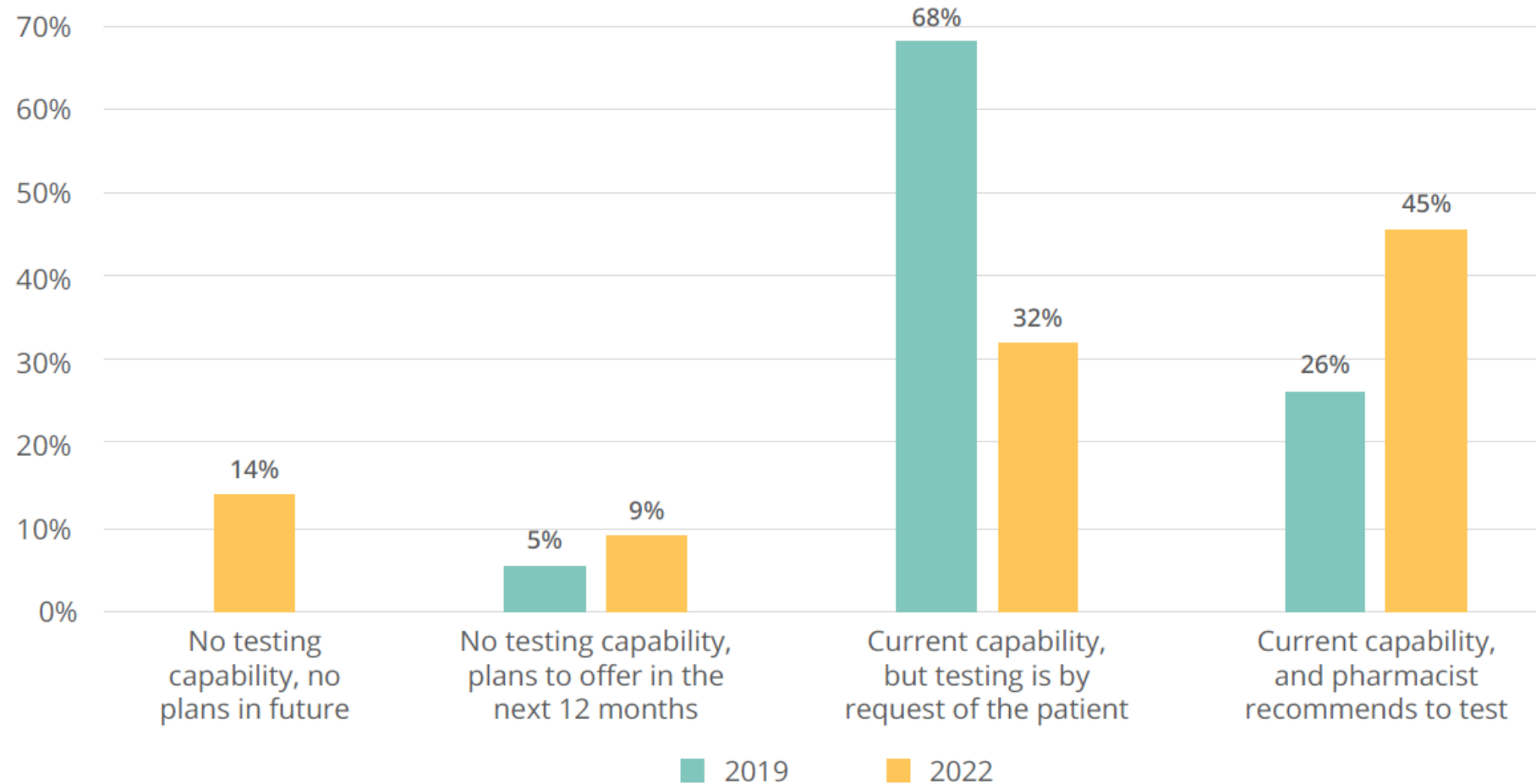
How much additional training is needed for pharmacist/pharmacy staff members to understand outcomes-based quality measures?



Most pharmacy groups feel their staff member would need only little training to understand outcomes-based quality measures

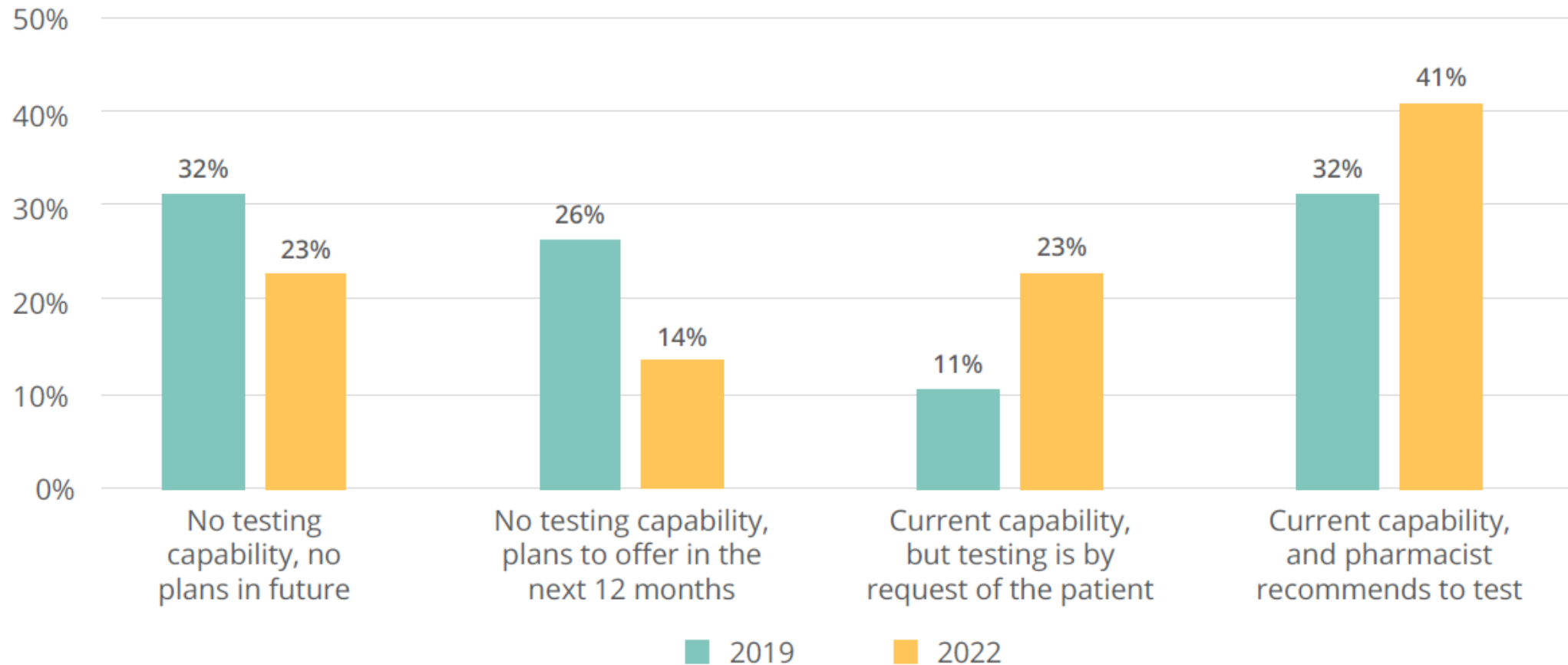
BP Testing Capability

Do patients visiting your pharmacy currently have the capability to test or monitor their blood pressure?



A1c Testing Capability

Do patients visiting your pharmacy currently have the capability to test or monitor their hemoglobin A1c?



Ch 2: Summary

- Pharmacy groups are more confident than ever linking reimbursement to performance
- Staff would only need little training, but software may not be ready for tracking data for outcomes-related measures
- Pharmacies are ready with current capability to perform many tests in the pharmacy setting

Pharmacies are ready to take steps forward in improving performance and patient outcomes



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Payer Survey – Focus Areas



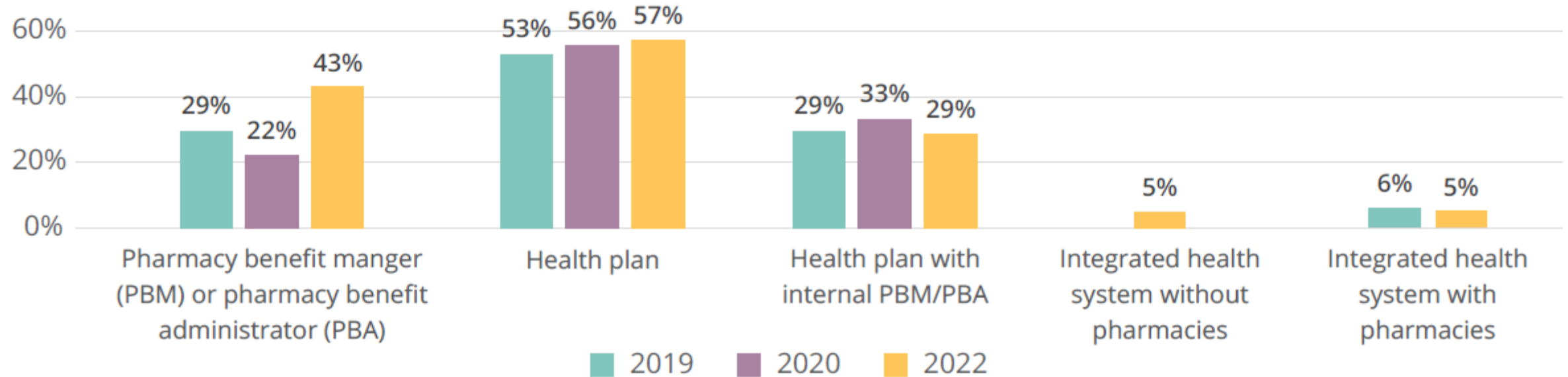
Challenges and successes with performance improvement



Partnerships with community pharmacies

Payer Panel – ‘Demographics’

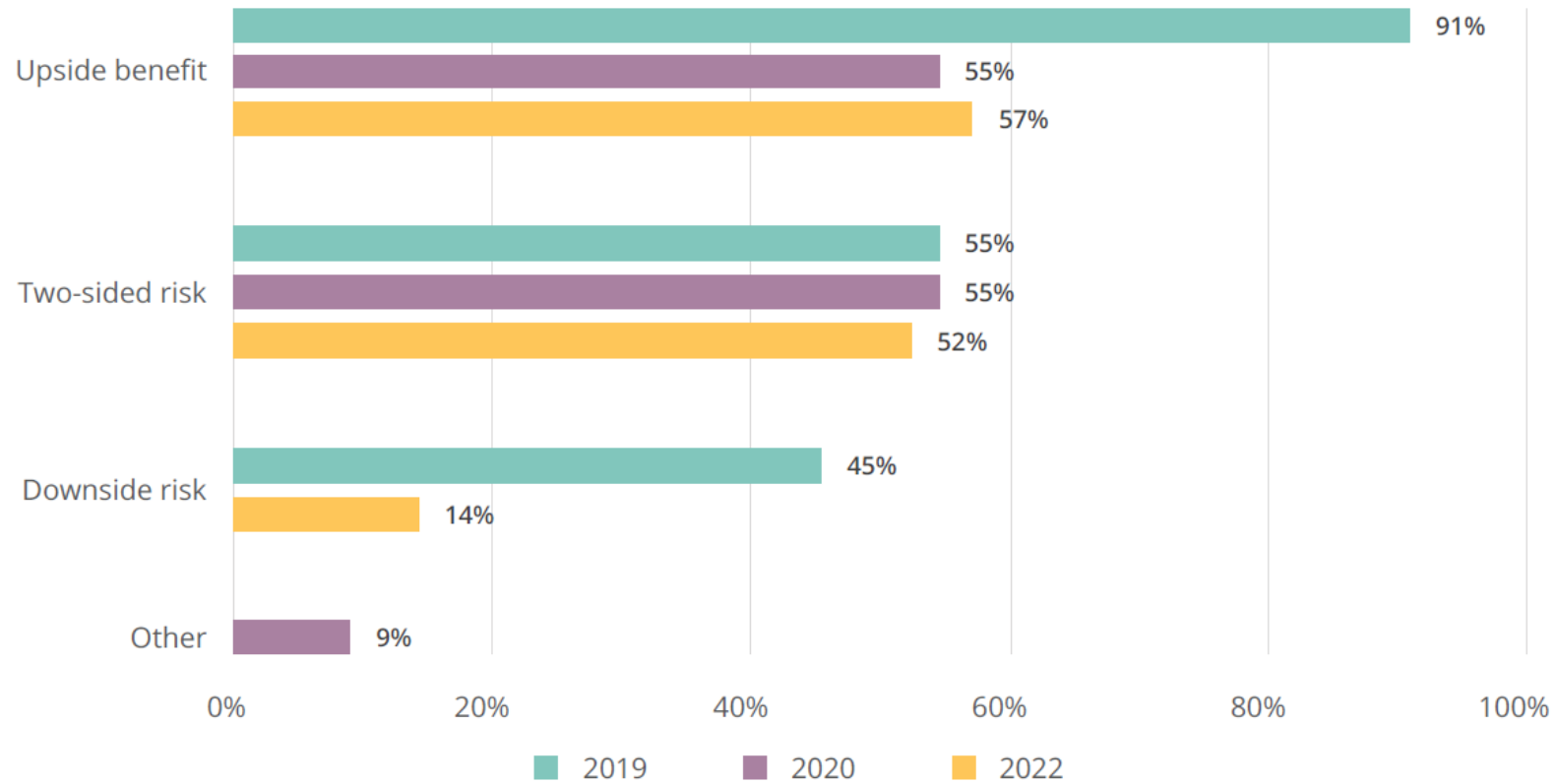
What type of payer organization do you represent?



Note: 2019 N = 17, 2020 N = 19, 2022 N = 21. Total may not equal 100% due to rounding and because respondents were asked to select all that apply.

Reimbursement structures

Of the providers with which you have a value-based or outcomes-based contract, what reimbursement structures are used?



Challenges to improvement

Challenge	% of Respondents
Understanding which interventions have the greatest impact	76
Aligning quality improvement within the organization	67
How to focus limited resources on the most critical opportunities	67
Aligning quality improvement across various external providers	62
Coordinating care for high cost/high utilizer members impacted by social determinants of health	62
Provider awareness and understanding quality measures	52
Lack of timely data from external data sources	48
Collecting data from disparate sources within the organization	43

Challenges with most success

Challenge	% of Respondents
Understanding which interventions have the greatest impact *	57
How to focus limited resources on the most critical opportunities *	43
Aligning quality measure improvement within the organization *	43
Complying with regulatory requirements	24
Collecting data from disparate sources within the organization	24
Provider awareness and understanding of quality measures	24

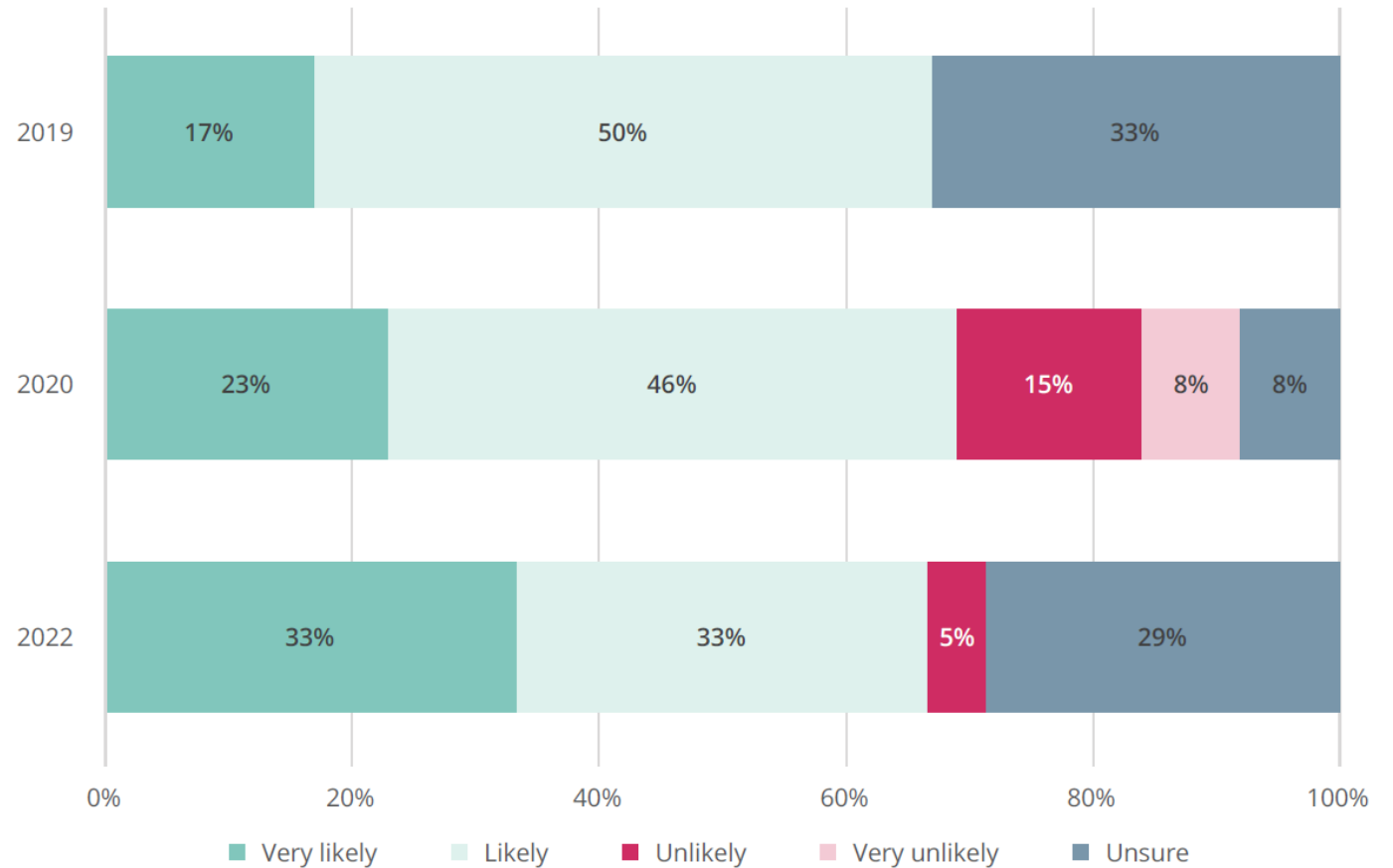
Challenges unable to overcome

Challenge	% of Respondents
Coordinating care for high cost/high utilizer members impacted by social determinants of health	33
Lack of timely data from external data sources	33
Aligning quality improvement across various external providers	33
Collecting data from disparate sources within the organization	29
The evolving reimbursement landscape related to performance on quality measures	24

Partnerships with Pharmacies

If community pharmacies could submit agreed-upon evidence of biometric test results or physical assessment findings for a quality measure in accordance with data source mandates, how likely are you to contract with community pharmacies to perform them?

Most payers are likely to contract with pharmacies for testing in the pharmacy space if the data meet specific quality criteria



Measures Community Pharmacies Can Influence

Measure	% of Respondents
Vaccination (e.g., flue, COVID-19, shingles)	95
Medication adherence for cholesterol (statins)	90
Medication adherence for hypertension (RAS antagonists)	90
Medication adherence for diabetes	90
MTM completion rate for CMR	86
Controlling blood pressure	86
Statin therapy for patients with cardiovascular disease	76
Diabetes care – A1c test completion	76
Care for older adults – medication review	76
Medication reconciliation post discharge	71
Diabetes care – blood sugar controlled	67

Ch 3: Summary

- Payers utilizing a mixture of upside benefit and downside risk
- Significant challenges remain, despite progress and successes with several major challenges
- Payers are likely to contract for testing in the pharmacy setting if data is of high quality
- Pharmacies are viewed as a useful means of impacting quality measures

A great deal of opportunity exists for payers and pharmacies to work together on quality improvement



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Final Thoughts

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Consumers Willing to Increase Utilization

Pharmacy consumers are taking advantage of services in pharmacies, but they are prepared and willing to utilize even more if we can close educational gaps and actively offer enhanced services

Pharmacies are Capable

Pharmacies have capacity for testing and are ready to take on value-based arrangements tied to outcomes and performance

Payers are Engaged


Payers recognize pharmacies as a meaningful channel for improving medication-use quality and have expressed interest in contracting with pharmacies



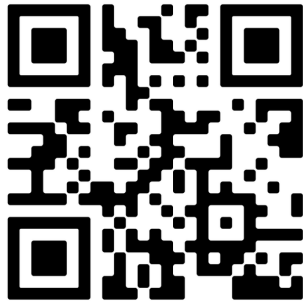
Question and Answer

Please submit your questions using the Q&A feature at the bottom of your screen.

Join us in Nashville!



PQA 23
ANNUAL MEETING
NASHVILLE, TN | MAY 10-12, 2023



PQA 

Medication Use Quality:
A PQA Live CE Event

May 10, 2023
8:00 a.m. - 12:00 p.m. CT

Omni Nashville Hotel
Nashville, Tenn.

0.4 Pharmacist CEU



2023 PQA Healthcare Quality IQ (HQIQ)

[Student Program](#) for Getting Smart on Medication Use Quality

PQA Healthcare Quality IQ (HQIQ) program teaches pharmacy students the basics of quality measurement and strategies to improve medication safety, adherence and appropriate use.

**Nomination form closes:
February 24, 2023**

Sponsored by  **PQS**

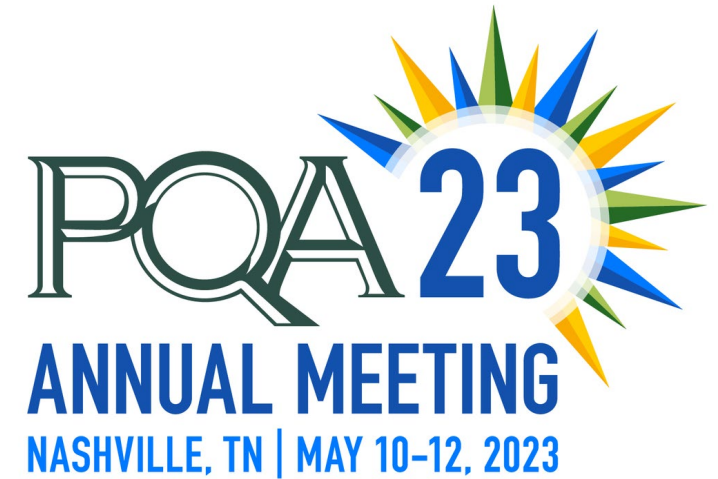
HQIQ Participant Benefits

- Scholarship to attend PQA Annual Meeting
- Scholarship to Attend *Medication Use Quality Live* (4-hour in-person training)
- Free Access to Medication Use Quality (11-hour online, self-directed training)
- Live, online workshop on developing quality improvement proposals (1 hour)
- Program certificate and national recognition
- Future complimentary access to PQA's module on Quality Improvement Plan Implementation (3 hours)

Diversity in Quality Scholarship

The Diversity in Quality scholarships is for minority health care professional students who have completed at least their second year of study in a pharmacy or other health care degree program – and are part of racial, ethnic and other minority groups who are underrepresented in quality and health care leadership positions.

Nomination form closes: March 17, 2023





Optimizing Health by Advancing the Quality of Medication Use

Thank You. Join Us Again in March

Next Quality Essentials Webinar:

Thursday, March 16, 2023, 1-2 pm ET

**PQA and Risk Adjustment: History and
Future Directions**

