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The *voice* of the
community
pharmacist.

Disrupted or Empowered? Future Trends in Community Pharmacy Practice

B. Douglas Hoey, Pharmacist, MBA
CEO, National Community Pharmacists
Association Cardinal RBC

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Disclosure Statement

There are no relevant financial relationships with ACPE-defined commercial interests for anyone else in control of the content of the activity.



Pharmacist and Technician Learning Objectives

1. Identify three trends in the pharmacy marketplace that will impact your business.
2. Describe the evolution of primary care services available to healthcare consumers.
3. Discuss the impact on patient access by the cost polarization of generic drugs and specialty/biosimilar drugs.

“Changing the Pharmacy Payment Model”

The U.S. is the only government in the world that has outsourced the prescription drug benefit to PBMs.

Not coincidentally, the U.S. pays the highest drug prices in the world!



Changing the Pharmacy Payment Model

It's happening!

- The COVID-19 pandemic accelerated how pharmacy is viewed and where care is delivered
- The old model of PBMs as “judge, jury, and executioner” rewarded higher drug costs—a now well-known contradiction
- The impact of the Supreme Court ruling clarifying states DO have authority over PBMs in their states will continue
- Drug shortages are going to drive hard decisions and disrupt patient care
- Health-systems and health insurers are in an “arms race”—and the “arms” they want is primary care



Disrupted or Empowered?

Changes to Rx Drug Pricing:

- Inflation Reduction Act introduces a new pricing term: “Maximum Fair Price”
- “Cost Plus” now in 20 state Medicaid programs and could become a federal law
- Retroactive pharmacy DIR going away—how are the vertically integrated PBMs responding?
- Will the FTC 6b study have an impact?



Disrupted or Empowered?

Why does “Everyone” want to work with independent pharmacies?

- Locations that reach socially vulnerable populations
- Higher “hands on” results for payers
- Personal relationship that can positively influence patient behavior
- Proven primary care services track record from pandemic
- **Political Pressure!**



Disrupted or Empowered?

- Who is “Everyone?”





Disrupted or Empowered?

Vertical Integration of Primary Care

- The Association of American Medical Colleges (AAMC), expects the U.S. to face a shortage of primary care physicians **ranging from 21,400 to 55,200 by 2033.**

CVS-Aetna investing in their Health Hubs **aetna** **CVS Health**[™]

- HealthHUB will expand primary care for lower risk patients. Pharmacies will serve as the next step. M&A activity to support primary care. HealthHUB and MinuteClinics serve roughly 45% of the US population.

Walmart building primary care clinics



- Walmart to open 4,000 healthcare ‘supercenters’ by 2029 that include ‘comprehensive’ clinical laboratory services



Disrupted or Empowered?

Walmart Health Centers Are Coming to Florida

BENTONVILLE, Ark — Walmart is introducing its Walmart Health centers to Florida, with five of the in-store clinics set to open over a four-week period in the Jacksonville, Orlando and Tampa metro areas.

Walmart first introduced the health care model two years ago, with clinics inside or adjacent to remodeled Supercenters, offering primary and urgent care, labs, X-rays and mental health counseling as well as dental, optical and hearing services.

Patients can schedule appointments online at the WalmartHealth.com website.

Walmart has touted the concept as an opportunity for the company to apply strategies that led to the Supercenters' success to a U.S. health care system that is burdened by high costs, limited access and uneven results.

"Two years after the launch of Walmart Health, we continue evolving and growing to make health care even more accessible

vice president of omnichannel care offerings at Walmart. "With only one primary care doctor per 1,380 Florida residents, these Walmart Health centers will help address the demand for care in three major cities in the

Clinics will debut in three metro areas.

Sunshine State, delivering quality health care at the right time in the right setting, right next to where many Floridians get their groceries. We are part of these communities, and we are excited to bring more options for in-person and telehealth care services to our neighbors."

The state-of-the-art health centers are capable of delivering services beyond the diagnostic tests and immunizations



Offerings range from primary care to labs, X-rays and dental services.

according to Walmart. On-site Walmart care hosts and community health workers will help customers navigate their visit and understand the resources available, according to the company, and will be a familiar presence for consumers making regular visits.

"Walmart is committed to Flor.

a company representative said. "We are excited to meet the needs of Florida's residents as the state's population grows. From 2010 to 2019, Florida's population grew 13%, more than double the total U.S. population growth."

The newest Walmart Health centers will offer care seven days a week with weekend and eve-

05/26/2022

CVS Health launches CVS Health Virtual Primary Care

CVS Health Virtual Primary Care will give members access to primary care, on-demand care, chronic condition management and mental health services virtually, with the option of being seen in person when needed.



Sandra Levy
Senior Editor

CVS Health announced the launch of CVS Health Virtual Primary Care, a new virtual care solution available through a single digital platform.

The offering connects CVS Health's services, clinical expertise and data for a more coordinated and consumer-centric healthcare experience. Demonstrating CVS Health's bold strategy to improve primary care, the new solution enables consumers to choose care when and where they want — in a retail or community-based setting, through at-home health services or virtually, the company said.

The new offering, which is currently being sold to Aetna fully insured, self-insured plan sponsors



Disrupted or Empowered?

Walgreens investing in Village MD

Walgreens

- Walgreens Boots Alliance is becoming the majority owner of VillageMD, as it opens hundreds of doctor offices with the primary-care company.
- It plans to have at least 600 primary-care clinics in more than 30 U.S. markets by 2025 and 1,000 by 2027.
- The deal is part of an effort to turn neighborhood drugstores into health-care destinations with doctors who provide care, write prescriptions and draw traffic to the retail locations.

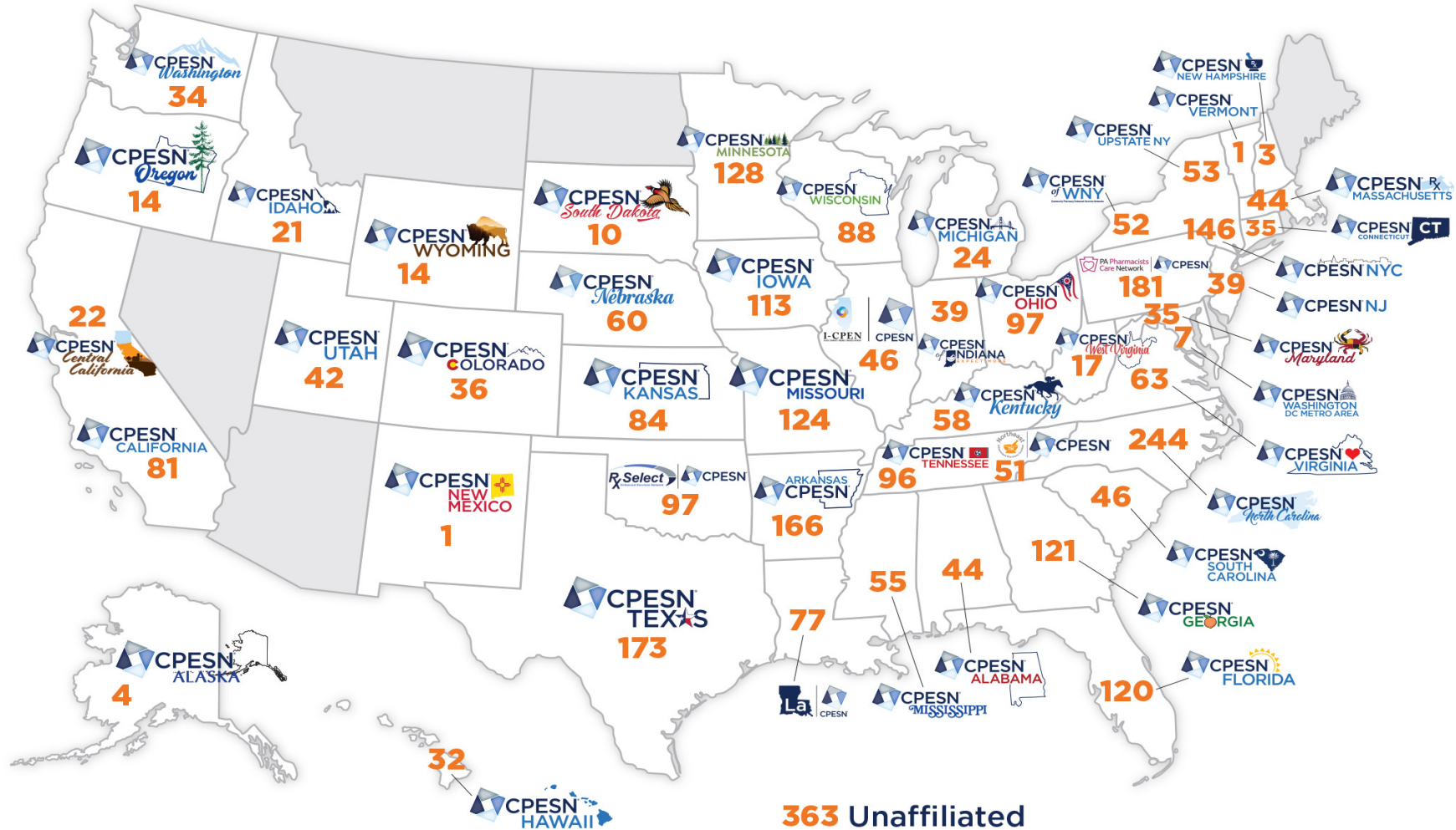
Independents' response?

- CPESN aggregates local networks of independent pharmacies





Clinically Integrated CPESN Networks





Disrupted or Empowered?

Demand for primary care services:

- Shortage of primary care workers and access sites
- U.S. pays more for healthcare than anyone—efficient chronic care not our country's strength
- Will pharmacists be more or less engaged in filling the primary care gaps?
- Will pharmacists control their own destiny through a clinically integrated network or outsource the contracting of their services?

OUR CURRENT PHARMACY MODEL



- Medication dispensing
 - Immunizations
 - Medication synchronization
 - Medication packaging
 - Compounding
 - Point of Care Testing
 - Examples: Influenza, COVID-19, strep, and A1C
-

OUR CURRENT PATIENT CARE SERVICE OFFERINGS

Chronic Care Management (CCM)

What Does the Pharmacist Do?

- Medication adherence screening
- Medication counselling
- Therapeutic recommendations
- Lifestyle modification education
- Lab reviews
- Preventative screening reviews
- Immunization reviews
- Patient assistance programs
- Disease state education
- Etc...



OUR CURRENT PATIENT CARE SERVICE OFFERINGS

Chronic Care Management (CCM)

What is Involved?

- Dedicated, monthly, direct patient-care time
- Annual care plan development for chronic disease state management
- Creating personalized healthcare goals tailored to patient's specific needs



OUR CURRENT PATIENT CARE SERVICE OFFERINGS

Remote Physiological Monitoring (RPM)

What is Involved?

- Cellular connective monitoring device
 - Examples: blood pressure, scales, glucometers, etc.
- Real-time vital values for better provider interactions

What Does the Pharmacist Do?

- Daily vital review
- Disease state education
- Therapeutic recommendations



SERVICE CODE DESCRIPTION

Service	Description	Code	Estimated Reimbursement
CCM	Initial Care- 20 minutes	99490	\$60.50-\$63.74
CCM	Additional Care - 20 minutes (up to 60 minutes total)	99439	\$45.59-\$48.24
RPM	Device Set-Up	99453	\$16.72-\$18.96
RPM	Device – 16 days/month	99454	\$48.93-\$55.57
RPM	RPM treatment and management – 20 minutes	99457	\$46.67-\$49.99
RPM	Additional Care - 20 minutes (up to 60 minutes total)	99458	\$38.47-\$40.67

B. Douglas Hoey, Pharmacist, MBA

CEO, National Community Pharmacists Association

Doug.Hoey@ncpa.org

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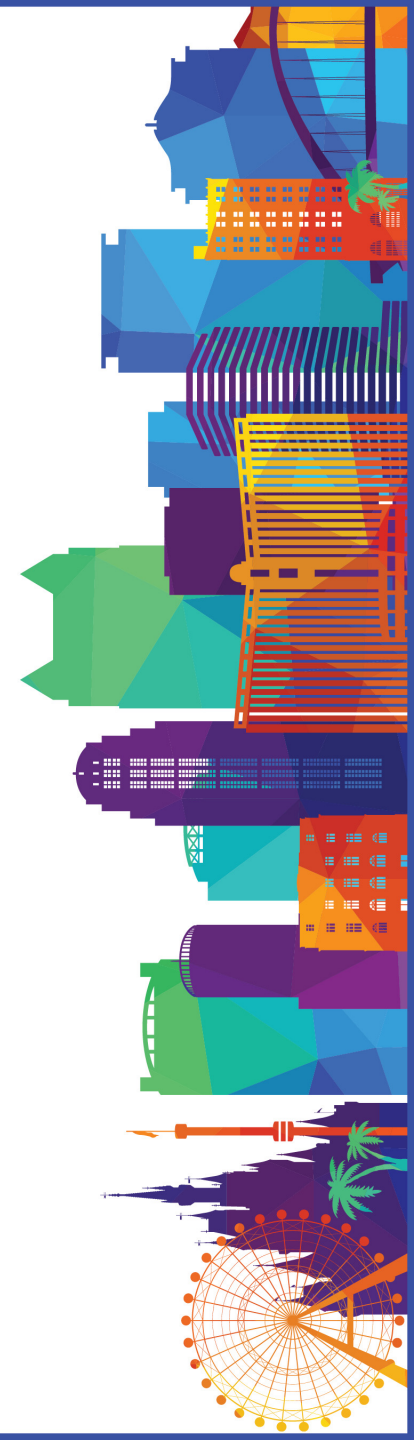
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