



Managed Markets & National Accounts Service

Hospital Pharmacists Research— Spring 2011

Hospitals Begin MD Partnerships in Response to Health Care Reform

Under health care reform, hospitals are anticipating increased patient volume, but a continued decline in physician and hospital reimbursement.

In response to Medicare-related provisions in the reform bill, hospitals are beginning to develop relationships with physicians to prepare for bundled Medicare payments and/or participation in Accountable Care Organizations (ACOs). One-fourth of the Hospital Pharmacy interview panelists indicated their institutions are taking steps to form ACOs, although implementation and adoption of ACOs is expected to evolve slowly.

Hospitals Seeking Improved Patient Reimbursement Support from Manufacturers

Hospital panelists see a strong need for manufacturer-sponsored patient reimbursement programs and support for indigent patients. These two areas of support are among the tactics of highest interest to hospital panelists.

Although most manufacturers have some type of reimbursement and indigent support, Hospital panelists view most current programs as

- complex,
- time-consuming and
- difficult to access.

As a result, many hospitals have found it necessary to dedicate staff or contract with external organizations to coordinate reimbursement support for their patients.

Top Manufacturer Programs/Resources of Interest to Hospital Pharmacy Directors

Bar-Coding Support

Patient Reimbursement Assistance

Indigent Patient Financial Aid

About HIRC

Health Industries Research Center (HIRC) conducts strategic market research on trends in health care, pharmaceuticals, and managed care businesses.



HIRC

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GSK Rated Best in Contracting & Programs, Amgen is Top "Partner of Choice"

Hospital Pharmacy Directors rated GlaxoSmithKline highest in willingness to negotiate contracts and on value of programs and resources, followed closely by Amgen.

- In contracting, GSK was recognized for their flexibility, 340B pricing and aggressive pricing on *Arixtra*.
- GSK stands out for its CE support, in-service staff programs and strong contract pull-through.

Amgen was selected most often as Hospital Pharmacy Directors' "Partner of Choice", and also received the most Best Account Manager nominations.

Top Manufacturers — Hospital Pharmacists			
Best in Contracting	Best in Programs/ Resources	Partner of Choice	Best Account Managers
GSK	GSK	Amgen	Amgen

Account Manager Interaction Most Preferred by Hospital Pharmacy Directors

Hospital Pharmacy Directors were queried about the types of manufacturer representative interactions they most value.

Hospital panelists' preferred point of contact from manufacturers is account managers who are decision makers regarding contracting opportunities, contract compliance and pull-through support. In addition, Pharmacy Directors value occasional interaction with medical liaisons, primarily for clinical information on new products and on off-label product use.

Report Methodology and Availability

HIRC's Hospital Pharmacy Director research was conducted in the first quarter of 2011 through a combination of 33 surveys and 12 in-depth interviews with Pharmacy Directors from large hospitals and hospital systems. The complete findings are outlined in Chapter VI of the Spring Managed Markets & National Accounts Handbook, which is available to subscribers at www.hirc.com.

About HIRC's Managed Markets & National Accounts Service

Managed Markets and National Accounts is the most comprehensive research service available to help pharmaceutical firms assess performance and stay abreast of trends within a multitude of managed care, government and institutional markets. Surveys and interviews conducted with:

- *Health Plan Pharmacy Dir.*
- *Health Plan Medical Dir.*
- *PBMs*
- *Medicare PDPs*
- *Medicaid MCOs*
- *State Medicaid Directors*
- *Specialty Pharmacies*
- *LTC Consultant Pharmacists*
- *Hospital Pharmacists*
- *Retail Drug Chains*

Key reports include:

- *Ratings of Manufacturers on Contracting & Programs*
- *Customer Needs Assessment*
- *Pharma's Ratings of Customers*
- *Market Segment Situation Analyses*
- *Future Scenarios*
- *Headcounts & Organizations*

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