



Quality of Care: Models & Metrics

Pharmaceutical Manufacturer Investment and Payer Priorities in Care Management

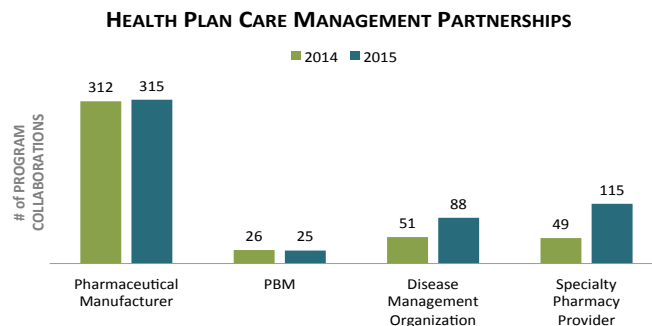
With the increasing cost of specialty drugs and the impact of the ACA reverberating throughout the health care system, the role of care management continues to evolve and remain of critical importance to health plans' goals in quality and population health. Thus, more and more plans are emphasizing care management across a broad array of disease states. HIRC's report, *Manufacturer Investment and Payer Priorities in Care Management*, provides an overview of health plan collaborations in care management and examines the disease states of highest priority. The report addresses the following questions:

- Which pharmaceutical manufacturers lead in the overall quality of their care management program offerings? Which manufacturer programs are most often nominated as best-in-class?
- What are the critical attributes and components of the care management programs that health plans view as best?
- Which disease states are highest priority for plans to address with care management?
- What types of care management support are payers looking for in oncology?

Key Finding: Care management collaborations involving oncology palliative care, resources that tie to quality measurement goals, and patient and provider education tools that can be easily integrated into internal programs would be most impactful to health plans.

The Care Management Landscape is Evolving

Health plans often utilize third-party materials and resources from pharmaceutical manufacturers and other organizations to support their care management efforts. Plans report most partnerships with pharmaceutical firms; however, a rise in collaborations with disease management organizations and specialty pharmacies was reported in 2015, suggesting that plans are increasingly relying on these firms to support patient care initiatives.



Due to the high cost of specialty drugs, many plans expect to see an increased need for care management in specialty, with a focus on medication adherence. The report provides the full listing of health plan collaborations with vendors across 14 high profile disease states.

Novo Nordisk and Merck Rank Highest in Quality of Care Management Program Offerings

Maintaining its leadership position in diabetes and the hemophilia space, Novo Nordisk ranks highest in the quality of its care management program offerings in 2015, with Merck following in second. The best manufacturers in care management provide high quality resources and tools that align with health plans' goals.

TOP PHARMACEUTICAL FIRMS IN CARE MANAGEMENT PROGRAM QUALITY

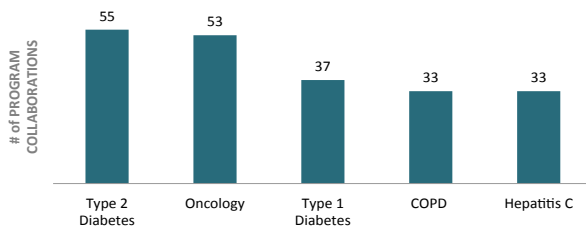
RANK	PHARMACEUTICAL MANUFACTURER	TOP DISEASE STATE(S) WITH PROGRAM COLLABORATIONS
1	Novo Nordisk	Diabetes, Hemophilia
2	Merck	Diabetes, Asthma
3	Lilly	Diabetes
4	GlaxoSmithKline	Asthma
5	AbbVie	Rheumatoid Arthritis, Hepatitis C

- Novo Nordisk's program features website support for members with diabetes as well as health plan case and care management training by diabetes educators.
- Merck is noted for the breadth of its modular, unbranded resources in care management that are easy to implement.

Oncology and Hepatitis C Enter the Top Five Disease States of Highest Priority for Care Management

While type 2 diabetes remains the disease state of highest priority to plans due to its prevalence, the number of program collaborations reported for specialty therapeutic areas, such as cancer and hepatitis C, increased notably in 2015. Care management programs for oncology include support in care navigation, survivorship, and treatment education. The full report examines plans unmet needs in oncology care management and additional opportunities for partnership across all priority disease states.

TOP 5 PRIORITY DISEASE STATES FOR CARE MANAGEMENT



Research Methodology and Report Availability

In December-January, HIRC surveyed 70 commercial health plan quality managers and pharmacy and medical directors. Thirty-three Medicare executives were also surveyed. Online surveys and follow-up telephone interviews were used to gather information. The *Manufacturer Investment and Payer Priorities in Care Management* report is part of the Quality of Care: Models and Metrics Service, and is now available to subscribers at www.hirc.com.

The Quality of Care: Models and Metrics Service analyzes quality and care management initiatives within payer markets and new care delivery models including patient-centered medical homes (PCMHs), accountable care organizations (ACOs), and health exchange plans. This research provides key metrics and environmental trends to help pharmaceutical executives develop quality strategies and value-added programs in key market segments.

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