



## Specialty Pharmaceuticals

### Health Exchange Plans: Specialty Medication Management and Manufacturer Engagement

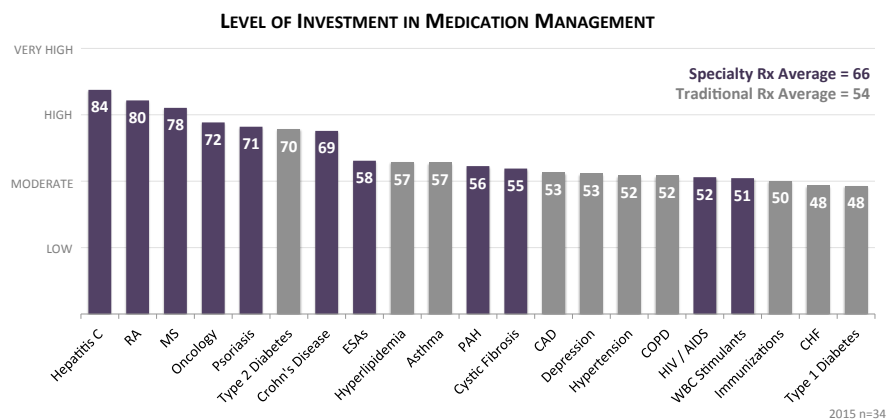
Enrollment in the Health Insurance Marketplace is expected to increase dramatically between now and 2018, leveling off at 25 million members if projections hold. HIRC's report, *Health Insurance Marketplace Plans: Specialty Medication Market Access and Manufacturer Performance*, examines exchange plan approaches to formulary, benefit design, and utilization management. The report addresses the following questions:

- Which therapeutic classes do exchange plans invest in most to manage? What is their approach to specialty medication management?
- Which specialty brands demonstrate favorable coverage and preferred status in exchange plan formularies?
- What are patients' cost sharing responsibilities for specialty medications by metal tier?
- Which pharmaceutical manufacturers have best engaged plans in issues specific to their exchange membership?

**Key Finding:** Exchange plans primarily use high drug copays and narrow formularies to moderate their specialty medication spend. Some plans expect these approaches to be applied to fully insured commercial populations in future years.

### Marketplace Carriers Invest the Most in Managing Hepatitis C, RA, and MS Medications

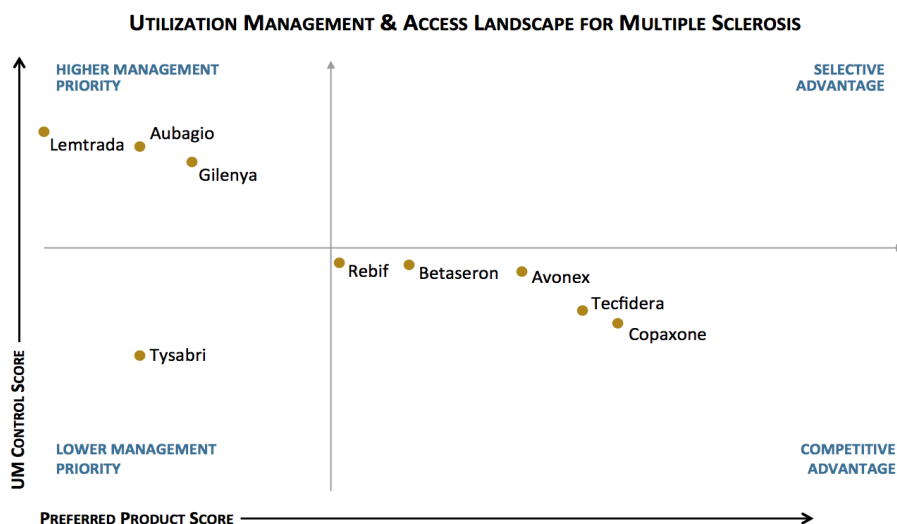
Ratings from pharmacy and medical directors representing carriers in state-based and federally-facilitated exchanges indicate highest investment in managing the cost and utilization of specialty medications, with hepatitis C, RA, MS and oncology medication management of highest priority.



Top investment activities include staff time spent on prior authorizations, case management, and specialty pharmacy clinical services.

## Copaxone and Tecfidera Maintain Favorable Access Position in Exchange Plans for Multiple Sclerosis

The utilization management (UM) landscape varies by class. Some products are more often designated as preferred, while others are subject to higher levels of UM control. In the MS class, Copaxone and Tecfidera are most often designated as preferred in exchange plan formularies, while Aubagio and Gilenya are subject to higher levels of UM control.



The full report provides coverage data and the market access landscape for 37 brands across seven specialty classes.

- RA/Psoriasis/Crohn's Disease: ACTEMRA, CIMZIA, ENBREL, HUMIRA, ORENCIA, REMICADE, STELARA, XELJANZ
- Multiple Sclerosis: AUBAGIO, AVONEX, BETASERON, COPAXONE, GILENYA, LEMTRADA, REBIF, TECFIDERA, TYSABRI
- Hepatitis C\*: HARVONI, PEGASYS, PEGINTRON, OLYSIO, SOVALDI
- PAH: ADEMPAS, LETAIRIS, TRACLEER, OPSUMIT, ORENITRAM
- Cystic Fibrosis: CAYSTON, KALYDECO, PULMOZYME
- Erythropoiesis-Stimulating Agents (ESAs): ARANESP, PROCRIT, EPOGEN
- White Blood Cell Stimulants: GRANIX, NEUPOGEN, NEULASTA, LEUKINE

\* Viekira Pak was not yet approved at the launch of this study.

## Research Methodology and Report Availability

In December-January, HIRC surveyed 34 pharmacy and medical directors from plans operating in the federally-facilitated and state-based exchange, representing 3.4 million lives (43% of the public exchange market). Online surveys and follow-up telephone interviews were used to gather information. The *Health Insurance Marketplace Plans: Specialty Medication Market Access and Manufacturer Performance* report is part of the Specialty Pharmaceuticals Service, and is now available to subscribers at [www.hirc.com](http://www.hirc.com).

The Specialty Pharmaceuticals Service offers insights, analyses, and recommendations specific to the management of specialty medications across eight key therapeutic classes. Health exchange and commercial health plans are examined, with a focus patients' cost burden, developing management trends, and manufacturer value-added programming and account support. Specialty pharmacy provider and ACO segments are also explored.

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# HIRC

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