More Health Systems, More Data, More Access: Bridging Divides Among Specialty Pharmacy Stakeholders for the Benefit of Complex Patients

Key Concepts

› Growth in size, scope and scale over the past decade has allowed Excelera to make a meaningful impact in bridging the divides among specialty pharmacy stakeholders, creating efficiencies and improving the care of complex patients.

› Size, scope and scale mean: more health systems, more providers, more patients, more data, more access and more insights.

› For drug manufacturers and payers, Excelera provides a single point of entry to collaboration with health systems.

› The scale of aggregated data to which Excelera offers access is expansive enough to provide real-world evidence and demonstrate meaningful trends, even for rare conditions.

Introduction

Trends since the early 2000s have favored the growth of health system specialty pharmacy. Partners like ExceleraRx, LLC, and the Excelera nationwide network of health systems have fostered the development and optimization of high-performing specialty pharmacies in the health system setting.

With success has come recognition that greater size, scope and scale result in greater impact and effectiveness. The size, scope and scale of the Excelera Network—and the corresponding size, scope and scale of its Complex Patient Data Platform—have unique power to improve the care of complex patients while benefiting all the stakeholders in the specialty pharmacy ecosystem: health systems, drug manufacturers and payers.

Beginning in 2021, the impact will be magnified by our partnership with Shields Health Solutions. The combined company will serve more than 60 health systems and academic health centers, including more than 700 hospitals, across 43 states. Accounting for a nearly $30 billion specialty pharmacy opportunity, the combined organization will be able to provide manufacturers with unparalleled access to data insights and to present payers with the opportunity to help optimize care and improve outcomes for nearly one million patients with complex and chronic conditions. What is especially meaningful is not only the sheer size, but the fact that this size accompanies a patient-centric operating model in which integration with the entire care team, at the health system level, is the core principle.

Excelera was founded by health systems, and the health systems in the Excelera Network see the value of owning and operating their own specialty pharmacies. As health systems seek to build and optimize specialty pharmacy, Excelera provides not just its own data-driven solutions and expertise, but ways for members to share best practices and use one another as resources.

More Health Systems, More Patients, More Access

Hospitals and health systems now employ nearly half the physicians in the United States: 44% in 2018, up from 25% in 2012. During the same time period, the number of physician practices owned by

hospitals or health systems grew by 44,400.[i] In oncology, one of the largest categories of specialty therapies, a shift away from community oncology practice is reflected in the acquisition of 722 oncology clinics by hospitals between 2008 and 2020.[ii] While there are varying perspectives regarding this consolidation trend, the parallel growth in health system specialty pharmacy that has also occurred during this time has led to greater clinical integration in specialty care, with care teams sharing knowledge, space and systems, including access to the electronic medical record (EMR), for enhanced coordination of care.

The health systems in the Excelera Network are among the largest in the nation. For drug manufacturers and national payers, the number of health systems and patients represented by Excelera offers a way to efficiently develop a national health system specialty pharmacy strategy and activate this strategy with a single contract. Payers benefit from access to data illuminating tens of millions of covered lives; manufacturers benefit from access to specialty patients and providers in a manageable, collaborative way; health systems benefit from access to payer contracts and limited distribution drugs (LDDs) from which they might have been shut out on their own. A partner with the scale, scope and expertise of Excelera helps to bridge the divides and create efficiencies.

Aggregated Data: The Key to Insights

A national strategy must be based on data. With the number of health systems in the network expanding, Excelera's Complex Patient Data Platform is enriched by the addition of more data about a greater number of complex patients and a greater number of specialty drugs, including biologic and biosimilar therapies and drugs prescribed for rare and orphan diseases. The scale of the aggregated data is compelling to drug manufacturers and payers, unlocking insights into population health for a larger group of patients.

Payers, especially, struggle with gaps in the data readily available to them, which is based on claims. Excelera's data platform can provide more meaningful insights to help customize benefit structure.

For all stakeholders, the aggregated data is expansive enough to provide real-world evidence and demonstrate meaningful trends, even for rare conditions. For example, more than half the cystic fibrosis (CF) patients in the U.S. receive care at health systems belonging to the Excelera Network.

By connecting to the EMR and tracking the patient journey, the platform addresses increasingly robust reporting requirements, and by aggregating across the network, it provides seamless, less fragmented data that other specialty pharmacies simply have not been able to produce. It allows for the development of a strategy that recognizes the importance of quality of experience for patients and providers.

For health systems, the data platform provides the tools to not only monitor their own performance but to benchmark those metrics against aggregated performance data from across the network. New processes have been created, such as a systematic process for reporting proportion of days covered (PDC), a common method of measuring medication adherence, on a scheduled cadence, allowing specialty pharmacists to regularly measure adherence and make appropriate patient outreach and/or therapy management decisions as needed.

Excelera also uses the volume and quality of data available to create predictive models across a variety of disease states and variables. One recent model demonstrates the ability of machine learning to identify patients at risk for discontinuing oncology therapy so that providers can intervene to keep them on track.

Evolving Partnerships, Long-Term Thinking

For payers and manufacturers, Excelera provides a gateway to a nationwide network of health systems whose specialty pharmacies meet the highest standards. As models of value-based care continue to evolve, Excelera's data platform can deliver meaningful data and insights on patient outcomes and the patient journey to build value-based contracts that genuinely address quality and the total cost of care. In the context of value-based contracts between payers and manufacturers, Excelera's data can demonstrate what is working and what is not working for specific drugs and disease states.

For manufacturers, a long-term partnership with Excelera may involve working together initially to understand the potential of collaborating with integrated health systems, developing a national strategy and continuing to work together to maximize product lifecycle opportunities as more indications are approved. The single point of access that Excelera facilitates may prove to be even more important in the context of reduced in-person engagement by sales representatives. An educational platform, ExceleR8U, also offers access to health system providers.

For health systems, in addition to specialty pharmacy startup and specialty pharmacy optimization, opportunities include Home Infusion Solutions, an LDD program, a Payer Access Program, a transparent Pharmacy Benefit Management (PBM) Solution and others. Health systems have long-term relationships with patients in high-risk populations, while many commercial payers do not. The ability to maintain this relationship can make a difference in quality of care, and Excelera shares in the vision of improving the care of complex patients over the long term.

Conclusion

Growth in size, scope and scale over the past decade has allowed Excelera to make a meaningful impact in bridging the divides among specialty pharmacy stakeholders, creating efficiencies and improving the care of complex patients.

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[i] Physicians Advocacy Institute. Updated Physician Practice Acquisition Study: National and Regional Changes in Physician Employment, 2012-2018. February 2019.
[ii] Aptitude Health. The Growing Importance of Access to Health Systems and Integrated Delivery Networks. December 3, 2020. Accessed at https://www.aptitudehealth.com/blog/growing-importance-idn-access/ on December.