

AUTOIMMUNE PATIENT SERVICES BEST PRACTICES

SUMMARY

A private, ongoing, multi-client study.
JANUARY 2020



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Autoimmune Patient Services Best Practices

This provides highlights from an annual report, available in conjunction with a live, interactive database, updated quarterly which helps to identify patient services best practices, as identified by users (e.g., prescribers, office staff and patients). Those user ratings provide insights into the most valued and highest rated patient services for brands across the autoimmune market.

Key Questions Answered

- Which autoimmune brand patient services do autoimmune prescribers, office staff, and patients deem to be most valuable and best overall?
- Which individual autoimmune patient services do prescribers, office staff, and patients use most, and which have the highest levels of satisfaction?
- How do utilization and valuation of individual autoimmune patient services differ among practice types (independent practices, IDNs/health systems, academic medical centers)?

METHODOLOGY

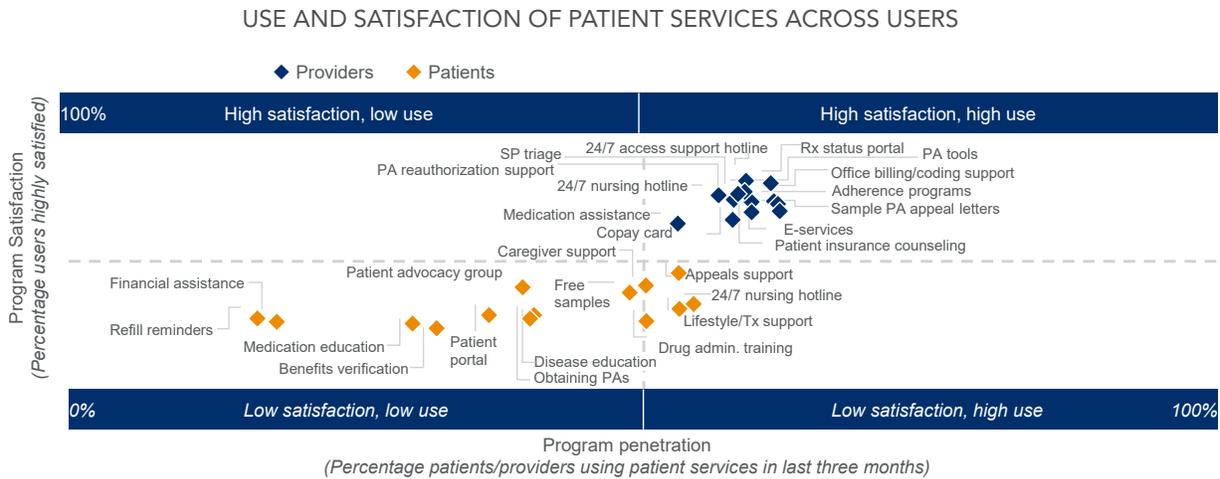
- Online surveys were conducted with autoimmune patient service users throughout 2019, including:
 - 194 prescribers and office staff
 - 178 patients with an autoimmune disease (e.g., RA, psoriasis or IBD)
- Additional detailed survey data and data cuts are available with research purchase

Key Findings	Implications & Recommendations
<ul style="list-style-type: none"> • Patient adherence programs and sample prior authorization (PA) appeal letters are highly important to providers in meeting crucial patient needs (e.g., consistency with therapy, navigating access hurdles) in order to ensure continuation of therapy. 	<ul style="list-style-type: none"> • Patient service development and improvement should follow these practice priorities/needs: (1) anticipated and help navigate reauthorization failures, (2) support patient care management and compliance.
<ul style="list-style-type: none"> • Autoimmune patient services rated most satisfactory by providers are often not the most utilized, highlighting opportunities for improvement. Patients are significantly less satisfied with available autoimmune services than providers. 	<ul style="list-style-type: none"> • While overall provider service satisfaction may be comparatively high, improvement in individual services, such as 24/7 access support, appeals process support, and Rx status portal, should be considered. • Autoimmune patients rely heavily on physician offices to inform them of available programs and services. To improve satisfaction and drive utilization of programs, disease and drug education must be provided to providers and patients alike.
<ul style="list-style-type: none"> • Targeted autoimmune patient service messaging and communications should reflect distinctly different business priorities and preferences by provider practice type. 	<ul style="list-style-type: none"> • As more providers join vertically integrated systems, the importance of patient service offering with e-services functionality (because of their utilization of EHR integration) grows.

Source: Health Strategies Insights by EVERSANA, Patient Services and Hubs, October 2019.

Providers Treating Patients with Autoimmune Diseases Express Higher Utilization and Satisfaction Rates for Patient Services than Patients Themselves

Disparities between service program ratings on importance and satisfaction across user types highlight opportunities for autoimmune biopharmaceutical companies to more competitively differentiate their patient services programs

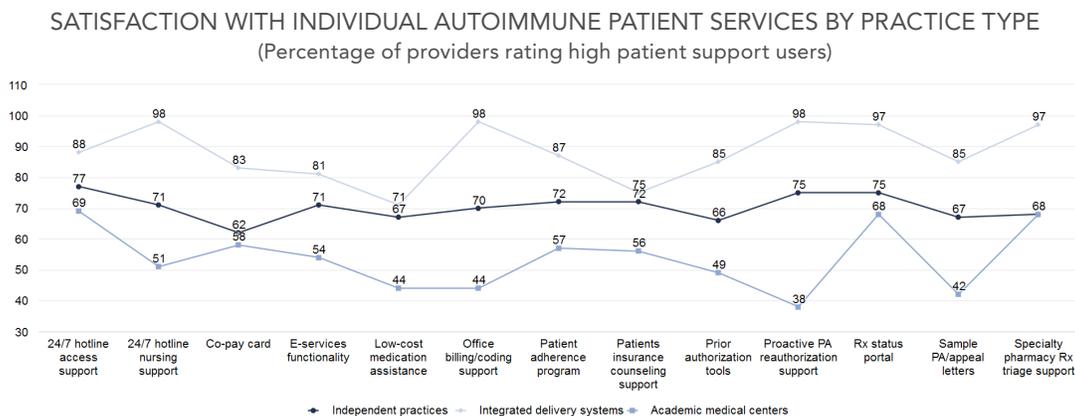


N=59 providers; N=178 patients

Source: Health Strategies Insights by EVERANA, Patient Services and Hubs, October 2019.

Integrated Delivery Systems and Independent Practices Both Report High Levels of Satisfaction with Autoimmune Patient Services

Providers from academic medical centers are generally less satisfied with autoimmune patient services, whereas providers from integrated delivery systems report higher levels of satisfaction. Focusing on those providers who present the greatest opportunities will help biopharmaceutical companies overcome patient access barriers; in this case, raising satisfaction levels for providers from academic medical centers in proactive PA reauthorizations and assisting with PA appeals may generate the greatest ROI.



Source: Health Strategies Insights by EVERANA, Patient Services and Hubs, October 2019.

“When I’m recommending patient support service programs to patients, I tend to point them to the ones that help me out the most. That’s beneficial for us as a medical practice and then beneficial for the patient as far as they have questions about their medication, how to take their medication, what happens when they have a reaction. Just anything in general that they may have questions.”

– Provider, Academic Medical Center, Autoimmune



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Providers Highlight Most Value PA Support In the Highly Managed Autoimmune Category

Patient adherence programs and prior authorization support services are highly important in meeting crucial patient needs (e.g., consistency with therapy, important access hurdles) in order to ensure compliance and continuation of therapy.

Those services that can best support providers by assisting with PAs, appeals, and ensuring insurance coverage resonate among providers as most important, as they struggle to meet the needs of all patients and encounter barriers from insurers.

“Patient adherence programs are a great resource. They take over the process once we have already submitted the prior authorization ensuring that the patient will receive the medication. They also help with insurance related questions and take care of the appeal process if needed.”

– Provider, Autoimmune

“If the patient gets denied, I’ll either send them to another company or the patient support program which takes care of the process of writing the appeal letter. The doctor only needs to sign it, and they will submit the letter to the insurance company. The patient program does everything and stays in contact with the patient providing updates on the appeal process.”

– Provider, Autoimmune

Satisfaction in patient adherence programs have room for improvement, as providers are held to adherence and quality metrics.

“I really don’t deal directly with prescription status portals, it is handled by the office staff. I sometimes hear from them that it seems like a prescription got lost in limbo and there is no update on the status. Nobody has a clear understanding of how to proceed, and the blame game begins.”

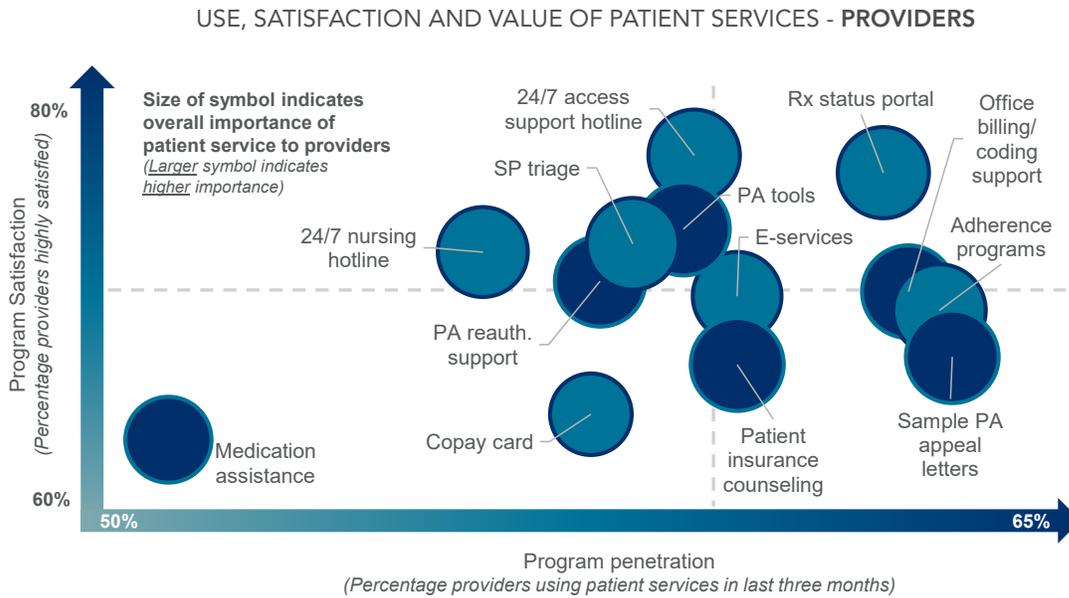
– Provider, Autoimmune

“24/7 hotline nursing support is under used because most patients are not aware that they can contact the pharmaceutical company 24 hours, 7 days a week with any questions regarding their medication.”

– Provider, Autoimmune

Providers Highlight Opportunities for Improved Use and Satisfaction with Medication Assistance Programs, Copay Cards, and Nursing Hotlines

Providers rate most services as having similar importance or value to their patient care and prescribing decisions. Some of the services that rank just slightly higher in importance include services to remove administrative burdens from their offices, such as PA and appeals support, assistance with office billing and coding, and counseling services on patient insurance coverage.

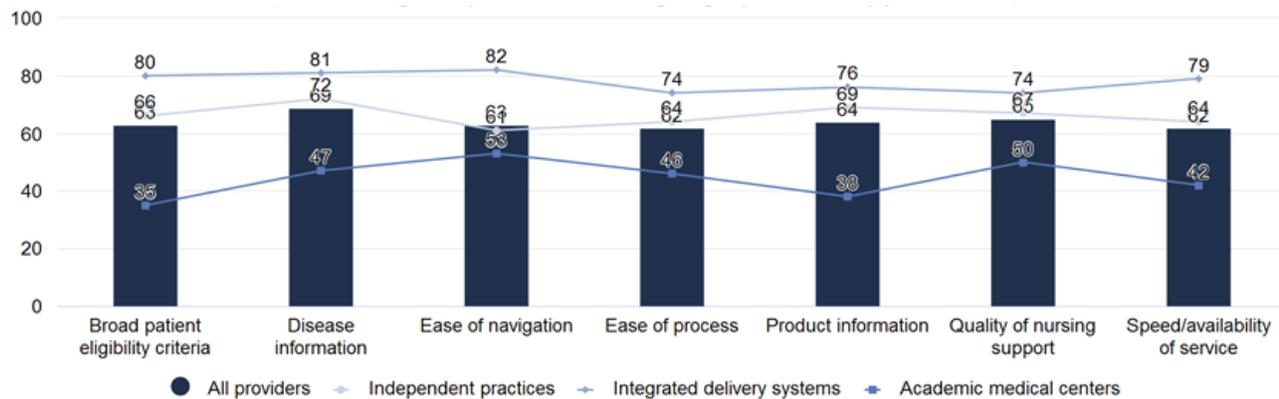


N=59 providers;
Source: Health Strategies Insights by EVERSANA, Patient Services and Hubs, October 2019.

Disease Information and Quality Nursing Support Drives Provider Program Referrals to Patients

Independent providers and integrated delivery systems consistently place greater value on key program attributes than academic medical centers.

PROGRAM ATTRIBUTES CONSIDERED WHEN RECOMMENDING AUTOIMMUNE SERVICES TO PATIENTS AND/OR CAREGIVERS
(Percentage of providers rating high patient support users)



N=59 providers;
Source: Health Strategies Insights by EVERSANA, Patient Services and Hubs, October 2019.



“With broad patient coverage eligibility, it is a lot easier for me to ensure they will get covered and we can start them on the appropriate treatment. The patient is more confident if I am giving the medication I said to be the best for them and they are covered for it.”

– Provider, Autoimmune

“If the patient support programs continue to offer services as they currently are, then they can help a lot of doctor’s offices. That includes good communication of services, copay assistance, free drugs for patients without insurance, and benefit assistance.”

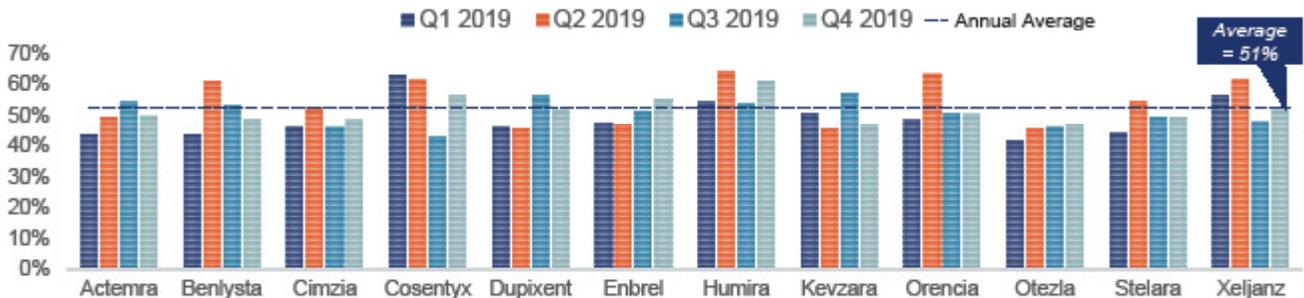
– Provider, Autoimmune

Providers are Especially Satisfied with Biopharma Patient Services Offered for Humira, Cosentyx, Xeljanz

On average throughout 2019, approximately half of providers reported high to very high satisfaction on most patient services across brands, especially for services offered to support Cosentyx, Humira, Xeljanz in particular. Biopharmaceutical companies still have an opportunity to continue to improve patient service offerings across patients and providers to improve their brand value and better support autoimmune patients.

Detailed metrics around specific patient services, and breakdowns by different provider types, can be accessed online on our INTELLICENTER® portal.

Humira Patient Services Lead in Customer Satisfaction At the End of 2019
(Average percentage providers rating high satisfaction across biopharmaceutical patient programs each quarter)

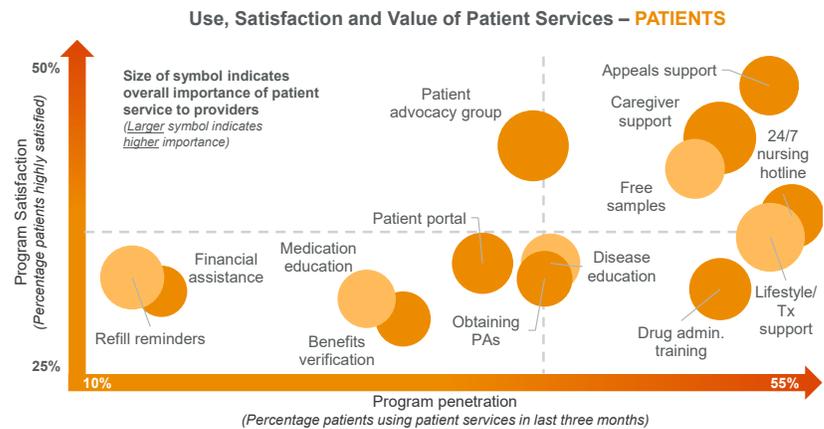


N size varies by brand.

Source: Health Strategies Group, Autoimmune Patient Services and Hubs, December 2019.

Autoimmune Patients Express Low Satisfaction and Limited Utilization Overall for Patient Services, Creating Room for Growth

Patients rate caregiver support and access to patient advocacy groups as some of the most important patient services, and those have some of the relatively highest utilization and satisfaction scores with those services. Improving the perceived patient value and importance of pivotal patient services such as refill reminders and different education programs will help drive use and potentially satisfaction for those services.



N=178 patients

Source: Health Strategies Insights by EVERSANA, Patient Services and Hubs, October 2019.



“I use administration training the most. Because I’ve never given myself a shot, and I was a little nervous of doing that. The training was good and I was satisfied with it. It was personal. They sent a nurse here to help me do it. She was very nice. It made it a lot easier for me to do it, since like I said I’ve never had to give myself an injection before and a little leery of doing it.”

– Patient

“The program pointed me to a patient forum. I didn’t use it, because I already went to the internet, went to Reddit. There’s an update forum. But I do remember them pointing me to some sort of forum, which was nice.”

– Patient

Autoimmune Patients Suffer From Chronic and Tedious Conditions—Lifestyle and Treatment Support Resonates Strongly

Autoimmune patients rely heavily on physician offices to inform them of available programs and services. To improve satisfaction and drive utilization of programs; disease and drug education must be provided to providers and patients alike.

“So I take my shots weekly and no; I haven’t gotten any kind of treatment reminders. Actually, I have a really bad time remembering to take my shots. Sometimes I’ll forget it and then have to take it the next day. I need to do a better job of making a calendar or something to keep track of that. A text message might be really nice.”

– Patient

“I did not receive anything about benefit verification because I didn’t really have any problems going through to get Humira. They wanted to give me something else and they said it’s going to take some time. I think it was Enbrel or [some] other medication. And it was going to take longer. They could deny me. I was like well I want something that’s going to be pretty easy going through. And that’s when I talked to my doctor. And he said Humira is the best thing.”

– Patient



QUOTES ON THE HIGHEST VALUED PROGRAM

Whether or not I feel that the Humira Foundation excels or the company excels makes it more streamlined in terms of getting the paperwork through faster, I'm not certain. But I know it goes through insurance a lot faster.

– Provider, Autoimmune

QUOTES ON THE LOWEST VALUED PROGRAM

For Otezla it's like we submit the documentation but I just feel like there's constantly paperwork that keeps getting done and the patient doesn't get the free drug. Or at one point I got the free drug and then they stopped giving it. And then it was the hospital to try to get the free drug again for the patient. So then we just kind of gave up and went to another drug, because it was hard on the patient to keep coming into the office to get samples versus getting the drug mailed to them.

– Provider, Autoimmune



Xeljanz, I think they have a very good program about giving free drugs. They supply us with a lot of samples. They will do the bridge program where they will send the patient medication and such. And they have been very easy. From my opinion, they feel like they get the patient on the drug and the patient is stable then they will write appeal letters for us that will say hey the patient is on the drug. They're being stable and then keep working on trying to get the insurance.

– Provider, Autoimmune

Even though Otezla especially touts free drugs, it has been challenging for me to get a patient started on the drug before the approval. I mainly just have to deal with what I can get for free samples, as opposed to actually getting the drug from the company mailed to the patient.

– Provider, Autoimmune

Source: Health Strategies Insights by EVERSANA, Patient Services and Hubs, October 2019.

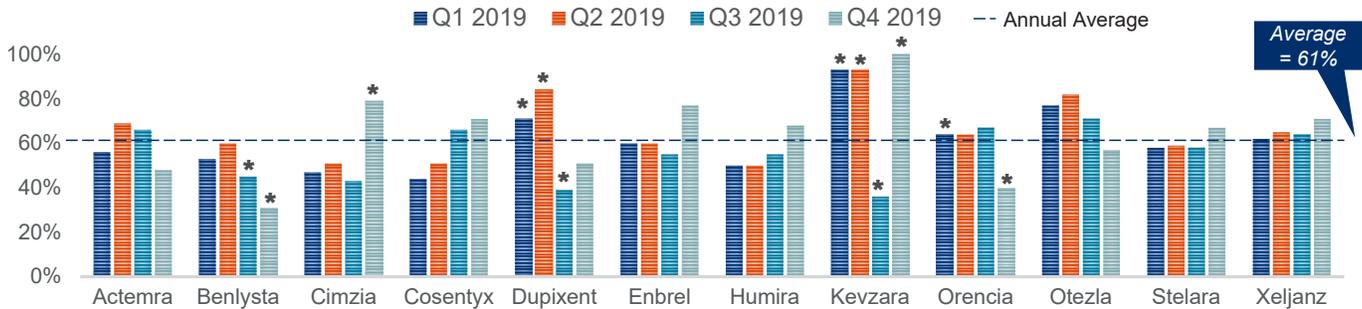
Cosentyx, Humira, Stelara and Xeljanz Received Steady and Rising Patient Satisfaction Ratings Throughout 2019

Patient satisfaction ratings vary more quarter to quarter and brand versus brand than provider satisfaction ratings. Particular note should be taken when comparing ratings on brands that had fewer than five responses; those should be evaluated in a more directional manner due to the smaller sample.

Detailed metrics around specific patient services, and breakdowns by different provider types, can be accessed online on our INTELLICENTER® portal.

Humira Patient Services Lead in Customer Satisfaction at the End of 2019

(Average percentage patients rating high satisfaction across biopharmaceutical patient programs each quarter)



* Indicate n size less than 5 respondents.

N sizes varies by brand.

Source: Health Strategies Group, Autoimmune Patient Services and Hubs, December 2019.

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