



Pharmacists are changing the trajectory of healthcare

Creative approaches to closing gaps and
improving patient care

Walgreens





Taking pressure off a healthcare system under siege

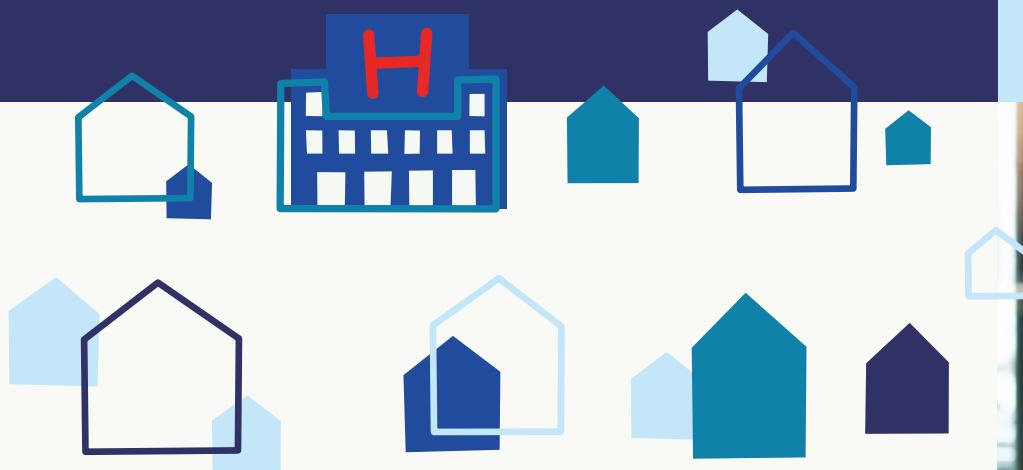
Before the COVID-19 pandemic hit, the healthcare delivery system in the U.S. was already under significant strain, facing a looming shortage of primary care physicians, a rapidly aging and more chronically ill population, unequal access for traditionally underserved and at-risk communities, and ever-spiraling costs.

More than 40%

of active physicians in the U.S. will be 65 or older within the next decade and facing retirement decisions.¹

\$93 billion

in excess medical care costs per year in the U.S. are a result of healthcare disparities.²



MARKETPLACE OVERVIEW

Now, the system is being pushed to—and even beyond—its limits by the pandemic, which has sent shock waves far beyond hospital COVID wards. As providers and medical staff attest, depression and other mental health issues, substance abuse, and poor nutrition have all increased among the general population as the pandemic rages on.³ Medical professionals are feeling the pressure as well, with high turnover rates and the number of people leaving the profession indicating significant implications for the current and future workforce.

18%

of U.S. healthcare workers have quit their jobs since the pandemic began.⁴

82%

of provider practices say capacity and burnout are moderate to extremely large challenges.⁵



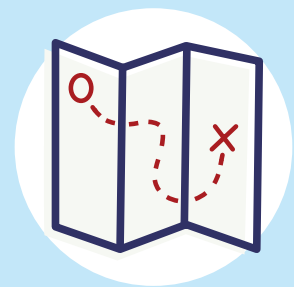
Enabled by innovative digital technologies, patients increasingly embrace new methods of care delivery, such as telemedicine.

~20%

of U.S. adults who had healthcare provider appointments in a four-week period used telemedicine, according to rolling averages reported between April 2020 and January 2022.⁶

91%

of those who have used telemedicine say they are likely to schedule another telemedicine appointment instead of an in-person visit in the future.⁷



Although digital channels will undoubtedly relieve some pressure from the overloaded system, much more help is needed.



Pharmacists are uniquely positioned to help

As a known and trusted local resource⁸ and among the most accessible⁹ of all medical professionals, pharmacists are ready to deliver that critical help. Far more than simply prescription order fillers and dispensers of general advice for taking medication, pharmacists have deep, specialized knowledge and experience, which is critical in providing quality patient care through collaboration with traditional providers



Deep knowledge, clinical expertise

Since 2003, all pharmacy school graduates have earned a doctor of pharmacy (PharmD) degree, which includes a similar amount of clinical classroom training as medical doctors (MDs).¹⁰ Importantly, pharmacists' unique position in the medical ecosystem at the nexus of patients, providers, health systems and plans offers unrivaled visibility all along the patient journey. In addition, pharmacists interact with many types of physicians and medical professionals—primary care, specialty care, emergency care, therapists, nutritionists, dentists and others—giving pharmacists even deeper insight into the healthcare continuum.

This continued access and visibility offers pharmacists numerous potential opportunities to support, complement and extend both primary and specialty care services. These could include performing basic diagnosis of minor illnesses, testing for and managing some mental health conditions, and supporting the management of complex and chronic illnesses such as cancer and HIV.

Primary care providers surveyed agreed that pharmacists are well-suited to fill many common gaps in care⁵:

82%

agree for adult vaccinations

62%

agree for adherence programs

58%

agree for health screenings

51%

agree for regular touch points with chronic patients on medication

Better access to care

We're already seeing community pharmacies becoming an attractive choice for consumers as access points for care. Performing vaccinations, such as for the flu or now COVID-19, is an established, high-profile example, but many additional services are becoming routine at pharmacies as well. Testing for HIV, COVID-19 and other conditions; mental health screening; and education on protective health measures are all being provided, which is an especially appealing option for those without a primary care physician (PCP).



57.5%

of pharmacies scheduled patient care appointments in 2019 compared to **36.4%** just five years prior.¹¹

A matter of trust

The trust that pharmacists have earned in their local communities is another reason pharmacists can provide significant value across the healthcare ecosystem. Local pharmacists have built strong relationships with their customers as well as the providers, health systems and plans that know those customers as patients and plan members.

Nearly all Americans (91%) live within five miles of a community pharmacy.¹² That proximity allows pharmacists to regularly engage with patients and collaborate with local community organizations and national alliances, cementing their place within the community and further extending their knowledge and accessibility.

Research shows that attitudes toward pharmacists from consumers and PCPs are increasingly positive:

71%

of Americans rank pharmacists high or very high on honesty and ethical standards—the highest rating since 2012.¹³

Pharmacists are among the most trusted professionals.⁸



Pharmacists, empowered by data, are key to lowering cost of care



Capitalizing on the unique position pharmacists occupy—as well as the expertise, accessibility and trust that pharmacists have earned—offers a smarter path forward.

Through analytics-led insights, pharmacists can help extend care to support adherence and promote health equity to lower costs for insurers and patients while improving patients' quality of life. Data insights can reveal at-risk patients, identifying social determinants of health and other potential barriers to care that may be keeping them from adhering to therapy, many of which can then be addressed by the pharmacist and staff.

Medication Therapy Management

Medication Therapy Management (MTM) is another area where empowered pharmacists can make an impact. Annual comprehensive medication reviews are available for all Medicare Part D–sponsored patients, which allow pharmacists to have a comprehensive review with a patient. Pharmacists and patients can discuss their medication regimen holistically, identifying any areas of opportunity.

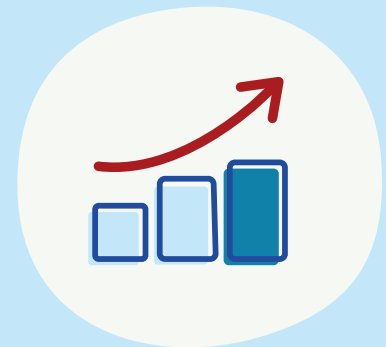
Smart technologies, such as digital reminder tools and smart pill bottles, can help patients stay on schedule, informed by data that can be securely shared with primary care physicians to ensure proper administration of care. For patients who may be taking medications from several providers, the pharmacist can identify potential drug interaction issues and help keep timing and dosages on track as the respective providers intended.

Health equity

Pharmacists can play a key role in identifying underserved and at-risk individuals and populations. By reporting on and sharing expanded key metrics, such as race, ethnicity, socioeconomic status, language and other variables, a clearer picture can emerge of the gaps in care for given areas, groups and even individuals.

After they have been identified, many of these gaps can be addressed using technologies such as telemedicine, with pharmacists consulting with patients to discuss medication side effects, adherence challenges and overall disease state management. Pharmacists and their teams can facilitate connections to sources of financial assistance through local and national organizations and manufacturers' programs, all to help eliminate common barriers that, left unaddressed, often result in further health decline and more costly-to-treat populations.

Transportation can be a significant issue for those seeking medical care, but digital apps can be used as conduits of care as well as to support adherence, regardless of the patient's ability to travel. With these barriers reduced or eliminated, new services can be provided in high-risk geographies to improve individual and population health and lower the costs of care.



\$42 billion

in lost productivity per year is a result of healthcare disparities in the U.S. alone.²



Support throughout the patient journey

One of the most important things a pharmacist can offer is continuity. With a ground-level view across medications for a given individual, pharmacists can identify opportunities to support that individual through digital tools and proactive engagement or raise a flag for any potential areas of concern. Pharmacists can use this unique vantage point to become a vital link between the patient and all stakeholders—providers, insurers, health systems, financial assistance sources and governmental agencies—sharing and leveraging data to better serve individuals and their communities.

Through proactive communication and ongoing support delivered across the complete patient journey, pharmacists can more effectively and consistently engage patients, helping reduce many common barriers to care. Technology-based communications such as refill reminders and online consultations can help keep patients engaged and adherent, leading to positive health outcomes and lower costs.

Pharmacist-led basic healthcare services, such as testing and immunization services, are well-known for conditions including HIV/AIDS, influenza and, most recently, COVID-19, but much more can be accomplished. Increasingly, the idea of expanding prescriptive authority—enacting statewide protocols that authorize pharmacists to prescribe a specified medication or class of medications when providing a clinical service—is gaining recognition as a response to the challenges of access and cost for many patients.





Empowering pharmacists for expanded responsibilities

Changing the model

While the potential benefits are compelling, significant transformation will be required to realize the full value of the evolution. Pharmacy business models must change to meet the disrupting influence of digital pharmacies and the nontraditional players that are ratcheting up competition even while margins shrink. Legislation that defines the types of services that pharmacists are authorized to perform is currently uneven across the country and will require changing established, often outdated policies. Taken to the next step, it's not far-fetched to imagine a time when primary care providers make the initial diagnosis, and then the pharmacy team uses its clinical expertise, accessibility and digital tool set to manage the therapy.

Meeting the challenge will require ongoing investments in digital technology, in reimagining business processes and workforce utilization, and in educating the public and legislators about the benefits of a new approach. Most critically, it will require commitment to the continual development and empowerment of pharmacists and the people who support their work daily.

Walgreens, for example, created the role of Health Outcomes Pharmacist, a designation for those pharmacists who provide individualized, high-touch care to patients with complex and chronic conditions in need of extra support. To support their mission, we're implementing cutting-edge automation technologies and localized micro fulfillment centers designed to reduce the in-store burdens on pharmacists and staff. The idea is to free their time for deep consultative and other higher-value work. We're evolving our care model to be even more collaborative, more deeply integrating pharmacists into the healthcare continuum, with the goal of redefining local pharmacies as a community resource for affordable, accessible routine and preventive health and well-being care, including testing and immunizations.

Improving access to information and care

With expanded responsibilities comes the need for pharmacists to have the tools they require for success. Information technology and automation technologies will each play major roles in empowering the new pharmacist without overloading these already busy professionals.

Improving specialty pharmacy

Already, Walgreens has 300+ community-based specialty pharmacies that are staffed with highly trained pharmacists and support teams with additional disease-state expertise, including patient advocates and reimbursement specialists. Located near provider specialists, these pharmacies provide high-touch care for patients living with cancer, HIV/AIDS, rheumatology and pulmonary issues, and many other complex health conditions.

Pharmacist-delivered clinical programs

The high-touch engagement provided by Walgreens Advanced Care® and Walgreens Connected Care® programs, available for a range of chronic and complex health conditions, has been shown to increase the proportion of days covered (PDC) for many patients along with other significant benefits.^{14,15}

For patients in the Walgreens
Connected Care cystic
fibrosis program¹⁴:

48% fewer

emergency department (ED) visits

34% less

ED costs

For patients in Walgreens
Advanced Care Early Outreach
and Advanced Care Responsive
Outreach programs¹⁵:

EARLY OUTREACH

15.5 percentage

point increase in on-time refill rate for
targeted medications

5.8 percentage

point increase in on-time refill rate for
maintenance medications

10.5 percentage

point increase in percent of
prescriptions on 90-day fills

RESPONSIVE OUTREACH

7.5 percentage

point increase in on-time refill rate for
targeted medications

4.2 percentage

point increase in on-time refill rate for
maintenance medications

3.0 percentage

point increase in percent of
prescriptions on 90-day fills

EMPOWERING PHARMACISTS FOR EXPANDED RESPONSIBILITIES

Vaccination

Proven successful for decades, Walgreens annual vaccination program for flu, delivered in store and through off-site clinics, has become a seasonal staple for many Americans. Our response to the COVID-19 pandemic leveraged that experience, helping get vaccines to vulnerable Americans in communities nationwide.

Legislative advocacy

Petitioning voters and state legislators while advocating for change is a vital part of empowering pharmacists. Expanding the care that pharmacists can deliver is largely dependent on legislative approval for extending prescriptive authority and provider status to pharmacists, which authorizes healthcare providers to prescribe specific medications, including controlled substances in some cases.

Research and analytics

Pharmacists are in an ideal position to leverage health data, and the Walgreens Health Analytics Research and Reporting (HARR) team is dedicated to providing data-driven insights around population health, adherence support program and service effectiveness, best practices for care and case management, and identifying industry and societal trends that demand attention.



**Walgreens is making a
real difference**

60 million+

flu shots administered since 2010

55 million+

COVID-19 vaccinations given
at Walgreens locations as of
December 2021

15 million+

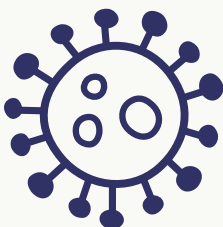
COVID-19 vaccines given in
areas ranking in the CDC's social
vulnerability index

60,000

trained immunizers, including
27,000 pharmacists

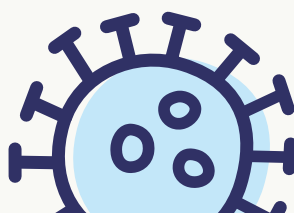
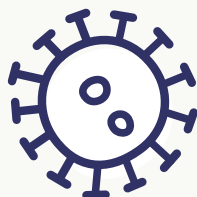
17

vaccines available for immunization,
including flu, pneumonia, shingles,
meningitis, hepatitis and travel-
related vaccines, depending on
state restrictions



Walgreens COVID-19 Index,

an interactive tracking tool, is helping identify
current and emerging variants in real time.

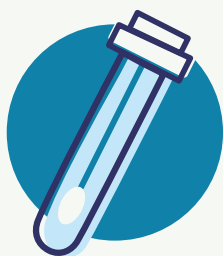




Reimagining reimbursement models

Working alongside health systems for acute care, preventive care and disease state management, Walgreens is looking to redefine how healthcare is delivered and funded. Transformative models such as alternative payment models and sustainable point-of-care reimbursement strategies are gaining traction, and Walgreens has several initiatives in the works.

- Collaborating with several leading healthcare companies for A1C testing and planning further expansion with additional partners



Testing and treatment

Empowering pharmacists often starts with expanding pharmacy-based testing and treatment programs. In states across the country, Walgreens pharmacists offer confidential counseling, testing services and access to medications, with increased focus on serving those in high-prevalence and at-risk communities. Pharmacist-led disease state management programs are being designed and rigorously tested to help improve adherence and drive better health outcomes that lower the costs of care.

- Walgreens has testing programs for HIV in multiple states, with some states already granting prescriptive authority for pre-exposure/post-exposure prophylaxis (PrEP/PEP).
- Additional states are working to expand prescriptive authority for these and other conditions and disease states, such as our program in Florida, through which we test and treat for upper respiratory conditions.

CONCLUSION

Moving forward

Qualified by education and experience, empowered by data, and deeply embedded in the healthcare ecosystem, today's pharmacists are in an ideal position to bring about significant change for many of the challenges facing healthcare today. Empowering and supporting pharmacists and enabling them to practice at the top of their license offers patients, providers, health systems and plans a responsible and realistic answer for a system under terrible strain. As they have throughout the pandemic, pharmacists are filling gaps in care, but they need far more support.

Transformation is demanded, spanning new business and reimbursement models, creative approaches to employee staffing and training, and the implementation of innovative technology. In some cases, legislative action will be required to expand what pharmacists are authorized to do.

With the need already massive and ever-growing, the time is right for focusing on the value the pharmacist drives.



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