

  
BrightInsight

WHITE PAPER

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# Abandonment and discontinuation variation in specialty drugs

Digital solutions to identify and plug value  
leakage in immunology and other fields



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# Executive Summary

Leading pharma brands are aware that they have conversion and payer issues in the specialty drug market. These issues impact the companies themselves and also the patients who need their therapies. Many patients who are clinically appropriate for therapy never start, while others discontinue treatment prematurely. Among patients who do begin treatment, there is variation in time to first fill, which may delay progress for those who do not fill their prescriptions immediately.

While these challenges aren't specific to a single pharma company or therapy area, it's been difficult to analyze them on a broader level—until now.

Claritas Rx is changing the way companies access and analyze data with a platform that illuminates the patient experience for specialty biopharma products. Companies can leverage the actionable insights provided by the platform—including information about access, duration of therapy and other metrics—and partner with BrightInsight to deploy digital solutions. These solutions can address pain points along the patient journey, thereby plugging value leakage and improving the lives of patients.

In this white paper, we'll explore:

- Variation in conversion between life-saving and non-life-saving therapies
- Variation within non-life-saving therapies
- Reasons for conversion issues, such as problems with the enrollment, patient onboarding, insurance coverage, funding support and operations
- Variation within immunology therapies
- How companion apps powered by BrightInsight restore value
- How data insights from Claritas Rx can help pharma companies identify leakage and validate and optimize solutions

## Behind the data

Claritas Rx uses proprietary methods to consume data directly from specialty pharmacies. These data include information not used in the claims process, which provides rich daily visibility across brands from the day prescriptions are sent to the pharmacy. Their data platform ingests, validates, integrates and de-identifies the data, and layers on analytics and machine learning to illuminate and predict the patient journey.



**For more than ten years, we've been dedicated to using data and analytics to support patients with a better experience on specialty, rare disease and cell and gene therapies. Our platform integrates a broad array of commercial and patient-level data. It uses domain-driven analytics and machine learning to mine the data and identify rich, actionable insights about the patient experience and brand performance on a daily basis."**

– Michael Fitzgibbons, CEO, Claritas Rx



**One of the biggest challenges facing biopharma—and healthcare in general—is poor access to treatments. While there are various programs to support patients available from industry, government and the nonprofit sector, many patients fall through the cracks. Companion apps play an important role in connecting patients to these resources and can be the one-stop-shop to guide patients through their journey. This builds affinity and stickiness among patients and provides the missing data to truly understand the whole patient journey."**

– Kal Patel, MD, CEO & Co-Founder, BrightInsight



# Variation in conversion

For this white paper, we used a unique, proprietary data set from Claritas Rx and looked at 85 brands to analyze their patient journeys. We studied 43 brands that served life-threatening disease states and 42 brands in non-life-threatening therapy areas.

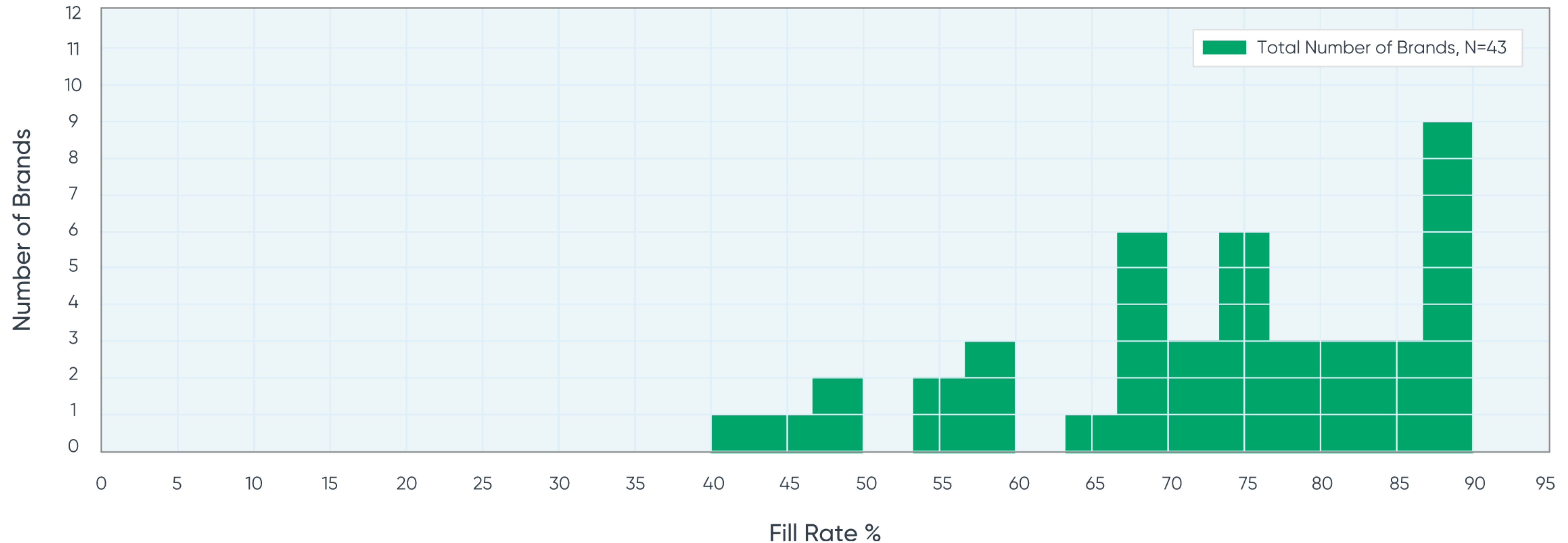
For the following analysis, Claritas RX reports a roughly 5% margin of error for abandonment and discontinuation rates across brands. This uncertainty is similar across brands, so the data's ability to act as a benchmark across brands is robust.

Life-threatening		Non-life-threatening	
Disease category	Number of brands	Disease category	Number of brands
Hematology	11	Non-life-threatening Infectious disease	7
Oncology	22	Immunology	24
Life-threatening Infectious disease	10	Multiple Sclerosis	11
Total	43	Total	42

## Fill rate

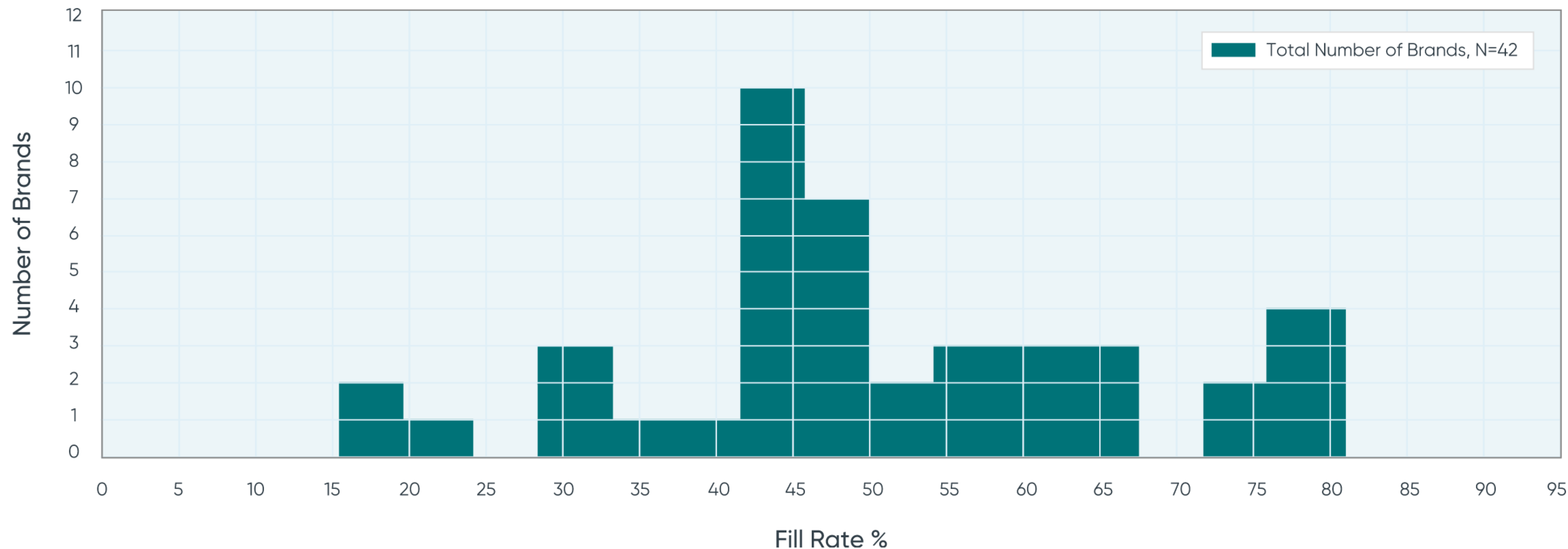
The overall paid fill rate across all selected market segments we reviewed was 62%. Unsurprisingly, drugs for life-threatening conditions have a 27% higher paid fill rate than those for non-life-threatening conditions. This comparison does underscore the opportunity for non-life-saving drugs—and even some life-saving drugs—to improve their conversion rates.

### Distribution of drug fill rates for life-threatening illnesses



Most of the drugs for life-threatening illnesses (63%) have a 70% or better fill rate. Surprisingly, there are a number of life-saving therapies that do not convert very well: About a fifth of life-saving therapies (21%) converted at lower than 60%. This highlights a significant barrier to access to life-saving therapies in the U.S. that presents challenges for many patients.

## Distribution of drug fill rates for non-life-threatening illnesses



As the chart above illustrates, there is a much wider variation in conversion among non-life-saving brands. Six of the 42 non-life-saving therapies (14%) convert at 70% or higher—on par with most life-saving treatments. These brands are converting very well. About a quarter of non-life-saving therapy brands (26%) converted at between 50% and 70%. A large proportion (40%) of the non-life-saving drugs were clustered between a 40% and 50% conversion rate. These drugs are experiencing difficulties in conversion. Meanwhile, a fifth (20%) of the non-life-saving brands had a conversion rate under 40%. These brands are facing serious abandonment issues.

This wide variation suggests not only that there are a variety of issues across the specialty prescription journey but also that some brands have found solutions for these challenges.



## Time to fill

The overall time from referral to paid fill is, on average, 29 days. Drugs for life-threatening conditions reach paid fill in approximately half as many days as drugs for non-life-threatening conditions.

Measure	Population	
	Life-threatening illness	Non-life-threatening illness
Paid Fill Rate (%)	77%	50%
Time to Paid Fill (days)	17	32

## Types of drop-offs: Abandonment and discontinuation

Abandonment includes patients who fail to fill a prescription after it has been sent to the pharmacy. Discontinuation occurs when patients begin the therapy and then stop. Both types of drop-offs have a variety of different factors and causes.

# The patient journey for specialty therapies

As the name suggests, specialty prescriptions present a unique journey for patients and their providers. In a recent survey, 84% of providers reported some difficulties starting patients on specialty medications.<sup>1</sup> Claritas Rx has used its proprietary data to build a framework to identify the root cause of risk within the specialty drug market. It has identified four treatment stages, each with its challenges that patients must overcome.



## Enrollment

At the enrollment stage, the healthcare provider has sent the prescription to the pharmacy but prior authorization has not been initiated. Patients may fail to fill prescriptions if their condition has resolved or may select a different treatment.

## Coverage

Next, the payer initiates the prior authorization process. Many things can go wrong, from failure to complete prior authorization forms to denial of coverage. Most patients who abandon their prescriptions do so during the coverage stage.

## Funding support

Affordability can be an issue even when a therapy is covered by insurance. While there are a variety of programs to help patients secure funding for their treatments, many patients have trouble navigating this process.

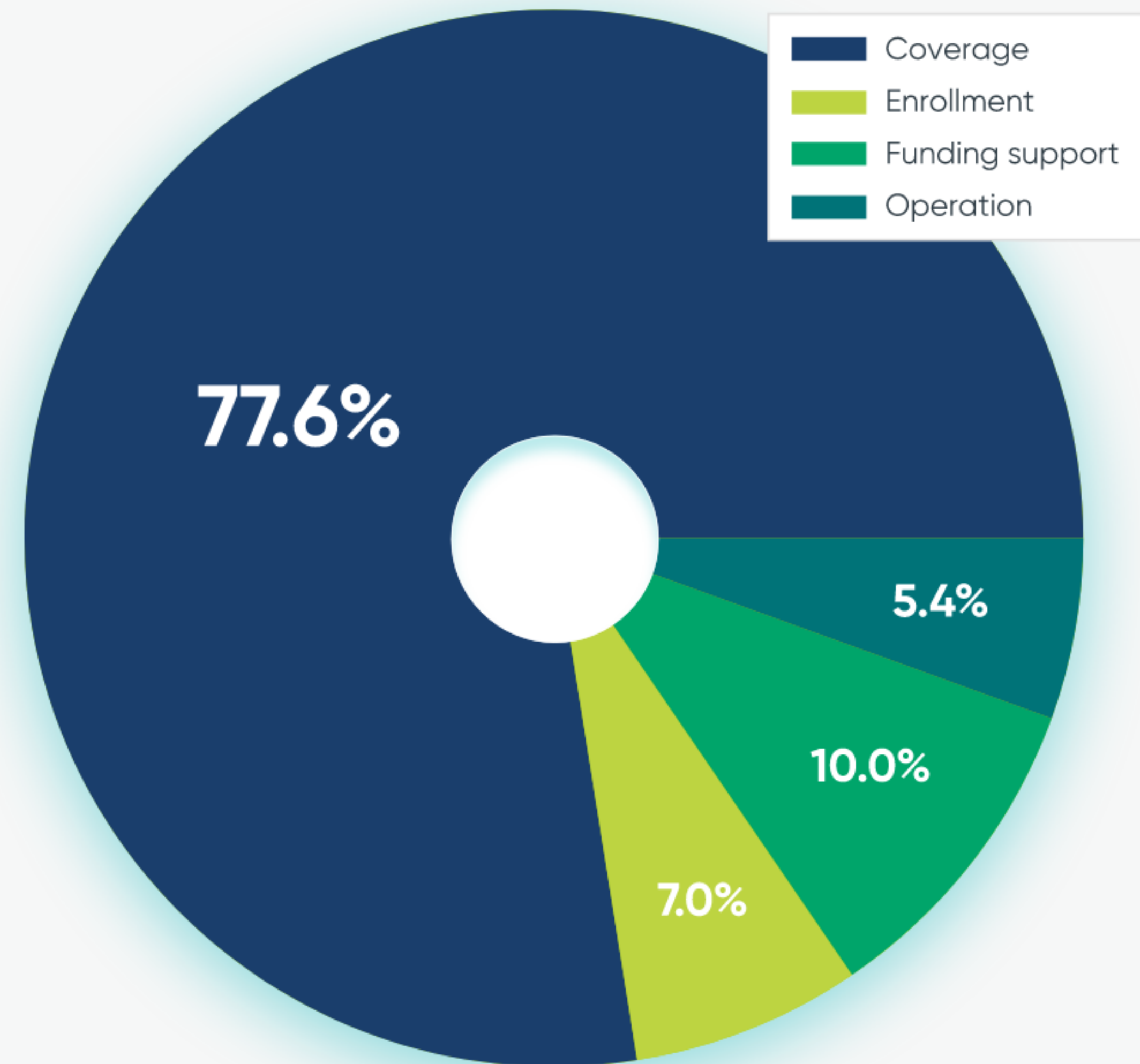
## Operation

Patients still face challenges after they've secured coverage and funding for their treatment. Discontinuations in this stage suggest a need for better clinical care coordination.

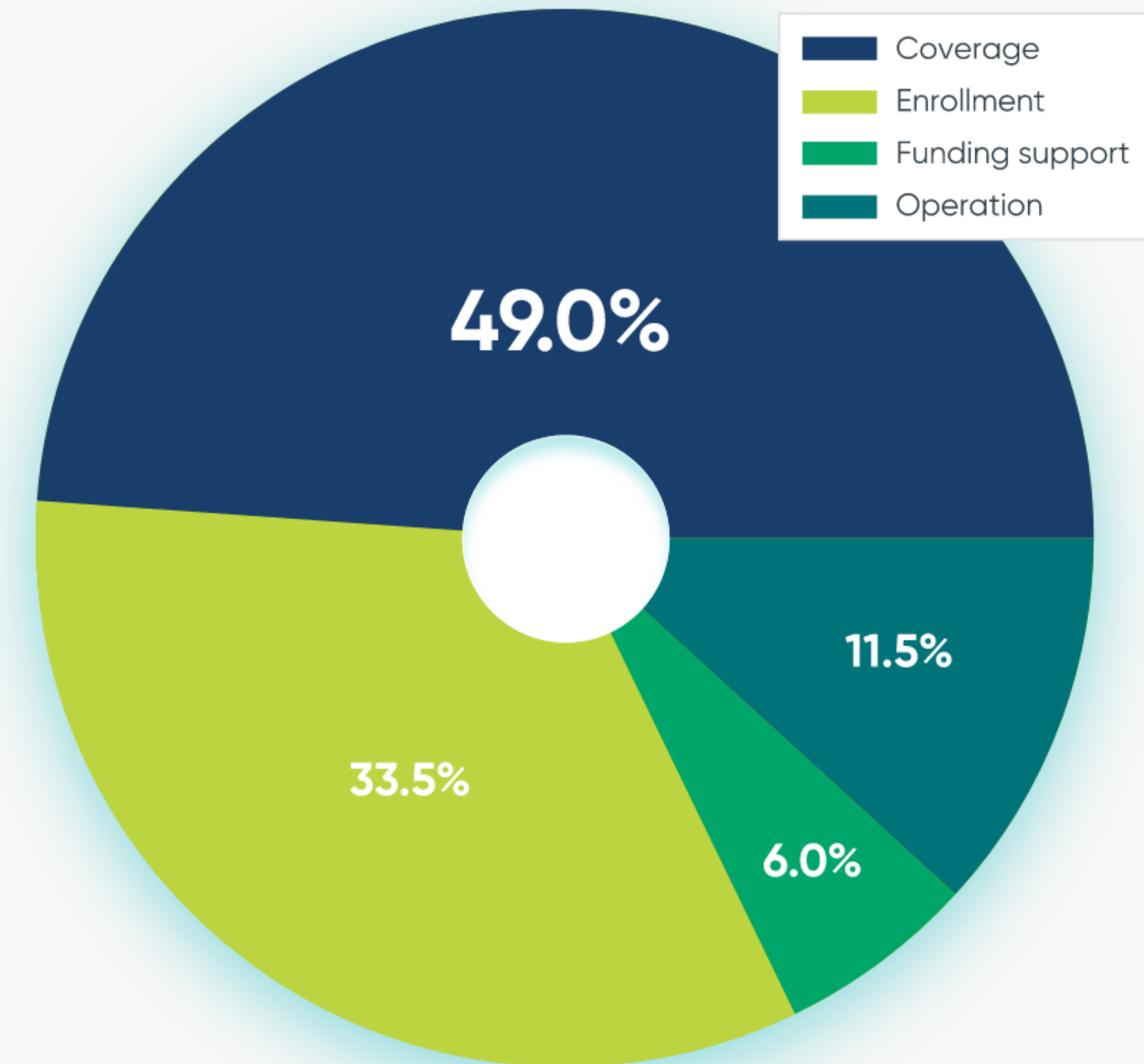


## Patient's stage at time of abandonment

Non-life threatening



Life threatening





# A deep dive into immunology brands

Roughly half of the brands in the non-life-saving drug category specialize in immunology therapies, and many of those companies provide biologics. Many patients drop off at various points in the immunology patient journey, with some brands seeing a majority of drop-offs related to coverage issues.

## Unique challenges

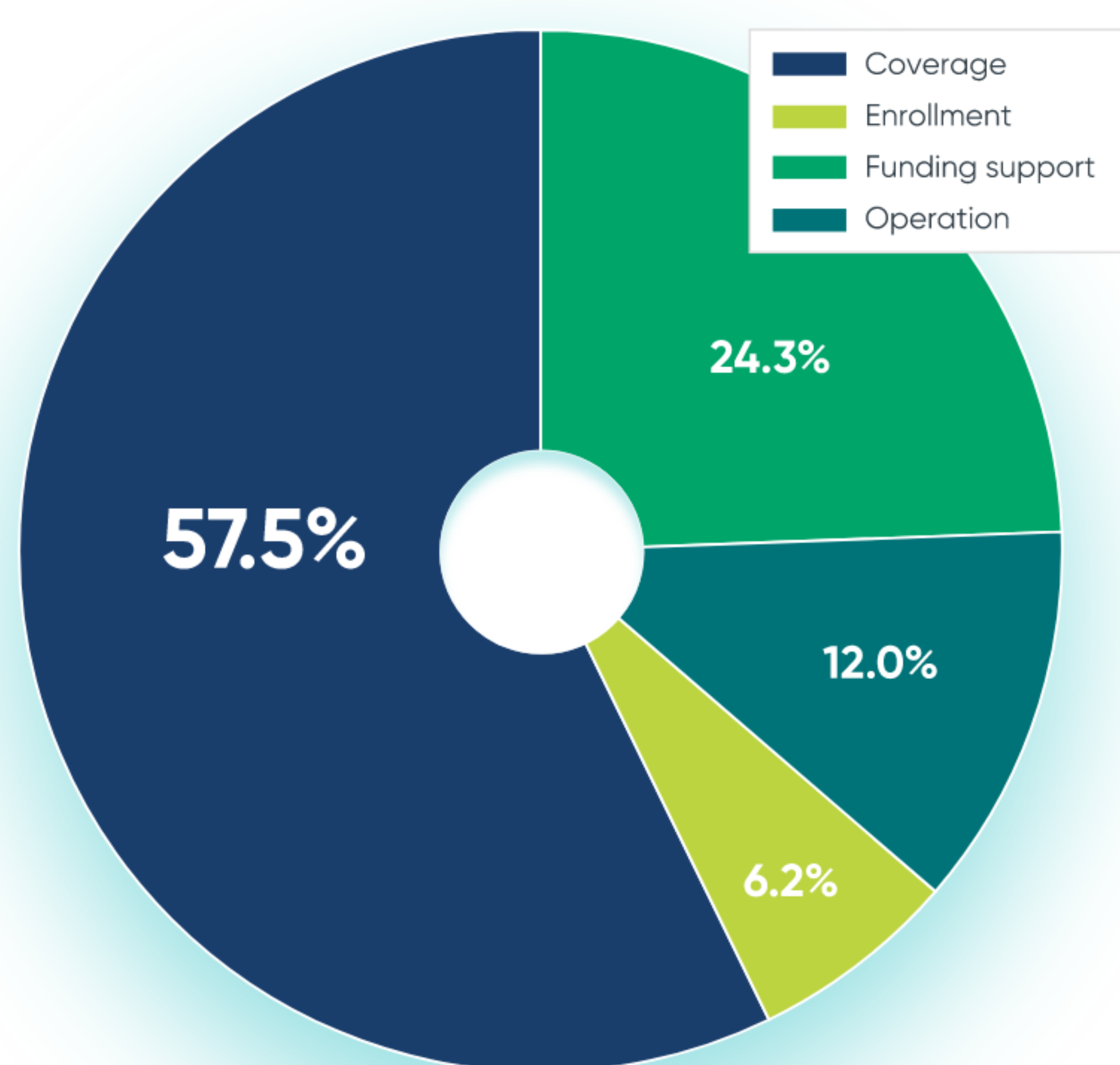
A patient starting a biologic or other specialty drug faces a number of challenges that can contribute to poor conversion, including:

- Issues with therapy initiation and reimbursement; it's hard to keep track of the prior authorization process and to access resources like patient support programs (PSP) and financial assistance
- Patient fear and anxiety, including fear of needles or adverse events
- Time-consuming treatment protocols; many patients struggle to track infusion or injection sites
- The need for multiple follow-ups; patients often have numerous questions and concerns about their treatment experience
- Ongoing psychological barriers
- A long waiting period before patients see results

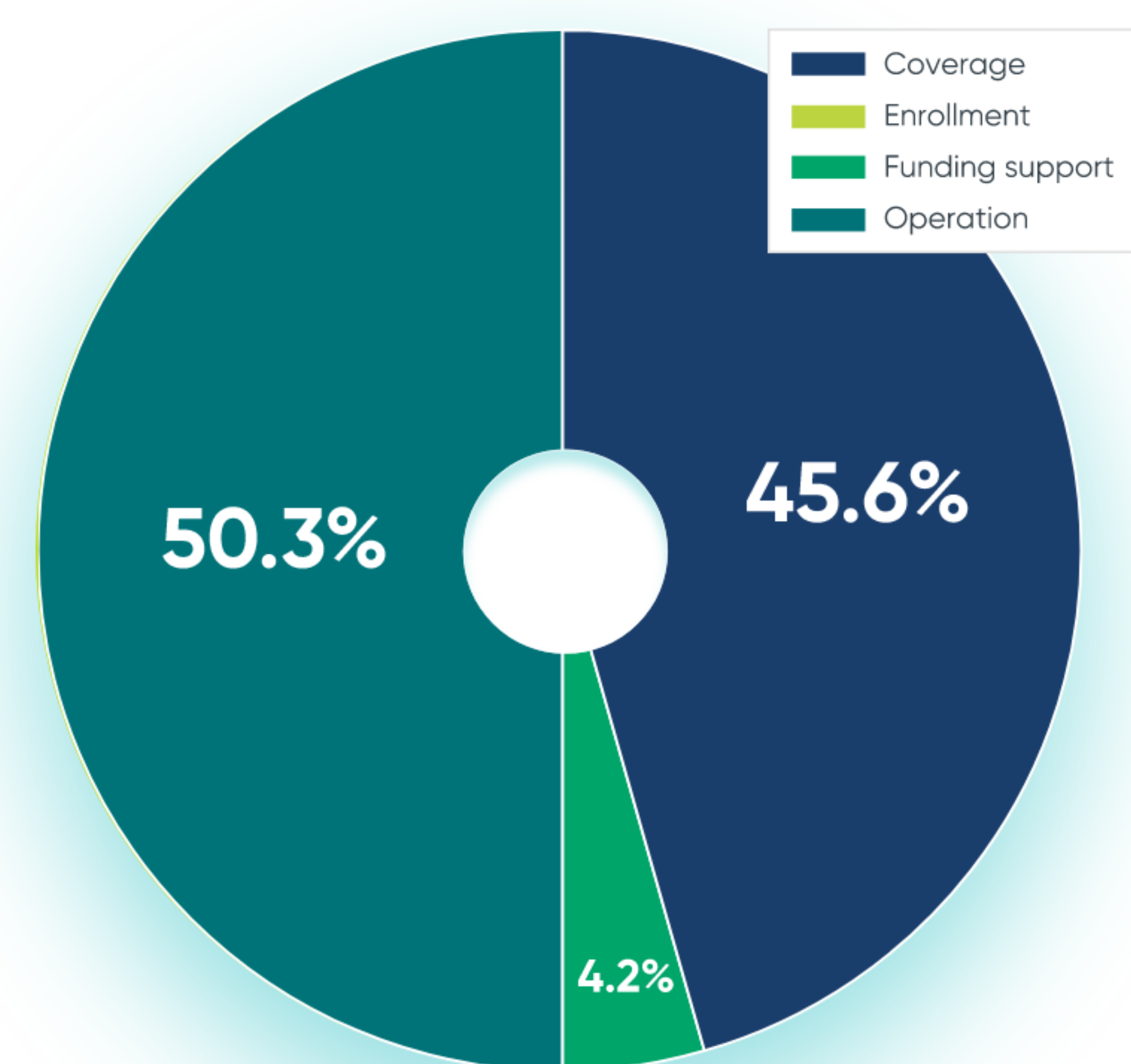
## Variation in causes of abandonment and discontinuation

Abandonment of immunology therapies is concentrated within the coverage and funding stages, while issues in operations are a main driver of discontinuations. There are a variety of reasons for abandonment and discontinuation within each of these stages.

Abandonments in immunology (n=75,946)



Discontinuations in immunology (n=45,945)



### ENROLLMENT

Just 6% of abandonments occur during the enrollment phase. This may be due to multiple prescriptions being written for the same condition. For example, an immunologist may provide a prescription for both a topical and an injectable therapy, and the patient chooses only to fill the topical, which provides enough relief.

### COVERAGE

Coverage is a major cause of both abandonments (58%) and discontinuations (46%) in immunology. Market access-related issues are common in immunology and coverage issues play a big role in poor conversion. Payers are likely to have more stringent requirements for patients to gain authorization within the autoimmune category than oncology, for example. The prior authorization process in this therapy area can be complex and may prove too burdensome for many providers to navigate. Meanwhile, many therapies are simply not covered by many plans.

### FUNDING SUPPORT

The inability to pay for a therapy is a significant driver of abandonments within immunology, accounting for 24% of the drop-off. Even after patients secure insurance, there may be significant deductibles, copays or other forms of cost-sharing that make it difficult for patients to access their therapies. While there are a variety of funding options to support patients, from Rx discount cards to drug financial assistance programs, many patients who would qualify never seek them out. According to a 2020 survey, 52% of patients ask their providers about affordability programs while 29% just go without their medications.<sup>2</sup>

### OPERATIONS

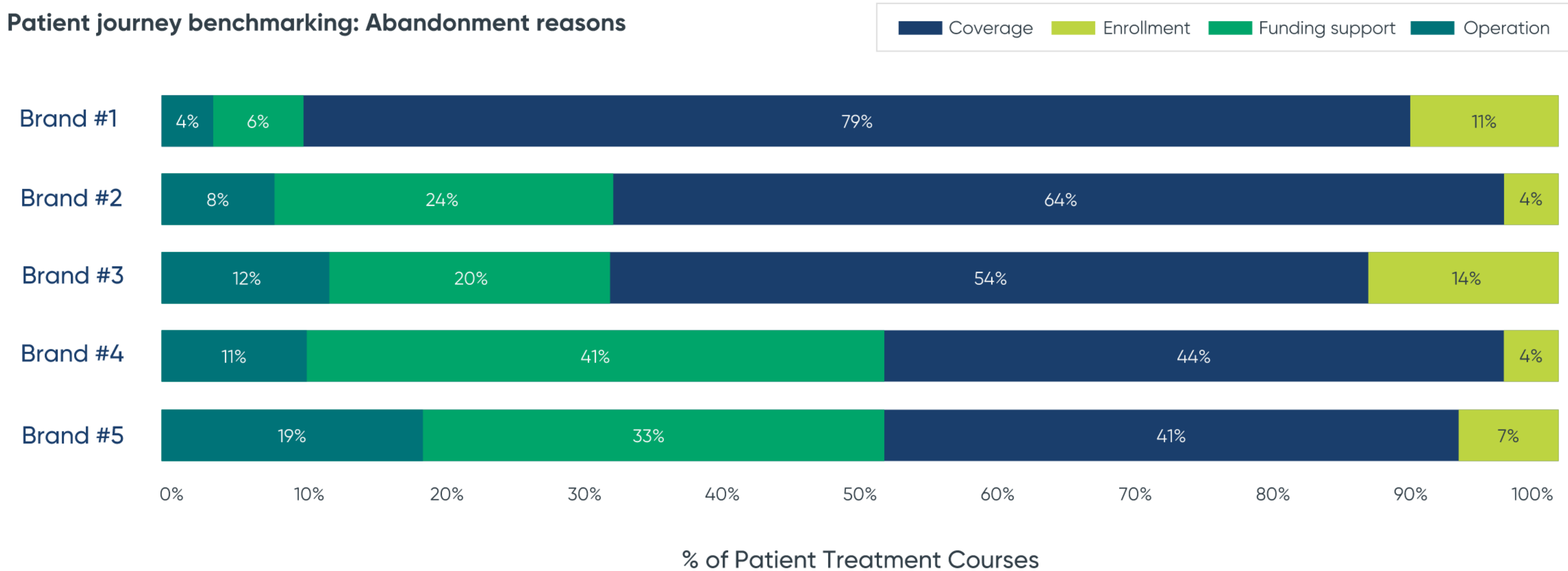
A significant portion of abandonments take place in the operations stage, and half of all discontinuations occur then. This may include changes in therapies, new prescriptions, perception of efficacy or tolerance, and many more. BrightInsight's digital Disease Management Solution can provide valuable data and insights to track issues in the patient journey that may be causing drop-offs, and provide the needed support to keep patients adherent, such as treatment reminders, adverse event and symptom tracking and more.



## Significant variation by brand

Brand-specific approach can help prevent abandonment

### Patient journey benchmarking: Abandonment reasons



This graph illustrates that while the set of tactics that specialty brands can utilize to address these barriers may be similar across brands, the optimal mix of these tactics should vary significantly. Brand teams struggle with how to manage the relative investment in payer contracts, field access teams and digital solutions. These Claritas Rx benchmarks can uniquely help brand teams optimize the mix of access solutions to enhance the patient experience.

# BrightInsight patient companion apps to improve conversion

Patients who struggle to get coverage or find funding for their therapy are likely to drop off. Digital solutions offer an opportunity to improve conversion and get those patients the care they need.

There is no one-size-fits-all solution, but once companies determine where in the journey patients are experiencing challenges, digital solutions can be designed to solve the problems.

A companion app built on BrightInsight's Disease Management Solution can solve many issues that lead to poor conversion, including accelerating time to first fill and improving adherence and persistence with therapy.

As we've seen, coverage and funding are central to conversion in specialty drugs. It's still common for prior authorization and financial assistance to be managed through manual processes that increase time to fill and lead to abandonment.<sup>3</sup> Companion apps can help more people use patient support programs to qualify for and afford therapy while enhancing the overall patient experience with the brand.

A companion app can include patient support features, such as:

- Digital prior authorization tracking
- Real-time benefit investigation tracking
- Easy on-app registration and benefits verification for PSP/FAP/copay and access coupons
- Copay card management and registration
- Document exchange to mitigate access and out-of-pocket cost barriers

<sup>3</sup> 2022 Medication Access Guide. CoverMyMeds. Accessed April 2023.





## Resolving issues in disease management

Many issues lead to discontinuation after a patient has started a therapy. Companion apps can solve many disease management issues that cause poor conversion from the start of the patient journey onward, including:

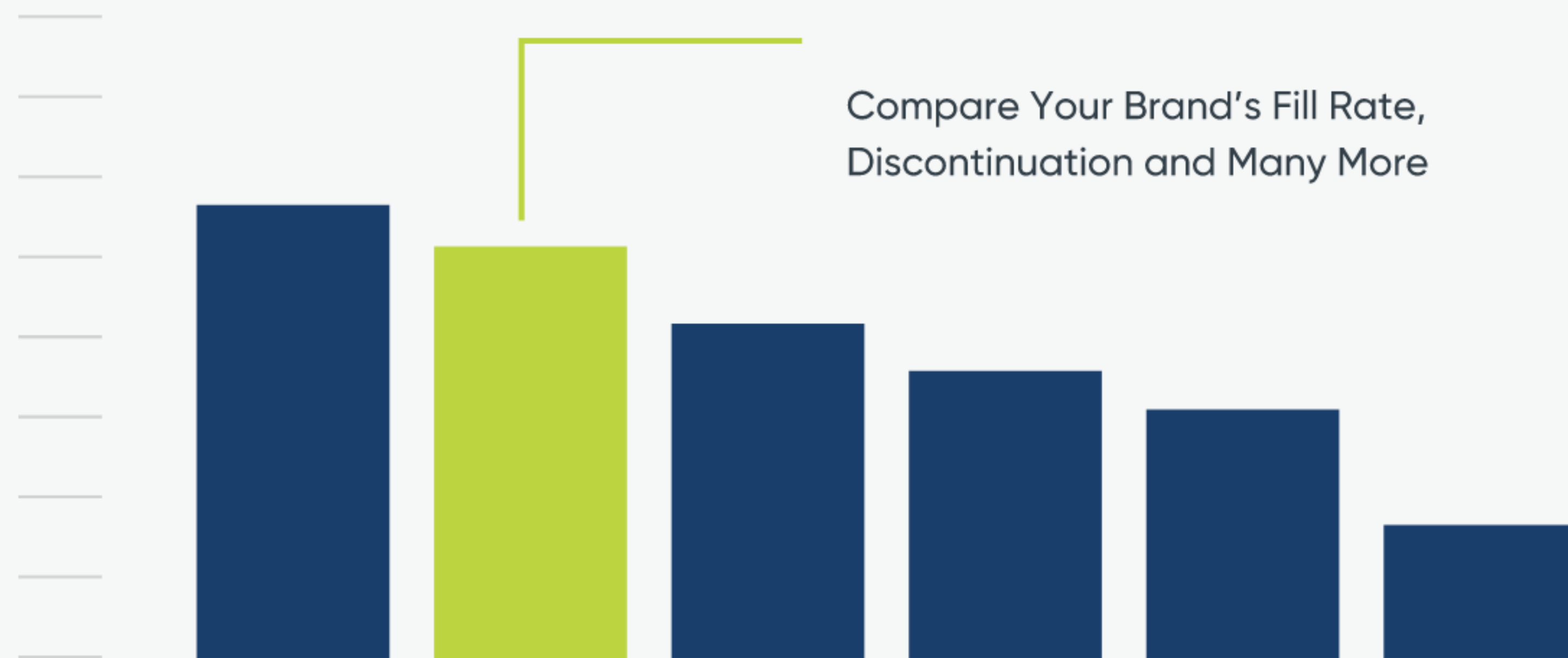
- Patient selection algorithms to help PCPs get the right patients on the right therapy
- In-app education and counseling with a nurse to help ease concerns related to self-injection or treatment efficacy and side effects
- Digital solutions that lead to stronger engagement, such as the ability to schedule and track injection administration
- Support for patients as they administer the injection to help them do so properly and have an optimal experience; this improves tolerability of the treatment
- Tools such as in-app timers to help the patient get the medication to room temperature and at-home SubQ body maps for infusion tracking
- ePRO and QoL surveys to help patients see the results of therapy, which increases adherence and persistence
- Medication management tools to help keep patients adherent, improve results and decrease side effects
- A place to log vitals, integrate diagnostics and view charts and trends from digital metrics; this can provide “aha” moments and create a feedback loop that shows the patient the impact of their therapies
- Digital patient support, such as prior authorization tracking, copay card management and registration and document exchange
- Data insights that help companies identify value leakage and track the effectiveness of their digital solutions



# Data and analytics from Claritas Rx

Claritas Rx's data can help identify conversion issues and validate and optimize solutions.

## Claritas Rx Brand Benchmarking



The Claritas Rx solution lets biopharma companies compare median turnaround times and fill rates by all payer types, amongst analog brands. Their analysis can help you answer the following: What are the biggest drivers of abandonment for your brand? How do access barriers compare between your brand and others? What can you do to help patients start and stay on treatment? The dynamic platform provides quick and easy access to data. Compare your brand performance against others in the market—and drill down into the “why”—to develop strategies that optimize your success.



**The data that is the backbone of our platform really comes alive once a patient is prescribed one of these treatments. A lot of data and analysis in this space focuses on finding the next prescription. But where we find there's a big unmet need around data and analysis is after the patient is prescribed, helping make sure that every patient that is appropriate for treatment gets on treatment and stays on as is appropriate."**

– Stuart Kamin, SVP of Corporate Strategy & Business Development, Claritas Rx

## Claritas Rx Patient Services Benchmarking



The Claritas Rx solution enables you to compare your brand's performance metrics with benchmark data they have gathered to identify issues and give you a sense of what good looks like. Claritas Rx can tailor their analytics to help you explore a variety of metrics, including understanding the impact that physician experience and product maturity may have on first-paid shipments over time. With Claritas Rx, you'll have the insights to benchmark partner performance.



**BrightInsight has invested heavily in our platform to enable seamless integrations with innovative companies to enhance our biopharma and medtech customers' digital health solutions. Through this partnership, our customers can access Claritas Rx's proprietary data and analysis right in the BrightInsight Analytics Dashboard to track conversions and measure the effectiveness of digital interventions. It's a perfect example of how integrating data across two compelling platforms can provide more value to patients, clinicians and our life sciences customers."**

– Kal Patel, MD, CEO & Co-Founder, BrightInsight



# Partners you can count on

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## About Claritas Rx

Claritas Rx helps specialty biopharma companies gain actionable insights to positively support patients through access to life-changing treatment. Claritas Rx offers a unique blend of deep domain expertise combined with proprietary analytics and curated specialty data sets, enabling organizations to maximize the value created by innovative medicine. At Claritas Rx, customer satisfaction is a part of everything we do, which is why more life sciences organizations rely on us daily.



## About BrightInsight

BrightInsight provides the leading global platform for biopharma and medtech regulated digital health solutions. When speed matters, we help companies accelerate time to market for regulated digital health offerings across therapeutic areas, including apps, healthcare provider interfaces, analytics dashboards, algorithms, medical devices, connected combination products, diagnostics and Software as a Medical Device (SaMD).

BrightInsight replaces the need for lengthy and complex “build from scratch” implementations by offering configurable applications and a proven platform built under a Quality Management System to support global security, privacy and regulatory requirements. When building digital health products on the BrightInsight Platform, compliance is future-proofed as intended use changes scale across geographies.

