Bringing Healthcare Home

The Current State of Prescription Delivery

In early 2020, prescription delivery was already on the rise. Then, as COVID-19 spread across the globe, delivery became a necessity.

But understanding your prescription delivery options – whether you are a pharmacist, provider, or patient – can be difficult. We've created this report for that reason.

Delivery is a necessity, not a luxury. It can be the difference between a patient keeping up with their drug regimen and giving up on it altogether.

Improving adherence to therapy improves public health and leads to a lower overall healthcare spend.

Patients Need Delivery

- Improves adherence
- Provides convenience
- Gives patients greater control over their own care

A wide range of patients can benefit from a reliable delivery solution.

Telehealth patients	25% of patient consultations during the pandemic were telehealth visits.
Older adults	Adults over 65 years of age are more likely to take multiple maintenance medications.
Caregivers	Prior to the pandemic, 30% of an in-workflow solution's deliveries were signed for by someone other than the patient, such as a parent, nurse, caregiver, or guardian.
Patients with certain circumstances	Working long hours, living too far away from a pharmacy, lacking reliable transportation, or being busy could keep a patient from picking up their prescription on time.
Patients with chronic conditions	In 2014, 42 percent of Americans had not one but multiple chronic conditions.

Delivery can also help pharmacies and health systems stay competitive in a complex market.

Pharmacies are more likely to remain in a PBM's preferred network if they can ensure patients have reliable, consistent access to their maintenance medications.

Pharmacies & Health Systems Need Delivery

- Reduces prescription abandonment
- Improves inventory management
- Helps maintain standing with PBMs

If you've determined that prescription delivery can benefit your business or your own health, you first need to know your options.

Even businesses with an existing delivery solution may wish to explore their options in order to increase volume and save valuable time.

Patient Solutions

Volunteer Couriers	Free, same-day service	Limited service
Brick & Mortar + Shipping/Courier	Standard shipping usually free	Additional fees for expedited medications, like antibiotics and insulin
Brick & Mortar + In-House Driver	Same-day service usually free	Difficult for pharmacy to implement
PBM Mail-Order	Automatic refills	Limited service; not all medications available
E-Commerce Platform	Lower prices, ease of use	Limited service; may lack accreditation
Patient-Initiated Third Party	May allow patient to use trusted local pharmacy	May be confusing to request delivery through third party

Pharmacy Solutions

Courier/Logistics Partners	Manage drivers, routing, delivery notifications	Courier partner may need guidance from pharmacy
In-Workflow	Saves time and effort; pharmacy controls price of delivery, service levels, service windows, delivery data	May be outside of budget for smaller pharmacies

For business owners, consider the elements most important to your store and patients to help you choose an appropriate delivery solution.

If seeking an in-workflow solution, make sure to ask whether the delivery provider is already integrated with your pharmacy software system. If not, encourage your software system vendor to pursue integration.

Delivery Solution Essentials: Service Levels

- On-demand delivery
  - On-demand delivery can make your pharmacy more attractive to current and new patients.
- Same-day/next-day delivery
  - Patients have come to expect delivery within one or two days. Offering quick delivery can be a major differentiator for pharmacies competing with retailers that only offer shipping.
- Shipping
  - Shipping is affordable, useful for refills, and helps pharmacies attract and retain patients who live too far away for on-demand or same-day delivery.

Delivery Solution Essentials: Patient Solutions

- Patient delivery notifications
  - Patients want to know when they can expect a delivery, especially if their medication is expensive or temperature-sensitive.
- Nationwide courier network with redundancy & flexibility in key regions
  - Many delivery solutions are very geographically limited, meaning that many pharmacies and patients will not benefit from their services. A nationwide network ensures widespread benefit and timely delivery.
- Privacy and security measures (tamper-evident packaging, etc.)
  - Any legitimate delivery solution should ensure that patients' health information is protected.

Delivery Solution Essentials: Pharmacist Experience

- In-workflow option
  - Delivery solutions that integrate with a pharmacy's software can save time and effort for staff, streamline data storage, and provide more features than web portals.
- Digital capture of signatures and copay information
  - Paperless signature capture and storage are useful in the case of an audit. Digital capture also reduces the need for drivers to return sensitive patient data to the pharmacy.
- Package tracking
  - Tracking provides peace of mind for pharmacy staff.

The full industry report includes charts comparing the businesses operating within the previously-mentioned delivery-solution categories.

The following slides offer a few highlights from each category.

Courier Partners

Deliv Rx

Dropoff Delivery

Roadie Delivery

Courier Partners

What they can do:
- Give pharmacies the power to offer same-day or on-demand deliveries
- Let pharmacies set the price for delivery

What they can't do:
- Specialize in prescription delivery; with the exception of Deliv Rx, they deliver a wide range of goods and materials
- Integrate with pharmacy software
- Provide pharmacy with long-term storage of delivery data

In-workflow

RxTrax

ScriptDrop (Pharmacy integration solution)

In-workflow

What they can do:
- Give pharmacies the power to offer shipping, same-day, and on-demand deliveries
- Let pharmacies set the price for delivery
- Integrate with pharmacy workflow to make delivery easy
- Ensure long-term storage of delivery data within pharmacy software

What they can't do:
- Allow patients to initiate requests on their own

Volunteer Couriers

Pills2Me

The Shopper Next Door

Invisible Hands

Volunteer Couriers

What they can do:
- Provide free, on-demand, contact-free delivery of prescriptions and groceries to seniors

What they can't do:
- Serve patients outside of their limited service areas (Metro areas in NY, NJ, CT, NV, WA)
- Provide a means of requesting deliveries other than online forms
- Provide chain-of-custody records in case of lost or damaged prescriptions

Brick & Mortar + Shipping/Couriers

CVS

Walgreens/Walgreens Express

Walmart

Costco Pharmacy

Costco Pharmacy + Instacart (Costco members only)

Brick & Mortar + Shipping/Couriers

What they can do:
- Provide free standard shipping nationwide
- Offer web portals or mobile apps for ease of use

What they can't do:
- Offer affordable same-day or on-demand delivery
- Generally, most cannot handle refrigerated or specialty medications

PBM Mail Order

Caremark

Express Scripts

OptumRx

PBM Mail Order

What they can do:
- Provide free standard shipping nationwide

What they can't do:
- Offer any same-day or on-demand delivery
- Handle refrigerated, specialty, or acute medications

E-Commerce

Healthwarehouse.com

Capsule

Alto

PillPack

NowRx

Medly

Honeybee

Blink Health/Blink Health Plus

CaryRx

CareZone

divvyDOSE

E-Commerce

What they can do:
- Some provide free standard shipping nationwide; others provide free same-day delivery to a limited service area
- Some offer telehealth services or adherence packaging
- Most accept insurance

What they can't do:
- Shipping-only solutions cannot handle refrigerated, specialty, or acute medications
- Same-day solutions only serve specific cities or states (Primarily coastal regions)

Patient-Initiated

NimbleRx

GetMyRx

ScriptDrop (Patient solution)

Phil Rx (Specialty meds only)

Phox Health

ZipDrug (Medicare Advantage patients only)

Patient-Initiated

What they can do:
- Offer same-day or on-demand delivery
- Provide a web portal, mobile app, or SMS process for patients

What they can't do:
- Most do not operate nationwide
- Some do not provide courier service to pharmacies, instead only contracting with pharmacies that already provide delivery

Interested in ScriptDrop's solutions? Let's compare them.

In-workflow pharmacy solution	Patient solution
Pharmacy initiates delivery request	Patient initiates delivery request
Pharmacy process occurs within pharmacy software	Pharmacy process is manual, requires faxing and/or use of ScriptDrop portal
Delivery data storage	Delivery data storage
Multiple service levels available	Only same-day service level available
Development work required for implementation	Development work only required if pharmacy needs customizations
Nationwide	Nationwide
Pharmacy can opt to buy tamper-evident packaging from ScriptDrop	
Pharmacy will receive free social media kit for marketing purposes; can opt to buy signage	

Despite patients' increasing need for delivery and copious industry research demonstrating its positive impact on adherence, there are obstacles to the expansion of delivery.

Patients: Until recently, patients did not know delivery was an option

Pharmacies: Often reliant on in-store customers for revenue, due to PBM practices like low reimbursements or retroactive DIR fees

PBMs: Only promote delivery via their own mail-order pharmacies.

The COVID-19 pandemic has changed the healthcare industry landscape.

It was already clear that reliable prescription delivery had the potential to impact the quality and cost of American healthcare for generations to come.
Now it is clear that reliable prescription delivery *must* become the new normal.

Takeaways

- The pandemic demonstrated the significant need for prescription delivery. The fact that major pharmacy chains like CVS and Walgreens implemented free delivery made that need abundantly clear.
- Many patients stand to benefit from delivery.
- Choosing a delivery solution for your business or for yourself requires a good working knowledge of the current options.
- There are challenges to implementing delivery, but its positive impact on patient health, overall healthcare spend, and pharmacy differentiation makes it more than worthwhile.

Thanks for your time!

Thank you for your interest in prescription delivery. To learn more, read the full report on our website at https://report.scriptdrop.co, reach out to your ScriptDrop contact, or email us at info@scriptdrop.co

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