

The Impact of COVID 19 on Patient Support Programs

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Background & Objective

The world has continued to evolve following the initial Coronavirus (COVID-19) outbreak in North America in March 2020. Despite the evident adjustment of society to the 'new normal' some sectors, particularly the Pharmaceutical and Healthcare industries, remain especially concerned about the ongoing impact of COVID-19 on vulnerable patient populations. In an effort to better understand the impact of COVID-19 on Patient Support Programs (PSPs), Waldron & Associates conducted a multi-phase survey series throughout the COVID-19 pandemic.

Key findings of the September 2020 survey highlighted that, even six months following the initial COVID-19 outbreak, PSPs have continued to play an integral role for the Pharmaceutical Industry. PSPs have acted as an essential tool for navigating continuity of care throughout the COVID-19 pandemic, therefore helping to establish PSPs as a fundamental aspect of patient access and care. Findings from the April 2020 and June 2020 surveys were further emphasized by September 2020 survey respondents, particularly as the Pharmaceutical Industry prepares for the approaching 'second wave'.

Methods

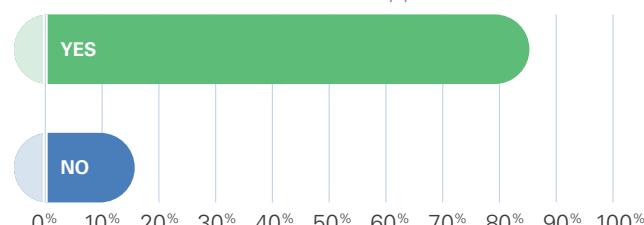
The Phase One survey was successfully piloted in April 2020, just weeks after the initial COVID-19 outbreak in Canada and the United States. An accompanying Phase Two survey was conducted in June 2020, to better understand the evolving impact of COVID-19 on PSPs. Finally, the Phase Three survey was rolled out in September 2020. The September 2020 survey received 28 responses, with respondents belonging to more than 20 different companies, largely Pharmaceutical Manufacturers or PSP Program Suppliers/Providers. The majority of respondents (79%) were Pharmaceutical Manufacturers. Three Industry White Papers featuring the Phase One April 2020 survey results, the Phase Two June 2020 survey results and the Phase Three September 2020 were published by Waldron & Associates in 2020.

The respondents each had programs located in Canada and varied in size, running anywhere between a single program to over 10+ programs.

Results

Has COVID impacted the role that PSPs play in the Pharmaceutical Industry?

Answered: 26 Skipped: 2



If yes, do you think these changes will remain/ continue into the "New Normal"?

Answered: 26 Skipped: 2

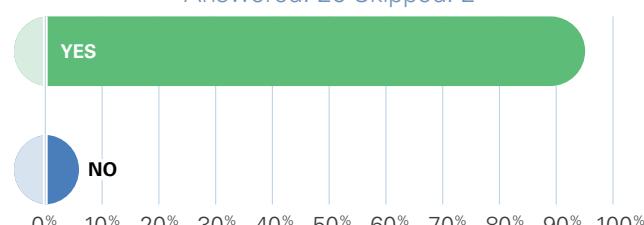


Figure 6: (a) 85% of September survey respondents reported that COVID-19 has impacted the role of PSPs in the Pharmaceutical Industry. (b) Over 95% of respondents reported that these PSP changes will continue throughout the new normal.

How has COVID-19 impacted your PSP's Services in the past 2 months?

Answered: 27 Skipped: 1

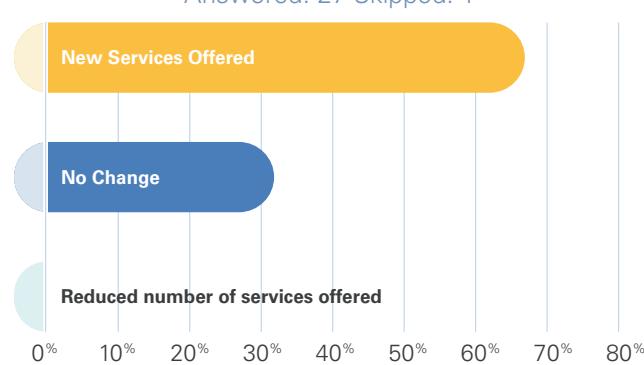


Figure 4: 67% of survey respondents reported offering new PSP services over the past two months, while none reported a reduction in the number of services offered.

Reflections on COVID – looking back over the past months since COVID began, do you think your organization has changed?

Answered: 28 Skipped: 0

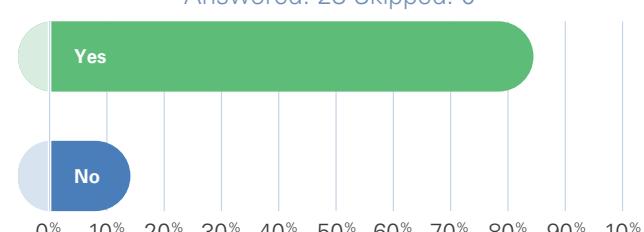


Figure 1: 86% of September survey respondents reported changes in their organizations over the past six months, as a response to COVID-19.

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3. "Insights of COVID-19 on Patient Support Programs in Canada," Innomar Strategies, Webinar, September 30, 2020.
4. Yasasvi Popuri, Jay Lichtenstein, & Ganesh Vedarajan, "Patients and physicians brace for flu season amid COVID-19," ZS, October 8, 2020, https://www.zs.com/insights/patients-and-physicians-brace-for-flu-season-amid-covid-19?utm_source=internal-insights&utm_medium=email&utm_campaign=patients-and-physicians-brace-for-flu-season-amid-covid-19&utm_term=pharmaceuticals-and-biotech&utm_content=pharma&mkt_tok=eyJpIjoiT1RKak16SmhaREPsT-mpObCIslnQiOjaQzJ-saE5yQkxDlpvNkJKuk5MRDAwZytCQ2lHaH-B1ZnFpbFISMXQyWszK3JoK2pRyvPUGZwckVDWDJ1c1BNT-0J2RDM-wURDeTzqRGI5RXEY0FVTDPRU2RNandLWnRpR2xw-TEVjZU5iR2syd29LQk5pUvdYOvhUS2hhRHlrcCJ9
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6. Mark C. Perna, "Building Resilience When You're Pandemic-Fatigued," Forbes, October 7, 2020, <https://www.forbes.com/sites/markcperna/2020/10/07/building-resilience-when-youre-pandemic-fatigued/?sh=3e78ddd24345>
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8. Pranav Srivastava, "How COVID-19 is shaping the oncology customer experience," ZS, October 12, 2020, <https://www.zs.com/insights/how-covid-19-is-shaping-the-oncology-customer-experience>



Figure 2: A summary of organizational changes made in adjustment to the new normal.

Conclusion

In response to the ongoing COVID-19 related challenges uncovered by the September 2020 survey, final recommendations focused on the creation of well-paced operation strategies in preparation for the prolonged impacts of the COVID-19 pandemic, particularly the second wave. Specifically, organizations should:

1. Prepare for the end of 2020, the beginning of 2021 and beyond.
2. Formulate effective training plans for virtual field employees so that all field staff are informed and up to date on ongoing program changes.
3. Continue to review offered services and adapt with patient needs, as dictated by the second wave.

Programs should also plan for current patient needs and for those that may arise in the future, including any new services and their management strategies. Finally, it is essential that programs continue to communicate regularly, both internally and externally, so that patients can remain continually supported. Successful programs will ensure they continue to review, revise and refocus their business plans to best prepare for the evolving pandemic and the post-COVID future.

PSPs, as well as the Pharmaceutical Industry in general, have an opportunity to evolve within the 'new normal'. This evolution could involve engaging and collaborating with different services, models or partnerships, particularly those that may have been challenging to access prior to COVID-19. Although the Coronavirus pandemic has drastically impacted and challenged the Pharmaceutical Industry, the evolving 'new normal' and the impending second wave provide an opportunity to reshape the Pharmaceutical landscape for the better. As the COVID-19 pandemic endures beyond the second wave, there is no doubt that PSPs will continue to play a key role in reshaping this new landscape and will support patients throughout the crisis.

how-covid-19-is-shaping-the-oncology-customer-experience

9. "COVID-19 latest updates: Rod Hart, Chief Customer and Marketing Officer, speaks about the upcoming holiday season," Canada Post, Video, Accessed November 10, 2020, <https://www.canadapost.ca/cpc/en/our-company/news-and-media/corporate-news/coronavirus-disease-covid-19.page>
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