NASP | PATIENT SATISFACTION SURVEY

Actionable Insights from the
National Association of Specialty Pharmacy

2023 Patient Satisfaction Survey Results

An analysis of data from pharmacies across the industry reveals new opportunities to improve patient satisfaction

Introduction

The National Association of Specialty Pharmacy (NASP) is a 501(c)(6) trade association representing all stakeholders in the specialty pharmacy industry and works to unify the voices of specialty pharmacy in the U.S. Its members include the nation's leading specialty pharmacies, pharmaceutical and biotechnology manufacturers, group purchasing organizations (GPOs), distributors, and other industry stakeholders. NASP is dedicated to education, certification, federal and state level policy advocacy, and fosters connectivity amongst all specialty pharmacy industry stakeholders. The increasingly diversified specialty pharmacy marketplace has patients, prescribers, payers, pharmaceutical manufacturers, and pharmacies clamoring for statistically validated metrics which focus on the consistent measurement of quality and satisfaction of patient care services.

Patient satisfaction surveys can be used to demonstrate a specialty pharmacy's capabilities, (i.e. clear and concise communication, timely and accurate delivery of prescriptions, assistance with billing and insurance), and can be used internally to drive process improvements and operational enhancements.

NASP strongly supports a statistically validated methodology for benchmarked patient surveys to help our members and the patients they serve better understand and continuously improve patient satisfaction levels. Depending on the survey tool selected, it is important to consider the inherent risks. To avoid exposing unfounded weaknesses or deficiencies that are a result of the flaws of the survey tool construct rather than an indicator of the pharmacy's true performance, it is important to use a standard set of questions and metrics to measure performance.

Specialty pharmacies historically have employed a wide variety of patient satisfaction and engagement survey models and metrics, most of which were either internally developed or not specific to specialty pharmacies. These disparate measurement tools made it difficult for payers, manufacturers, patients, providers, and even pharmacies themselves, to adequately understand and benchmark their performance against other specialty pharmacies.

As a result, in August 2016, NASP leadership determined that a standardized survey tool was needed to establish performance benchmarks in specialty pharmacy patient satisfaction. NASP engaged SullivanLuallin Group (SLG), a leading healthcare consulting firm, to develop a survey tool that would become the "gold standard" for its members.

This document outlines the findings resulting from the patient satisfaction survey conducted from January 1, 2023, to December 31, 2023. The survey was designed to measure key performance areas affecting patient engagement including patient access to medication and pharmacist, prescription fulfillment, pharmacy/staff performance, billing, overall satisfaction and willingness to refer friends or family members.

Survey Goals and Attributes

NASP and SLG developed the Patient Satisfaction Survey Program with the following goals in mind:

- Create an independent, non-biased third-party survey that would serve as the industry standard

- Offer pharmacies and industry stakeholders a broad understanding of what drives patient engagement and satisfaction across the industry

- Provide consistent satisfaction metrics and reporting required by pharmaceutical manufacturers, accrediting bodies, and payer clients

- Conduct an advanced analysis of the survey data to determine the specific drivers of patient satisfaction for each participating pharmacy and to help these organizations identify opportunities to better demonstrate their impact, improve their patient education, and optimize their service offerings

- Lay the foundation needed to give member pharmacies a stronger collective voice in advocacy efforts with government entities such as Centers for Medicare and Medicaid Services (CMS), as well as private payers

This survey was also thoughtfully developed to meet the needs of participating pharmacies through the following key attributes:

- Ensure statistically sound data and standards

- Maintain compliance with specialty pharmacy accreditation organizations

- Utilize a standardized set of questions aligned with payers' and manufacturers' contractual requirements of specialty pharmacies

- Offer a cost-effective survey solution for all pharmacies through efficiencies of bundled mailings and/or electronic distribution methods and response data entry

- Provide in-depth, customized analysis of survey data to each pharmacy

- Provide for blinding of any pharmacy-specific data, to ensure that each pharmacy's own data will not be shared at an identifiable level

- Secure and safeguard patient data, ensuring that all data collected and reported is also not identifiable.

Participating Organizations

BDRN, LLC

AMBER SPECIALTY PHARMACY

Jefferson Health
HOME OF SIDNEY KIMMEL MEDICAL COLLEGE

UC San Diego Health

Albertsons Companies
Specialty Care

ardon

Baystate Health

Altru HEALTH SYSTEM

JOHNS HOPKINS MEDICINE

MONUMENT HEALTH
HOME+
SPECIALTY PHARMACY

SENDERRA Specialty Pharmacy

FAIRVIEW

Carolinas HealthCare System is
Atrium Health

CHRISTUS Specialty Pharmacy

MARKET 32 BY PRICE CHOPPER

Price Chopper

TGH Tampa General Hospital
PHARMACY

blue sky SPECIALTY PHARMACY

ALLIED HEALTH SOLUTIONS
A DIVISION OF WVU Medicine

SYNERGEN Rx

UMMC

THE University of Vermont
MEDICAL CENTER

PromptCare Companies
High-tech. High-touch. Better care.

ARJ Infusion SERVICES
Where Caring is the Ultimate Factor.

BioTek reMEDys

EVERSANA

Walmart

Saint Luke's

Atrium Health
Wake Forest Baptist

Scripps

Nebraska Medicine
SERIOUS MEDICINE. EXTRAORDINARY CARE.

Hartford HealthCare

RUSH UNIVERSITY MEDICAL CENTER

UC DAVIS HEALTH

SYNERGEN Rx

MedStar Health

VIVO Health Pharmacy

Methodology

A goal of 400 responses per pharmacy was set based on industry standards. To reach this goal, it was determined that a minimum of 2,500 surveys would need to be distributed for each pharmacy to patients who filled a prescription during the calendar year (January 1, 2023 to December 31, 2023). For member pharmacies that had a patient population smaller than the minimum 2,500, a census survey of all available patients was conducted. For member pharmacies able to provide records in excess of the 2,500 minimum, a stratified sample was pulled to ensure that each sample population was representative of the member's patient population. Approximately 187,420 surveys were distributed via either mail, email and/or text. Pharmacies using online distribution had the option to send a reminder email to non-responders.

Analysis

New/Returning Pharmacies:

A total of 27,549 surveys were returned before the cut-off date of February 29, 2024, from 35 participating pharmacies. This represents a response rate of 14.7%.

A breakdown of returns by New/Returning and Pharmacy Type are below.

	Number of Pharmacies	Number of Returns	Percentage of Returns
New	5	9,028	32.77%
Returning	30	18,521	67.23%
Totals	35	27,549	100%

Data analyses began with comparing mean scores for all questions between 2022 and 2023. Mean scores decreased from 2022 to 2023 on all survey items. Of the 33 survey items with decreased scores, 33 decreased statistically significantly at the 95% Confidence Interval.

The five questions with the largest significant decreases are presented in the table below. A table comparing mean scores for all survey questions between 2022 and 2023 is available in Appendix 1.

Significant decreases:

Item	2022 Score	2023 Score	t-score
A3. Our ability to return your calls in a timely manner	4.55	4.44	-11.233
A6. The professionalism of our staff	4.74	4.68	-9.985
A1. Your phone calls answered promptly	4.64	4.56	-9.815
A5. Your ability to obtain prescription refills	4.72	4.65	-9.789
A4. Clear and concise phone communication	4.64	4.57	-9.417

Overall dataset five smallest decreases:

Item	2022 Score	2023 Score	t-score
A2. Your ability to contact us after hours	4.32	4.29	-2.227
E3. Your experience with our pharmacy compared to other pharmacies you have used	4.67	4.64	-3.596
C3. Effectiveness/helpfulness of our website and/or app	4.51	4.45	-4.397
E6. Using any number from 0 to 10, where 0 is the least likely to recommend and 10 is most likely to recommend, how likely are you to recommend this practice to a friend or family member?	9.31	9.19	-6.084
C2. Promptness in resolving billing/insurance questions or problems	4.57	4.50	-6.194

The same analysis was performed again including only the pharmacies that returned to the program in 2023. Mean scores increased from 2022 to 2023 on two survey items, none statistically significantly. Mean scores decreased from 2022 to 2023 on 31 survey items, 6 statistically significantly. The questions with the most favorable changes (least decreasing scores) and the questions with the most significant decrease are presented in the table below. A table comparing mean scores for all survey questions from 2022 and 2023 for only returning pharmacies is included in Appendix 2.

Significant decreases:

Item	2022 Score	2023 Score	t-score
A3. Our ability to return your calls in a timely manner	4.55	4.44	-11.233
A6. The professionalism of our staff	4.74	4.68	-9.985
A1. Your phone calls answered promptly	4.64	4.56	-9.815
A5. Your ability to obtain prescription refills	4.72	4.65	-9.789
A4. Clear and concise phone communication	4.64	4.57	-9.417

Five most favorable changes:

Item	2022 Score	2023 Score	t-score
A3. Our ability to return your calls in a timely manner	4.55	4.44	-11.233
A6. The professionalism of our staff	4.74	4.68	-9.985
A1. Your phone calls answered promptly	4.64	4.56	-9.815
A5. Your ability to obtain prescription refills	4.72	4.65	-9.789
A4. Clear and concise phone communication	4.64	4.57	-9.417

The 2023 data was then split into new and returning pharmacies for mean score comparison. Returning pharmacy responses were significantly higher than those of new pharmacies on all survey items. The five questions with significant differences are presented in the table below. A table comparing all 2023 mean scores of new and returning pharmacies is included in Appendix 3.

Five most significant differences:

Item	New score	Returning Score	t-score
A3. Our ability to return your calls in a timely manner	4.26	4.53	20.956
A1. Your phone calls answered promptly	4.42	4.63	20.116
A5. Your ability to obtain prescription refills	4.53	4.71	18.151
A6. The professionalism of our staff	4.57	4.73	17.834
E1. Our practice	4.59	4.75	16.828

This result, combined with the significant increases in returning pharmacy scores from 2022 to 2023, suggests that new pharmacies largely contributed to the lower scores seen in 2023.

Pharmacy Type

The survey participants were associated with one of three categories, Academic Institution, Non-Academic Health System, and Independent Pharmacy. The breakdown of the three pharmacy types is identified in the table below.

Survey Participant Definitions

Academic Specialty Pharmacy: any Specialty Pharmacy that is owned and/or operated by a health system that is owned by or affiliated with an academic institution.

Non-Academic Health System Specialty Pharmacy: any Specialty Pharmacy that is owned and/or operat- ed by a health system that is not part of an academic institution.

Independent Specialty Pharmacy: any Specialty Pharmacy that has an ownership structure independent of a health system or academic medical center.

	Number of Pharmacies	Number of Returns	Percentage of Returns
Academic Institution	12	7,433	26.98%
Health System	12	8,270	30.02%
Independent Pharmacy	11	11,846	43.00%
Totals	35	27,549	100%

A ranking analysis was conducted taking the aver- age scores for all survey responses for each of the three pharmacy types. The Academic based specialty pharmacies scored two and a half a points higher than Non-Academic Health System based specialty phar- macies, with the independent specialty pharmacies scoring 5.6 points under the Academic based specialty pharmacies.

	Average Scores of All Survey Questions
Academic Specialty Pharmacy	93.9
Non-Academic Health System Specialty Pharmacy	91.4
Independent Specialty Pharmacy	88.3

A break-down by all survey measures shows that Academic Specialty Pharmacies scored higher on all items. Non-Academic Health System Specialty Pharmacies scored higher than Independent Specialty Pharmacies on all measures.

		Academic	Health System	Independent
Number of Responses		7433	8270	11846
Your Call to Our Specialty Pharmacy	A1. Your phone calls answered promptly	92.5	89.0	86.9
	A2. Your ability to contact us after hours	85.6	81.2	81.0
	A3. Our ability to return your calls in a timely manner	90.2	85.4	83.7
	A4. Clear and concise phone communication	93.6	90.5	85.4
	A5. Your ability to obtain prescription refills	95.0	91.6	88.5
	A6. The professionalism of our staff	95.2	92.7	89.3
	A7. Availability of medical information/ advice by telephone	92.5	90.6	87.1
	A8. Confidence and trust in this provider	94.4	92.7	88.4
Your Interaction with the Call Center Staff	B1. The courtesy of the person who took your call	95.1	92.8	89.9
	B2. The helpfulness of the person who took your call	94.7	92.2	89.3
	B3. Willingness to listen carefully to you	94.6	91.9	88.9
	B4. Taking time to answer your questions	94.7	91.9	89.0
	B5. Amount of time spent with you	93.7	91.1	87.8
	B6. Explaining things in a way you could understand	93.9	91.9	88.1
	B7. Instructions regarding medication/ follow-up care	93.9	92.3	88.5
	B8. Showing respect for what you had to say	94.5	92.1	89.2
	B9. Empathy and concern for your needs	93.9	91.4	88.3
	B10. Concern for your privacy	94.3	92.7	89.5
	B11. Knowledge of your health condition	92.0	90.5	85.9
	B12. Knowledge of your medication(s)	93.7	91.9	87.4
Our Communication with You	C1. The helpfulness of the people who assisted with billing/insurance	91.9	89.1	87.2
	C2. Promptness in resolving billing/ insurance questions or problems	90.7	87.2	85.6
	C3. Effectiveness/helpfulness of our website and/or app	89.3	86.6	84.3

		Academic	Health System	Independent
Your Prescription	D1. Timeliness of the delivery of your prescription	94.6	92.1	90.0
	D2. Condition of the prescription when received	96.2	94.9	92.3
	D3. Accuracy of your filled prescription	96.2	94.9	92.3
	D4. Keeping you informed of the prescription status	94.1	91.4	89.0
	D5. Promptness in resolving issues/questions concerning your prescription	93.5	90.5	87.7
Overall Satisfaction	E1. Our practice	95.5	93.0	90.1
	E2. Communication with our pharmacy team	95.0	92.4	89.0
	E3. Your experience with our pharmacy compared to other pharmacies you have used	93.9	91.8	88.4
	E4. Likelihood of using this pharmacy again?	95.5	93.8	89.7
	E6. Using any number from 0 to 10, where 0 is the least likely to recommend and 10 is most likely to recommend, how likely are you to recommend this practice to a friend or family member?	94.8	91.8	89.8
	Overall Score	**93.9**	**91.4**	**88.3**

A Net Promoter Score (NPS) was also calculated for each of the three specialty pharmacy types. The result showed a more significant difference between Independent Specialty Pharmacies and those associated with Academic and Non-Academic Health Institutions.
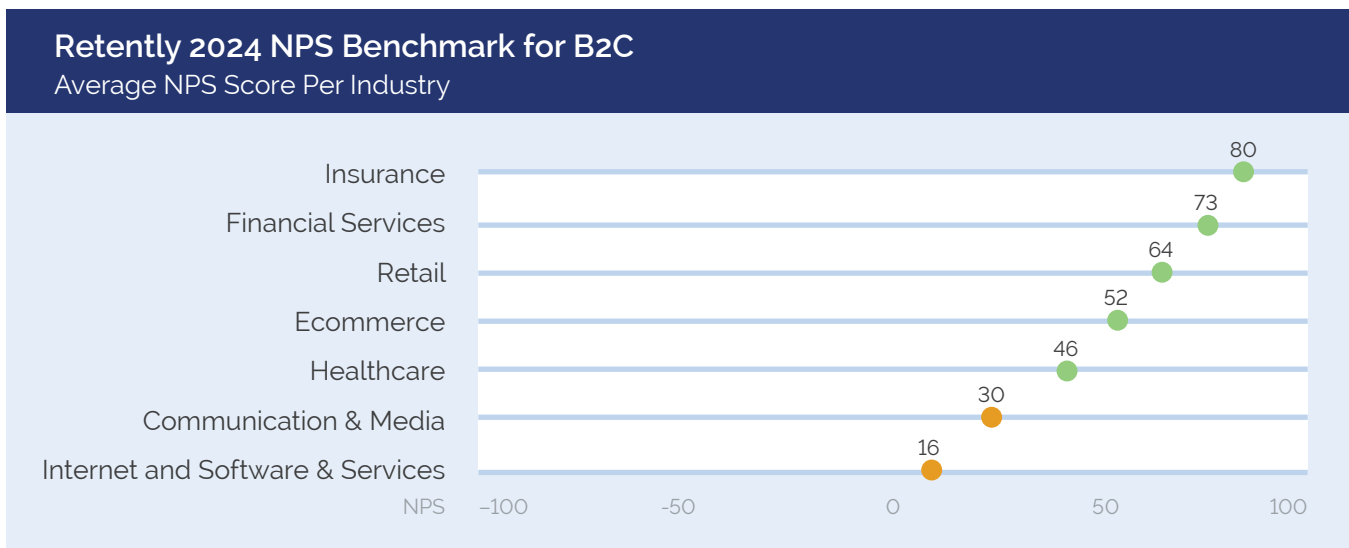
How likely are you to recommend this practice to a friend or family member?						
	9–10	7–8	0–6	NPS	# Responses	100-pt Score
National Association of Specialty Pharmacy (NASP) (N=27,549)	83.6%	9.0%	7.3%	76.3	24,112	91.9
Academic	89.3%	6.6%	4.1%	85.2	6,829	94.8
Health System	84.4%	8.0%	7.6%	76.8	7,468	91.8
Independent	79.1%	11.5%	9.4%	69.7	9,815	89.8

Net Promoter Score (NPS)

Net Promoter Score (NPS) is a cross-industry standardized index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. It is used to gauge the customer's overall satisfaction with a company's product or service and the customer's loyalty to the brand. Specialty pharmacies maintain a high-touch, service-oriented approach, and staff often play a significant role in a patient's direct care team. Specialty pharmacies employ skilled staff with in-depth knowledge and highly specific expertise on the disease states and the patients they manage. As a result, the patient's experience of a specialty pharmacy differs from that of a traditional retail pharmacy. To further illustrate this, a review of the NPS Leaders by industry further demonstrates the high level of customer loyalty and satisfaction with specialty pharmacies.

Retently 2024 NPS Benchmark for B2C
Average NPS Score Per Industry

Industry	NPS
Insurance	80
Financial Services	73
Retail	64
Ecommerce	52
Healthcare	46
Communication & Media	30
Internet and Software & Services	16

NPS scale: −100, -50, 0, 50, 100

A net promoter score was also calculated for each pharmacy that participated in the survey program, using question E5 from the survey (Likelihood of recommending our pharmacy to family and friends?). The net promoter scores for each pharmacy are displayed below, with Health Systems designated in light orange, Academic Institutions in blue, and Independent Pharmacies in light yellow.

Pharmacy	Scores			# Responses	Mean Score	NPS	Type
	9–10	7–8	0–6				
Overall	83.6%	9.0%	7.3%	24,112	9.19	76.30	
01	92.7%	5.0%	2.4%	723	9.63	90.30	Academic
02	93.3%	3.2%	3.4%	525	9.60	89.90	Health System
03	92.6%	4.5%	2.8%	1,020	9.63	89.80	Academic
04	91.4%	5.1%	3.5%	627	9.62	87.90	Health System
05	90.4%	6.7%	2.9%	490	9.58	87.50	Academic
06	91.1%	5.0%	3.9%	337	9.54	87.20	Academic
07	90.8%	5.2%	4.0%	877	9.52	86.80	Academic
08	89.2%	7.6%	3.1%	706	9.55	86.10	Academic
09	89.5%	6.6%	3.9%	258	9.52	85.60	Health System
10	90.9%	3.8%	5.3%	585	9.51	85.60	Health System
11	89.9%	5.7%	4.4%	456	9.48	85.50	Academic
12	90.1%	5.1%	4.8%	312	9.48	85.30	Independent
13	89.4%	5.4%	5.1%	777	9.38	84.30	Health System
14	87.9%	8.1%	4.0%	99	9.39	83.90	Health System
15	87.3%	8.8%	3.9%	411	9.41	83.40	Academic
16	86.2%	10.3%	3.4%	29	9.52	82.80	Independent
17	88.6%	5.3%	6.2%	341	9.39	82.40	Health System
18	87.4%	7.2%	5.4%	445	9.37	82.00	Academic
19	87.2%	6.7%	6.0%	893	9.32	81.20	Health System
20	85.5%	9.7%	4.8%	124	9.39	80.70	Health System
21	84.9%	10.3%	4.8%	1,102	9.30	80.10	Health System
22	85.1%	9.1%	5.8%	464	9.38	79.30	Academic
23	85.1%	8.9%	6.0%	838	9.27	79.10	Health System
24	84.3%	9.0%	6.7%	432	9.26	77.60	Academic
25	82.7%	9.6%	7.7%	468	9.13	75.00	Academic
26	83.8%	7.4%	8.8%	68	8.97	75.00	Independent
27	81.0%	11.6%	7.4%	4,910	9.12	73.60	Independent
28	80.1%	10.5%	9.4%	256	9.06	70.70	Independent
29	79.5%	11.1%	9.4%	1,038	8.97	70.10	Independent
30	74.4%	13.8%	11.8%	246	8.71	62.60	Independent
31	74.9%	12.7%	12.4%	1,972	8.77	62.50	Independent
32	75.6%	10.3%	14.1%	788	8.64	61.50	Independent
33	72.0%	14.0%	14.0%	93	8.51	58.00	Independent
34	70.9%	13.6%	15.5%	103	8.46	55.40	Independent
35	66.1%	14.2%	19.8%	1,299	8.14	46.30	Health System

Health System   Academic Institutions   Independent Pharmacy

The three pharmacies with the highest NPS values were selected for linear regression analysis between the net promoter question and the action items on the survey.

The top four most predictive survey action items and the net promoter question are listed below for pharmacies 01, 02, and 03. Questions are colored based on category. Call Center Staff is noted with yellow, Communication with Pharmacy Team/Pharmacist or nurse in blue, and Prescription Coordination in red. Items that appeared more than once have been bolded. The results highlight the importance of staff and pharmacy team communication as well as prescription coordination.

Pharmacy 01

The helpfulness of the person who took your call (B2, B=0.323)

Promptness in resolving issues/questions concerning your prescription (D5, B=0.286)

Communication with our pharmacy team (E2, B=0.282

Condition of the prescription when received (D2, B=0.25)

Pharmacy 02

Concern for your privacy (B10, B=0.265)

Keeping you informed of the prescription status (D4, B=0.251)

Communication with our pharmacy team (E2, B=0.224)

Accuracy of your filled prescription (D3, B=0.224)

Pharmacy 03

Communication with our pharmacy team (E2, B=0.474)

Willingness to listen carefully to you (B3, B=0.264)

Confidence and trust in the pharmacist or nurse (A8, B=0.124)

Your phone calls answered promptly (A, B=0.084)

■ Center Staff　■ Communication with Pharmacy Team/Pharmacist or nurse　■ Prescription Coordination
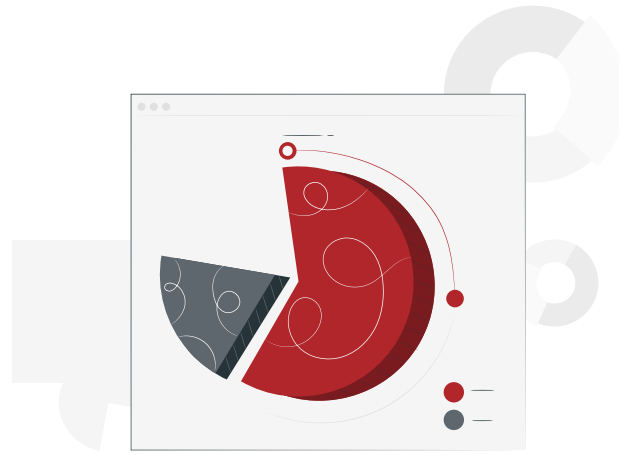
Linear Regression

To analyze the data on a more summative level, multivariate linear regression models were developed to predict (1) E1: 'Our specialty pharmacy and service' and (2) E5: 'Likelihood of recommending our pharmacy to family and friends' using the actionable survey items. The items with the highest, significant b-values are listed below for each outcome question studied.

Our Specialty Pharmacy and Service	
Item	B
E2. Communication with Our Pharmacy Team	0.421
A8. Your Trust and Confidence in the Pharmacist or Nurse	0.110
D5. Promptness in Resolving Issues/questions concerning your prescription	0.081
D1. Timeliness of the delivery of your prescription	0.079
B2. The Helpfulness of the person who took your call	0.078

Likelihood of Recommending Our Pharmacy to Family and Friends	
Item	B
E2. Communication with Our Pharmacy Team	0.577
A8. Your Trust and Confidence in the Pharmacist or Nurse	0.400
D5. Promptness in Resolving Issues/questions concerning your prescription	0.271
B9. Empathy and concern for your needs	0.214
A5. Your ability to obtain prescription refills	0.181

■ Access   ■ Prescription Coordination   ■ Prescription Delivery   ■ Center Staff

Here we see most items are related to Access (blue), Prescription Coordination (red), and Prescription Delivery (orange). These results, like those of previous correlation analyses, highlight the importance of these categories when recommending a specialty pharmacy.

Results for the top two drivers for the overall data, (E2) "Communication with our Pharmacy Team" and (A8) "Your trust and confidence in the pharmacist or nurse" were compared by pharmacy. The table below lists mean scores and tabular results for each pharmacy, sorted by mean score.

A8. Your trust and confidence in the pharmacist or nurse

Pharmacy	Excellent	Very Good	Good	Fair	Poor	# Responses	Mean Score	Type
Overall	77.8%	15.2%	4.7%	1.1%	1.1%	23,001	4.67	
04	87.3%	11.3%	1.1%	0.3%	0.0%	645	4.86	Health System
09	86.1%	12.6%	1.3%	0.0%	0.0%	231	4.85	Health System
07	86.2%	11.9%	1.5%	0.2%	0.1%	905	4.84	Academic
13	86.3%	10.9%	2.4%	0.2%	0.1%	817	4.83	Health System
01	85.3%	12.0%	2.2%	0.6%	0.0%	692	4.82	Academic
03	85.7%	11.2%	2.5%	0.4%	0.2%	824	4.82	Academic
08	85.0%	12.7%	1.9%	0.1%	0.3%	685	4.82	Academic
12	85.1%	12.6%	1.9%	0.4%	0.0%	262	4.82	Independent
05	84.4%	12.7%	2.2%	0.5%	0.2%	416	4.81	Academic
02	85.7%	10.4%	2.5%	1.1%	0.2%	441	4.80	Health System
14	87.5%	7.7%	2.9%	1.0%	1.0%	104	4.80	Health System
06	80.6%	17.3%	2.1%	0.0%	0.0%	284	4.79	Academic
10	82.8%	12.1%	3.8%	1.1%	0.2%	447	4.76	Health System
11	79.3%	16.8%	3.4%	0.3%	0.3%	357	4.75	Academic
23	80.1%	15.9%	2.7%	1.1%	0.1%	879	4.75	Health System
17	80.1%	14.8%	4.7%	0.0%	0.4%	256	4.74	Health System
18	80.2%	15.2%	3.7%	0.4%	0.4%	455	4.74	Academic
21	80.5%	14.3%	3.9%	0.6%	0.7%	1,216	4.73	Health System
15	77.9%	15.9%	5.3%	0.9%	0.0%	321	4.71	Academic
16	77.4%	19.4%	0.0%	3.2%	0.0%	31	4.71	Independent
19	79.1%	14.4%	5.3%	0.7%	0.4%	695	4.71	Health System
20	79.0%	15.3%	4.0%	0.8%	0.8%	124	4.71	Health System
24	78.8%	15.3%	4.2%	0.6%	1.1%	472	4.70	Academic
22	75.3%	17.6%	6.5%	0.4%	0.2%	506	4.67	Academic
25	75.2%	18.2%	5.2%	0.8%	0.6%	363	4.67	Academic
26	75.9%	12.1%	6.9%	3.4%	1.7%	58	4.57	Independent
33	72.3%	16.0%	8.5%	2.1%	1.1%	94	4.56	Independent
27	67.9%	21.6%	8.4%	1.1%	0.9%	4,818	4.55	Independent
28	72.8%	14.2%	8.8%	2.9%	1.3%	239	4.54	Independent
32	70.9%	19.0%	5.5%	2.5%	2.0%	688	4.54	Independent
29	68.5%	20.2%	6.9%	2.0%	2.4%	1,138	4.51	Independent
30	68.4%	19.1%	8.8%	1.8%	1.8%	272	4.50	Independent
31	63.6%	24.7%	9.4%	1.3%	0.9%	1,590	4.49	Independent
34	65.3%	18.1%	11.1%	2.8%	2.8%	72	4.40	Independent
35	59.5%	26.0%	10.4%	2.4%	1.8%	1,169	4.39	Health System

Health System   Academic Institutions   Independent Pharmacy

E2. Communication with our pharmacy team

Pharmacy	Excellent	Very Good	Good	Fair	Poor	# Responses	Mean Score	Type
Overall	77.8%	15.2%	4.7%	1.1%	1.1%	23,001	4.67	
12	90.9%	7.5%	0.9%	0.3%	0.3%	319	4.88	Independent
04	89.4%	8.4%	2.1%	0.2%	0.0%	631	4.87	Health System
01	88.8%	8.9%	1.6%	0.4%	0.3%	697	4.86	Academic
05	88.1%	9.9%	1.6%	0.2%	0.2%	497	4.86	Academic
06	87.5%	10.4%	1.8%	0.3%	0.0%	337	4.85	Academic
07	87.9%	10.0%	1.8%	0.3%	0.0%	874	4.85	Academic
08	88.3%	9.6%	1.7%	0.1%	0.3%	699	4.85	Academic
09	86.2%	11.9%	1.5%	0.0%	0.4%	261	4.84	Health System
03	86.5%	11.3%	1.5%	0.4%	0.4%	1,028	4.83	Academic
02	88.0%	8.4%	1.9%	0.8%	1.0%	526	4.82	Health System
11	84.6%	13.2%	2.0%	0.0%	0.2%	461	4.82	Academic
16	81.5%	18.5%	0.0%	0.0%	0.0%	27	4.81	Independent
14	84.4%	13.5%	1.0%	0.0%	1.0%	96	4.80	Health System
10	85.3%	9.5%	4.6%	0.2%	0.3%	587	4.79	Health System
13	85.1%	10.9%	2.7%	0.9%	0.4%	770	4.79	Health System
23	81.3%	15.1%	2.9%	0.5%	0.2%	827	4.77	Health System
21	82.1%	12.5%	3.6%	1.0%	0.8%	1,082	4.74	Health System
18	80.8%	13.0%	4.8%	0.7%	0.7%	438	4.73	Academic
19	82.7%	11.5%	3.7%	0.3%	1.8%	907	4.73	Health System
20	79.3%	14.9%	5.0%	0.0%	0.8%	121	4.72	Health System
22	78.9%	15.3%	4.9%	0.4%	0.4%	450	4.72	Academic
15	80.1%	14.4%	3.6%	0.2%	1.7%	418	4.71	Academic
17	80.8%	13.4%	3.8%	0.6%	1.5%	343	4.71	Health System
26	85.1%	7.5%	3.0%	1.5%	3.0%	67	4.70	Independent
24	75.4%	18.7%	4.2%	1.0%	0.7%	407	4.67	Academic
25	78.0%	15.7%	3.8%	0.6%	1.9%	477	4.67	Academic
28	78.1%	13.4%	4.9%	2.0%	1.6%	247	4.64	Independent
32	73.9%	17.6%	5.7%	1.5%	1.3%	670	4.61	Independent
27	71.1%	19.9%	6.8%	1.0%	1.2%	4,623	4.59	Independent
29	69.7%	19.8%	6.4%	2.1%	1.9%	934	4.53	Independent
33	69.1%	21.0%	4.9%	3.7%	1.2%	81	4.53	Independent
31	65.0%	21.1%	8.4%	3.0%	2.5%	1,813	4.43	Independent
34	63.5%	20.2%	9.6%	1.0%	5.8%	104	4.35	Independent
35	58.0%	23.2%	10.7%	4.7%	3.4%	1,182	4.28	Health System

■ Health System   ■ Academic Institutions   ■ Independent Pharmacy

Advisory Board Review

As part of our review of the survey findings, we presented preliminary survey results and findings to a volunteer advisory board consisting of key stakeholders across the specialty pharmacy industry (i.e. manufacturer, technology provider(s), academic health systems). These stakeholders were then provided with a questionnaire (See Appendix 4), to give their feedback and insights on the initial findings. Although not all stakeholders responded to the questionnaire and feedback was not received from pharmaceutical manufacturers, payers or independent SPs, the information that was collected offered valuable insights for consideration.

Here are the key points:

1. **Scores were down statistically significantly for all items on the survey:** Stakeholders attribute this to several factors including an increase in specialty therapeutics on the market, changes in 3rd party courier policies, staffing issues, and communication challenges.

2. **Most statistically significant changes were in responsiveness and professionalism of the specialty pharmacy staff:** Stakeholders believe this could be due to patients becoming more informed and less tolerant of issues, and staff workload and burnout becoming more prevalent in the industry.

3. **Opportunity for operational changes in 2024:** Stakeholders see a significant opportunity to re-examine core values and services provided to patients, with a focus on improving the quality of services and enhancing the patient experience.

4. **Academic based Specialty Pharmacies score above Health System owned/operated and Independent Specialty Pharmacies:** Stakeholders offered these potential reasons for this finding: Patients may perceive Academic Medical Centers (AMCs) as having a more unified healthcare team including a specialty pharmacy working collaboratively on their behalf. AMCs can leverage various resources, including vertical integration, to offer flexible services and reduce costs. They also may have more opportunities for in-person interactions and can onboard patients to clinical trials, enhancing patient satisfaction. Additionally, their access to comprehensive electronic medical records and frequent interactions with care teams provide unique insights and improve patient experiences.

5. **Specialty Pharmacy maintains a strong Net Promoter Score:** Stakeholders believe this is due to the personalized care and support provided by specialized and highly trained clinical experts, which leads to better quality care and improved health outcomes for patients.

6. **Key drivers of overall satisfaction and NPS:** Stakeholders agree that communication with the pharmacy team, trust and confidence in the pharmacist or nurse, and prompt resolution of issues/questions concerning prescriptions are key drivers of overall satisfaction and NPS.

7. **Findings provide insights into the direction the specialty pharmacy industry is moving towards:** Stakeholders believe the industry is moving towards more personalized patient care, resulting in better outcomes for patients.

8. **Utilization of information published in the NASP Patient Survey White Paper to inform business decisions:** Some stakeholders have utilized the information published in the NASP Patient Satisfaction Survey White Paper to inform their business decisions, while others were not aware of the white papers.

9. **Data findings regarding customer satisfaction for future NASP Patient Survey White Papers:** Stakeholders would like to see data findings regarding patient expectations, digital uptake, and significance of its utilization with patients in future NASP Patient Satisfaction Survey White Papers.

Based on the findings from the responses to the Advisory Board Questionnaire, below are some recommendations:

1. **Enhance Communication Channels:** Strengthen communication channels between specialty pharmacies and patients. Clear, timely communication can improve patient satisfaction and trust. Consider implementing automated reminders for prescription refills, appointment scheduling, and medication adherence.

2. **Invest in Staff Training and Development:** Given the impact of staff responsiveness and professionalism on overall satisfaction, invest in ongoing training and development for specialty pharmacy staff. This includes improving soft skills, empathy, and patient-centered communication.

3. **Prioritize Patient-Centric Services:** Focus on personalized patient care. Tailor services to individual patient needs, preferences, and health conditions. Consider offering virtual consultations, telehealth services, and personalized medication management plans.

4. **Address Workload and Burnout:** Recognize the challenges faced by specialty pharmacy staff due to workload and burnout. Implement strategies to manage workload effectively, such as optimizing workflows, hiring additional staff, and promoting work-life balance.

5. **Leverage Net Promoter Score (NPS):** Continue using NPS as a metric to assess patient loyalty and satisfaction. Regularly collect feedback from patients and act on it to improve services. Identify promoters and detractors to tailor interventions accordingly.

6. **Collaborate with Industry Associations:** Engage with organizations like the National Association of Specialty Pharmacy (NASP). Leverage their resources, research, and white papers to inform business decisions. Stay informed about industry trends and best practices.

7. **Explore Digital Solutions:** Embrace digital tools to enhance patient experience. Offer online portals for prescription refills, appointment scheduling, and secure messaging. Provide educational content through digital channels to empower patients.

8. **Promote Patient Education:** Educate patients about specialty medications, potential side effects, and adherence. Develop patient-friendly materials, conduct workshops, and provide personalized counseling. Informed patients are more likely to have positive experiences.

9. **Collaborate with Healthcare Providers:** Strengthen relationships with healthcare providers, including physicians, nurses, and other specialists. Seamless coordination between specialty pharmacies and providers ensures better patient outcomes and satisfaction.

Remember that these recommendations should be tailored to the specific context of each specialty pharmacy. Regularly assess progress and adjust strategies based on feedback and evolving industry trends.

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Best Practices

To add greater value to NASP members, it was determined that hearing from top performing specialty pharmacies in the 2023 NASP patient survey program would provide key insights into how they were able to succeed during 2023. The top two key driver survey items for the 2023 patient survey were "Your communication with our pharmacy team" and "Your trust and confidence in the pharmacist or nurse." The top performers for each of these key drivers needed to have successfully participated in the NASP patient survey program for 2023 and have at least 100 patient responses. We are proud to announce the 2023 top performers, Monument Health and Ardon Health.

Communication with our Pharmacy Team Key Driver Winner—Ardon Health

Ardon Health is pleased to be recognized as a key driver award recipient, recognizing the exceptional communication our patients have with our pharmacy team. This honor highlights our commitment to delivering patient-centered care. Our approach centers around empathizing with patients, stepping into their shoes, and using our professional experiences to enrich and improve their lives. This philosophy is central to our leadership in achieving positive outcomes.

Ardon connects the healthcare ecosystem by facilitating collaborations between healthcare providers and community organizations to inspire better health outcomes. We create cohesive connections between providers, employers, and patients through open communication and partnership, aiming to remove barriers to treatment and improve patient outcomes. Our pharmacy team actively participates in patient advocacy boards, engages in industry boards, attends and presents at industry conferences, and volunteers in the community to provide direct support to those in need.

Ensuring safety is at the core of our mission. We prioritize patient well-being and treatment efficacy through stringent quality control measures and continuous monitoring of treatment outcomes. Our infrastructure includes automated safety checks, staff training on safety protocols, and regular safety audits to uphold this commitment.

Our high-touch, interactive patient management program empowers patients to understand their disease and prescribed therapies, enabling them to continue living their lives while receiving the necessary pharmaceutical treatment. This clinician-guided approach has led to increased medication adherence and personalized treatment plans tailored to each patient's unique needs.

Ardon fosters an inclusive culture where all are welcome and considered integral to who we are. Our approach to care and compassion creates a supportive environment for patients and staff. We are proud to have staff with significant tenure, reflecting our commitment to creating a positive and inclusive workplace.

To measure the effectiveness of our clinical programs, Ardon uses evidence-based clinical research data to analyze patient outcomes, identify care obstacles, and tailor interventions for optimized treatment results. Our disease-specific clinical programs include integrated monthly touchpoints, personalized consultations, and educational sessions to maximize patient engagement and satisfaction.

Our Clinical Pharmacists build patient trust and confidence through personalized medication counseling, ongoing education, and collaborative therapy management. They educate and empower patients, ensure safe dispensing of specialty medications, conduct patient assessments, engage with providers to optimize therapy, and perform comprehensive prescription verification.

Ardon's commitment to compassionate communication, patient-centered care, and leveraging our knowledge and experiences distinguishes us. Through empathetic teamwork, high-touch patient management, and seamless digital engagement, we strive to exceed expectations and achieve optimal treatment outcomes, ensuring the best possible care for all our patients.

Your Trust and Confidence in the Pharmacist or Nurse Key Driver Winner—Monument Health

Monument Health Specialty Pharmacy follows an open-door model with readily accessible clinical staff onsite. Our new-start consults are provided face-to-face with a specialty pharmacist and therapy management nurse. There is a scheduled meeting in a private consult room with the patient and their support person(s). The consultations typically last 45-60 minutes. Video and phone appointments are also available, but in-person visits are encouraged.

Each of our nurses have a designated "new start" day each week, where they may see patients throughout the day with various disease states. This helps maintain/expand their knowledge base for all the specialty disease states and medications. For follow-up patient management, each nurse is dedicated to patients with specific disease states. This works well as the same nurse is following up with "their" patients time after time. Strong relationships are formed which leads to more comfortability and more willingness from the patient to share. Both our pharmacists and nurses are

available to our patients via phone or in-person anytime with little to no wait during business hours. One of our own clinical pharmacists is on-call 24/7 so patients can reach them directly without having to go through an answering service.

We share the electronic health record with our prescribing providers, both within Monument Health, as well as those practicing through the other major healthcare system in the area. All our new-start and follow-up documentation is entered and available for providers and patients to access. This communication allows for better quality and continuity of care. The providers are very receptive, and in fact encourage the Specialty Pharmacy to provide feedback/information and recommendations. Our provider survey NPS this year was 98%, indicating the high level of provider trust and service that we have fostered with our providers.
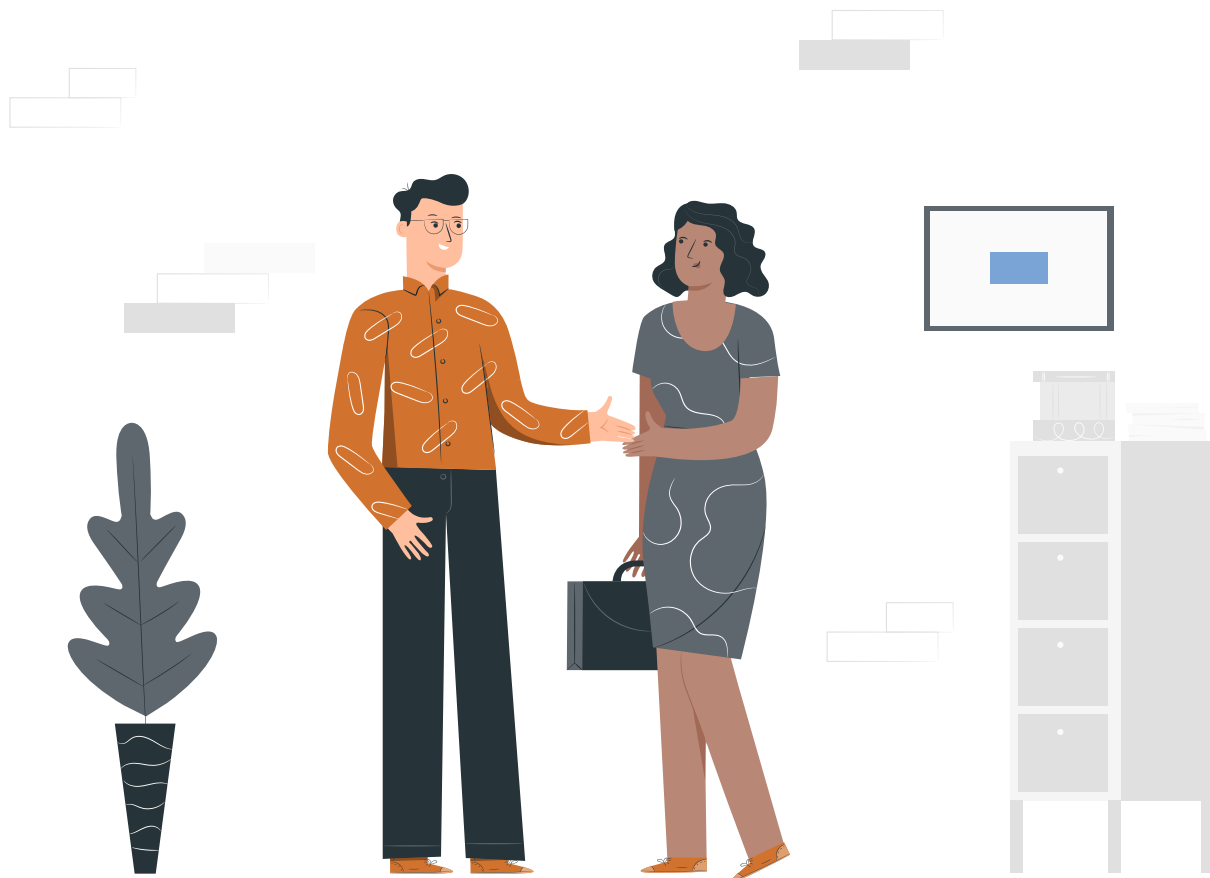
Conclusions

In conclusion, the analysis of the survey data reveals several critical insights into the performance and patient satisfaction of new and returning specialty pharmacies. The overall response rate of 14.7%, derived from 27,549 surveys, provides a robust sample for assessment. Notably, mean scores for all survey items decreased from 2022 to 2023, with 33 items showing statistically significant declines. However, when isolating the data to only returning pharmacies, the decline was less pronounced, indicating that new pharmacies contributed to the lower overall scores in 2023.

The comparative analysis between new and returning pharmacies highlighted that returning pharmacies rated their experiences significantly higher across all survey items. This suggests a higher level of satisfaction and loyalty among returning pharmacy pharmacies, which is further corroborated by the Net Promoter Scores (NPS). Academic Institutions scored the highest on average, followed by Non-Academic Health Systems, with Independent Pharmacies scoring the lowest across all measures except for one independent scoring highly on one of the key drivers.

The regression analyses underscore the importance of effective communication with the pharmacy team, the professionalism and trustworthiness of staff, and efficient prescription coordination and delivery. These factors were the most predictive of overall satisfaction and the likelihood of recommending the pharmacy to others.

These findings emphasize areas for improvement and highlight the critical role of staff interactions and communication in driving patient satisfaction. Future efforts should focus on these key drivers to enhance the overall patient experience and maintain high standards of service across all specialty pharmacy types.

The importance of expanding pharmacy participation in the survey program cannot be overstated. By engaging more pharmacies in the survey program, we can better identify areas for improvement, foster best practices, and ultimately elevate the standard of care across all specialty pharmacy types.