Background
The TPG-National Payor Roundtable (TPG-NPRT) focuses on market access programs within the United States and is a subsidiary of The Pharmacy Group. The TPG-NPRT maintains a proprietary database of Chief Medical Officers, Chief Pharmacy Officers and other key decision makers from health plans in the United States.

Pharmacy & Therapeutics (P&T) Committees and technology assessment entities are tasked with making coverage decisions with limited information available. Pharmacy & Therapeutic (P&T) Committees and technology assessment entities are tasked with making coverage decisions with limited information available.

Objective and Purpose
The 2015 US Payor Landscape for Specialty Pharmacy: Results from a Survey of Medical and Pharmacy Directors

Results
- A total of 311 persons responded to the survey (34.1% response rate).
- Only 6% reported multiple degrees (Figure 2), and the most common degree was MD (65.4%).
- Most respondents worked for a health plan (80.5%) and 13.0% were local, 36.0% were national, and 39.0% were regional.
- The type of plans represented are shown in Figure 3.
- Most respondents worked for a health plan (80.5%) and 13.0% were local, 36.0% were national, and 39.0% were regional.
- Cost sharing is shifting towards a percentage basis (Figure 6).
- Most respondents worked for a health plan (80.5%) and 13.0% were local, 36.0% were national, and 39.0% were regional.

Methods
- An online, iterative survey was developed with 85 questions and included:
  - Two phases
  - Links to be used to single or multiple answers.
  - Open ended responses (ie, what disease states most concern you?)
  - Invitations to participate were sent to 224 medical and pharmacy directors currently employed by US health plans and insurers from the TPG-NPRT database in December 2014.
  - The survey focused on the:
    - Pharmacy & Therapeutics (P&T) committee process.
    - Management of specialty pharmaceuticals (SPs) and specialty pharmacies.
    - Policies regarding the use of specialty pharmacy providers.
    - Restriction on specialty pharmacy providers.
    - Necessity of specialty pharmacy providers.
  - The respondents were mostly chief medical directors and chief pharmacy directors (Figure 2), the “Other” category included: VP (of Pharmacy, Medicine, or Medical Affairs); Chief Medical Officer, Senior Medical Director [3], and Consultant [3].
  - The disease states most concerning to these plan directors from budgetary point of view:
    - Most concerning: Cancer/oncology (18); Hepatitis C (9); and Diabetes (4);
    - Second most concerning: Cancer/oncology (10); Hepatitis C (8); and Diabetes (2);
    - Third most concerning: Cardiovascular/heart disease (6); Diabetes (6); Multiple sclerosis (5); and Cancer/oncology (4);
  - Other items mentioned included: Orphan diseases; Cardiovascular/heart disease; Biologics; and HIV.
  - Based on recent programs with US Payors, Medical Directors, and Sponsors (pharmaceutical companies, medical device and health technology companies, TPG-NPRT and The Pharmacy Group decided to conduct a survey of medical and pharmacy directors involved with P&T Committees and technology assessment entities tasked with making coverage decisions with limited information available. Pharmacy & Therapeutic (P&T) Committees and technology assessment entities are tasked with making coverage decisions with limited information available.
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Conclusions
- Expenditures for Specialty Pharmacy products and the use of specialty pharmacy products will continue to grow over the next 5 years.
- The disease states most concerning to these plan directors from a medical care point of view:
  - Most concerning: Cancer/oncology (18); Hepatitis C (9); and Diabetes (4);
  - Second most concerning: Cancer/oncology (10); Hepatitis C (8); and Diabetes (2);
  - Third most concerning: Cardiovascular/heart disease (6); Diabetes (6); Multiple sclerosis (5); and Cancer/oncology (4);
  - Other items mentioned included: Orphan diseases; Cardiovascular/heart disease; Biologics; and HIV.
  - The disease states most concerning to these plan directors from budgetary point of view:
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Figure 1. Survey Respondent Degrees (multiple answers allowed)