



Health System Patient Access in 2025

Macro Trends and What They Demand of Us

Presented by **cencora**

This presentation includes confidential and proprietary information. Sharing its contents with third parties requires prior written approval from Cencora.



Panelists



Ryan Telford

VP, Ambulatory and Specialty Solutions
Cencora



Chris Sanders

VP, Ambulatory and Specialty Solutions
Cencora



Health System Demand

With rising drug prices and increasing complexity, the demand for patient access support services is expected to grow considerably



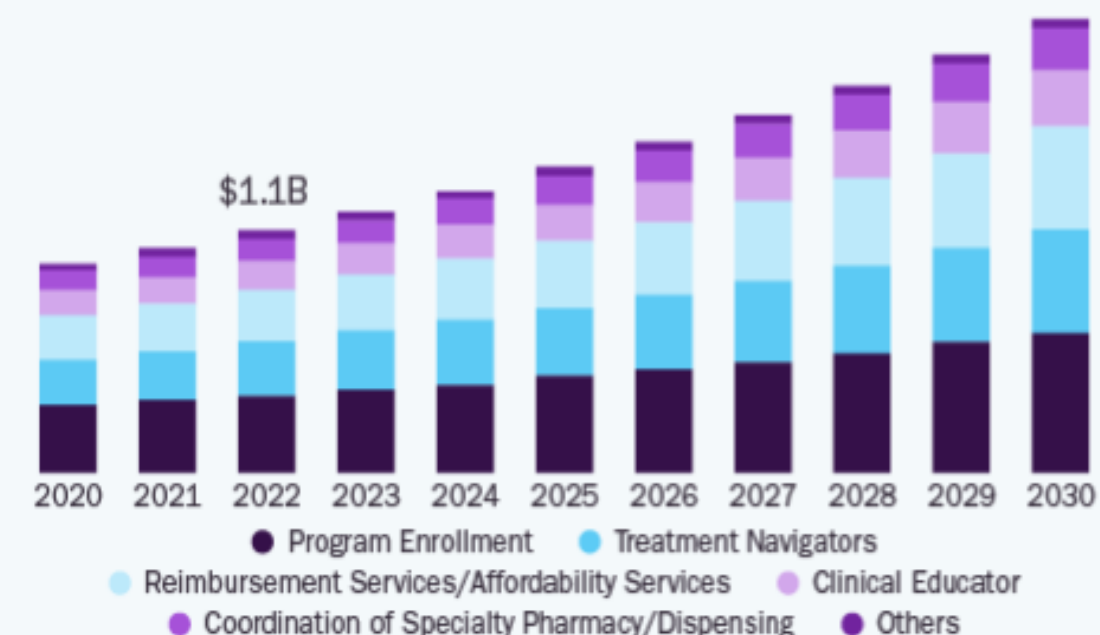
One-third of IDNs cite **increasing patient access** to specialty services as **their top priority in 2024**; one-in-five cite margin improvement as the top priority²

1. Grandview Research Industry Analysis, Pharma hub patient access support service market report

2. Health Industries Research Center, IDN Landscape 2024

U.S. Pharma HUB and Patient Access Support Service Market

Size, by Service Type, 2020 - 2030 (USD Billion)



8.2%

U.S. Market CAGR,
2024 - 2030

The market is projected to grow year over year¹



Access Challenges



Adjacent Impacts



340b Program



**Inflation
Reduction Act**



**Medicaid
Restrictions**

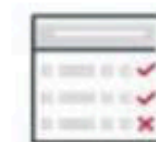
Major healthcare policies



Marketplace tax credit restrictions
and Medicaid cost sharing
→ *reduce affordability*



Medicaid work requirements
→ *increase admin burden*



Medicaid and Marketplace
enrollment restrictions and
eligibility verification barriers
→ *increase admin burden*



State Medicaid
financing restrictions
→ *reduce federal funding to states*



Medicare sequestration trigger
→ *reduces federal spending*

*Advisory Board. Healthcare Policy Updates Timeline.
August 18th, 2025.*

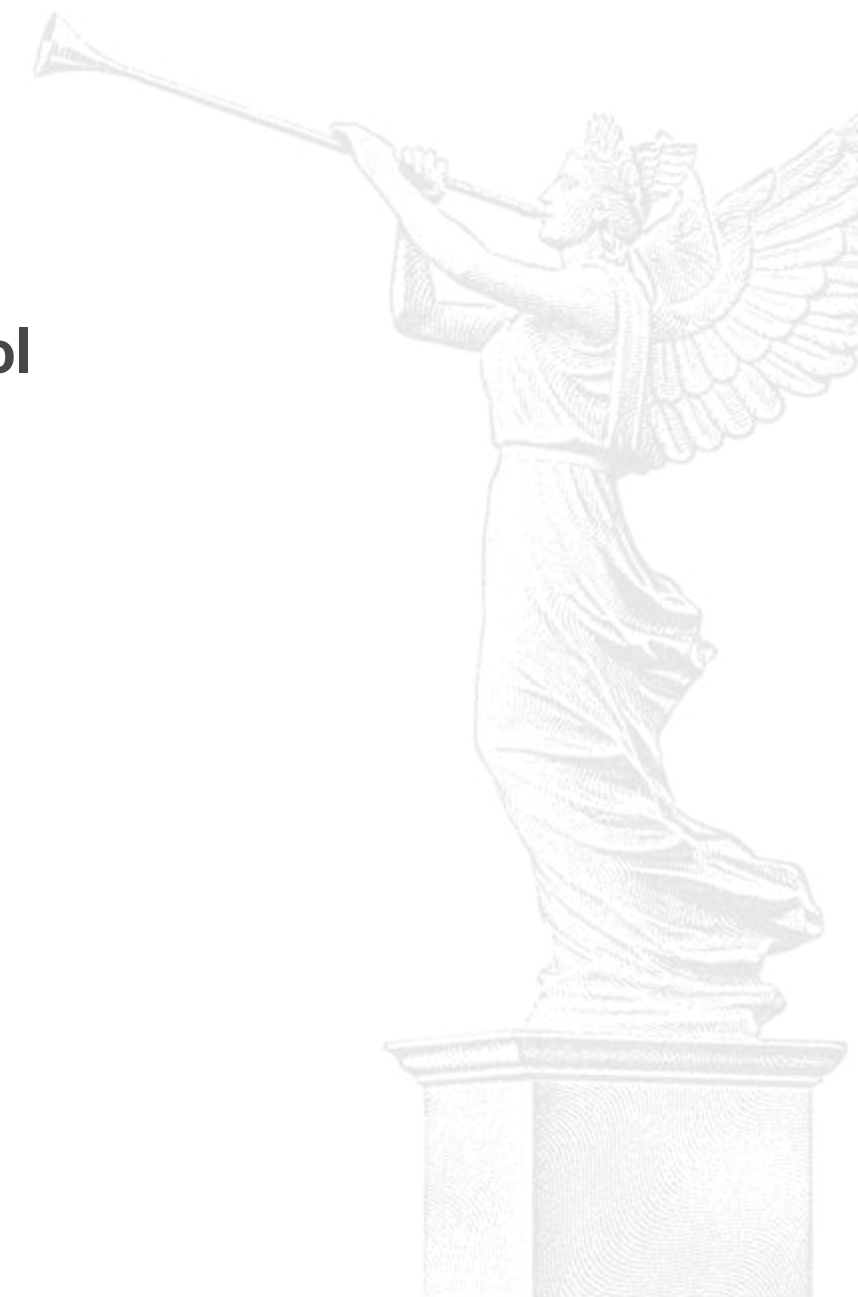
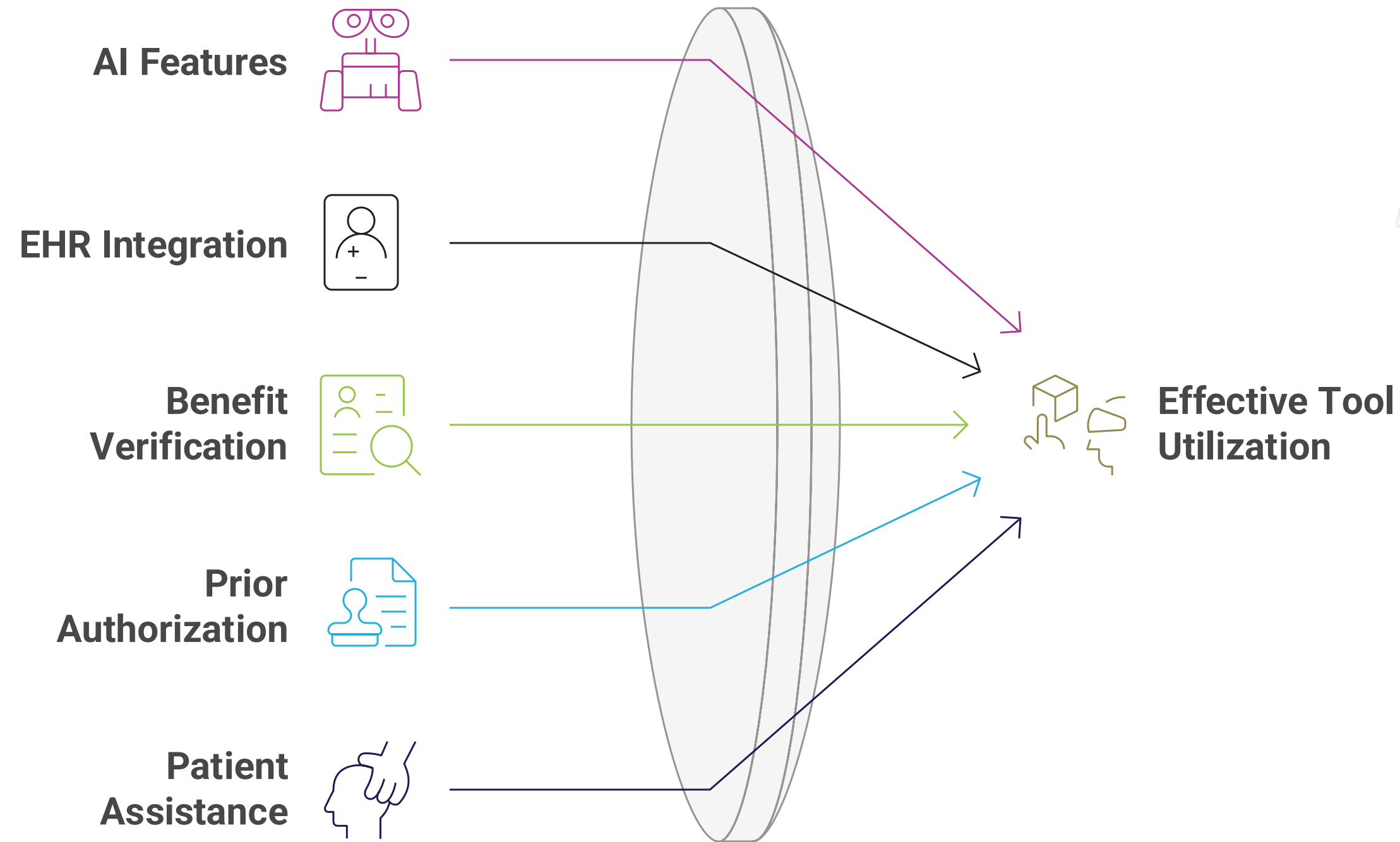
Efficiency in High Demand

The tools associated with PAP & BV/PA for specialty pharmacy, infusion centers, and revenue optimization are in high demand by medical facilities

- Reimbursements from payers are diminishing, and patient responsibility is increasing
- As denials and PA requests increase, institutions are taking on financial burden
- Manual processes, like financial assistance program matching and BV/PA, are slow and require staffing
- The number of specialty pharmacies is increasing



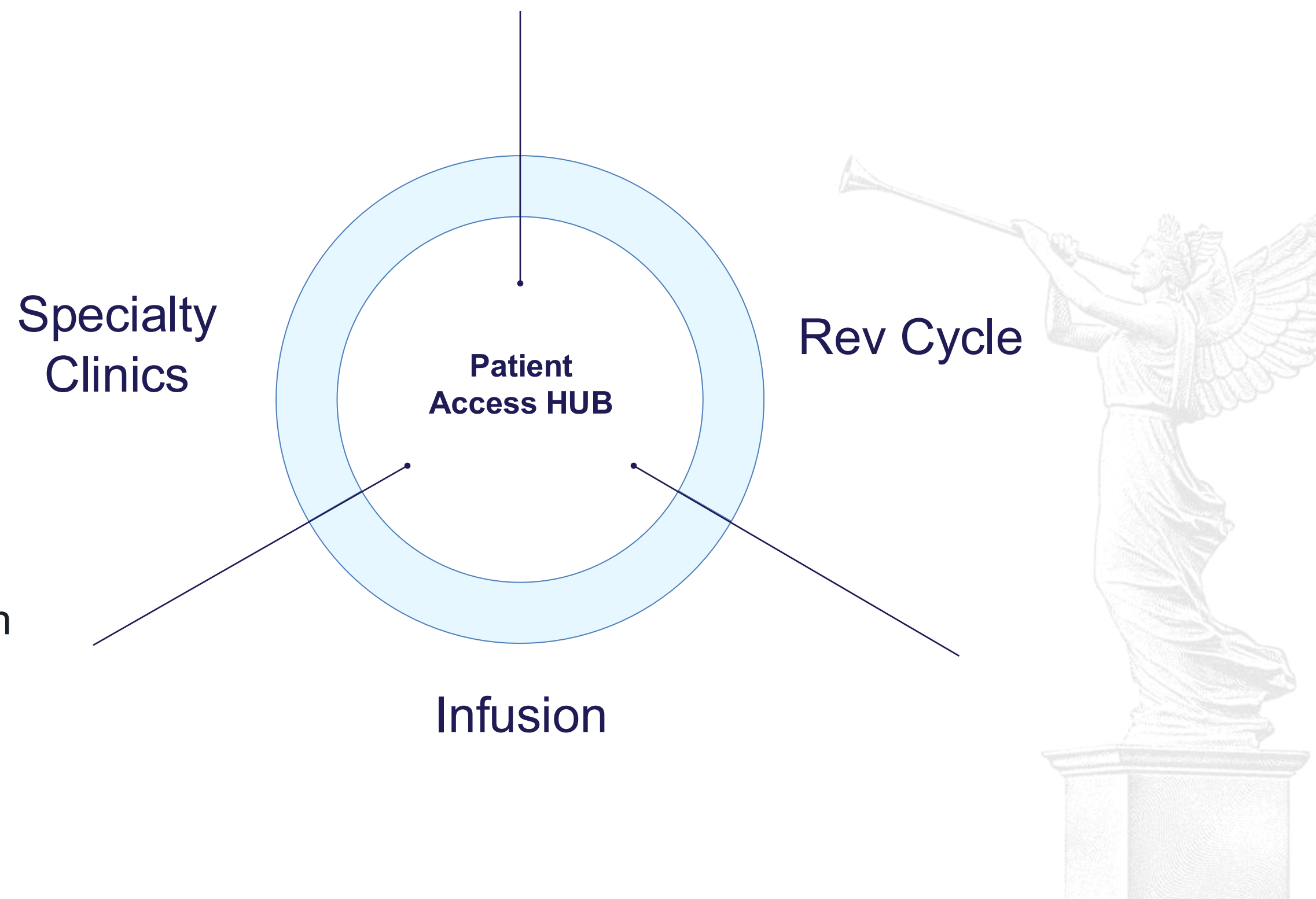
Technology Complexity



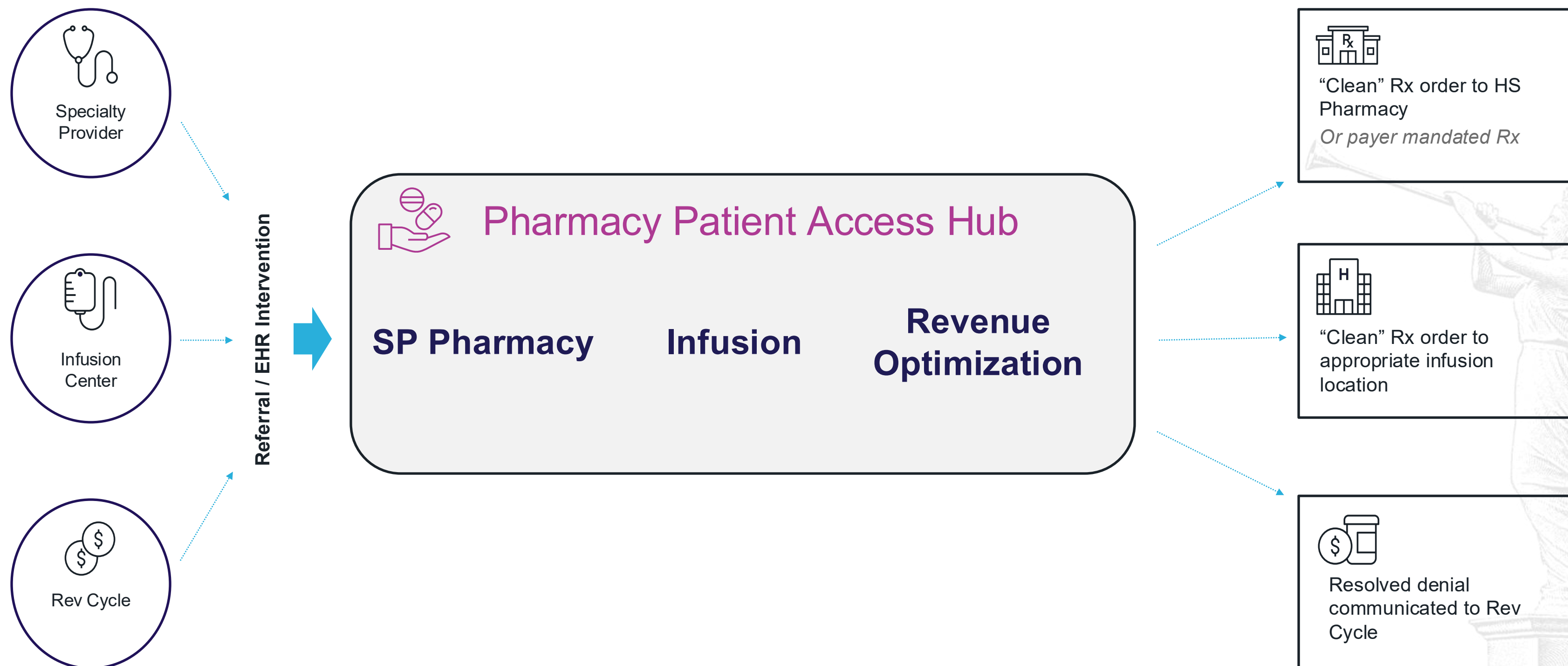
Pharmacy Patient Access HUB Model

**Streamlining services
for enhanced provider /
patient experience and
additional margin
capture**

- Optimizes Administrative Processes
- Increases Prescription Internalization
- Reduce Access Barriers
- Enhance Profitability and Reduces Costs



Pharmacy Patient Access HUB Model



Elevating Care

Patients

Decrease time to therapy

Decrease in out of pocket spend and financial toxicity

Improvement in overall satisfaction¹

Clear communication and less ambiguity

Scheduling coordination

Advocate alongside their journey

Providers

Decrease in overall administrative burden

Becomes the “easy button” for clinical staff

Improves overall provider satisfaction²

Clear lines of accountability

Increase time for patient care

Less time spent on insurance related problems

Potential clinical support

Health System

Increase in internalization

Contract pharmacy decision trees

Medication reimbursement optimization

Decrease in overall denials

Decrease in prescription abandonment

Able to be agile when changes occur (payer, legislation, formulary, etc.)

Provide a high level of care for handling high cost and complex medications

¹Kelley TN, Canfield S, Diamantides E, Ryther AMK, Pedersen CA, Pierce G. ASHP Survey of Health-System Specialty Pharmacy Practice: Practice Models, Operations, and Workforce - 2022. Am J Health Syst Pharm. 2023 Dec 5;80(24):1796-1821. doi: 10.1093/ajhp/zxad235. PMID: 37742303.

²Anguiano RH, Zuckerman AD, Hall E.. Comparison of provider satisfaction with specialty pharmacy services in integrated health-system. Am J Health Syst Pharm. 2021 May 24;78(11):962-971. doi: 10.1093/ajhp/zxab079.

Financial Impact



Reduces Administrative Burden

Hub handles tasks like insurance claims and pharmacy coordination, allowing providers to focus on patient care.



Enhances Operational Efficiency

Streamlined processes improve workflow, increase patient throughput, and reduce medication errors.



Boosts Financial Performance

Accurate management of medication access minimizes claim denials and delays, improving revenue collection.



Drives Better Clinical Outcomes

Hub enhances patient compliance, leading to improved chronic disease management and fewer hospital readmissions.



Revenue Optimization

Institutions need ways to identify and correct inefficiencies; this often means weighing the benefits of in-house vs. outsourced solutions

- **Human error** – Staff juggling multiple tasks may make errors that lead to missed authorizations
- **Denials management** – There is often underpayment, or no payment, causing institutions to leak revenue; there is a need to track and predict denials effectively
- **Vendor limitations** – Vendors often fall short of the savings they projected to offer
- **Resource allocation** – Performing services in-house can cause staffing problems and limit efficiencies, RCM roles must weigh pros/cons of outsourcing

Chris Sanders, PharmD, MHA

Managing Director, Pharmacy Practice Solutions
Cencora

Mobile: 414.702.5996

Email: christopher.sanders@cencora.com

Ryan Telford, PharmD

VP Ambulatory and Specialty Solutions
Cencora

Mobile: 720.988.5218

Email: ryan.telford@cencora.com



THANK YOU

