

ACTIONABLE INSIGHTS FROM THE  
National Association of Specialty Pharmacy



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



PATIENT  
SATISFACTION  
SURVEY



## 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.

**NASP is committed to identifying opportunities to demonstrate the value of specialty pharmacy and help its pharmacy members improve patient satisfaction.**

**NASP strongly supports a statistically validated methodology for benchmarked patient surveys to help our members better understand and continuously improve patient satisfaction levels.**

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 to December 31, 2022. 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 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.

**The Patient Satisfaction Survey Program was developed to create an independent, non-biased third-party survey that would serve as the industry standard.**

## 2022 Participating Organizations

Thirty-five NASP corporate members opted to participate in the 2022 NASP Patient Survey Program.



## 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 NASP calendar year (January 1, 2022, to December 31, 2022). 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 140,915 surveys were distributed via mail or email. Pharmacies using online distribution had the option to send a reminder email to non-responders.

## Analysis

### New/Returning Pharmacies

A total of 17,477 surveys were returned before the cut-off date of February 9, 2022, from 35 participating clients. The average response rate for mailed and emailed surveys, based on our experience in surveying over three million patients a year, tends to land between 15% and 18%. This is associated with organizations that survey their patients weekly or monthly. Many of the NASP survey participants are surveying their patients once or twice a year which can significantly reduce their overall response rate. Thus, the 12.4% response rate we see in 2022 is not inconsistent with industry standards. A breakdown of returns by New/ Returning and Pharmacy Type is below.

|               | Number of Pharmacies | Number of Returns | Percentage of Returns |
|---------------|----------------------|-------------------|-----------------------|
| New           | 5                    | 1,004             | 5.7%                  |
| Returning     | 30                   | 16,473            | 94.3%                 |
| <b>TOTALS</b> | <b>35</b>            | <b>17,477</b>     | <b>100%</b>           |

**35**  
participating  
specialty  
pharmacies

**17,477**  
survey  
responses

**12.4%**  
response  
rate

Data analyses began with comparing mean scores for all questions between 2021 and 2022. Mean scores increased from 2021 to 2022 on all survey items, 16 significantly so. The five questions with the largest significant increases are presented in the table below. A table comparing mean scores for all survey questions between 2021 and 2022 is available in Appendix 2.

| Item   | 2021 Score | 2022 Score | t-score |
|--|------------|------------|---------|
| E2. Communication with our pharmacy team   | 4.69       | 4.73       | 5.112   |
| E3. Your experience with our pharmacy compared to other pharmacies you have used | 4.63       | 4.67       | 4.299   |
| A3. Our ability to return your calls in a timely manner                          | 4.51       | 4.55       | 4.235   |
| B11. Knowledge of your health condition  | 4.59       | 4.62       | 4.097   |
| D1. Timeliness of the delivery of your prescription                              | 4.70       | 4.73       | 3.852   |

The same analysis was then performed again including only the pharmacies that returned to the program in 2022. Mean scores increased from 2021 to 2022 on all survey items, 15 significantly so. The questions with the largest significant increases are presented in the table below. A table comparing mean scores for all survey questions from 2021 and 2022 for only returning pharmacies is included in Appendix 3.

| Item   | 2021 Score | 2022 Score | t-score |
|--|------------|------------|---------|
| E2. Communication with our pharmacy team   | 4.69       | 4.73       | 4.601   |
| E3. Your experience with our pharmacy compared to other pharmacies you have used | 4.63       | 4.67       | 3.996   |
| B11. Knowledge of your health condition  | 4.59       | 4.62       | 3.781   |
| A3. Our ability to return your calls in a timely manner                          | 4.51       | 4.55       | 3.743   |
| D4. Keeping you informed of the prescription status                              | 4.68       | 4.71       | 3.680   |



The 2022 data was then split into new and returning pharmacies for mean score comparison. Returning client responses were higher than those of new clients on 17 survey items, four significantly so. Of the 16 survey items where new clients scored higher, none were significant. The questions with significant differences are presented in the table below. A table comparing all 2022 mean scores of new and returning pharmacies is included in Appendix 4.

| Item  | New Score | Return Score | t-score |
|---|-----------|--------------|---------|
| C2. Promptness in resolving billing/insurance questions or problems   | 4.44      | 4.58         | 3.961   |
| D3. Accuracy of your filled prescription                              | 4.76      | 4.81         | 2.942   |
| C1. The helpfulness of the people who assisted with billing/insurance | 4.55      | 4.63         | 2.690   |
| D4. Keeping you informed of the prescription status                   | 4.65      | 4.71         | 2.230   |

This result, combined with the significant increases in returning client scores from 2021 to 2022, suggests that returning pharmacies largely contributed to the higher scores seen in 2022.

**Retail prescriptions account for 10%<sup>1</sup> of the healthcare spend. Though only 2% of prescription drug claims are specialty medications, specialty medicines accounted for 53% of all drug spend in the United States, up from 27% in 2010 and driven by growth in autoimmune and oncology therapies.<sup>2</sup> The specialty drug pipeline has attracted new players to the specialty pharmacy space.**

1. <https://www.cms.gov/Research-Statistics-Dataand-Systems/Statistics-Trends-and-Reports/NationalHealthExpendData/Downloads/highlights.pdf>

2. <https://www.iqvia.com/insights/the-iqvia-institute/reports/the-use-of-medicines-in-the-us>

### 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 operated 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.

### Pharmacy Type

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

|                                  | # of Pharmacies | # of Returns  | % of Returns |
|----------------------------------|-----------------|---------------|--------------|
| Academic Specialty Pharmacy      | 13              | 7,764         | 44.4%        |
| Health System Specialty Pharmacy | 12              | 5,364         | 30.7%        |
| Independent Specialty Pharmacy   | 10              | 4,349         | 24.9%        |
| <b>TOTALS</b>                    | <b>35</b>       | <b>17,477</b> | <b>100%</b>  |

A ranking analysis was conducted taking the average scores for all survey responses for each of the three pharmacy types. The Academic based specialty pharmacies scored nearly a point higher than Non-Academic Health System based specialty pharmacies, with the independent specialty pharmacies scoring 4.5 points under the Academic based specialty pharmacies.

### Average Scores of All Survey Questions

|   |       |
|---|-------|
| Independent Specialty Pharmacy                | 89.2% |
| Non-Academic Health System Specialty Pharmacy | 92.8% |
| Academic Specialty Pharmacy:                  | 93.7% |

A breakdown by all survey measures shows that Academic Specialty Pharmacies scored higher on all items. Likewise, Non-Academic Health System Specialty Pharmacies scored higher on all measures apart from “Your ability to contact us after hours” whereas Independent Specialty Pharmacies out-scored Non-Academic Health System Specialty Pharmacies.

### Average Scores for “Your Ability to Contact Us After Hours”

|   |       |
|---|-------|
| Independent Specialty Pharmacy                | 81.8% |
| Non-Academic Health System Specialty Pharmacy | 83.1% |
| Academic Specialty Pharmacy:                  | 83.8% |

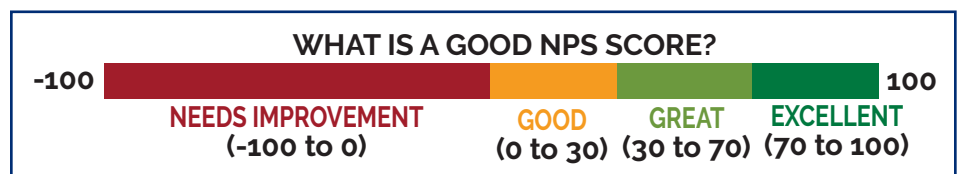
| Pharmacy Type                        |  | Academic | Health System | Independent |
|--------------------------------------|--|----------|---------------|-------------|
| Number of Responses                  |  | 7,764    | 5,364         | 4,349       |
| YOUR CALL TO OUR SPECIALTY PHARMACY  | A1. Your phone calls answered promptly   | 91.8     | 91.1          | 89.0        |
|                                      | A2. Your ability to contact us after hours   | 83.8     | 81.8          | 83.1        |
|                                      | A3. Our ability to return your calls in a timely manner  | 90.1     | 88.4          | 86.0        |
|                                      | A4. Clear and concise phone communication  | 93.3     | 92.4          | 85.3        |
|                                      | A5. Your ability to obtain prescription refills  | 94.5     | 93.4          | 89.9        |
|                                      | A6. The professionalism of our call center staff   | 94.9     | 94.2          | 90.4        |
|                                      | A7. Availability of medical information/advice by telephone  | 92.2     | 91.1          | 89.5        |
|                                      | A8. Confidence and trust in this provider  | 94.0     | 93.2          | 89.7        |
| YOUR INTERACTION WITH THE CALL STAFF | B1. The courtesy of the person who took your call  | 94.7     | 93.9          | 90.9        |
|                                      | B2. The helpfulness of the person who took your call   | 94.6     | 93.6          | 90.2        |
|                                      | B3. Willingness to listen carefully to you   | 94.4     | 93.5          | 89.2        |
|                                      | B4. Taking time to answer your questions   | 94.4     | 93.4          | 90.1        |
|                                      | B5. Amount of time spent with you  | 93.5     | 92.1          | 88.9        |
|                                      | B6. Explaining things in a way you could understand  | 93.7     | 93.1          | 88.4        |
|                                      | B7. Instructions regarding medication/follow-up care   | 93.8     | 92.9          | 89.5        |
|                                      | B8. Showing respect for what you had to say  | 94.5     | 93.4          | 89.9        |
|                                      | B9. Empathy and concern for your needs   | 93.9     | 92.9          | 89.1        |
|                                      | B10. Concern for your privacy  | 94.2     | 93.4          | 90.5        |
|                                      | B11. Knowledge of your health condition  | 92.2     | 91.3          | 86.3        |
|                                      | B12. Knowledge of your medication(s)   | 93.6     | 92.7          | 88.0        |
| OUR COMMUNICATION WITH YOU           | C1. Helpfulness of the people who assisted with billing/insurance  | 91.6     | 91.1          | 87.9        |
|                                      | C2. Promptness in resolving billing/insurance questions or problems  | 90.5     | 89.7          | 86.0        |
|                                      | C3. Effectiveness/helpfulness of our website and/or app  | 89.0     | 87.5          | 85.4        |
| YOUR PRESCRIPTION                    | D1. Timeliness of the delivery of your prescription  | 94.3     | 93.9          | 90.7        |
|                                      | D2. Condition of the prescription when received  | 96.1     | 95.3          | 93.4        |
|                                      | D3. Accuracy of your filled prescription   | 96.2     | 95.3          | 93.3        |
|                                      | D4. Keeping you informed of the prescription status  | 93.8     | 92.9          | 89.8        |
|                                      | D5. Promptness in resolving issues/questions concerning your prescriptions   | 93.5     | 92.6          | 88.0        |
| OVERALL SATISFACTION                 | E1. Our practice   | 95.4     | 94.3          | 90.6        |
|                                      | E2. Communication with our pharmacy team   | 94.5     | 93.7          | 89.7        |
|                                      | E3. Your experience with our pharmacy compared to other pharmacies you have used   | 93.2     | 92.4          | 88.0        |
|                                      | E4. Likelihood of using this pharmacy again?   | 95.4     | 94.3          | 90.3        |
|                                      | E5. Using any number from 0 to 10, where 0 is the least likely to recommend, how likely are to you recommend this practice to a friend or family member? | 94.5     | 93.6          | 89.5        |
| OVERALL SCORE                        |  | 93.7     | 92.8          | 89.2        |

### Why is NPS Important?

Consumers are experiencing rapid improvements (e.g. speed, easy purchase process, transparent pricing) in customer service from companies selling products and services they purchase. They expect the same from their healthcare providers. Gone are the days where incoherent medical jargon, slow hand-offs from clinic to pharmacy, and mysterious pricing algorithms are tolerated. Specialty pharmacy service levels, capabilities, and their ability to deliver medications and connect with patients are being compared to Amazon, Apple, and Netflix services — not just other pharmacies.

## 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. **The overall NPS score for NASP survey participants in 2022 was 80.0.** To better understand the strength of the NASP NPS score, a review of the NPS Leaders by industry shows that Costco, the leader in NPS for Drug Stores and Pharmacies is at a respectable 55. .



### The Net Promoter Score Question

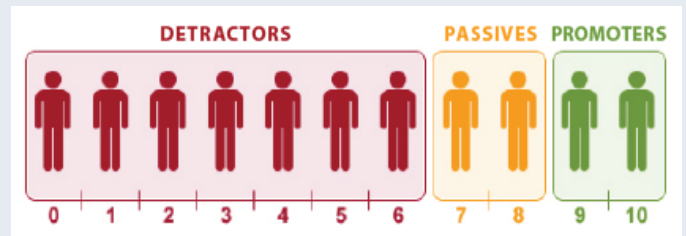
**E6. On a scale of 0-to-10, likelihood of recommending our pharmacy to family and friends?**

The scale is rated from 0 (not at all likely) to 10 (extremely likely). Depending on the responses, customers fall into one of 3 categories:

**Promoters** are customers who respond with a score of 9 or 10. Typically, these customers are loyal and enthusiastic customers.

**Passives** are customers who respond with a score of 7 or 8. These customers are satisfied with your service but not happy enough to be considered promoters.

**Detractors** respond with a score of 0 to 6. These are unhappy customers who are unlikely to buy from you again, and may even discourage others from buying from you.



To calculate Net Promoter Scores, discount the passive scores and subtract the percentage of detractors from the percentage of promoters.

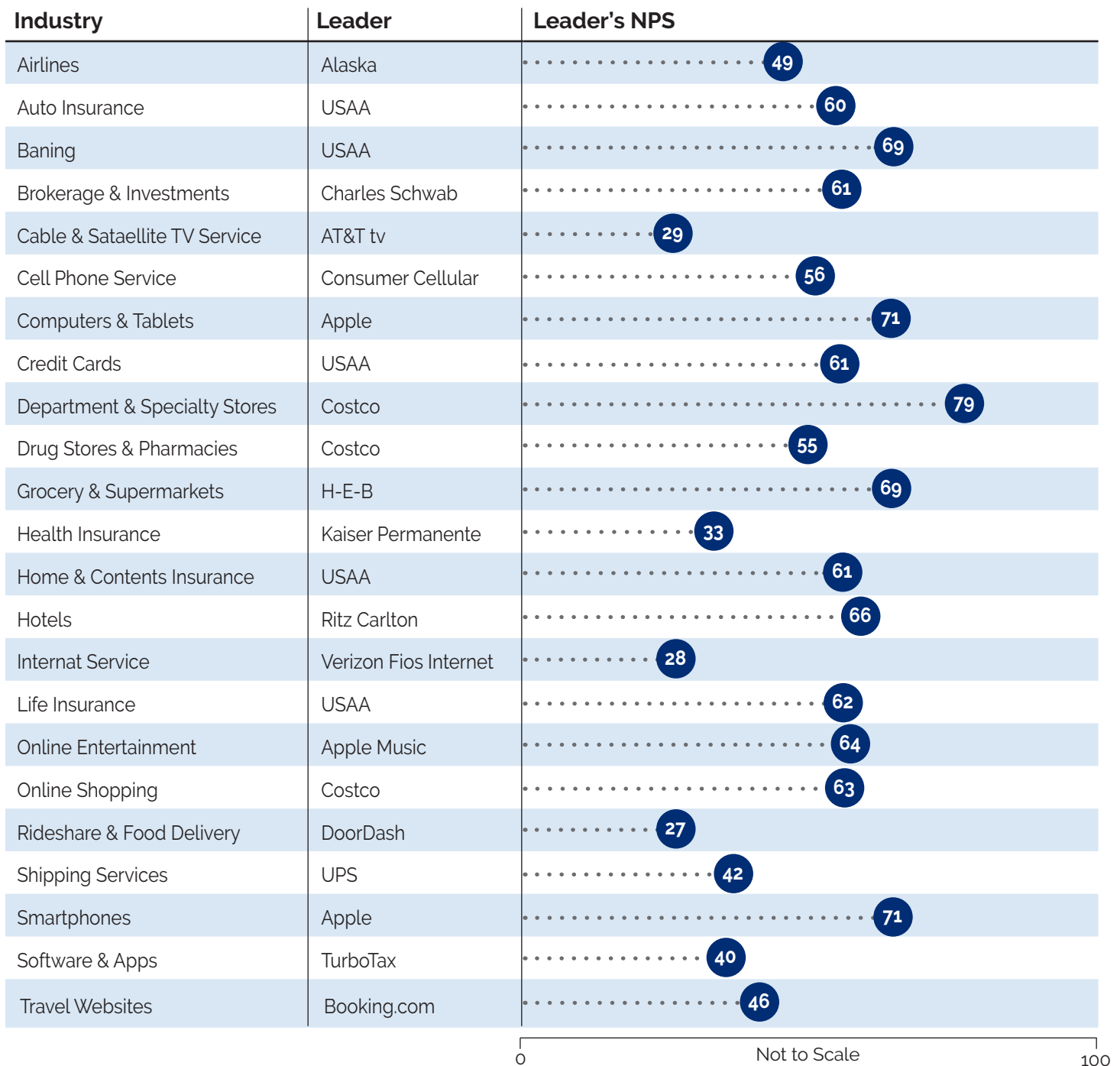
**% Promoters**

**- % Detractors**

**= Net Promoter Score**

**Example:** If 60% of respondents are Promoters, 20% are Passive, and 20% are Detractors, your net promoter score would be 40.

## NPS Leaders by Industry



### Net Promoter Scores (NPS) by Specialty Pharmacy Type

A Net Promoter Score (NPS) was 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.

**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?**

|                                   | 9-10  | 7-8   | 0-6  | NPS         | # Responses | Mean Score |
|-----------------------------------|-------|-------|------|-------------|-------------|------------|
| NASP Member Pharmacies (N=17,477) | 86.1% | 7.8%  | 6.1% | <b>80.0</b> | 15,865      | 93.070     |
| <b>Academic</b>                   | 89.1% | 6.3%  | 4.6% | <b>84.5</b> | 7,249       | 94.530     |
| <b>Health System</b>              | 87.1% | 7.4%  | 5.5% | <b>81.6</b> | 4,857       | 93.640     |
| <b>Independent</b>                | 79.0% | 11.3% | 9.8% | <b>69.2</b> | 3,759       | 89.530     |

### Net Promoter Scores (NPS) for All Participating Pharmacies

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 on the next page (*page 13*), with Academic Institutions in blue, Health Systems designated in green, and Independent Pharmacies in gold. Locations that had fewer than 30 responses to question E5 are highlighted in red text.

| Pharmacy       | Scores       |             |             | # Responses   | Mean Score  | NPS         | Type          |
|----------------|--------------|-------------|-------------|---------------|-------------|-------------|---------------|
|                | 9 - 10       | 7 - 8       | 0 - 6       |               |             |             |               |
| <b>Overall</b> | <b>86.1%</b> | <b>7.8%</b> | <b>6.1%</b> | <b>15,865</b> | <b>9.31</b> | <b>80.0</b> |               |
| 01             | 100.0%       | 0.0%        | 0.0%        | 12            | 9.92        | 100.0       | Independent   |
| 02             | 100.0%       | 0.0%        | 0.0%        | 34            | 9.85        | 100.0       | Independent   |
| 03             | 92.8%        | 4.8%        | 2.4%        | 249           | 9.61        | 90.4        | Academic      |
| 04             | 93.2%        | 3.3%        | 3.5%        | 546           | 9.61        | 89.7        | Health System |
| 05             | 91.2%        | 6.7%        | 2.1%        | 194           | 9.58        | 89.1        | Health System |
| 06             | 91.4%        | 5.7%        | 2.9%        | 35            | 9.54        | 88.5        | Independent   |
| 07             | 91.5%        | 5.4%        | 3.1%        | 683           | 9.61        | 88.4        | Academic      |
| 08             | 91.3%        | 5.6%        | 3.1%        | 575           | 9.58        | 88.2        | Academic      |
| 09             | 91.5%        | 5.0%        | 3.5%        | 1381          | 9.55        | 88.0        | Academic      |
| 10             | 90.3%        | 7.3%        | 2.4%        | 165           | 9.68        | 87.9        | Health System |
| 11             | 91.9%        | 3.8%        | 4.2%        | 260           | 9.51        | 87.7        | Academic      |
| 12             | 91.7%        | 4.2%        | 4.2%        | 575           | 9.54        | 87.5        | Health System |
| 13             | 91.4%        | 4.5%        | 4.1%        | 443           | 9.48        | 87.3        | Independent   |
| 14             | 91.7%        | 3.8%        | 4.5%        | 896           | 9.53        | 87.2        | Academic      |
| 15             | 89.5%        | 8.1%        | 2.3%        | 86            | 9.63        | 87.2        | Health System |
| 16             | 90.1%        | 5.6%        | 4.3%        | 463           | 9.49        | 85.8        | Academic      |
| 17             | 89.0%        | 6.1%        | 4.9%        | 344           | 9.48        | 84.1        | Health System |
| 18             | 86.8%        | 9.9%        | 3.2%        | 403           | 9.53        | 83.6        | Academic      |
| 19             | 88.4%        | 6.2%        | 5.4%        | 259           | 9.44        | 83.0        | Academic      |
| 20             | 87.6%        | 6.9%        | 5.5%        | 565           | 9.35        | 82.1        | Health System |
| 21             | 87.5%        | 6.6%        | 5.9%        | 730           | 9.33        | 81.6        | Health System |
| 22             | 87.9%        | 5.7%        | 6.4%        | 314           | 9.38        | 81.5        | Academic      |
| 23             | 86.2%        | 7.7%        | 6.2%        | 65            | 9.26        | 80.0        | Health System |
| 24             | 84.9%        | 9.2%        | 5.9%        | 391           | 9.26        | 79.0        | Academic      |
| 25             | 84.0%        | 9.8%        | 6.2%        | 519           | 9.22        | 77.8        | Academic      |
| 26             | 83.4%        | 8.6%        | 7.9%        | 856           | 9.16        | 75.5        | Academic      |
| 27             | 81.6%        | 11.4%       | 7.0%        | 1243          | 9.17        | 74.6        | Health System |
| 28             | 82.1%        | 9.3%        | 8.6%        | 151           | 9.05        | 73.5        | Health System |
| 29             | 82.4%        | 8.3%        | 9.3%        | 193           | 9.04        | 73.1        | Health System |
| 30             | 80.2%        | 11.3%       | 8.6%        | 222           | 9.04        | 71.6        | Independent   |
| 31             | 80.0%        | 10.0%       | 10.0%       | 100           | 8.92        | 70.0        | Independent   |
| 32             | 79.0%        | 10.7%       | 10.4%       | 328           | 8.90        | 68.6        | Independent   |
| 33             | 76.9%        | 12.9%       | 10.3%       | 2058          | 8.88        | 66.6        | Independent   |
| 34             | 68.2%        | 27.3%       | 4.5%        | 22            | 8.91        | 63.7        | Independent   |
| 35             | 73.5%        | 11.9%       | 14.7%       | 505           | 8.67        | 58.8        | Independent   |

The three pharmacies with the highest NPS values, excluding Pharmacy 01 because of response size, were selected for a correlation analysis between the net promoter question and the action items on the survey.

The top four positive, significant correlations between survey action items and the net promoter question are listed below for pharmacies 02, 03, and 04. Questions are colored based on category. Call Center Staff is noted with blue, Prescription Coordination in purple, Prescription Delivery in green, Access in red, and Billing/Insurance in gold. Items that appeared more than once have been bolded. The results highlight the importance of staff, access, and prescription coordination in recommending a specialty pharmacy.

| Pharmacy 02   | Pharmacy 03   | Pharmacy 04  |
|---|---|--|
| <ul style="list-style-type: none"> <li>Your trust and confidence in the pharmacist (A8, r = 0.878)</li> </ul>                     | <ul style="list-style-type: none"> <li>Keeping you informed of the prescription status (D4, r=0.434)</li> </ul>                         | <ul style="list-style-type: none"> <li>Willingness to listen carefully to you (B3, r=0.363)</li> </ul>           |
| <ul style="list-style-type: none"> <li>Knowledge of your health condition (B11, r=0.699)</li> </ul>                               | <ul style="list-style-type: none"> <li>Promptness in resolving issues/questions concerning your prescription (D5, r = 0.427)</li> </ul> | <ul style="list-style-type: none"> <li>The helpfulness of the person who took your call (B2, r=0.359)</li> </ul> |
| <ul style="list-style-type: none"> <li>Taking time to answer your questions (B4, r=0.682)</li> </ul>                              | <ul style="list-style-type: none"> <li>Effectiveness/ helpfulness of our website (C3, r=.424)</li> </ul>                                | <ul style="list-style-type: none"> <li>Showing respect for what you had to say (B8, r=0.359)</li> </ul>          |
| <ul style="list-style-type: none"> <li>Promptness in resolving billing/insurance questions or problems (C2, r = 0.655)</li> </ul> | <ul style="list-style-type: none"> <li>Your ability to obtain prescription refills (A5, r=0.382)</li> </ul>                             | <ul style="list-style-type: none"> <li>Clear and concise phone communication (A4, r = 0.341)</li> </ul>          |





## 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 Description  | B     |
| E2                                  | <b>Communication with our pharmacy team</b>                           | 0.393 |
| A5                                  | <b>Your ability to obtain prescription refills</b>                    | 0.112 |
| A8                                  | <b>Your trust or confidence in the pharmacist or nurse</b>            | 0.109 |
| D3                                  | Accuracy of your filled prescription                                  | 0.090 |
| D1                                  | Timeliness of the delivery of your prescription                       | 0.078 |
| Likelihood of Recommending Pharmacy |   |       |
| #                                   | Item Description  | B     |
| E2                                  | <b>Communication with our pharmacy team</b>                           | 0.488 |
| A8                                  | <b>Your trust and confidence and in the pharmacist or nurse</b>       | 0.356 |
| D5                                  | Promptness in resolving issues/questions concerning your prescription | 0.348 |
| A5                                  | <b>Your ability to obtain prescription refills</b>                    | 0.333 |
| B3                                  | Willingness to listen carefully to you                                | 0.238 |

**Bold face** = Items that appeared more than once

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

Although technology augmented and boosted communication between patients and pharmacies, the respondents emphasized the fact that one-on-one communication is still a critical part of care.

## 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. These stakeholders were then provided with a questionnaire (see Appendix 6) to solicit their feedback and insights on the initial findings. A review of their responses shows that the stakeholders felt there were several contributing factors that attributed to the overall improvement in scores over the past year. One factor that has drastically improved scores over the past year is the increased level of technology resources being utilized by specialty pharmacies since the onset of the pandemic. This has had a positive impact on communication between the specialty pharmacies and patients. Along with seeing scores improve across all survey measures, the most significant improvement was in "Communication with our pharmacy team". Many respondents attributed the expansion of communication platforms to the overall increase in patient satisfaction. Throughout COVID many patients were able to adopt more "modern" forms of communication such as texting, zoom meetings, and emails. Respondents felt this access to direct communication with the pharmacy team made them aware of what the patients' needs are and that the pharmacy team is on their side. **Although technology augmented and boosted communication between patients and pharmacies, the respondents emphasized the fact that one-on-one communication is still a critical part of care.**

The respondents were asked from their perspective as an industry stakeholder, if the findings indicate an opportunity for possible operational changes for 2023. Most respondents indicated that operational change would be a viable opportunity for 2023 into 2024, citing the need to "focus on key indicators year after year." **They suggested that an internal survey of the entire NASP Survey team would help pinpoint and provide insights on how best to improve patient satisfaction and engagement.** To quote one Advisory Board member, "There will always be opportunities to improve operations as technology and stakeholder expectations are constantly evolving." Ever-evolving technology, therapies, and continuous changes in manufacturer and payor requirements are a constant in this industry. Closely analyzing the evolution of trends will play an important role in the level of patient care offered and how specialty pharmacies can continue to support an elevated patient care experience

Academic-based specialty pharmacies outscored the Health

Systems owned/operated specialty pharmacies and Independent Specialty Pharmacies for the second year in a row. The respondents commented on that topic as well, mentioning patient bias and access to better resources and technology, which allows many academic specialty pharmacies to excel in patient satisfaction. Many individuals associate higher quality care with academic health systems, which may have contributed to their overall higher scores. Additionally, stakeholders noted that academic specialty pharmacies have access to more clinical trials, more board-certified pharmacists, and residents who all typically work collaboratively to help best meet the patients' needs.

**"Better quality equates to a better overall care experience" was a common theme for many of the stakeholders.** They clearly felt that specialty pharmacies, "offer a unique experience providing immediate access to providers/clinicians", resulting in greater collaboration and communication across the entire care team. The stakeholders all agreed that the great majority of specialty pharmacies have a more intimate and personal relationship with their patients other industries lack. This is reinforced by the fact that the survey found patients felt communication and convenience are extremely important when determining their overall satisfaction with their specialty pharmacy. Many of the stakeholders hope this will be a major focus for 2023. They believe that this will bring continued growth to the industry and an ongoing overall increase in their already high Net Promoter Scores.

**The questionnaire offered plenty of insight into the stakeholders' thoughts on the future of specialty pharmacy and where the industry was headed.** The stakeholders' responses on the future of the specialty pharmacy were positive, with one respondent stating, "We see our specialty pharmacy customers continuing to grow and evolve, becoming more sophisticated in the way they operate ...". Bottom line, the members of the Advisory Board see the specialty pharmacy industry continuing to grow at a rapid pace over the next several years and that the ability of individual specialty pharmacies to adopt more innovative ways to meet patients' needs will be vital for success.

Some of the respondents were not aware of the Patient Satisfaction Survey White Paper as they were new to the industry or NASP, but it was best summed up by one respondent saying, "This is my first year of being so closely involved with this survey and its findings, so no, I have not used their results to inform my business decisions. I plan to going forward." The white paper is a great tool to utilize for everyone

**The stakeholders all agreed that the great majority of specialty pharmacies have a more intimate and personal relationship with their patients other industries lack. This is reinforced by the fact that the survey found patients felt communication and convenience are extremely important when determining their overall satisfaction with their specialty pharmacy.**

**The stakeholders are excited to see what the future holds for this industry and specialty pharmacies as it grows and moves forward for years to come.**

in the industry to connect and inform. **Final thoughts among the stakeholders were a resounding call for greater participation within the program from all NASP member specialty pharmacies to further boost numbers and gain a more robust data set and better understanding of this industry for not only new members but veterans of the industry as well.** All in all, the stakeholders are excited to see what the future holds for this industry and specialty pharmacies as it grows and moves forward for years to come.

NASP thanks this year's Patient Survey Advisory Board participants.

- Jenna Bay – ARJ Infusion Services
- Andrew Babb, PharmD – BioTek reMEDys
- Cecelia Byers - Surescripts
- Jillian Dura, PharmD, BCOP – Seagen
- Emily Juhnke - Keycentrix
- Timothy L'Hommedieu – Atlas Health
- Dylan Lindsay – University of Mississippi Medical Center
- Heidi Polek – DrFirst
- Chandra Wahgren – Moda Corporate

## BEST PRACTICES

To add greater value to NASP members, it was determined that hearing from top performing specialty pharmacies in the 2022 NASP patient survey program would provide key insights into how they were able to succeed during 2022. The top two key driver survey items for the 2022 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 2022 and have at least 100 patient responses. We are proud to announce the 2022 top performers, University of Vermont Medical Center and Ardon Health.

### Communication with our Pharmacy Team

University of Vermont Medical Center (UVM) scored an outstanding score of 97 on a 100 point scale on Communication with our pharmacy team and an NPS in excess of 90, which provides further evidence of the efficacy of our key driver analysis. Here is some information about UVM and what they have done to excel in 2022.

*The University of Vermont (UVM) Medical Center Specialty Pharmacy is located in the largest city in the rural state of Vermont. Since opening in 2014, like many specialty pharmacies, we have experienced rapid growth year over year. From the start, we have prioritized excellent patient communication and strive to create a comprehensive, yet personalized approach with every patient interaction. We have been successful in maintaining this approach throughout the years by utilizing and adapting several strategies.*

*Our patient communication is directly intertwined with our patient engagement in their specialty pharmacy services. Being that Vermont is largely rural with many dirt roads, wide seasonal temperature swings and lower access to cellular data, this has created unique challenges when it comes to reaching our patients. We cannot always rely on national carriers for these rural deliveries, especially in those areas of limited cell phone coverage, so our patient care coordinators and pharmacists are empowered to listen to our patient's needs. When a patient is called for the first time, our team reviews services, discusses next steps, and coordinates deliveries and education to accommodate these individual needs and schedules. We utilize a local same-day courier service giving our patients the ability to decide what day and time frame they prefer for delivery. Using a local courier allows us to quickly adapt to last-minute changes and to communicate with*

**University of Vermont Medical Center (UVM) scored an outstanding score of 97 on a 100 point scale on Communication with our pharmacy team and an NPS in excess of 90, which provides further evidence of the efficacy of our key driver analysis.**

**Our staff is empowered to be patient-centric, and each member of our team strives to make the management of their health as easy as possible. We bring sincerity and integrity to the care of our patients which has become evident through our patient satisfaction and engagement.**

*University of Vermont  
Medical Center*

*our patients. This individualization is not limited to deliveries. We are licensed in multiple states to provide continuous care for those who travel to warmer weather in the winter. In addition, our pharmacists meet with patients via telehealth to provide education for those unable to come on-site. We are able to accommodate these unique requests for patients in these rural areas which further establishes trust and personalized service which are the major keys to our success.*

*Another impactful strategy that we've implemented has been separating out our incoming and outgoing phone calls to different patient care coordinators. Accrediting bodies require phone calls to be answered within 30 seconds by a live person. Our specialty pharmacy has always answered much faster, but with growth, we saw our time to answer increase. In the past, each patient care coordinator would make outgoing phone calls and take incoming phone calls. We identified this as an area for process improvement. Now, at least two patient care coordinators are assigned to only take incoming phone calls. This allows patient care coordinators to maintain a high level of uninterrupted, personalized service to make outgoing calls and that our response time for incoming calls is shortened. This ultimately ensures our patients have access to our staff quickly.*

*Our staff is empowered to be patient-centric, and each member of our team strives to make the management of their health as easy as possible. We bring sincerity and integrity to the care of our patients which has become evident through our patient satisfaction and engagement.*

### **Your Trust and Confidence in the Pharmacist or Nurse**

Ardon Health scored an outstanding score of 97.2 on a 100-point scale on Confidence and trust in the pharmacist or nurse and a NPS in excess of 87; which again shows that success in the key driver will help improve your overall key outcomes. Here is some information about Ardon Health and what they have done to excel in 2022.

*At Ardon, we differentiate ourselves through our exceptional communication and our ability to meet patients where they are along their journey. Our approach is centered around empathizing with patients, stepping into their shoes, and tapping into our professional experiences to enrich and improve the lives of our patients. This patient-centered philosophy is a critical component of our innovative leadership in delivering patient care and achieving positive outcomes.*



Ardon's pharmacists and specialty navigators have established a close working relationship with providers in PeaceHealth clinics, with a shared goal of removing barriers to treatment and improving patient outcomes. Through this collaboration, we have embedded pharmacy services directly within clinics at PeaceHealth medical centers, leading to streamlined and improved care for patients. By working closely alongside healthcare providers, Ardon ensures that patients benefit from the combined expertise of our team and the healthcare professionals, resulting in enhanced treatment experiences and overall improved outcomes.

To measure the effectiveness of our clinical programs and support services, Ardon has implemented a high-touch, interactive patient management program. This clinician-guided approach enhances patients' understanding of their disease and prescribed therapies. Through improved communication and coordination with caregivers and healthcare providers, we have achieved increased medication adherence and personalized treatment plans tailored to each patient's unique needs. Ardon utilizes evidence-based clinical research data to identify and overcome obstacles to care, resulting in optimized treatment outcomes. Our disease-tailored clinical programs have been seamlessly integrated into monthly touchpoints, maximizing patient engagement and satisfaction. A patient with an extensive history of failed DMARDs for psoriatic arthritis began to have a flare up of their psoriasis. Having failed most available DMARDs for their arthritis, the provider opted to add-on an additional medication to their current therapy to manage their psoriasis. When the prior authorization was initially denied by the patient's insurance, the Ardon in-clinic pharmacist stepped in to provide the clinical rationale/evidence to assist on the appeal. The denial was rapidly overturned, with the patient able to start therapy just a couple days later.

Recognizing the importance of convenient and accessible communication, Ardon implemented a digital patient engagement tool in 2021. This tool enables patients to refill prescriptions and connect with the pharmacy team via text, email or the MyArdon app. The positive impact of this tool on patient adherence has significantly improved our PDC. By providing a user-friendly communication platform, Ardon empowers patients to take a more active role in managing their treatment, leading to improved overall outcomes. A compelling story of how our communication made a significant difference is when one patient was able to use My Ardon's live chat feature to communicate with a Clinical Pharmacist when they were unable to use their phone. The patient was traveling internationally during a heat wave and her

**Ardon Health scored an outstanding score of 97.2 on a 100-point scale on Confidence and trust in the pharmacist or nurse and a NPS in excess of 87; which again shows that success in the key driver will help improve your overall key outcomes.**

**Ardon's differentiator lies in our unwavering commitment to compassionate communication, our patient-centered approach, and our confidence in using our knowledge and experiences to enrich and improve the lives of our patients.**

*medication was out of the refrigerator longer than anticipated. The pharmacist determined that the medication was not viable to use, discussed other ways to manage her condition until she returned to the US, and determined dosing plan for when she returned.*

*Ardon's differentiator lies in our unwavering commitment to compassionate communication, our patient-centered approach, and our confidence in using our knowledge and experiences to enrich and improve the lives of our patients. Through empathetic collaboration, high-touch patient management, and seamless digital engagement, we consistently strive to exceed expectations and optimize treatment outcomes for all our patients.*



## CONCLUSIONS

### Hitting the Mark — Strong Industry Performance

In general, specialty pharmacies continue to outperform other industries in overall patient satisfaction. NPS scores associated with specialty pharmacies continue to improve year over year, with a nearly 7% increase from 2022 to 2023! The highest score in 2023 was 100.0 and the lowest 58.8, as compared to 96.2 and 53.1 in 2022.

Returning pharmacies had a notable increase in overall scores, demonstrating the effectiveness of utilizing survey results to improve processes.

### Key Drivers of Satisfaction

The most critical part to improving overall patient satisfaction is identifying the key drivers of satisfaction. Questions with high correlation to overall satisfaction provide opportunities for specialty pharmacies to focus on process improvement efforts.

The three specialty pharmacies with the highest NPS scores achieved these results based primarily on access and prescription coordination as key drivers, which would indicate that their ability to perform well in this area is a key reason for their success.

"Communication with our pharmacy team," "your trust and confidence in the pharmacist or nurse," and "promptness in resolving issues/questions concerning your prescription" are the most predictive/important when patients determine overall satisfaction and their willingness to recommend.

### Difference Among Types of Specialty Pharmacies

The continued increase in NASP members participating in the patient satisfaction survey process (35 for 2022) allows for more meaningful analysis by unique type of specialty pharmacy. In 2022, academic-based specialty pharmacies remained the top leaders of overall patient satisfaction amidst the additional non-academic health system and independent specialty pharmacies.

Academic-based specialty pharmacies scored higher in all surveyed areas. Non-academic health system-based specialty pharmacies outperformed independent specialty pharmacies on all survey items except for afterhours contact. Finally, independent specialty pharmacies made up the 6 lowest NPS scores for 2022.

**In general, specialty pharmacies continue to outperform other industries in overall patient satisfaction.**

**Utilizing different communication techniques to tailor effective and meaningful communication with the patient leads to trust and strong patient satisfaction.**

These findings suggest that specialty pharmacies that represent organizations providing healthcare services upstream and downstream of specialty pharmacy care are leveraging their more comprehensive care and local brand recognition.

After an analysis of survey results, discussions with the advisory board and our best practice representatives, the overall sentiment was communication is key in 2022. Pharmacies that posted high scores focused on improving and elevating communication strategies with their respective patient population. Utilizing different communication techniques to tailor effective and meaningful communication with the patient leads to trust and strong patient satisfaction. As digital engagement continues to gain popularity, savvy pharmacies are keen to balance technology (digital apps, messaging, and telehealth) with one-on-one counseling, using technology as a complement to communication, not as a replacement.

Listening to the patient's needs and adjusting service delivery utilizing patient responses to key drivers of the patient's satisfaction, pharmacies participating in the NASP survey will continue to improve their scores and demonstrate specialty pharmacy as an industry that provides a vital to service to patients with chronic and rare conditions.

## APPENDICES

Appendix 1: Survey numbers and questions

Appendix 2: Comparison between 2022 survey results and 2021 survey results, using all responses. Significant changes in mean score are noted in the last two columns.

Appendix 3: Comparison between 2022 survey results and 2021 survey data, using only data from returning pharmacies. Significant changes in mean score are noted in the last two columns.

Appendix 4: Comparison between new and returning pharmacies in the 2022 survey. Significant differences in mean score are noted in the last two columns

Appendix 5: Descriptive Statistics for NPS by Pharmacy

Thank you to 2022 Patient Satisfaction Survey key authors and contributors:

- Sheila Arquette, NASP
- Juliana Horton, Blue Sky Specialty Pharmacy
- Thomas Jeffrey, SullivanLuallin Group

## APPENDIX 1: Survey Numbers and Questions

Question # Question

### Your Call To Our Specialty Pharmacy

- A1 Your phone call answered promptly
- A2 Your ability to contact us after hours
- A3 Our ability to return your calls in a timely manner
- A4 Clear and concise phone communication
- A5 Your ability to obtain prescription refills
- A6 The professionalism of our call center staff
- A7 Availability of the on-call pharmacist or nurse (if applicable)
- A8 Your trust and confidence in the pharmacist (if applicable)

### Your Interaction With The Call Center

- B1 The courtesy of the person who took your call
- B2 The helpfulness of the person who took your call
- B3 Willingness to listen carefully to you
- B4 Taking time to answer your questions
- B5 Amount of time spent with you
- B6 Explaining things in a way you could understand
- B7 Instructions regarding your medication and next steps
- B8 Showing respect for what you had to say
- B9 Empathy and concern for your needs
- B10 Concern for your privacy
- B11 Knowledge of your health condition
- B12 Knowledge of your medication(s)

### Our Communication With You

- C1 Helpfulness of people who assisted you with billing/insurance
- C2 Promptness in resolving billing/insurance questions or problems
- C3 Effectiveness/helpfulness of our website

### Your Prescription

- D1 Timeliness of the delivery of your prescription
- D2 Condition of the prescription when received
- D3 Accuracy of your filled prescription
- D4 Keeping you informed of the prescription status
- D5 Promptness in resolving issues/questions concerning your prescription

### Your Overall Satisfaction With

- E1 Our specialty pharmacy and service
- E2 Communication with our pharmacy team
- E3 Your experience with our specialty pharmacy over other pharmacies you have used
- E4 Likelihood of using this pharmacy again?
- E5 Likelihood of recommending our pharmacy to family and friends?

**APPENDIX 2: Comparison between 2022 survey results and 2021 survey results, using all responses. Significant changes in mean score are noted in the last two columns.**

| Question # | NASP<br>01/01/2022 - 12/31/2022<br>(by date of service) |                     |                    | NASP<br>01/01/2021 - 12/31/2021 |                     |                    | Standard Error of the Difference Between Means | T-Score | Higher than Previous | Lower than Previous |
|------------|---|---------------------|--------------------|---------------------------------|---------------------|--------------------|--|---------|----------------------|---------------------|
|            | Mean Score for Client                                   | Number of Responses | Standard Deviation | Previous Mean Score for Client  | Number of Responses | Standard Deviation |  |         |                      |                     |
| A1         | 4.64  | 15,413              | 0.6926             | 4.61                            | 16,936              | 0.7089             | 0.00781  | 3.507   | ▲                    |                     |
| A2         | 4.32  | 6,828               | 1.0173             | 4.32                            | 7,392               | 1.0045             | 0.01697  | 0.264   |                      |                     |
| A3         | 4.55  | 12,875              | 0.7730             | 4.51                            | 13,657              | 0.8049             | 0.00970  | 4.235   | ▲                    |                     |
| A4         | 4.64  | 16,410              | 0.7246             | 4.63                            | 17,864              | 0.7195             | 0.00781  | 1.087   |                      |                     |
| A5         | 4.72  | 16,208              | 0.6736             | 4.70                            | 17,665              | 0.6968             | 0.00748  | 3.505   |                      |                     |
| A6         | 4.74  | 16,363              | 0.6073             | 4.73                            | 17,907              | 0.6050             | 0.00656  | 1.678   |                      |                     |
| A7         | 4.65  | 9,713               | 0.6937             | 4.63                            | 10,338              | 0.6978             | 0.00985  | 1.660   |                      |                     |
| A8         | 4.71  | 14,128              | 0.6355             | 4.69                            | 15,331              | 0.6572             | 0.00755  | 2.758   | ▲                    |                     |
| B1         | 4.74  | 15,598              | 0.5900             | 4.74                            | 17,114              | 0.5768             | 0.00648  | 0.333   |                      |                     |
| B2         | 4.73  | 15,445              | 0.6145             | 4.72                            | 16,997              | 0.6245             | 0.00686  | 1.289   |                      |                     |
| B3         | 4.72  | 15,640              | 0.6387             | 4.71                            | 17,110              | 0.6370             | 0.00707  | 0.902   |                      |                     |
| B4         | 4.72  | 15,198              | 0.6235             | 4.72                            | 16,576              | 0.6215             | 0.00700  | 1.239   |                      |                     |
| B5         | 4.68  | 15,625              | 0.6518             | 4.67                            | 17,091              | 0.6524             | 0.00721  | 0.947   |                      |                     |
| B6         | 4.69  | 15,274              | 0.6563             | 4.68                            | 16,765              | 0.6563             | 0.00735  | 1.492   |                      |                     |
| B7         | 4.70  | 14,367              | 0.6469             | 4.68                            | 15,686              | 0.6569             | 0.00755  | 2.514   | ▲                    |                     |
| B8         | 4.72  | 15,542              | 0.6165             | 4.71                            | 17,011              | 0.6252             | 0.00686  | 2.400   | ▲                    |                     |
| B9         | 4.70  | 15,113              | 0.6561             | 4.68                            | 16,490              | 0.6640             | 0.00742  | 2.488   | ▲                    |                     |
| B10        | 4.72  | 14,614              | 0.6051             | 4.71                            | 15,931              | 0.5958             | 0.00686  | 1.112   |                      |                     |
| B11        | 4.62  | 14,052              | 0.7273             | 4.59                            | 15,225              | 0.7509             | 0.00866  | 4.097   | ▲                    |                     |
| B12        | 4.68  | 15,064              | 0.6732             | 4.66                            | 16,526              | 0.6905             | 0.00768  | 3.223   | ▲                    |                     |
| C1         | 4.62  | 11,540              | 0.7459             | 4.61                            | 12,630              | 0.7508             | 0.00964  | 0.698   |                      |                     |
| C2         | 4.57  | 9,573               | 0.8183             | 4.56                            | 10,461              | 0.8252             | 0.01162  | 0.931   |                      |                     |
| C3         | 4.51  | 7,669               | 0.8820             | 4.50                            | 8,191               | 0.8790             | 0.01400  | 0.761   |                      |                     |
| D1         | 4.73  | 15,995              | 0.6778             | 4.70                            | 17,579              | 0.6997             | 0.00755  | 3.852   | ▲                    |                     |
| D2         | 4.81  | 15,874              | 0.5169             | 4.80                            | 17,406              | 0.5290             | 0.00574  | 1.685   |                      |                     |
| D3         | 4.81  | 15,993              | 0.5218             | 4.80                            | 17,530              | 0.5311             | 0.00574  | 1.253   |                      |                     |
| D4         | 4.70  | 15,421              | 0.7130             | 4.67                            | 16,857              | 0.7450             | 0.00812  | 3.829   | ▲                    |                     |
| D5         | 4.68  | 13,259              | 0.7281             | 4.65                            | 14,502              | 0.7582             | 0.00894  | 3.650   | ▲                    |                     |
| E1         | 4.76  | 15,829              | 0.6083             | 4.73                            | 17,532              | 0.6412             | 0.00686  | 3.752   | ▲                    |                     |
| E2         | 4.73  | 15,552              | 0.6668             | 4.69                            | 17,111              | 0.7197             | 0.00768  | 5.112   | ▲                    |                     |
| E3         | 4.67  | 15,530              | 0.7619             | 4.63                            | 17,073              | 0.8103             | 0.00872  | 4.299   | ▲                    |                     |
| E4         | 4.76  | 15,775              | 0.6366             | 4.73                            | 17,409              | 0.6667             | 0.00714  | 3.718   | ▲                    |                     |
| E5         | 9.31  | 15,865              | 1.8265             | 9.29                            | 17,494              | 1.8286             | 0.02002  | 1.089   |                      |                     |

**APPENDIX 3: Comparison between 2022 survey results and 2021 survey data, using only data from returning pharmacies. Significant changes in mean score are highlighted in the last two columns.**

**01/01/2022 - 12/31/2022**  
(by date of service)

**01/01/2021 - 12/31/2021**

| Question # | Mean Score for Client | Number of Responses | Standard Deviation | Previous Mean Score for Returning | Number of Responses | Standard Deviation | Standard Error of the Difference Between Means | T-Score | Higher than Previous | Lower than Previous |
|------------|-----------------------|---------------------|--------------------|-----------------------------------|---------------------|--------------------|--|---------|----------------------|---------------------|
| A1         | 4.64                  | 14,531              | 0.6922             | 4.61                              | 15,791              | 0.7054             | 0.00806  | 2.966   | ▲                    |                     |
| A2         | 4.32                  | 6,486               | 1.0174             | 4.32                              | 6,882               | 1.0017             | 0.01746  | 0.202   |                      |                     |
| A3         | 4.55                  | 12,129              | 0.7718             | 4.51                              | 12,689              | 0.7984             | 0.01000  | 3.743   | ▲                    |                     |
| A4         | 4.64                  | 15,474              | 0.7241             | 4.63                              | 16,585              | 0.7190             | 0.00806  | 0.872   |                      |                     |
| A5         | 4.72                  | 15,369              | 0.6750             | 4.70                              | 16,427              | 0.6916             | 0.00768  | 2.845   | ▲                    |                     |
| A6         | 4.74                  | 15,435              | 0.6090             | 4.73                              | 16,648              | 0.6066             | 0.00678  | 1.571   |                      |                     |
| A7         | 4.65                  | 9,227               | 0.6957             | 4.63                              | 9,617               | 0.6923             | 0.01010  | 1.194   |                      |                     |
| A8         | 4.71                  | 13,341              | 0.6390             | 4.69                              | 14,169              | 0.6562             | 0.00781  | 2.528   | ▲                    |                     |
| B1         | 4.74                  | 14,729              | 0.5910             | 4.74                              | 15,933              | 0.5759             | 0.00663  | 0.243   |                      |                     |
| B2         | 4.73                  | 14,580              | 0.6140             | 4.72                              | 15,823              | 0.6205             | 0.00707  | 1.083   |                      |                     |
| B3         | 4.72                  | 14,760              | 0.6393             | 4.71                              | 15,921              | 0.6360             | 0.00728  | 0.783   |                      |                     |
| B4         | 4.72                  | 14,326              | 0.6227             | 4.72                              | 15,413              | 0.6200             | 0.00721  | 1.154   |                      |                     |
| B5         | 4.68                  | 14,740              | 0.6509             | 4.67                              | 15,899              | 0.6517             | 0.00742  | 0.819   |                      |                     |
| B6         | 4.69                  | 14,398              | 0.6573             | 4.68                              | 15,589              | 0.6523             | 0.00755  | 1.098   |                      |                     |
| B7         | 4.70                  | 13,540              | 0.6481             | 4.68                              | 14,549              | 0.6522             | 0.00775  | 1.830   |                      |                     |
| B8         | 4.72                  | 14,660              | 0.6171             | 4.71                              | 15,817              | 0.6248             | 0.00714  | 2.204   | ▲                    |                     |
| B9         | 4.70                  | 14,244              | 0.6554             | 4.68                              | 15,333              | 0.6605             | 0.00768  | 2.192   | ▲                    |                     |
| B10        | 4.72                  | 13,766              | 0.6052             | 4.72                              | 14,821              | 0.5923             | 0.00707  | 0.772   |                      |                     |
| B11        | 4.62                  | 13,227              | 0.7256             | 4.59                              | 14,137              | 0.7487             | 0.00894  | 3.781   | ▲                    |                     |
| B12        | 4.68                  | 14,206              | 0.6730             | 4.66                              | 15,370              | 0.6862             | 0.00794  | 2.971   | ▲                    |                     |
| C1         | 4.63                  | 10,819              | 0.7375             | 4.62                              | 11,727              | 0.7453             | 0.00990  | 0.788   |                      |                     |
| C2         | 4.58                  | 8,955               | 0.8044             | 4.56                              | 9,727               | 0.8208             | 0.01192  | 1.406   |                      |                     |
| C3         | 4.51                  | 7,261               | 0.8798             | 4.50                              | 7,579               | 0.8749             | 0.01442  | 0.357   |                      |                     |
| D1         | 4.73                  | 15,115              | 0.6779             | 4.71                              | 16,348              | 0.6943             | 0.00775  | 3.606   | ▲                    |                     |
| D2         | 4.81                  | 14,999              | 0.5167             | 4.80                              | 16,194              | 0.5267             | 0.00592  | 1.770   |                      |                     |
| D3         | 4.81                  | 15,124              | 0.5177             | 4.80                              | 16,304              | 0.5297             | 0.00592  | 1.642   |                      |                     |
| D4         | 4.71                  | 14,576              | 0.7094             | 4.68                              | 15,685              | 0.7406             | 0.00837  | 3.680   | ▲                    |                     |
| D5         | 4.68                  | 12,521              | 0.7272             | 4.65                              | 13,487              | 0.7549             | 0.00922  | 3.357   | ▲                    |                     |
| E1         | 4.76                  | 14,946              | 0.6113             | 4.73                              | 16,315              | 0.6371             | 0.00707  | 3.221   | ▲                    |                     |
| E2         | 4.73                  | 14,689              | 0.6705             | 4.69                              | 15,908              | 0.7190             | 0.00794  | 4.601   | ▲                    |                     |
| E3         | 4.67                  | 14,683              | 0.7649             | 4.63                              | 15,900              | 0.8110             | 0.00906  | 3.996   | ▲                    |                     |
| E4         | 4.75                  | 14,895              | 0.6401             | 4.73                              | 16,209              | 0.6631             | 0.00742  | 3.094   | ▲                    |                     |
| E5         | 9.31                  | 14,972              | 1.8274             | 9.29                              | 16,274              | 1.8263             | 0.02069  | 0.925   |                      |                     |

**APPENDIX 4: Comparison between new and returning pharmacies in the 2022 survey. Significant differences in mean score are highlighted in the last two columns.**

| Question # | NEW Specialty Pharmacies<br>01/01/2022 - 12/31/2022<br>(by date of service) |                     |                    | RETURNING Specialty Pharmacies<br>01/01/2022 - 12/31/2022 |                     |                    | Standard Error of the Difference Between Means | T-Score | Higher than Previous | Lower than Previous |
|------------|---|---------------------|--------------------|---|---------------------|--------------------|--|---------|----------------------|---------------------|
|            | Mean Score for Returning  | Number of Responses | Standard Deviation | Mean Score for New  | Number of Responses | Standard Deviation |  |         |                      |                     |
| A1         | 4.64  | 14,531              | 0.6922             | 4.63  | 882                 | 0.7006             | 0.02402  | 0.054   |                      |                     |
| A2         | 4.32  | 6,486               | 1.0174             | 4.32  | 342                 | 1.0158             | 0.05644  | 0.100   |                      |                     |
| A3         | 4.55  | 12,129              | 0.7718             | 4.53  | 746                 | 0.7925             | 0.02915  | 0.685   |                      |                     |
| A4         | 4.64  | 15,474              | 0.7241             | 4.66  | 936                 | 0.7336             | 0.02439  | -0.632  |                      |                     |
| A5         | 4.72  | 15,369              | 0.6750             | 4.72  | 839                 | 0.6476             | 0.02387  | -0.108  |                      |                     |
| A6         | 4.74  | 15,435              | 0.6090             | 4.75  | 928                 | 0.5778             | 0.02052  | -0.388  |                      |                     |
| A7         | 4.65  | 9,227               | 0.6957             | 4.68  | 486                 | 0.6536             | 0.03228  | -1.146  |                      |                     |
| A8         | 4.71  | 13,341              | 0.6390             | 4.73  | 787                 | 0.5724             | 0.02330  | -1.107  |                      |                     |
| B1         | 4.74  | 14,729              | 0.5910             | 4.74  | 869                 | 0.5732             | 0.02059  | 0.074   |                      |                     |
| B2         | 4.73  | 14,580              | 0.6140             | 4.72  | 865                 | 0.6239             | 0.02152  | 0.520   |                      |                     |
| B3         | 4.72  | 14,760              | 0.6393             | 4.72  | 880                 | 0.6293             | 0.02216  | -0.117  |                      |                     |
| B4         | 4.72  | 14,326              | 0.6227             | 4.72  | 872                 | 0.6369             | 0.02175  | 0.136   |                      |                     |
| B5         | 4.68  | 14,740              | 0.6509             | 4.68  | 885                 | 0.6672             | 0.02256  | 0.079   |                      |                     |
| B6         | 4.69  | 14,398              | 0.6573             | 4.69  | 876                 | 0.6410             | 0.02285  | -0.071  |                      |                     |
| B7         | 4.70  | 13,540              | 0.6481             | 4.72  | 827                 | 0.6274             | 0.02317  | -1.135  |                      |                     |
| B8         | 4.72  | 14,660              | 0.6171             | 4.73  | 882                 | 0.6067             | 0.02138  | -0.305  |                      |                     |
| B9         | 4.70  | 14,244              | 0.6554             | 4.70  | 869                 | 0.6688             | 0.02293  | -0.160  |                      |                     |
| B10        | 4.72  | 13,766              | 0.6052             | 4.73  | 848                 | 0.6026             | 0.02140  | -0.354  |                      |                     |
| B11        | 4.62  | 13,227              | 0.7256             | 4.62  | 825                 | 0.7546             | 0.02610  | 0.242   |                      |                     |
| B12        | 4.68  | 14,206              | 0.6730             | 4.66  | 858                 | 0.6775             | 0.02366  | 0.730   |                      |                     |
| C1         | 4.63  | 10,819              | 0.7375             | 4.55  | 721                 | 0.8601             | 0.02869  | 2.690   | ▲                    |                     |
| C2         | 4.58  | 8,955               | 0.8044             | 4.44  | 618                 | 0.9897             | 0.03400  | 3.961   | ▲                    |                     |
| C3         | 4.51  | 7,261               | 0.8798             | 4.51  | 408                 | 0.9220             | 0.04488  | -0.024  |                      |                     |
| D1         | 4.73  | 15,115              | 0.6779             | 4.71  | 880                 | 0.6759             | 0.02349  | 1.082   |                      |                     |
| D2         | 4.81  | 14,999              | 0.5167             | 4.78  | 875                 | 0.5198             | 0.01797  | 1.476   |                      |                     |
| D3         | 4.81  | 15,124              | 0.5177             | 4.76  | 869                 | 0.5867             | 0.01819  | 2.942   | ▲                    |                     |
| D4         | 4.71  | 14,576              | 0.7094             | 4.65  | 845                 | 0.7699             | 0.02522  | 2.230   | ▲                    |                     |
| D5         | 4.68  | 12,521              | 0.7272             | 4.66  | 738                 | 0.7437             | 0.02759  | 0.748   |                      |                     |
| E1         | 4.76  | 14,946              | 0.6113             | 4.76  | 883                 | 0.5554             | 0.02107  | -0.236  |                      |                     |
| E2         | 4.73  | 14,689              | 0.6705             | 4.75  | 863                 | 0.6011             | 0.02335  | -1.069  |                      |                     |
| E3         | 4.67  | 14,683              | 0.7649             | 4.70  | 847                 | 0.7071             | 0.02693  | -1.019  |                      |                     |
| E4         | 4.75  | 14,895              | 0.6401             | 4.78  | 880                 | 0.5753             | 0.02209  | -0.995  |                      |                     |
| E5         | 9.31  | 14,972              | 1.8274             | 9.30  | 893                 | 1.8124             | 0.06292  | 0.100   |                      |                     |

**APPENDIX 5: Descriptive Statistics for NPS by Pharmacy**

| Pharmacy       | Scores       |             |             | # Responses   | Mean Score  | NPS         | Type          |
|----------------|--------------|-------------|-------------|---------------|-------------|-------------|---------------|
|                | 9 - 10       | 7 - 8       | 0 - 6       |               |             |             |               |
| <b>Overall</b> | <b>86.1%</b> | <b>7.8%</b> | <b>6.1%</b> | <b>15,865</b> | <b>9.31</b> | <b>80.0</b> |               |
| 01             | 100.0%       | 0.0%        | 0.0%        | 12            | 9.92        | 100.0       | Independent   |
| 02             | 100.0%       | 0.0%        | 0.0%        | 34            | 9.85        | 100.0       | Independent   |
| 03             | 92.8%        | 4.8%        | 2.4%        | 249           | 9.61        | 90.4        | Academic      |
| 04             | 93.2%        | 3.3%        | 3.5%        | 546           | 9.61        | 89.7        | Health System |
| 05             | 91.2%        | 6.7%        | 2.1%        | 194           | 9.58        | 89.1        | Health System |
| 06             | 91.4%        | 5.7%        | 2.9%        | 35            | 9.54        | 88.5        | Independent   |
| 07             | 91.5%        | 5.4%        | 3.1%        | 683           | 9.61        | 88.4        | Academic      |
| 08             | 91.3%        | 5.6%        | 3.1%        | 575           | 9.58        | 88.2        | Academic      |
| 09             | 91.5%        | 5.0%        | 3.5%        | 1381          | 9.55        | 88.0        | Academic      |
| 10             | 90.3%        | 7.3%        | 2.4%        | 165           | 9.68        | 87.9        | Health System |
| 11             | 91.9%        | 3.8%        | 4.2%        | 260           | 9.51        | 87.7        | Academic      |
| 12             | 91.7%        | 4.2%        | 4.2%        | 575           | 9.54        | 87.5        | Health System |
| 13             | 91.4%        | 4.5%        | 4.1%        | 443           | 9.48        | 87.3        | Independent   |
| 14             | 91.7%        | 3.8%        | 4.5%        | 896           | 9.53        | 87.2        | Academic      |
| 15             | 89.5%        | 8.1%        | 2.3%        | 86            | 9.63        | 87.2        | Health System |
| 16             | 90.1%        | 5.6%        | 4.3%        | 463           | 9.49        | 85.8        | Academic      |
| 17             | 89.0%        | 6.1%        | 4.9%        | 344           | 9.48        | 84.1        | Health System |
| 18             | 86.8%        | 9.9%        | 3.2%        | 403           | 9.53        | 83.6        | Academic      |
| 19             | 88.4%        | 6.2%        | 5.4%        | 259           | 9.44        | 83.0        | Academic      |
| 20             | 87.6%        | 6.9%        | 5.5%        | 565           | 9.35        | 82.1        | Health System |
| 21             | 87.5%        | 6.6%        | 5.9%        | 730           | 9.33        | 81.6        | Health System |
| 22             | 87.9%        | 5.7%        | 6.4%        | 314           | 9.38        | 81.5        | Academic      |
| 23             | 86.2%        | 7.7%        | 6.2%        | 65            | 9.26        | 80.0        | Health System |
| 24             | 84.9%        | 9.2%        | 5.9%        | 391           | 9.26        | 79.0        | Academic      |
| 25             | 84.0%        | 9.8%        | 6.2%        | 519           | 9.22        | 77.8        | Academic      |
| 26             | 83.4%        | 8.6%        | 7.9%        | 856           | 9.16        | 75.5        | Academic      |
| 27             | 81.6%        | 11.4%       | 7.0%        | 1243          | 9.17        | 74.6        | Health System |
| 28             | 82.1%        | 9.3%        | 8.6%        | 151           | 9.05        | 73.5        | Health System |
| 29             | 82.4%        | 8.3%        | 9.3%        | 193           | 9.04        | 73.1        | Health System |
| 30             | 80.2%        | 11.3%       | 8.6%        | 222           | 9.04        | 71.6        | Independent   |
| 31             | 80.0%        | 10.0%       | 10.0%       | 100           | 8.92        | 70.0        | Independent   |
| 32             | 79.0%        | 10.7%       | 10.4%       | 328           | 8.90        | 68.6        | Independent   |
| 33             | 76.9%        | 12.9%       | 10.3%       | 2058          | 8.88        | 66.6        | Independent   |
| 34             | 68.2%        | 27.3%       | 4.5%        | 22            | 8.91        | 63.7        | Independent   |
| 35             | 73.5%        | 11.9%       | 14.7%       | 505           | 8.67        | 58.8        | Independent   |



## APPENDIX 6: NASP Patient Satisfaction Survey Advisory Board Questions

- 1) Scores were up for all items on the survey; from your perspective as a stakeholder in the Specialty Pharmacy Industry, what do you think best accounts for this?
- 2) The most statistically significant improvement was in "Communication with our pharmacy team" From your perspective, does this align with what you've seen in the industry during 2022? If you responded yes or no, please explain why.
- 3) Do the findings indicate an opportunity from your perspective as a stakeholder in the industry for possible operational changes in 2023? Please explain.
- 4) We have seen Academic based Specialty Pharmacies score above Health System owned/operated and Independent Specialty Pharmacies for the past couple of years. From your perspective as a stakeholder in the industry, what do you think might account for this?
- 5) Specialty Pharmacy continues to maintain a strong Net Promoter Score, ranging from 58.8 to 100. From your perspective as a stakeholder in the industry, what do you think accounts for this year after year?
- 6) The Key Driver analysis on the 2022 survey results show the most impactful touchpoints for improving overall satisfaction and NPS are centered on communication with the pharmacy team and effectively managing refills and issues/questions concerning your prescription. From your perspective, are these areas of focus surprising to you? Do they represent an opportunity as you look to 2023?
- 7) From your perspective as a stakeholder in the industry, do the findings provide insights into the direction the specialty pharmacy industry is moving towards?
- 8) This is the 6th year NASP has released a white paper on the Patient Satisfaction Survey Findings. Historically, have you utilized information published in the NASP Patient Survey White Paper to inform your business decisions? If so, please share how.
- 9) Other Comments/Thoughts

# Patient Satisfaction Survey Program



PATIENT  
SATISFACTION  
SURVEY

In collaboration with the SullivanLuallin Group, NASP has developed an industry-accepted patient satisfaction survey to address the unique drivers of patient engagement and satisfaction within the specialty pharmacy field. NASP corporate members at **Nickel level and above** receive either:

NASP Standard Survey Program\* participation at no charge (a \$1,695 value) which includes:

- Email survey distribution only
- Standard NASP survey, no custom questions
- Single wave survey distribution of up to 10,000 patients
- Access to Summary Report, Statistical Significance Report, Comments Report only
- Access to NASP benchmarking database

OR NASP Enhanced Survey Program\* participation at NASP member pricing (includes a \$1,695 NASP funded credit and additional savings over non-member pricing). Pricing is \$4,100 for emailed surveys, or \$8,250 for mailed surveys, and includes:

- Email or mail options
- Scalable in frequency and volume (pricing adjusted accordingly)
- Two-wave survey distribution of up to 2,500 patients (mail, unlimited for email)
- Full reporting
- Access to NASP benchmarking
- Annual Presentation of Findings

Copper level corporate members may participate in the survey program at the NASP member pricing; however, they will NOT receive the Standard Survey Program at no additional cost OR the \$1,695 credit toward the Enhanced Survey Program.

A Copper level corporate member may upgrade to the Nickel level for an additional \$2,130, and receive \$3,819 in additional benefits including:

- Three (3) additional NASP individual memberships
- \$600 in additional Annual Meeting Bucks
- NASP Standard Patient Satisfaction Survey participation at no additional cost
- One (1) additional online CSP exam prep course
- Two (2) additional Formulary Academy licenses

***The survey program isn't a benefit that benefits you?*** Did you know each corporate membership level offers two distinct benefit packages to choose from? Please contact NASP to learn more and ensure your benefit package best suits YOUR needs!



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**To participate:**  
Contact NASP at  
info@naspnet.org.