

Thinking Outside the Pillbox

A System-wide Approach to Improving Patient Medication Adherence for Chronic Disease

An expert roundtable



New England Healthcare Institute

Hotel Marlowe – Cambridge, MA
July 23, 2009

**The New England Healthcare Institute
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National Association of Chain Drug Stores Foundation

Partners HealthCare

Pfizer

PhRMA

Thomson Reuters

Agenda

Breakfast: 8:30 – 9:00 AM

Working Session: 9:00 AM – 12:30 PM

Welcome and Key Findings **9:00 AM**
Valerie Fleishman, Executive Director, New England Healthcare Institute

Introduction from the Moderator
Cliff Goodman, PhD, Senior Vice President, The Lewin Group

Moderated Stakeholder Discussion – Adherence Levers and Care Teams **9:15 AM**
Panelists

Panelist Voting

Break

Panelist Voting Results **10:45 AM**

Moderated Stakeholder Discussion – Linkages to Health Care Reform
Panelists

Discussion

Closing Remarks **12:20 PM**
Valerie Fleishman, Executive Director, New England Healthcare Institute

Lunch: 12:30 – 1:30 PM

Host

Valerie Fleishman

Executive Director, New England Healthcare Institute



Valerie Fleishman provides the strategic and operational direction for NEHI. Under her thoughtful guidance, NEHI's programs seek to improve chronic illness care, speed the adoption of valuable innovations and promote disease prevention and wellness. She has authored numerous articles and reports on a wide range of health policy issues.

Ms. Fleishman has fifteen years' experience in health care. Through her background in strategy and management consulting, she brings deep experience in health care research and analysis. Prior to joining NEHI, Ms. Fleishman was a Director in the Health and Wellness practice at Scient Corporation. At Scient, she led engagements with major biotechnology, medical device and pharmaceutical clients to analyze and execute strategic opportunities in areas such as remote patient monitoring, disease management, online physician platforms, clinical trials, and sales and marketing initiatives.

Prior to joining Scient, Ms. Fleishman was a manager in Arthur D. Little's Global Strategy Practice. She has also worked in brand marketing and product management at Johnson & Johnson's McNeil Consumer Products.

Ms. Fleishman received her BA, cum laude, from Harvard University and her MBA from the Harvard Business School.

Moderator

Clifford Goodman, PhD

Senior Vice President, The Lewin Group



Dr. Clifford Goodman is a Senior Vice President at The Lewin Group, a health care policy and human services consulting firm based in Falls Church, Virginia. He has more than 25 years of experience in health care evaluation, including in evidence-based health care, technology assessment, health economics, and studies pertaining to health care innovation, diffusion and payment. His experience includes directing studies and projects for an international range of government agencies, pharmaceutical, biotechnology and medical device companies, health care provider institutions, and professional, industry and patient advocacy groups.

For the Agency for Healthcare Research and Quality, Dr. Goodman has directed the Evidence-based Practice Centers Coordinating Center at The Lewin Group. He is a member of the Medicare Evidence Development & Coverage Advisory Committee (MEDCAC) of the Centers for Medicare and Medicaid Services and he has testified to Congress on issues pertaining to Medicare coverage of health care technology. He is a nationally recognized health policy issues moderator and expert panel facilitator.

Earlier in his career, as a National Research Council Fellow and later as director of the Council on Health Care Technology, he managed and staffed a series of health technology assessment projects at the Institute of Medicine of the National Academy of Sciences, including the landmark study, *Assessing Medical Technologies*. Subsequently, he was a visiting researcher at the Swedish Council on Technology Assessment in Health Care, in Stockholm. Dr. Goodman is a board member of Health Technology Assessment International and is a Fellow of the American Institute for Medical and Biological Engineering. He serves on the editorial boards of the *American Journal of Managed Care* and the *International Journal of Technology Assessment in Health Care*.

He did his undergraduate work at Cornell University, received a master's degree from the Georgia Institute of Technology, and earned his doctorate from the Wharton School of the University of Pennsylvania.

Participants

Bruce Bagley, MD

Director, Quality Improvement, American Academy of Family Physicians



Dr. Bruce Bagley is the Medical Director for Quality Improvement for the American Academy of Family Physicians (AAFP). During his practice career, Dr. Bagley provided the full range of family medicine services in a single specialty group practice in Albany, NY. The group was a pioneer in adapting to the challenges of managed care, quality improvement and informatics.

Dr. Bagley was elected president of the AAFP in 1998 and Chair of the Board in 2000. He chaired the AAFP's Task Force on Hospitalist Physicians, the Task Force on Obstetrics in Family Medicine, the Task Force on Quality Enhancement and the Task Force on Quality in Family Medicine. He also chaired the ad hoc committee on electronic medical records for the AAFP.

Dr. Bagley's current responsibilities with the AAFP include liaison work with other national organizations in the quality arena and active participation in the development, deployment and implementation of performance measures. Dr. Bagley has spoken extensively on the topics of performance measurement, office redesign, electronic health records and leadership. He is a 2005-6 Malcolm Baldrige Quality Award examiner.

Douglas Bell, MD, PhD

Research Scientist, RAND Corporation



Dr. Douglas Bell is a general internist and a researcher focusing on information technologies that support health care redesign. He is an Associate Professor of Medicine at UCLA and a Research Scientist at the RAND Corporation. He led an expert-consensus process and field study in e-prescribing that helped to motivate formation of the Certification Commission for Healthcare Information Technology. Other work includes studies of physicians' learning and retention from online educational exercises, and methods for semantically interoperable clinical performance measures.

In addition to clinical training in general internal medicine, and a PhD in health services research, Dr. Bell completed a 3-year medical informatics fellowship in the Harvard-MIT Health Sciences and Technology program, funded by the National Library of Medicine. His honors and awards include the Robert Wood Johnson Foundation Generalist Faculty Physician Scholar Award and election to the American College of Medical Informatics. Dr. Bell also serves on the Google Health Advisory Council.

Joshua Benner, PharmD, ScD

Research Director, Engelberg Center for Health Care Reform, Brookings Institution



Dr. Josh Benner is Research Director at the Engelberg Center for Health Care Reform at the Brookings Institution and an adjunct scholar at the Center for Clinical Epidemiology & Biostatistics at the University of Pennsylvania School of Medicine.

His work at Brookings focuses on improving the effectiveness and efficiency of medical product development and regulatory approval, as well as the development of better evidence on medical product safety, comparative effectiveness and quality of care. Prior to joining Brookings, Dr. Benner was Senior Principal in Health Economics and Outcomes Research at IMS Health. Previously, he was a Principal at ValueMedics Research.

Dr. Benner completed an AHRQ post-doctoral fellowship in health services research at the Brigham and Women's Hospital and Harvard Medical School. He received his doctor of pharmacy degree from Drake University and his master's and doctoral degrees in health policy and management from the Harvard University School of Public Health.

Bruce Berger, PhD, RPh

Professor and Head of Pharmacy Care Systems, Auburn University



Dr. Bruce Berger is a Professor and Head of the department of Pharmacy Care Systems at Auburn University. He was awarded an Alumni Professorship in 1996 for outstanding teaching, research and service at Auburn University. He was born in Cleveland, Ohio. Dr. Berger received his BS in Pharmacy from The Ohio State University. After practicing pharmacy for two years he returned to Ohio State and received his Master's and PhD in social and behavioral pharmacy. He taught at Ohio State before moving to West Virginia University in January 1980. After two years at WVU, he moved to Auburn University.

He has served as a consultant to Pfizer, Inc., Procter & Gamble, Amylin, Astra-Zeneca, GSK, the Overwaitea Food Group and Walgreens. He is the recipient of the Johnson & Johnson Award, the Lyman Award and the first American Association of Colleges of Pharmacy's Award of Excellence for his research. Dr. Berger is the 2007 winner of the APhA Wierderholt Prize for the best research publication in the social, behavioral and administrative sciences in pharmacy in the Journal of the APhA and the 2009 recipient of the AACP Robert Chalmers Distinguished Pharmacy Educator Award.

Troy Brennan, MD

Executive Vice President & Chief Medical Officer, CVS Caremark



Dr. Troyen Brennan has been Executive Vice President and Chief Medical Officer of CVS Caremark Corporation since November 2008. Previously, Dr. Brennan served as Executive Vice President and Chief Medical Officer of Aetna, Inc. from 2006 through 2008; from 1997 through 2006 he was President and Chief Executive Officer of Brigham and Women's Physician Hospital Organization, and from 2000 through 2006 he was also President and Chief Executive Officer of Brigham and Women's Physicians Organization.

Dr. Brennan has his MD and MPH from Yale Medical School, a JD from Yale Law School and a master's degree from Oxford University, where he was a Rhodes Scholar.

Ray Bullman

Executive Vice President, National Council on Patient Information and Education



Ray Bullman is Executive Vice President of the National Council on Patient Information and Education (NCPIE).

At NCPIE, Mr. Bullman has overseen the development of two collaborative projects targeting prevention of prescription medicine abuse among adolescents and teenagers with support from the U.S. Substance Abuse and Mental Health Services Administration. Under Mr. Bullman's leadership, NCPIE released the second in a series of comprehensive reports entitled, "Enhancing Prescription Medicine Adherence: A National Action Plan."

Mr. Bullman coordinated the signing of a NCPIE partnership agreement with the U.S. Food and Drug Administration to assist in the development, implementation and outreach for "Medicines in My Home."

He received a bachelor's degree from the University of Maryland, College Park, MD, and a master's in Association Management (MAM) from George Washington University, Washington, DC.

Chris Delaney

Chief Executive Officer, Insignia Health



Chris Delaney is the Chief Executive of Insignia Health. Insignia's mission – to activate consumers in their health – is anchored by the Patient Activation Measure™ (PAM) and extensive related research, and extended by programs that tailor support to an individual's self-management competency. A number of leading pharmaceutical brands and dozens of health care organizations use Insignia's model to segment patients and tailor support.

Prior to Insignia, Chris was Chief Marketing Officer for Definity Health. Definity pioneered account-based HSA and HRA health benefit designs, as well as a host of Web-based consumer health innovations centered on personalization. After Definity's acquisition by United Healthcare, Mr. Delaney became a founding partner of the Sequoi Group, a consultancy specializing in consumer-driven health care. Mr. Delaney also served as an advisor to various health care companies, including Healthline.

Previously, Mr. Delaney spent 12 years in executive-level brand management positions with The Pillsbury Company, Health Valley Foods, and Dreyer's & Edy's Grand Ice Cream. He holds a master's degree in business administration from the University of Minnesota's Carlson School of Management, and a Bachelor of Arts degree in psychology from Occidental College.

John Fallon, MD

Senior Vice President & Chief Physician Executive, Blue Cross Blue Shield of Massachusetts



Dr. John Fallon is Chief Physician Executive of Blue Cross Blue Shield of Massachusetts, where he is responsible for the standards of medical care and expanding health care strategies. He oversees the company's medical policies, acts as the main liaison with the plan's provider network, reviews upcoming legislation for medical impact, manages the company's medical directors, and acts as primary spokesperson for medical inquires and main medical contact with the Blue Cross Blue Shield Association and its 39 plans.

Dr. Fallon practiced Internal Medicine for over 20 years. He was previously CEO for the clinical enterprise at the State University of New York's Downstate Medical Center. He was also Chairman of the physician network of Partners HealthCare System, and the founder and CEO of North Shore Health System.

He is Board Certified in Internal Medicine and is a Fellow of the American College of Physicians. He received his MD from Tufts University School of Medicine, his master's degree in business administration from the University of South Florida, and a bachelor's degree from the College of the Holy Cross.

John Halamka, MD

Chief Information Officer, Beth Israel Deaconess Medical Center



Dr. John Halamka, MD, MS, is Chief Information Officer of Beth Israel Deaconess Medical Center, Chief Information Officer of Harvard Medical School, Chairman of the New England Health Electronic Data Interchange Network (NEHEN), CEO of MA-SHARE (a Regional Health Information Organization), Chair of the U.S. Healthcare Information Technology Standards Panel (HITSP), and a practicing Emergency Physician.

As Chief Information Officer of Beth Israel Deaconess Medical Center, he is responsible for all clinical, financial, administrative and academic information technology serving 3,000 doctors, 14,000 employees and two million patients. As Chief Information Officer of Harvard Medical School, he oversees all educational, research and administrative computing for 18,000 faculty and 3,000 students. As Chairman of NEHEN, he oversees the administrative data exchange in Massachusetts. As CEO of MA-SHARE, he oversees the clinical data exchange efforts in Massachusetts. As Chair of HITSP, he coordinates the process of electronic standards harmonization among stakeholders nationwide.

Margaret Hawkins

Manager, Health Promotion, AARP



Margaret Hawkins has over 20 years' experience in the development, implementation and evaluation of health programs in communities and corporate America all across the country. She has been AARP's Manager of Health Promotion for the last 9 years. This entails both the implementation of the Association's healthy behavior/prevention initiatives for its 40-plus million members, and the development of healthy behaviors/prevention content, resources, tools and information products. All of AARP health and prevention efforts are designed to help Americans over age 50 have improved health status. Exemplifying the efforts managed by Ms. Hawkins is AARP's ongoing Medicines and You campaign, which has produced millions of print brochures on the wise use of medication and distributed them through thousands of retail drug stores nationwide, developed online comparative drug information for consumers, and conducted hundreds of local medication reviews.

She has a master's degree in Health and Fitness Management from American University in Washington DC.

Edward Mauceri, MD

Executive Medical Director, Novartis Pharmaceuticals Corporation



As Executive Medical Director of Novartis Pharmaceuticals Corporation and Novartis Corporation, Dr. Edward Mauceri is responsible for the health, wellness and safety of more than 25,000 Novartis U.S. employees. He is the leading force behind Novartis' innovative Health & Wellness Program and their incentive-based health risk assessment program, which links HRA data to benefits utilization in order to develop Health & Wellness programs that are targeted to identified corporate concerns. These Health & Wellness programs have received NGBH Silver (2005) and Gold Awards (2006) and a Thomson Medstat Innovator Award (2008). Under his leadership the company has implemented a comprehensive Tobacco-Free policy for all sites and have qualified for the CEO Roundtable on Cancer Awareness and Prevention Gold Standard. Recently, he has launched a new Health and Productivity Management Program, Healthy Novartis – Healthy Future, which links Data Analysis, targeted Health Programs and ROI studies.

Dr. Mauceri has more than 18 years of experience leading corporate health management programs. His medical background also includes family practice, emergency room medicine and multi-specialty group practice.

Adele Pietrantoni, RPh

Regional Pharmacist, Centers for Medicare and Medicaid Services (CMS)



Adele Pietrantoni is Regional Pharmacist for the Centers for Medicare and Medicaid Services (CMS) in the Boston Office, which serves New England. She received a BA from Boston College in communication and English and a BS in Pharmacy from the Massachusetts College of Pharmacy and Health Sciences in Boston. She completed a residency program in Managed Care Pharmacy.

Prior to coming to CMS, Ms. Pietrantoni worked for a not-for-profit Massachusetts HMO as Manager, Clinical Pharmacy Programs, where she was responsible for the clinical and regulatory aspects of the Plan's pharmacy benefit. She has also completed a pharmacy residency in managed care pharmacy, and has experience as a community pharmacist in a chain setting.

Ms. Pietrantoni is active in professional pharmacist associations and has served on the Boards of both the Massachusetts Pharmacists' Association (MPhA) and the American Pharmacists Association (APhA). She has been honored with several awards, including the MPhA President's Pharmacist of the Year in 2002 and 2004 and as a Fellow of the American Pharmacists Association in 2006.

Michael Sokol, MD

Corporate Medical Director, Merck & Co.



Dr. Mike Sokol serves as the Corporate Medical Director for Merck & Co., Inc. He leads the Integrated Health Management department that is responsible for operating the company's employee health clinics, fitness centers, disability management programs and global occupational health activities. He also provides direction to Merck's health care benefits strategy and wellness initiatives.

In his prior roles at GlaxoSmithKline and Medco Health Solutions, Dr. Sokol provided subject matter expertise and consultative support to external customers. He also conducted health services research by examining factors that influence medication adherence and its impact on clinical and financial outcomes, and developed patient and physician education programs.

Dr. Sokol received his BS from Ursinus College in Collegeville, PA and his MD from Jefferson Medical College in Philadelphia, PA. He received his MS from the University of Maryland Department of Epidemiology and Preventive Medicine. Dr. Sokol is board certified in public health and general preventive medicine, and is a Fellow of the American College of Preventive Medicine.

Eve Slater, MD

Associate Clinical Professor of Medicine, Columbia College of Physicians & Surgeons



Dr. Eve Slater is an Associate Clinical Professor of Medicine at Columbia University College of Physicians & Surgeons. Dr. Slater was previously Senior Vice President of Worldwide Policy at Pfizer, Inc. She has served as Assistant Secretary of Health for the U.S. Department of Health and Human Services. Prior to joining HHS, she spent over 19 years with Merck. She served as a member of both the U.S. Keystone National Policy Dialogue on HIV and the NIH Office of AIDS Research Advisory Council. She was named to the Subcommittee of the FDA Science Board in 2007.

Dr. Slater received her BA from Vassar College and her MD from Columbia. She received her training in internal medicine and cardiology at the Massachusetts General Hospital, where she was the first woman named as Chief Resident in Medicine and later led the Hypertension Unit. She also served as Assistant Professor of Medicine at Harvard Medical School.

Troy Trygstad, PharmD, PhD

Director, Network Pharmacist Program, Community Care of North Carolina



Dr. Troy Trygstad is the Director of the Network Pharmacist Program for Community Care of North Carolina, a parent organization of 14 regional care management networks. These networks bring together medical practices, county health departments, hospital systems and mental health providers to integrate care delivery for Medicaid, Medicare and the uninsured. CCNC and its networks are responsible for developing and evaluating accountable care systems, measures and outcomes in North Carolina. It is also playing an integral role in Health Information Technology adoption and proliferation. The program has grown to include 24 pharmacists who are involved in a number of diverse activities ranging from patient-level medication reconciliation to practice level e-prescribing facilitation to network-level management of pharmacy activities.

Dr. Trygstad received his PharmD and MBA degrees from Drake University and a PhD in Pharmaceutical Outcomes and Policy from the University of North Carolina.

Attendees

- Alex Adams, PharmD;** National Association of Chain Drug Stores
- Mike Bakerman, MD;** Partners Community HealthCare
- Amber Batata, PhD;** Pfizer
- Gina Black;** Takeda Pharmaceuticals
- Marc Boutin;** National Health Council
- Barton Bracken;** Solucia Consulting
- Jennifer Bryant;** PhRMA
- Kevin Buckley;** Johnson & Johnson
- Nancy Bundek, PhD;** InnovationRx
- Kathy Bungay, PharmD;** Northeastern University
- Michael Cantor, MD;** New England Quality Care Alliance
- Stephane Chong;** Massachusetts Institute of Technology
- John Christina;** Deloitte
- David Cobden;** AstraZeneca
- Joshua Cohen, PhD;** Tufts Center for the Study of Drug Development
- Matt Collins, MD;** Neighborhood Health Plan
- Jim Connolly;** PricewaterhouseCoopers LLP
- Christopher Cook, PharmD, PhD;** GlaxoSmithKline
- David Downey;** Abbott Laboratories
- Catherine Dunham;** The Access Project
- Therese Fitzgerald, PhD;** Massachusetts Medical Society
- Jeff Forbes;** SironaHealth
- Catherine Frederico;** Frederico Arts LLC
- Teresa Gibson, PhD;** Thomson Reuters
- Paula Griswold;** Massachusetts Coalition for the Prevention of Medical Errors
- Chris Hendriksen;** VRI
- Tad Heuer;** Foley Hoag LLP
- Kevin Howat;** CMT
- Mimi Johnson;** National Consumers League
- Mary Kaysen;** Takeda Pharmaceuticals North America
- Ranch Kimball;** Joslin Diabetes Center
- David Lindeman, PhD;** Center for Technology and Aging
- Francis Lobo;** Takeda Pharmaceuticals
- Laura Long, MD;** BlueCross BlueShield of South Carolina
- David Macarios;** Amgen
- Elizabeth MacLean, PharmD;** Pfizer
- Mark Mandell, MD;** Partners Community HealthCare
- Barbara Manning;** Centers for Medicare & Medicaid Services
- William Marder, PhD;** Thomson Reuters
- Neil Minkoff, MD;** Harvard Pilgrim Health Care
- Khoa Nguyen;** Avalere Health
- Chuck Parker;** Continua Health Alliance
- Paul Parkinson;** Pfizer
- Urvashi Patel, PhD;** CMT
- Gary Persinger;** National Pharmaceutical Council
- John Reddy;** Abbott Laboratories
- Lynn Redington, DrPH;** Center for Technology and Aging
- Scott Reid;** Boston Scientific Corporation
- Alejandro Reti, MD;** Verisk Health
- Nathaniel Rickles, PharmD, PhD;** Northeastern University
- Rod Rivera;** Dresner Partners
- Edith Rosato;** National Association of Chain Drug Stores
- David Rose;** Vitality
- Stephen Rosenberg, MD;** ActiveHealth Management
- Laurie Ruttenberg;** Abbott Laboratories
- Luis Salmun, MD;** Medco Health Solutions
- Ram Sathyanarayana;** Ernst & Young
- Jodee Scannapieco;** AstraZeneca
- William Schlag;** Willis HRH
- Martin Sepulveda, MD;** IBM
- Dexter Shurney, MD;** Vanderbilt University and Medical Center
- Jeff Simmons;** Merck & Co.
- Marci Sindell;** Harvard Vanguard Medical Associates
- Scott Smith;** GlaxoSmithKline
- Stella Stergiopoulos;** Tufts Center for the Study of Drug Development
- Philip Swayze;** The Health & Wellness Institute
- Sean Teare;** InnovationRx
- Todd Ungard;** Vertex Pharmaceuticals
- Joshua Wachman;** Vitality
- Margot Walthall;** Silverlink Communications
- Amy West;** Novo Nordisk
- Randy Williams, MD;** Pharos Innovations
- Kellie Windle;** Boston Scientific Corporation
- Adam Woolley, PharmD;** Northeastern University
- Aaron Wesolowski;** Centers for Medicare & Medicaid Services

Notes



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The New England Healthcare Institute (NEHI) is a nonprofit, health policy institute focused on enabling innovation that will improve health care quality and lower health care costs. Working in partnership with members from across the health care system, NEHI brings an objective, collaborative and fresh voice to health policy. We combine the collective vision of our diverse membership and our independent, evidence-based research to move ideas into action.