



## **How Health Systems Can Optimize Revenue Streams and Improve the Patient Experience by Providing Home Infusion Pharmacy Services**

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## Home Infusion Snapshot

- In the United States, alternate-site infusion therapy expenditures are estimated to be \$9–11 billion annually.<sup>i</sup>
- The home infusion market is fragmented, with a few large national providers and many smaller regional and local providers.
- Growth hormone, as well as drugs for immune deficiency and hemophilia, are among the specialty drugs most frequently infused at home.
- Traditional therapies, such as anti-infectives and enteral nutrition, are the most common home infusions.

## Key Concepts

- Home infusion is a growing category.
- Many health systems find that home infusion pharmacy, as part of a broader specialty pharmacy strategy, aligns with their clinical and financial goals.
- Adding home infusion pharmacy services can have several positive impacts on health systems, including reduced overall cost of care and superior patient experience.
- Home infusion pharmacy has its own set of rules, operational complexities and best practices.
- Health systems that use a consultant to help launch home infusion pharmacy can get to market faster as they develop their in-house home infusion expertise.

## Introduction

At Excelera, we have spent a decade building the foundation on which informed, connected pharmacy care, grounded in the quality of integrated health systems, can thrive. Our goal is to create an environment where health systems, manufacturers, and payers have access to the information, insights, and solutions they need to improve outcomes for complex pharmacy patients.

Our holistic approach to complex care management, with pharmacy at the core, has led us to expand our consulting portfolio into home infusion. Available to health systems nationwide, the new solutions provide guidance in establishing and operating a home infusion

pharmacy that will allow health systems to capture a share of the specialty infusion prescription opportunity, generate revenue from ancillary infusion services, and deliver a superior patient experience.

## The Home Infusion Opportunity

Home infusion is a growing category. In the United States, alternate-site infusion therapy expenditures are estimated to be \$9–11 billion annually.<sup>i</sup> Globally, the home infusion market value was approximately \$22.2 billion in 2018, with an expected compound annual growth rate of 7.2% through 2026.<sup>ii</sup>

Several factors play into the growth of home infusion. An aging population and high rates of chronic disease result in a greater need for infused medication; this can lengthen hospital stays and put pressure on the limited capacity of ambulatory infusion centers. Home infusion can mitigate pressure on hospitals and infusion centers, while at the same time serving as a more practical and convenient option for individuals with mobility or transportation issues, or those who are relatively healthy and prefer the flexibility of home infusion in the context of their work and family schedules.

Financially, there is significant pressure by third-party payers to optimize infusion site of care. Health systems that do not offer home infusion can find themselves carved out and unable to provide care. (This can also impact the flow of information and cause gaps in a patient's medical record.) A home infusion pharmacy practice not only reduces total cost of care, but it has the potential to deliver a positive bottom line for the health system in two or three years.

From a clinical perspective, home infusion appears to be as safe and effective as inpatient or ambulatory infusion.<sup>iii</sup> A study of patients receiving intravenously administered IgG (IGIV) infusions either at home or in a hospital outpatient infusion clinic found “significantly lower rates of bronchitis and pneumonia” for home infusion.<sup>iv</sup> In addition, health systems that already operate home infusion pharmacies generally report high levels of patient satisfaction, with uninterrupted clinical care and coordination as a major contributor.

Technology is also a factor. Advances in infusion technology make home infusion a simpler, safer option than in the past.

In summary, providing home infusion pharmacy services can have a number of positive impacts for a health system:

- Capturing new revenue streams
- Increasing margin
- Freeing up valuable hospital beds and ambulatory infusion chairs
- Keeping low-risk patients out of high-acuity environments
- Lowering costs by optimizing site of care
- Delivering a fully integrated patient experience

## Launching A Home Infusion Pharmacy Practice

As the health care environment shifts to value-based care, many health systems find that home infusion pharmacy, as part of a broader specialty pharmacy strategy, aligns with their clinical and financial goals. However, home infusion has its own set of rules, operational complexities, and best practices. Some factors to consider:

**Need and Opportunity:** What is the need within the system? How many patients are leaving the system to obtain home infusion? What is the drug mix? What does the payer landscape look like?

**Cost:** Capital and startup costs will be considerable. One of the major contributing factors: cleanroom capabilities. Will you be able to use an existing cleanroom, or must you build out these capabilities?

**Nursing Support:** Will nurses be employees of the health system, or will you partner with a home care agency? A hybrid arrangement might be appropriate, if your health system has a wide geographic reach.

**Accreditation:** What accreditation do you already have, and what will you need to work toward? Most payers require accreditation.

**Executive Support:** A business plan and pro forma will have to be presented to health system leadership. Reduction in total cost of care will be a major consideration, but beyond that, the prospect of a positive bottom line in three-to-five years—or sooner—will improve chances of approval.

**Education and Sales:** Home infusion requires a sales force to promote the program and educate your own providers and other referral sources. You may be surprised by the effort required to shift long-established routines and assumptions.

## Excelera and Other Resources

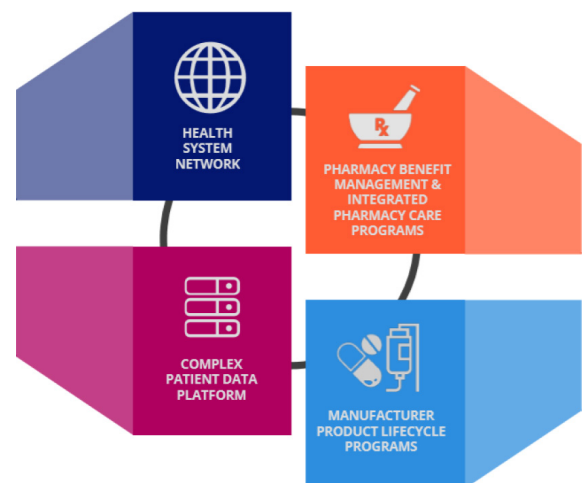
Health systems researching home infusion can gather insights and expertise in several ways:

## Associations

- The National Home Infusion Association ([NHIA](#)) is a trade association that provides a variety of resources and hosts an annual conference.
- The American Society of Health-System Pharmacists (ASHP) offers guidelines on home infusion pharmacy services.<sup>v</sup>

## Excelera Network Membership

**User Groups:** Excelera members have access to user groups on a variety of topics. The home infusion user group includes health systems that are in the early stages of thinking about home infusion, as well as those with many years of experience, such as Minneapolis-based Fairview Health Services, which has been offering home infusion to its patients for several decades.



Excelera has created an expanded suite of products, including Home Infusion Solutions, to help health systems deliver care for complex pharmacy patients.

**Retaining a Consultant:** Utilizing Excelera to lead development of infusion pharmacy solutions offers several benefits:

- Increased speed to market
- Insights into all aspects of home infusion pharmacy
- Avoidance of potentially costly errors
- Opportunity to tap into home infusion expertise while building your own expertise

Each Excelera consulting engagement is customized. In general, however, consulting, development, and project management services are provided. Elements include a blueprint for building infusion pharmacy, including cleanrooms; a playbook with best

practices for launching a home infusion pharmacy; and a referral plan and workflow for preferred or internal pharmacies based on the individual health system's data and processes. Health systems are provided tools and information to make the development and implementation of home infusion services succeed long past launch. Examples include assistance with payer contracting, support in obtaining accreditation, and assistance integrating with clinic-based nurse navigators and case managers.

## Launching Home Infusion: A Case Study

At Oregon Health & Science University (OHSU), the first site for Excelera's home infusion consulting program, lack of home infusion services represented a significant gap in care delivery. As a major regional provider in Oregon and southwest Washington, and Oregon's only academic health center, the OHSU system had robust ambulatory infusion capabilities. Two major community providers and other hospitals and health systems provided home infusion services in the region.

**"OHSU was new to home infusion. Excelera provided planning, project management, and other consulting services to guide us toward a successful launch." - Jeff Wassouf**

Pressure by third-party payers was a major factor in the decision to launch the home infusion program. In some cases, patients who had been coming to an OHSU ambulatory infusion clinic for years were having that coverage eliminated and being required to switch to home infusion—which OHSU did not offer. This break in continuity was not only disruptive to patients but sometimes to clinical communication.

Excelera began consulting with the OHSU team about 14 months prior to the planned launch. Excelera worked on the project plan, project management, ancillary services contracting, information systems coordination, and models for staffing, workflow, and finance, as well as providing other services and best practices from its comprehensive home infusion blueprint and playbook.

Therapies that OHSU now provides include antibiotic infusion, parenteral nutrition, specialty medications, enzyme replacement, and electrolyte replacement. Nurses in the program are employed by OHSU. Partnerships with home agencies are in place in the event that services are needed in more remote areas of the region.

OHSU's results have been excellent. Patients are extremely satisfied. Home infusion patient volumes have steadily increased. A handful of patients choose to receive their infusions at work rather than at home, a preference that OHSU could not previously accommodate.

## Conclusion

At Excelera, we are passionate about transforming the way complex pharmacy patient care is delivered within the health system. Our home infusion solutions are grounded in the understanding that improving outcomes for complex pharmacy patients is necessary, and, with the engagement of all stakeholders, it is possible.

- i National Home Infusion Association, <http://www.nhia.org/faqs.cfm> (Accessed September 23, 2019). Estimate includes home infusion and ambulatory infusion centers.
- ii Grand View Research, Inc. (2019) Home Infusion Therapy Market Size, Industry Growth Report 2019–2026. Available at: <https://www.grandviewresearch.com/industry-analysis/home-infusion-therapy-market> (Accessed August 23, 2019).
- iii Polinski JM, Kowal MK, Gagnon M, Brennan TA, Shrank WH. Home infusion: Safe, clinically effective, patient preferred, and cost saving [Abstract]. *Healthcare: The Journal of Delivery Science and Innovation*, 5(1–2), 68–80. Available at <https://doi.org/10.1016/j.hjdsi.2016.04.004> (Accessed September 11, 2019).
- iv Wasserman RL, Ito D, Xiong Y, Ye X, Bonnet P, Li-McLeod J. Impact of Site of Care of Infection Rates Among Patients with Primary Immunodeficiency Diseases Receiving Intravenous Immunoglobulin Therapy. *J Clin Immunol*. 2017;37(2):180–186. doi:10.1007/s10875-017-0371-0
- v <https://www.ashp.org/-/media/assets/policy-guidelines/docs/guidelines/home-infusion-pharmacy-services.ashx> (Accessed September 12, 2019).

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