

A Datamonitor report

ePrescribing: Infrastructure and Impact on the Healthcare Markets in the US and EU

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Providing you with:

- **Insight** into the different approaches taken towards adoption of ePrescribing in the US and UK
- **Identification** of current drivers of adoption and why they are important to the success of ePrescribing long-term
- **Analysis** of physicians' and consumers' views on ePrescribing and how they are affecting the rate of adoption in the US and EU
- **Recommendations** for pharmaceutical industry as to how to retain a share-of-voice in the process of adoption, particularly as regards the design of functional standards

Use this report to...

Identify the dangers of the traditional paper-based prescribing model and how electronic prescribing can improve patient safety and compliance

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Introduction

Technology has been used to either inform or expedite the prescribing process in most modern healthcare systems for over two decades. Recently, market forces – including greater regulatory intervention, increased investment from stakeholders and decreased resistance from end-users – have begun to converge to set the stage for widespread adoption of truly integrated ePrescribing solutions.

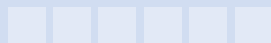
The healthcare industry is much like any other modern industry that has both the increased responsibility to ensure consumers' safety and the desire to ensure brand loyalty by providing end-users with a positive experience when using their products or services. The complexity of these challenges, particularly when set in the context of the rapidly evolving field of medicine, rule out either a simple or an immediate solution. The trend, particularly in industries where consumer-safety is imperative, has been to move towards both increased regulation and the expanded application of technology.

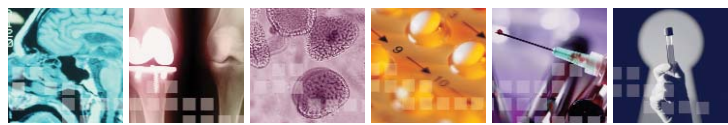
Key findings and highlights

- One of the greatest challenges facing ePrescribing has been finding a balance between the wants and needs of industry and end-users. Several stakeholders have been vying for influence over the design and implementation of ePrescribing systems. While this has served to move the market forward considerable conflicts of interest have also emerged.
- The attitude of the physician towards ePrescribing is the most important consideration for stakeholders because it is the point at which adoption either stalls or moves forward. Historically, physicians have been offered a variety of reasons and incentives to adopt ePrescribing, with varying degrees of success.
- It is the pharmaceutical industry's responsibility to ensure that decisions made at the point of care are not unduly controlled by other stakeholders, such as disruptive messaging meant to influence a physician to continuously second-guess specific prescribing decisions, or inequitable screen displays, which give preference to certain treatments.

Reasons to buy

- **Identify** the dangers of the traditional paper-based prescribing model and how electronic prescribing can improve patient safety and compliance
- **Understand** the importance of developing electronic medical records in parallel with ePrescribing initiatives
- **Assess** opportunities for pharmaceutical companies to maintain a share-of-voice during the





Sample pages from the report

An Introduction to Electronic Prescribing

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CHAPTER 2 AN INTRODUCTION TO ELECTRONIC PRESCRIBING

Electronic prescribing (ePrescribing) is the use of technology to write prescriptions, which may or may not include the practice of electronically transferring prescriptions from physicians to pharmacists. Prescribing is a multi-step process and can be assisted by technology at various points throughout the transaction, which ranges from the actual act of writing a prescription to the supply and administration of a drug.

While most stakeholders have now converged on a common end-to-end process, some bodies such as the American Medical Association continue to make the distinction between the use of technology to transmit prescriptions and the use of technology to assist in the decision-making process. This distinction is also important when controlled substances, because prescriptions for these substances are transmitted to a pharmacist electronically.

Figure 1: The term "ePrescribing" refers to the electronic transmission of prescriptions.

The use of electronic systems to inform, generate, modify or communicate a drug prescription. May or may not include the electronic transmission of prescriptions from physicians to pharmacists.

Source: Datamonitor

The traditional prescribing process

Patients assume a certain amount of responsibility for their health. Many drugs deemed to be appropriate for self-medication.

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An Introduction to Electronic Prescribing

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meaning that they are applying an end-to-end process starting with using decision-support tools or electronic health records and ending with the transmission of the prescription directly to the pharmacy. However, the majority of physicians continue to be entirely paper-based, thereby missing out on an opportunity to improve patient safety by using decision-support tools at the point-of-care.

Physicians in the five major EU markets

Datamonitor asked physicians in the five major EU markets to identify which technologies they use to write prescriptions. Physicians in the five major EU markets are heavily on the paper-based process of writing prescriptions (Datamonitor's 2005 ePrescribing survey).

Figure 8: Physicians in the five major EU markets use a variety of technologies to write and transmit prescriptions.

During your working hours, through the following methods, physicians use the following technologies to write and transmit prescriptions:

- Mobile devices
- Tablet PCs
- Paper / Fax
- PDA/Other

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The Future Decoded

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Figure 13: The pharmaceutical industry has a responsibility to ensure ePrescribing is not used as a means to influence prescribers at the point-of-care.

Pfizer's Written Testimony on Electronic Prescribing Standards to the National Committee on Vital and Health Statistics Subcommittee on Standards and Security

The greatest threat is that third parties may use ePrescribing to influence and inappropriately influence the clinical decision-making process at the critical point-of-care. These influences, driven by financial interests, represent inappropriate influences and may harm the patients' best interests at heart.

In light of the nature of the electronic health information system, it is imperative that the industry support the development of standards to serve as a vehicle to restore medical device and device effectiveness in the health care system and that the standards be based on a standard platform of other stakeholders to ensure the effectiveness of physicians.

This language applies to pharmaceutical manufacturers, pharmacy benefit managers, retail pharmacies, technology providers and others. The industry should be involved in the development and by CMS as they develop standards for this program.

Source: Pfizer, 2004

It is the responsibility of the pharmaceutical industry to ensure that decisions made at the point-of-care are not unduly controlled by other stakeholders through disruptive messaging meant to influence a physician to continuously second-guess specific prescribing decisions, or inequitable screen displays, which give preference to certain treatments over others. Finally, pharmaceutical companies should push to be able to provide balanced and fair information about their products through decision-support tools. This is an appropriate step, as companies ought to be permitted to provide prescribers with non-promotional information about their own product through the channels physicians are going to look to for decision-support.

Pharmaceutical manufacturers are understandably concerned about the potential negative impact ePrescribing will have on their bottom line as physician-facing sales.

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Page 40

“...One of the greatest challenges facing ePrescribing has been finding a balance between the wants and needs of industry and end-users...”

Table of contents

EXECUTIVE SUMMARY

- **Scope of the report**
- **Key findings**

AN INTRODUCTION TO ELECTRONIC PRESCRIBING

- **The traditional prescribing model and its limitations**
- **Market forces driving the adoption of ePrescribing**
 - Greater regulatory intervention
 - Increased investment from stakeholders
 - Decreased resistance from end users
- **The physician's perspective**
 - Physicians in the US
 - Physicians in the five major EU markets
- **The patient's perspective**
- **The pharmaceutical industry's perspective**

THE FUTURE DECODED

- **Physicians: improving patient safety by increasing use of decision-support tools**
- **Patients: improving compliance by improving prescribing efficiency**
- **Pharmaceutical companies: improving the prescribing process by maintaining a share-of-voice**

BIBLIOGRAPHY

- **Referenced publications and online articles**
- **Datamonitor resources**
- **Further reading**

APPENDIX

- **Definitions and abbreviations**
- **Extended methodology**
 - Datamonitor interviews
 - Datamonitor eHealth Physician Insight Survey 2005
 - Datamonitor eHealth Consumer Insight Survey 2005

LIST OF FIGURES

- Figure 1: The term "ePrescribing" may or may not refer to the electronic transmission of prescriptions to the pharmacist
- Figure 2: The traditional paper-based prescribing process results in errors and inefficiencies

Figure 3: A common national IT strategy paves the way for modernization initiatives in all healthcare systems

Figure 4: Stakeholders in the adoption of ePrescribing are interconnected, but at times can have conflicting interests

Figure 5: Physicians in the US and 5EU differed in their perceptions of the greatest barrier to their personal adoption of ePrescribing technologies

Figure 6: Physicians in the US are equally likely to write a prescription electronically as they are to submit a prescription electronically, regardless of the technology used

Figure 7: US physicians were much more positive about the likelihood that they will personally adopt ePrescribing than about the likelihood that their peers will do the same

Figure 8: Physicians in the 5EU made the distinction between using technology to write prescriptions and using technology to transmit prescriptions directly to the pharmacist

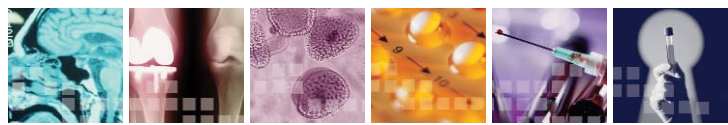
Figure 9: Physicians in the 5EU were somewhat more optimistic about the likelihood that they will personally adopt ePrescribing than about the likelihood that their peers will do the same

Figure 10: Patients are open to using the Internet to improve their access to information and medications

Figure 11: ePrescribing may present pharmaceutical companies with opportunities to gain increased access to information or improve patient compliance

Figure 12: The prescribing process leaves patients with many opportunities to opt out of receiving or picking up a prescribed medication

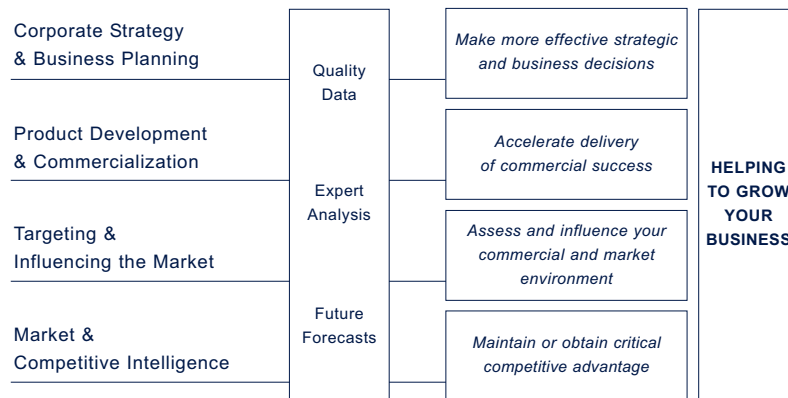
Figure 13: The pharmaceutical industry has a responsibility to ensure ePrescribing is not used as a means to influence prescribers at the point-of-care



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