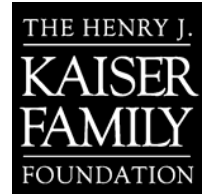

Chartpack



Kaiser Family Foundation

National Survey of Pharmacists and National Survey of Physicians

Findings on Medicare Part D

September 2006

Methodology

The Kaiser Family Foundation *National Survey of Pharmacists*, conducted April 21 through June 27, 2006, is based on a nationally representative random sample of 802 pharmacists working in independent retail, chain retail and HMO pharmacies. Once the sample was drawn, selected pharmacists were given the option of completing the questionnaire by telephone or online (615 pharmacists were interviewed by telephone and 187 completed the survey online). The sample frame was developed using Medical Marketing Services, Inc.'s Pharmacist/Pharmacies list. This list contains almost 200,000 pharmacists and is updated every 60 days. The final sample includes 548 chain pharmacists and 222 independent pharmacists.

The Kaiser Family Foundation *National Survey of Physicians*, conducted April 25 through July 8, 2006, is based on a nationally representative random sample of 834 office-based physicians involved in direct patient care with adults. Once the sample was drawn, selected physicians were given the option of completing the questionnaire by telephone or online (373 physicians were interviewed by telephone and 461 completed the survey online). The sample frame was developed using the American Medical Association's Physician Masterfile. This list contains over 800,000 physicians and is considered the most thorough source available for physician lists and statistics. Excluded from the sample frame were: 1) hospital-based physicians; 2) pediatrics and related specialties; and 3) specialties not involved in direct patient care (mostly anesthesiology, radiology, pathology and related specialties).

Kaiser Family Foundation staff designed and analyzed both surveys. Data were collected by Princeton Survey Research Associates International. The margin of sampling error for the full sample in each survey is plus or minus 3 percentage points. For chain pharmacists the margin of sampling error is plus or minus 4 percentage points, and for independent pharmacists it is plus or minus 7 percentage points. For physicians, some results are reported based on a subset of 657 physicians who say at least a few of their patients have enrolled in Medicare drug plans; the margin of sampling error for this group is plus or minus 4 percentage points. For results based on subsets of respondents the margin of sampling error may be higher. Note that sampling error is only one of many potential sources of error in this or any other public opinion poll.

Note: Percentages may not always add up to 100% due to rounding. Values less than 0.5 percent are indicated by an asterisk (*). "Vol." indicates that a response was volunteered by the respondent, and not offered as an explicit choice.

Section One: Survey of Pharmacists

Pharmacists report a great deal of experience with the new Medicare prescription drug benefit, and nearly all have spent at least some time helping customers make decisions related to the benefit.

- More than eight in ten pharmacists (85%) say they think they have at least some responsibility to advise customers about Medicare drug plans, including 43% who say they have a lot of responsibility (Chart 1).
- Nearly all pharmacists (97%) say that their customers have asked them for help or advice about Medicare drug plans, and nearly six in ten (57%) say *most* of their Medicare customers have asked for help or advice (Chart 2).
- Large majorities say they have helped Medicare customers in various ways, including talking to customers about switching from brand-name to generic drugs (85%), talking to them about concerns related to out-of-pocket costs (84%), helping them decide whether or not to enroll in a Medicare drug plan (77%), and helping them figure out if specific drugs are covered under their plans (75%) (Chart 3).
- Nearly nine in ten (86%) say they understand the Medicare prescription drug benefit “very well” or “somewhat well” (Chart 4).

Section One: Survey of Pharmacists (continued)

Pharmacists are fairly split on their overall impressions of the Medicare prescription drug benefit, and most say the new benefit is working well for their customers.

- Nearly half (45%) of pharmacists say they have a favorable impression of the benefit, while just over four in ten (41%) say they have an unfavorable impression (Chart 5). Eight in ten say these views of the benefit are based mainly on their experiences with customers (Chart 6).
- A plurality (40%) of pharmacists say they would give the implementation of the benefit a grade of C for average (22% give it an A or B, and 39% give it a D or F). Most (59%) say the implementation of the benefit has gotten better over the past few months (Chart 7).
- Pharmacists say the benefit is working well in many areas, particularly in terms of helping their customers.
 - Eight in ten say the benefit works very well (22%) or somewhat well (58%) for their customers in terms of lowering their out-of-pocket costs (Chart 8).
 - Similarly, eight in ten say the benefit works very well (16%) or somewhat well (63%) for their customers in terms of getting them access to the prescription drugs they need (Chart 8).
 - Nearly nine in ten (86%) agree that the benefit helps people on Medicare save money on their prescriptions, including 33% who strongly agree (Chart 9).
 - More than eight in ten (83%) agree that it is especially helpful for low-income people on Medicare, including 41% who strongly agree (Chart 9).
 - Among the 93% who say their pharmacy is set up to electronically verify customers' enrollment in Medicare drug plans, 82% say this system works very or somewhat well (Chart 10).
 - Among the 38% who say their pharmacy is set up to electronically verify which drugs are covered by specific Medicare drug plans, 86% say this system works very or somewhat well (Chart 10).

Section One: Survey of Pharmacists (continued)

Despite saying the new benefit works well for their customers, most pharmacists think the benefit is confusing for their customers, and many report that their customers have had problems filling prescriptions.

- Most pharmacists think the benefit is confusing for their customers (Chart 11):
 - Nearly nine in ten (86%) say their customers do not understand the benefit well.
 - Three-quarters (74%) say people on Medicare have too many plan choices.
- In addition to saying the benefit is confusing for their customers, nine in ten (91%) agree that the benefit is too complicated overall, including 59% who strongly agree (Chart 9).
- Half (51%) say the formularies for the plans most of their customers are enrolled in lack coverage for drugs their customers need (Chart 12).
- Eight in ten pharmacists (81%) say that their customers have experienced problems getting their prescriptions filled since joining a Medicare drug plan, including 19% who say *most* of their customers have experienced problems (Chart 13). The most common problems reported were leaving the pharmacy without a prescription because the drug wasn't on the plan's formulary (67% of pharmacists say this happened to their customers) and problems getting enrollment cards or letters of enrollment (66%), followed by having to pay out-of-pocket for prescriptions because enrollment could not be verified (58%) and leaving the pharmacy without a prescription because they couldn't afford the copay (49%) (Chart 14).
- Almost all pharmacists (92%) say they have customers who were previously covered by Medicaid and are now in a Medicare drug plan. A plurality (45%) say that these customers have experienced more problems than other customers, while slightly fewer (42%) say they have experienced the same number of problems, and one in ten (11%) say they have experienced fewer problems than other Medicare customers (Chart 15).

Section One: Survey of Pharmacists (continued)

In addition to problems for patients, many pharmacists also report administrative and financial problems with the Medicare prescription drug benefit, for themselves and their pharmacies.

- Nearly all pharmacists (96%) report at least one major or minor administrative problem related to the Medicare prescription drug benefit, including 79% who report at least one major problem. The issues most frequently cited as major problems were dealing with utilization management controls (57% of pharmacists said this has been a major problem related to the drug benefit over the past 3 months), getting through to hotlines run by the drug plans (50%), and getting through to hotlines run by Medicare (43%) (Chart 16). More than half (53%) say these types of problems have placed a lot of burden on them and their staff (Chart 17).
- More than half (53%) say the administrative burden of filling prescriptions under Medicare drug plans is worse than under typical commercial insurance plans (Chart 18).
- Nearly two-thirds (64%) of pharmacists report at least one financial problem for their pharmacy related to the drug benefit, including dispensing prescriptions before knowing they would be reimbursed (50%), receiving reimbursements from Medicare drug plans lower than they would receive from other plans (43%), waiting longer than usual for reimbursements to arrive (29%), and having to take out a loan or line of credit because of cash flow problems related to Medicare drug plan reimbursements (9%) (Chart 19). One in five (18%) say these types of problems have placed a lot of burden on their pharmacy, and another quarter say they have placed some burden (Chart 21).

Section One: Survey of Pharmacists (continued)

INDEPENDENT PHARMACISTS COMPARED WITH CHAIN PHARMACISTS

Views and experiences related to the Medicare drug benefit are different in many areas between pharmacists working in independent pharmacies and those working in chain drug stores. Overall, independent pharmacists report more experiences helping customers with the benefit, and are more likely to report that their customers have experienced problems filling prescriptions.

- Independent pharmacists (53%) are more likely than chain pharmacists (38%) to say they feel a lot of responsibility to advise customers about Medicare drug plans (Chart 1).
- Independent pharmacists (68%) are more likely than chain pharmacists (53%) to say that **most** of their Medicare customers have asked them for help or advice about the benefit (Chart 2).
- Independent pharmacists are more likely than chain pharmacists to say:
 - o **Most** of their Medicare customers have experienced problems filling prescriptions since joining Medicare drug plans (25% vs. 16%) (Chart 13);
 - o Their customers previously covered under Medicaid have experienced more problems than other Medicare customers (57% vs. 39%) (Chart 15).

Section One: Survey of Pharmacists (continued)

INDEPENDENT PHARMACISTS COMPARED WITH CHAIN PHARMACISTS (continued)

Independent pharmacists are more likely than chain pharmacists to report administrative burdens for themselves and financial burdens for their pharmacies related to the Medicare prescription drug benefit.

- Independent pharmacists are more likely than chain pharmacists to report major problems related to Medicare drug plans with determining enrollment, confirming which drugs are on plan formularies, coordinating coverage for non-covered drugs from other payers, dealing with utilization management controls, and getting through to hotlines run by the drug plans.
 - Nearly nine in ten (89%) independent pharmacists compared with about three-quarters (76%) of chain pharmacists report at least one *major* problem of this nature.
 - About two-thirds (65%) of independent pharmacists compared with fewer than half (48%) of chain pharmacists say these types of problems have placed “a lot” of burden on them and their staff (Chart 17).
- Independent pharmacists are more likely than chain pharmacists to be involved with and have knowledge about the financial aspects of their pharmacies, including drug plan reimbursements. Therefore, it is not surprising that independent pharmacists are more likely to say that their pharmacies have experienced a wide variety of financial problems related to Medicare prescription drug plans, while chain pharmacists are more likely to say their pharmacies have not experienced such problems, or they don’t know whether they have or not.
 - Nine in ten independent pharmacists (90%) compared with just over half (53%) of chain pharmacists report at least one of the following financial problems related to the Medicare prescription drug benefit (Chart 20):
 - Dispensed prescriptions before knowing for sure they would be reimbursed (73% vs. 40%);
 - Received reimbursements from Medicare drug plans lower than from other plans (78% vs. 29%);
 - Had to wait longer than usual for reimbursements to arrive (67% vs. 12%);
 - Had to take out a loan or line of credit because of cash flow problems related to Medicare drug plan reimbursement (27% vs. 1%).
 - More than four in ten independent pharmacists (44%) compared with just 7% of chain pharmacists say these types of financial problems have placed “a lot” of burden on their pharmacy (Chart 21).

Section One: Survey of Pharmacists (continued)

INDEPENDENT PHARMACISTS COMPARED WITH CHAIN PHARMACISTS (continued)

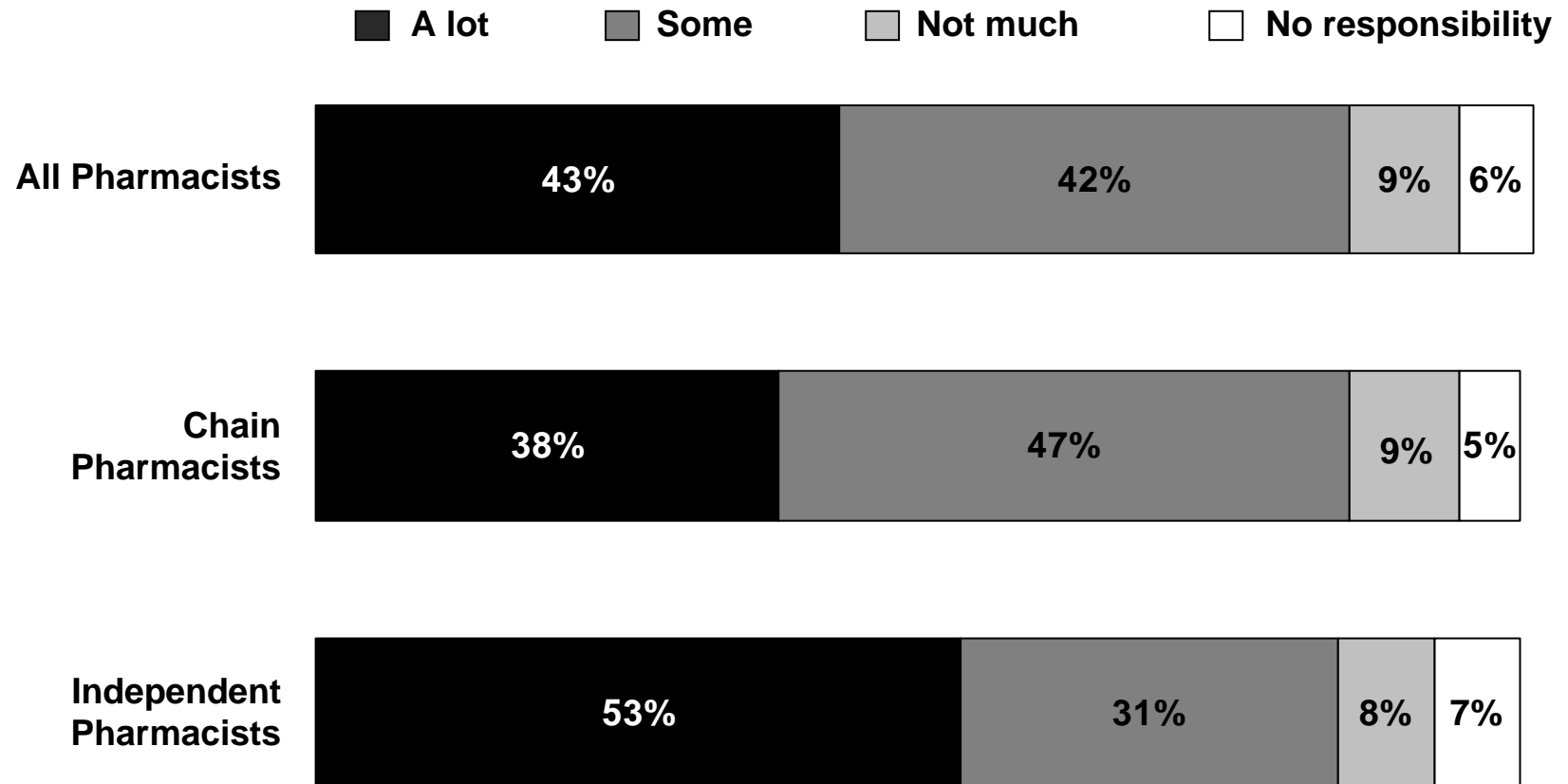
Perhaps reflective of their greater reported experiences with administrative and financial problems related to the benefit, independent pharmacists are more critical of the Medicare prescription drug benefit in many areas.

Independent pharmacists are more likely than chain pharmacists to:

- Say they have an unfavorable impression of the benefit (53% vs. 27%) (Chart 5);
- Give the implementation of the benefit a grade of D or F (56% vs. 30%);
- Say the administrative burden of filling prescriptions is worse under Medicare drug plans than under typical commercial insurance plans (64% vs. 48%) (Chart 18);
- Strongly agree that the benefit is too complicated (70% vs. 53%);
- Strongly agree that it benefits private health plans and pharmaceutical companies too much (51% vs. 19%);
- Say the formularies for most of their customers' plans lack coverage for drugs they need (62% vs. 46%) (Chart 12).

Pharmacists' Reported Responsibility to Help Customers with Medicare Drug Plans

How much responsibility, if any, do you think you have to advise your customers about Medicare drug plans?

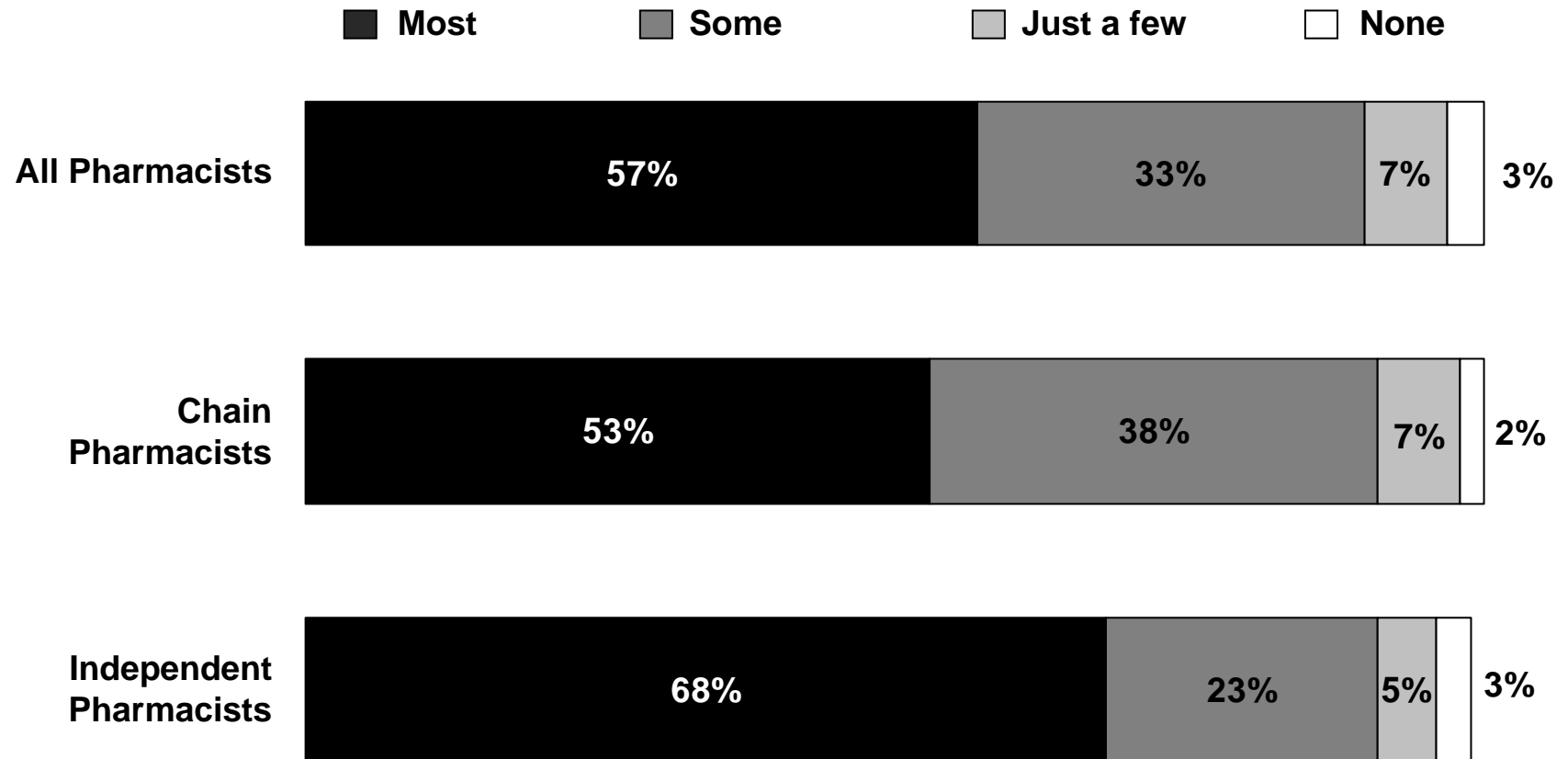


Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Reports of Customers Asking for Help

Have any of your customers asked you for help or advice about the Medicare drug plans, or not? (If yes: Would you say most, some or just a few of your Medicare customers have asked you for help or advice about the new Medicare drug plans?)



Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Ways Pharmacists Report Helping Customers with Medicare Drug Plans

Percent of pharmacists who say they have...

Talked to a customer about switching from a brand-name to a generic drug to save them money under their Medicare drug plan

85%

Talked to a customer about concerns related to their out-of-pocket costs under the Medicare drug plan

84%

Helped a customer decide whether or not to enroll in a Medicare drug plan

77%

Helped a customer figure out if a specific drug is covered by a Medicare drug plan

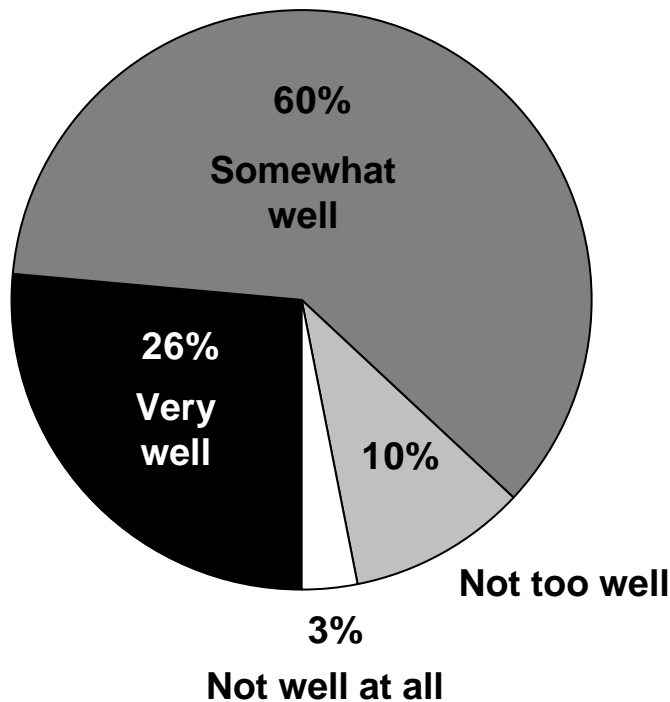
75%

Helped a customer decide which Medicare drug plan they should enroll in

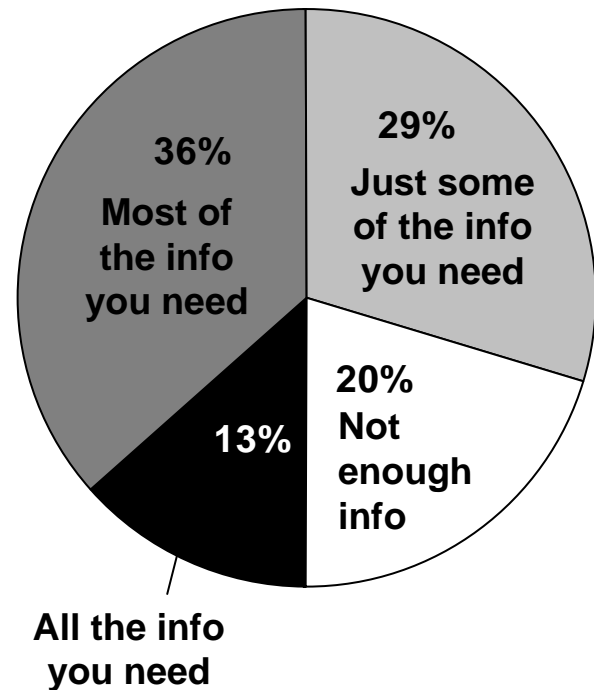
45%

Pharmacists' Reported Understanding of Medicare Drug Benefit

How well would you say you understand the new Medicare prescription drug benefit that went into effect in January 2006? Would you say you understand it very well, somewhat well, not too well, or not well at all?



Would you say you have all the information you need to help your Medicare customers understand how the new drug benefit will impact them, most of the information you need, just some of the information you need, or not enough information?



Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Impressions of Medicare Drug Benefit

Given what you know about it, in general, do you have a favorable or unfavorable impression of this new Medicare prescription drug benefit?

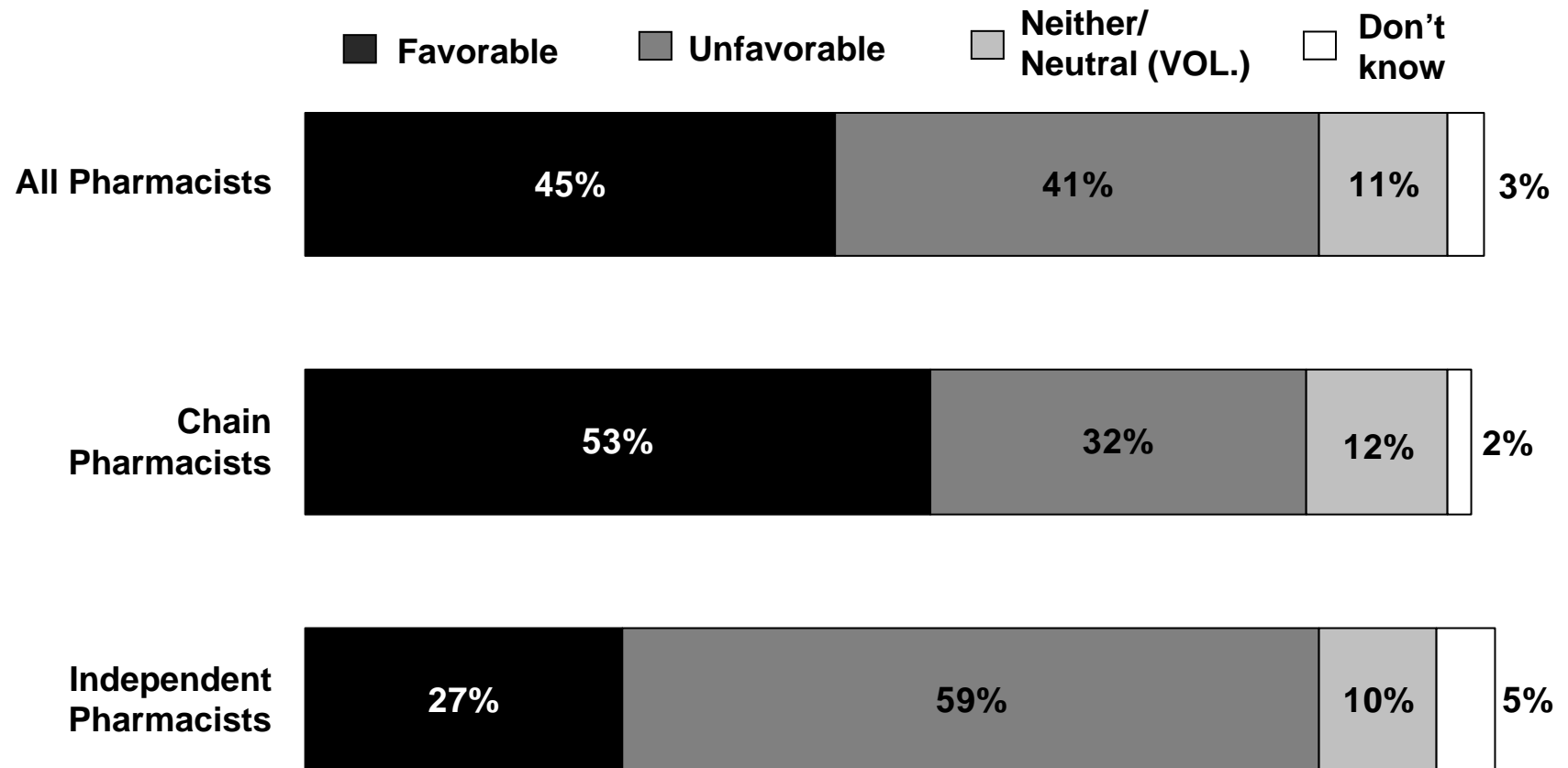
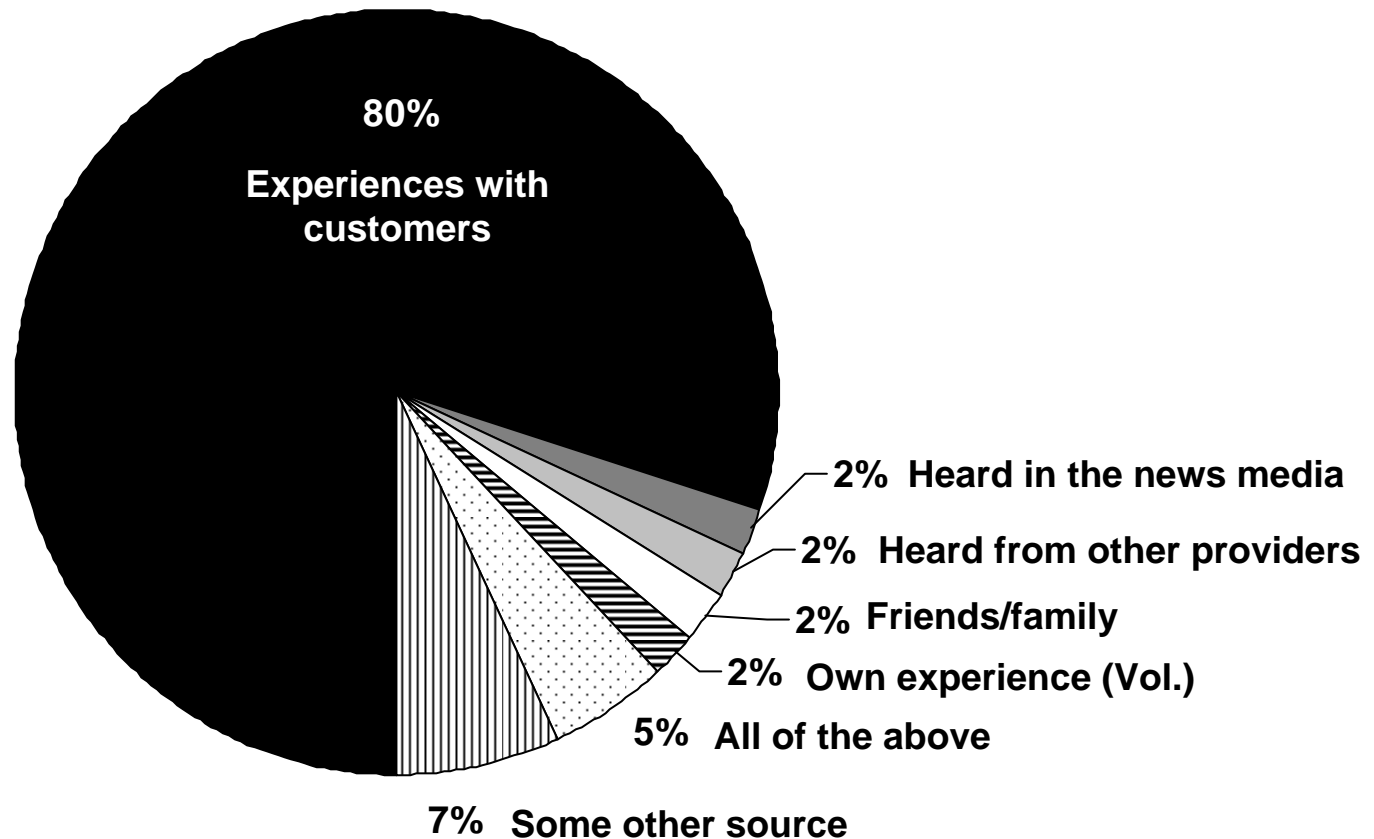


Chart 6

Pharmacists' Reported Source of Views of the New Medicare Drug Benefit

Are your views of the Medicare drug benefit based mainly on your experiences with your customers, experiences with friends and family members, what you've heard from other health care providers, what you've heard in the news media, or from some other source?

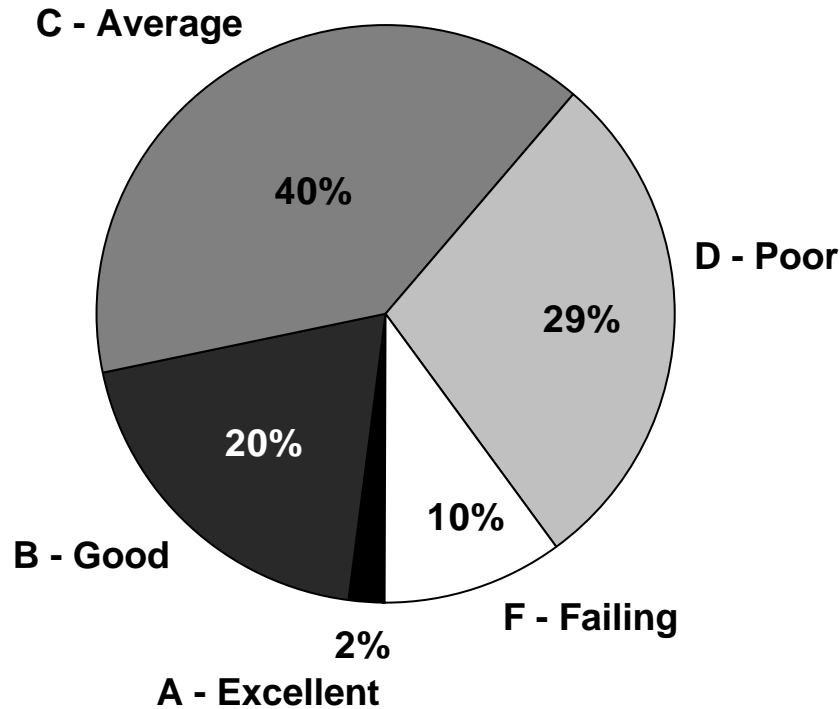


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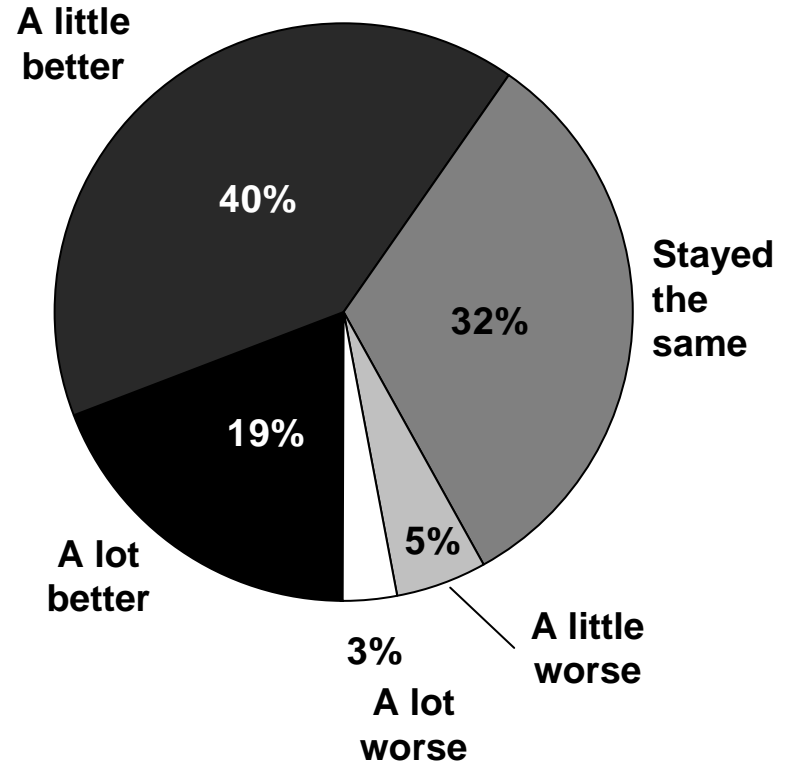
Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Rating of Part D Implementation

Overall, what grade would you give the implementation of the new Medicare drug benefit so far?



Over the past few months, would you say the implementation has gotten better, worse, or stayed about the same?



Note: Don't know responses not shown

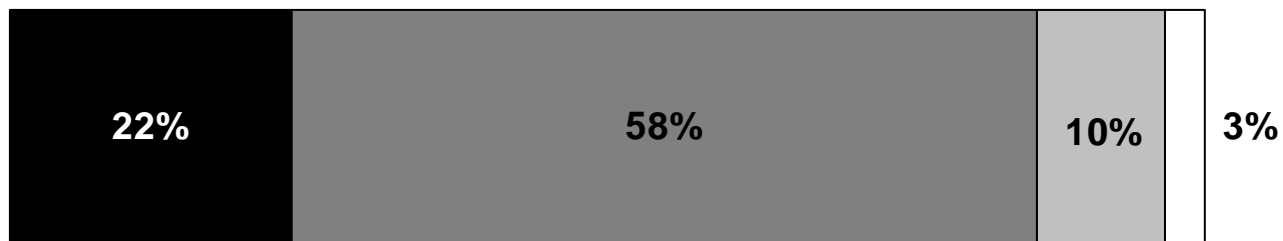
Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Evaluation of How Well the Benefit Works for Their Customers

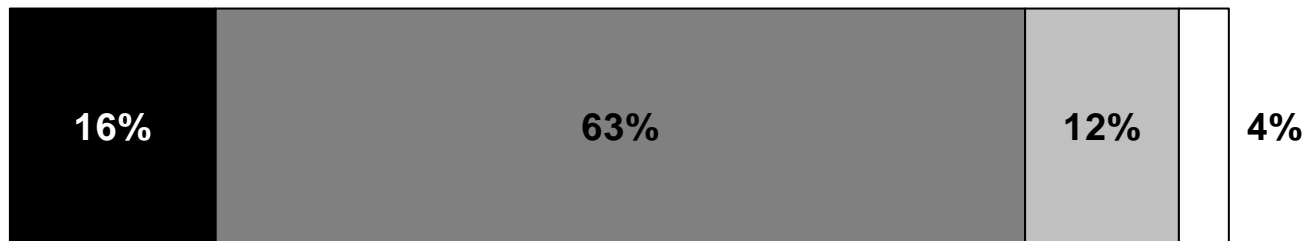
How well would you say the new Medicare drug benefit works for your customers in each of the following areas...

Very well
 Somewhat well
 Not too well
 Not well at all

Lowering their out-of-pocket costs



Getting them access to the prescription drugs they need



Note: Don't know responses not shown.

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Beliefs About the New Benefit

I'm going to read you some things some people have said about the Medicare prescription drug benefit, and I'd like you to tell me how much you agree or disagree with each...

Strongly agree
 Somewhat agree
 Somewhat disagree
 Strongly disagree

It is too complicated



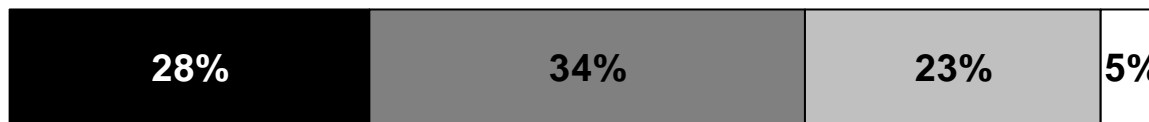
It helps people on Medicare save money on their prescriptions



It is especially helpful for low-income people on Medicare



It benefits private health plans and pharmaceutical companies too much

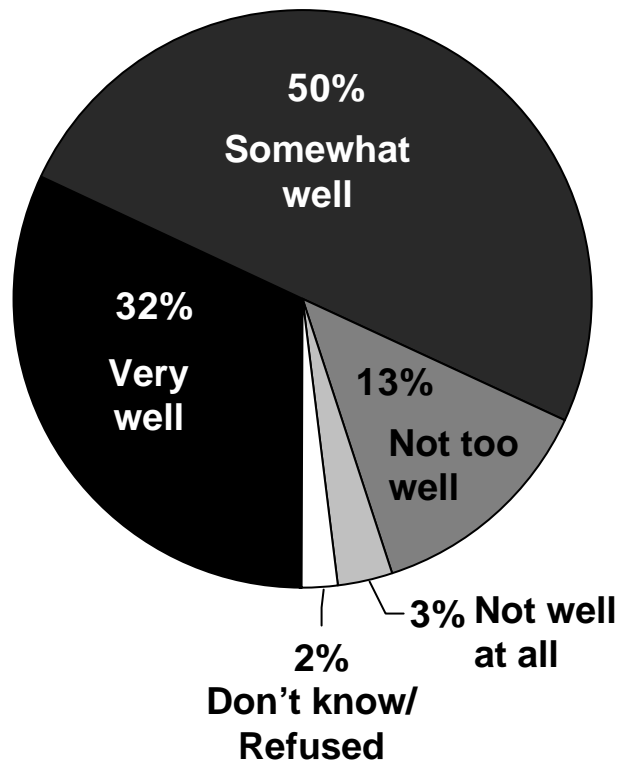


Note: Don't know responses not shown.

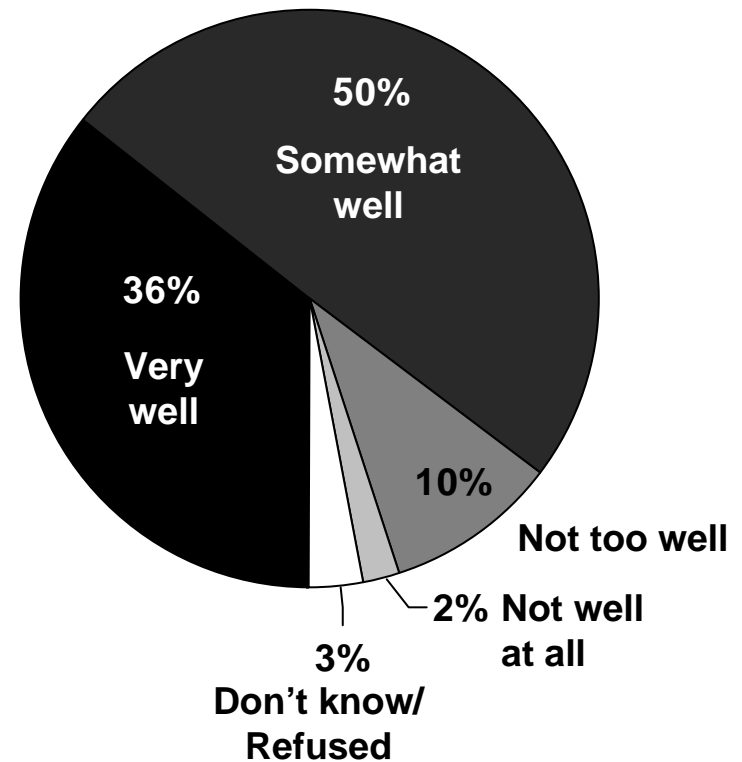
Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Rating of Electronic Systems Related to Medicare Drug Plans

Among the 93% of pharmacists who say their pharmacy is set up to electronically verify customers' enrollment in Medicare drug plans, percent who say this system works...

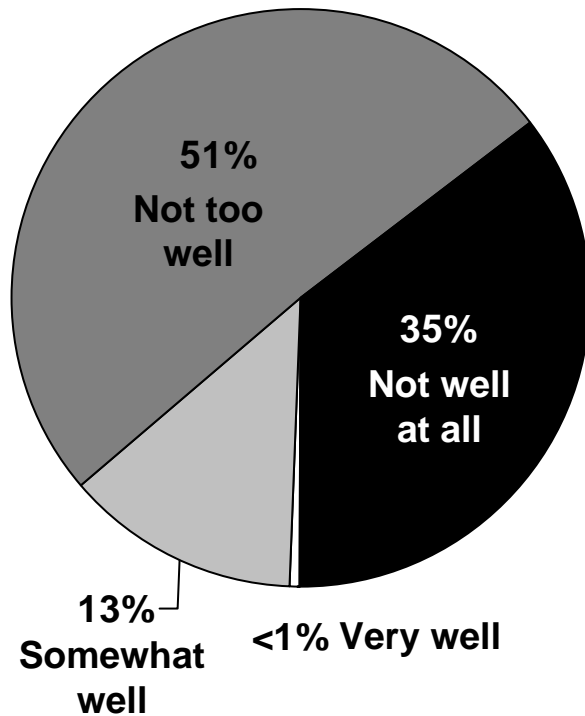


Among the 38% of pharmacists who say their pharmacy is set up to electronically verify which drugs are covered by specific Medicare drug plans, percent who say this system works...

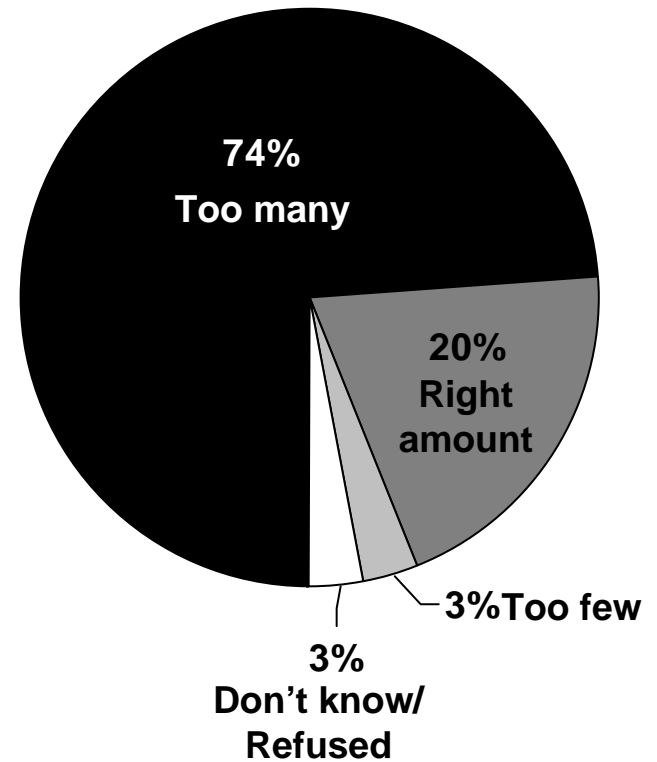


Pharmacists Say Benefit Confusing for Customers

How well do you think most of your Medicare customers understand the new drug benefit?

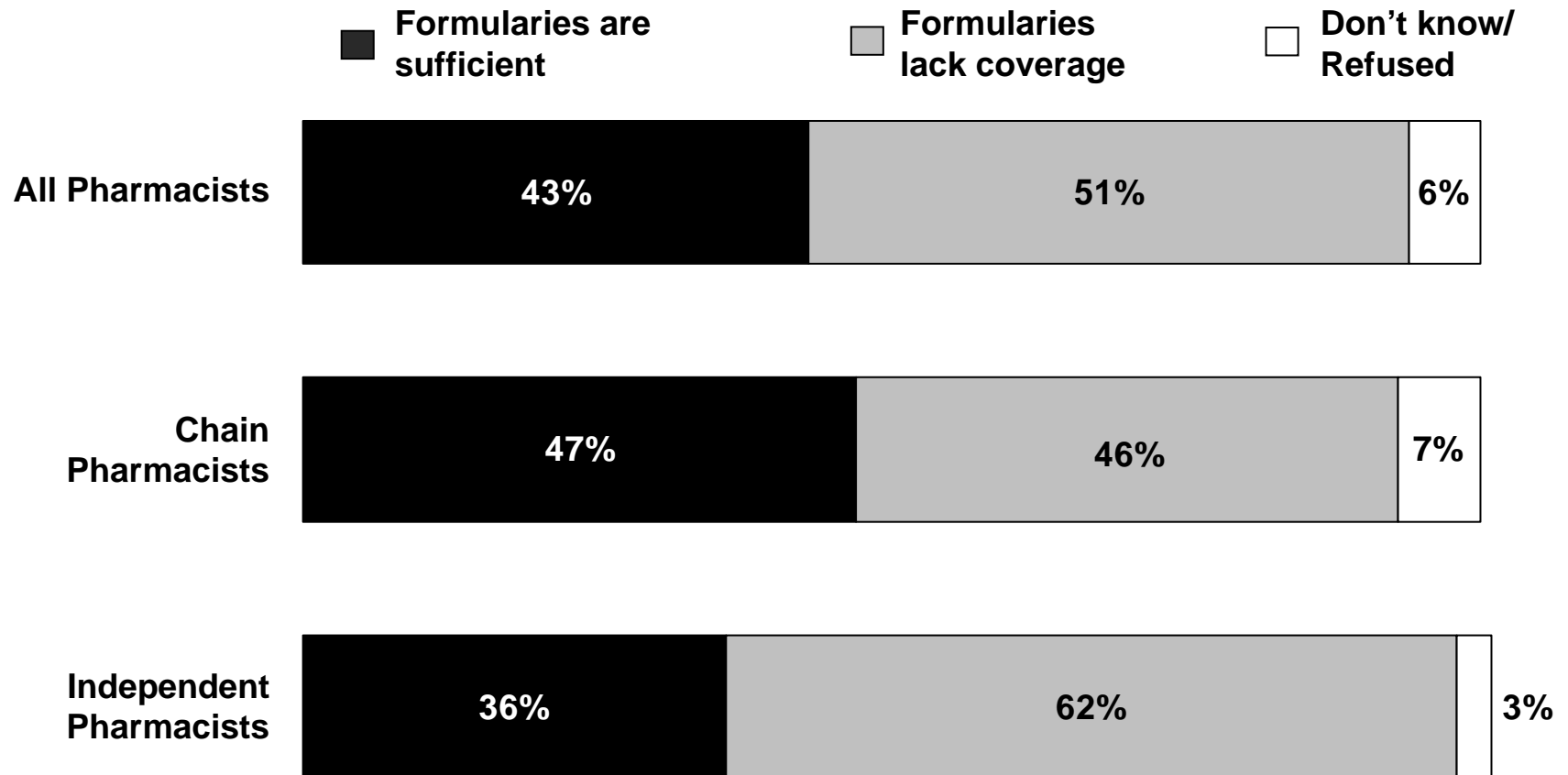


Do you think people on Medicare have too many, too few, or about the right amount of drug plans to choose from?



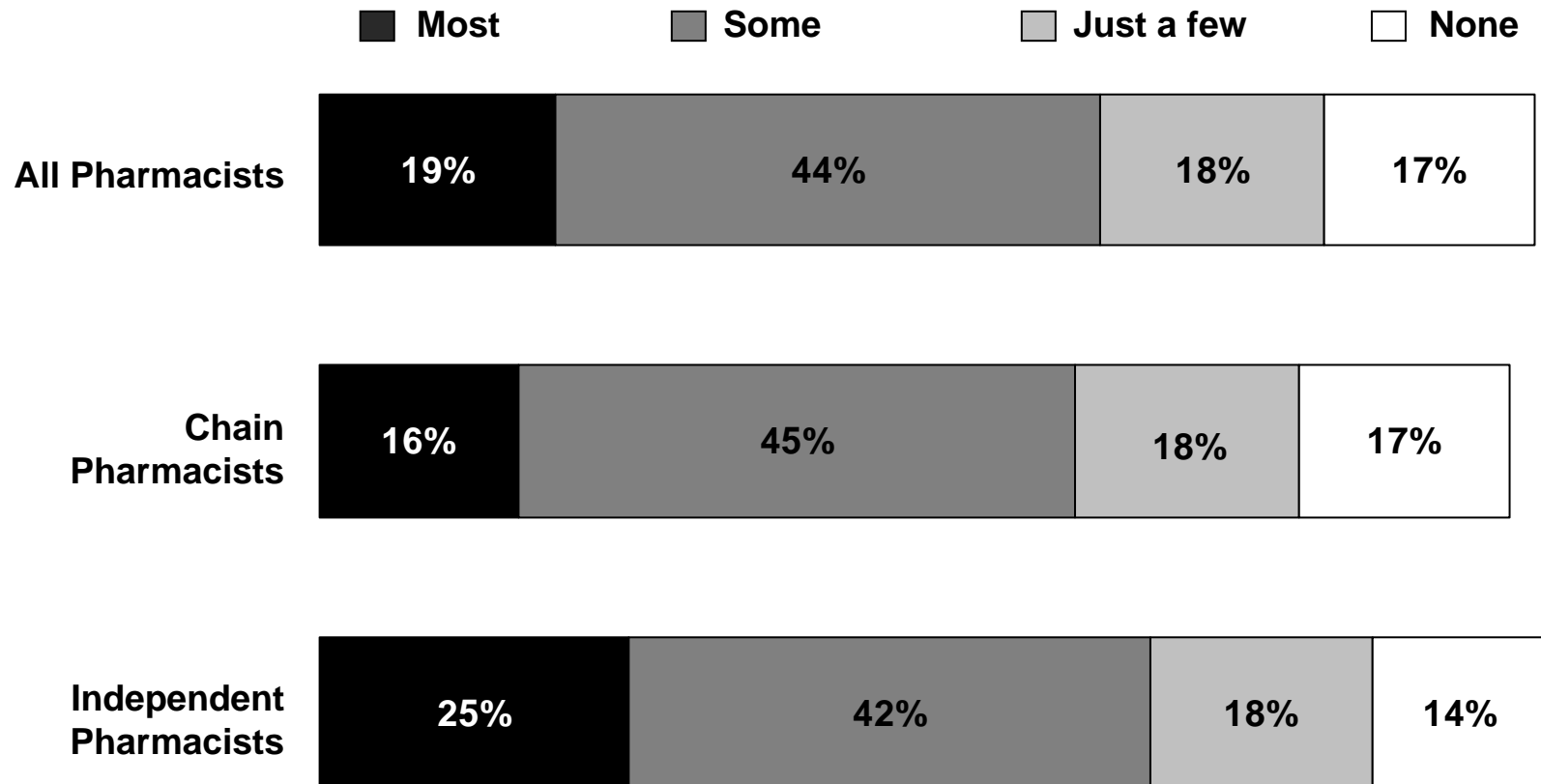
Pharmacists' Views of Medicare Drug Plan Formularies

Do you think the plans that most of your Medicare customers are enrolled in have formularies sufficient for your customers' needs, or do the formularies lack coverage for drugs they need?



Pharmacists' Reports of Customers Having Problems

To the best of your knowledge, have any of your Medicare customers experienced problems getting their prescriptions filled since joining a new Medicare drug plan, or not? (If yes: Would you say most, some or just a few of your customers who joined Medicare drug plans have had problems filling prescriptions?)



Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Reports of Specific Customer Problems

Percent of pharmacists who say any of their customers have experienced the following specific problems filling prescriptions since joining a Medicare drug plan...

Any Medicare customer left the pharmacy without their prescription because the drug wasn't on their plan's formulary

67%

Any Medicare customer had problems getting enrollment cards or letters of enrollment after signing up for a plan

66%

Any Medicare customer had to pay out-of-pocket for their prescription because you couldn't verify their enrollment

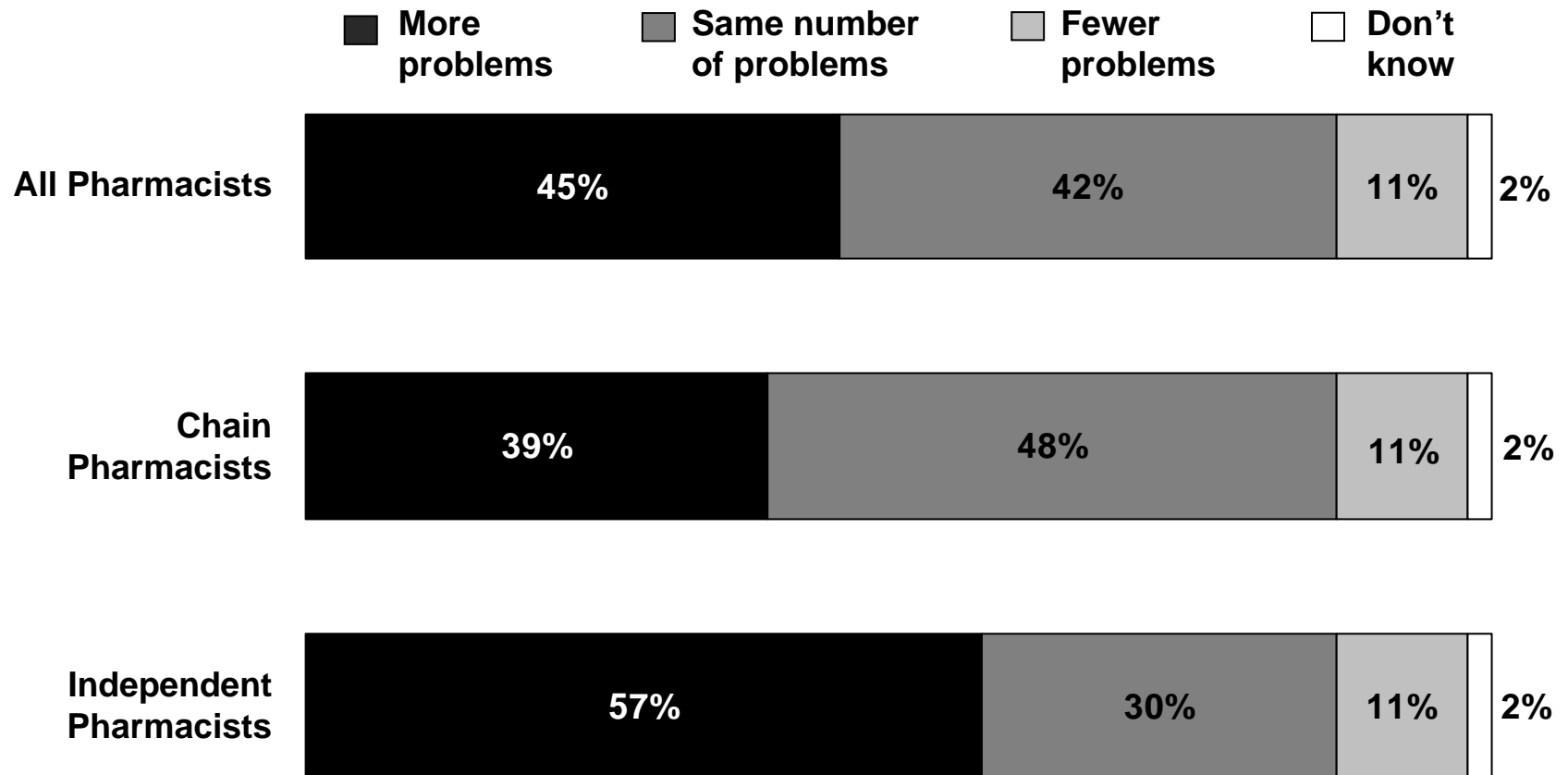
58%

Any Medicare customer left the pharmacy without their prescription because they couldn't afford the copay

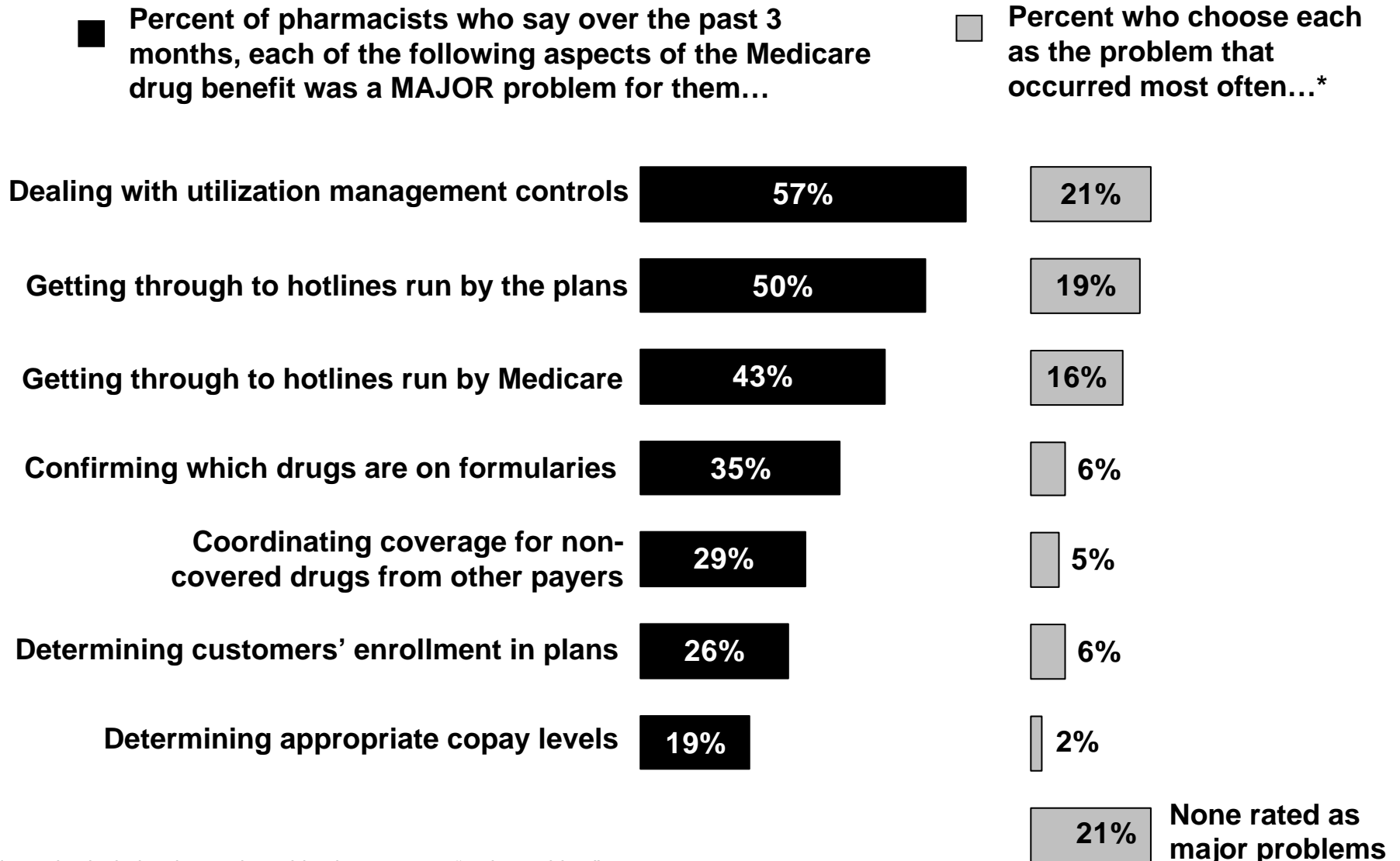
49%

Pharmacists' Reports of Problems for Dual-Eligibles

Among the 93% of pharmacists who say they have customers who were previously receiving drug coverage through Medicaid and are now in a Medicare drug plan: Is it your impression that these customers have experienced more problems, fewer problems, or about the same number of problems as other customers in Medicare drug plans?



Administrative Problems Reported by Pharmacists

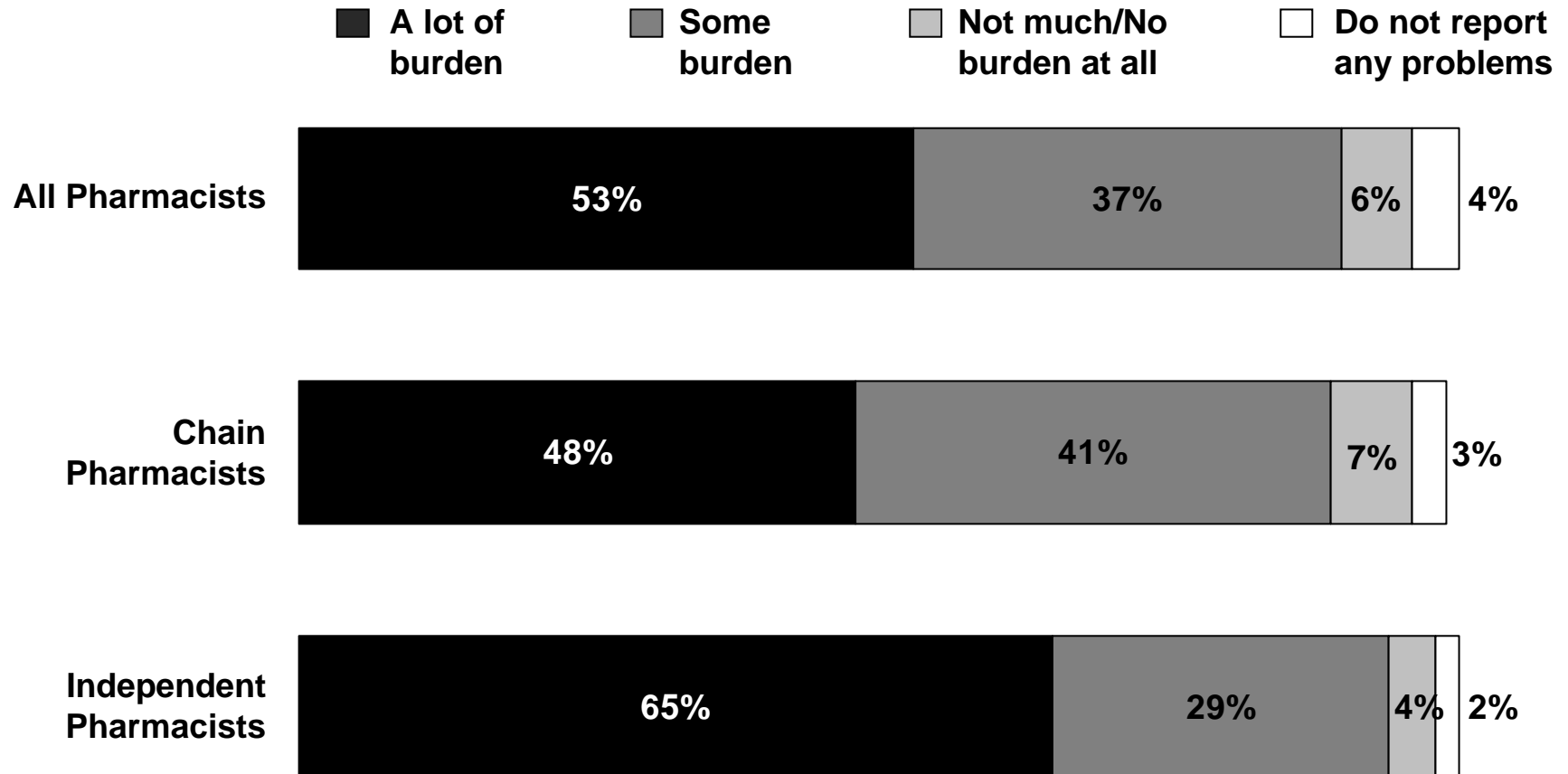


*Note: also includes those who said only one was a "major problem"

Sources: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Reported Burden of Administrative Problems

Overall, would you say that dealing with these types of (administrative) problems has placed a lot of burden on you and your staff, some burden, not too much, or no burden at all?



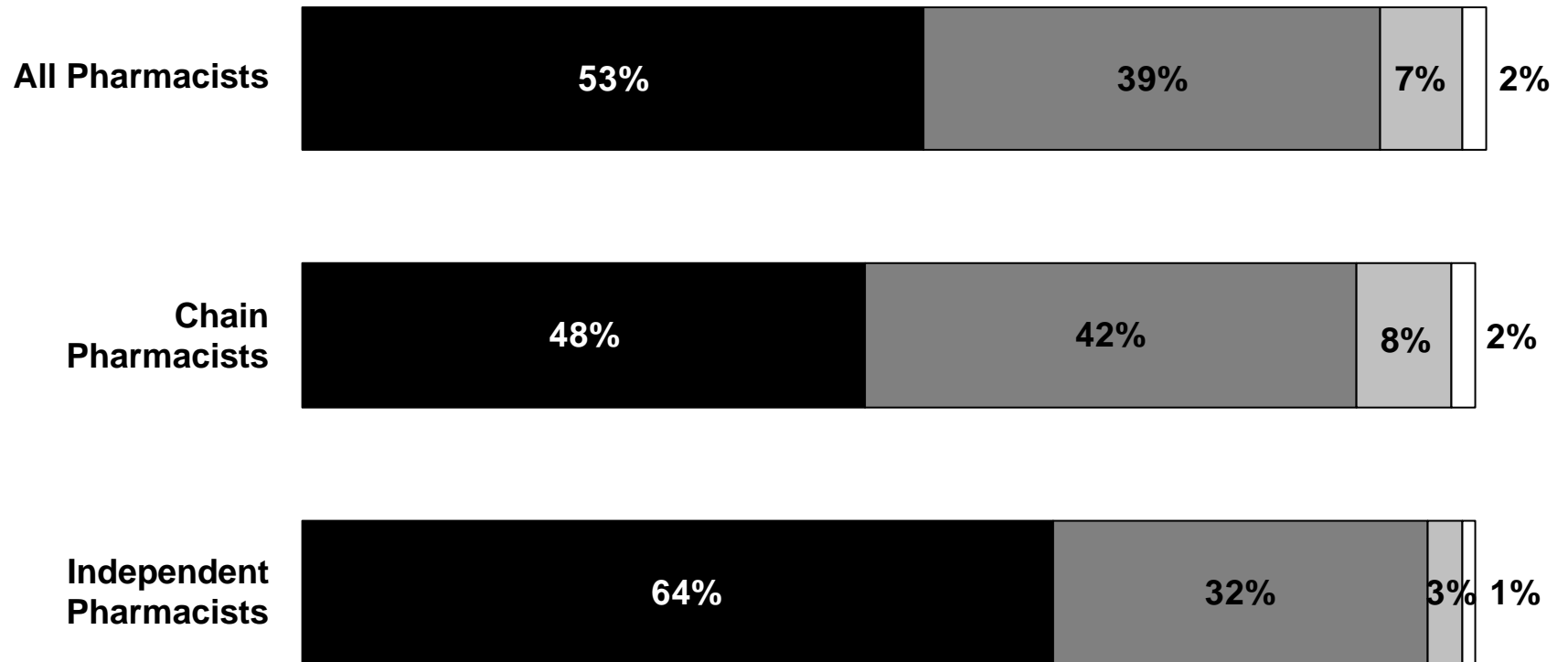
Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Pharmacists* (conducted April 21-June 27, 2006)

Pharmacists' Assessment of Administrative Burden Under Medicare Drug Plans vs. Private Plans

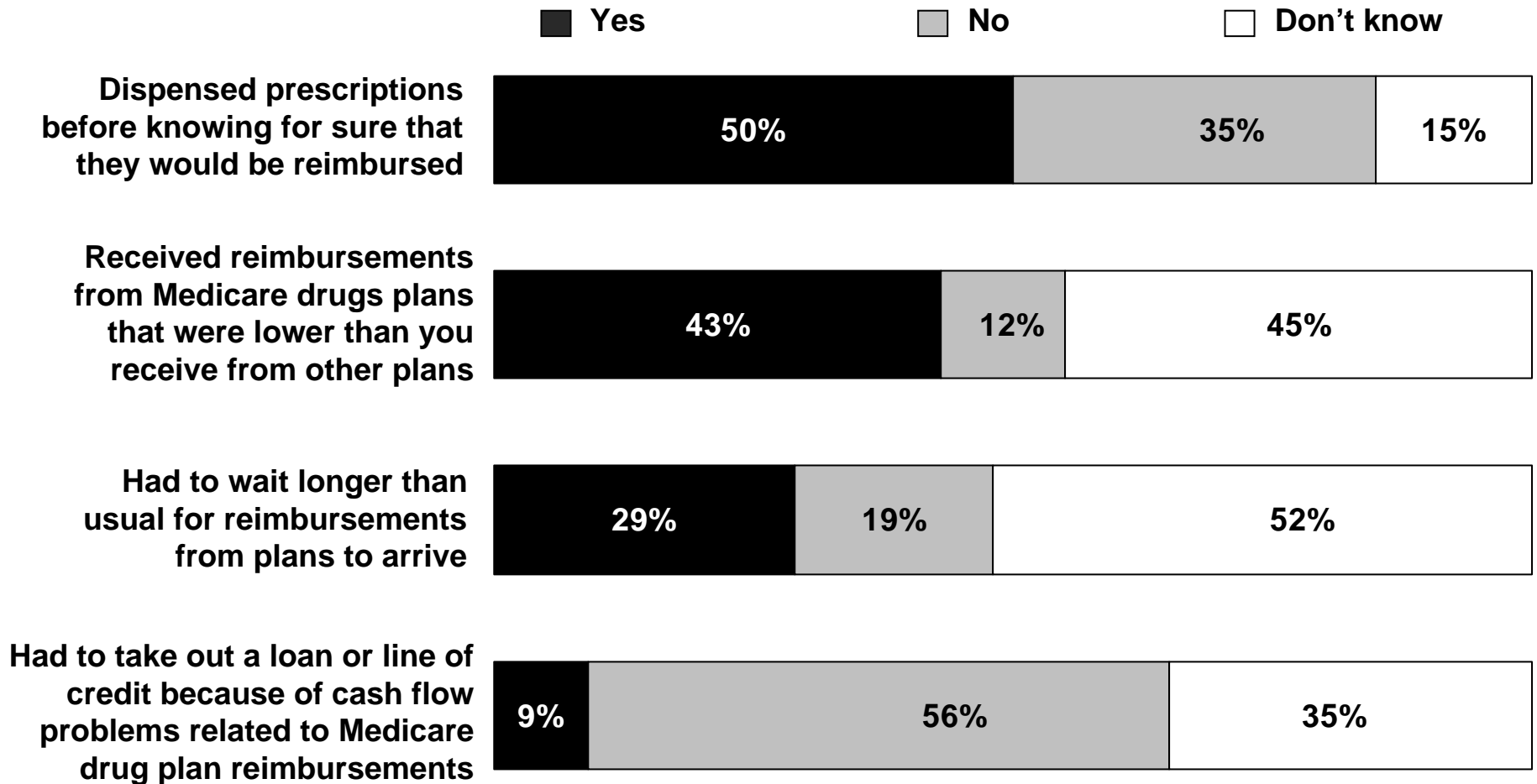
Based on your own experience, would you say that the administrative burden of filling prescriptions for customers covered by the new Medicare drug plans is better, worse, or about the same as the administrative burden under typical commercial insurance plans?

Worse
 About the same
 Better
 Don't know



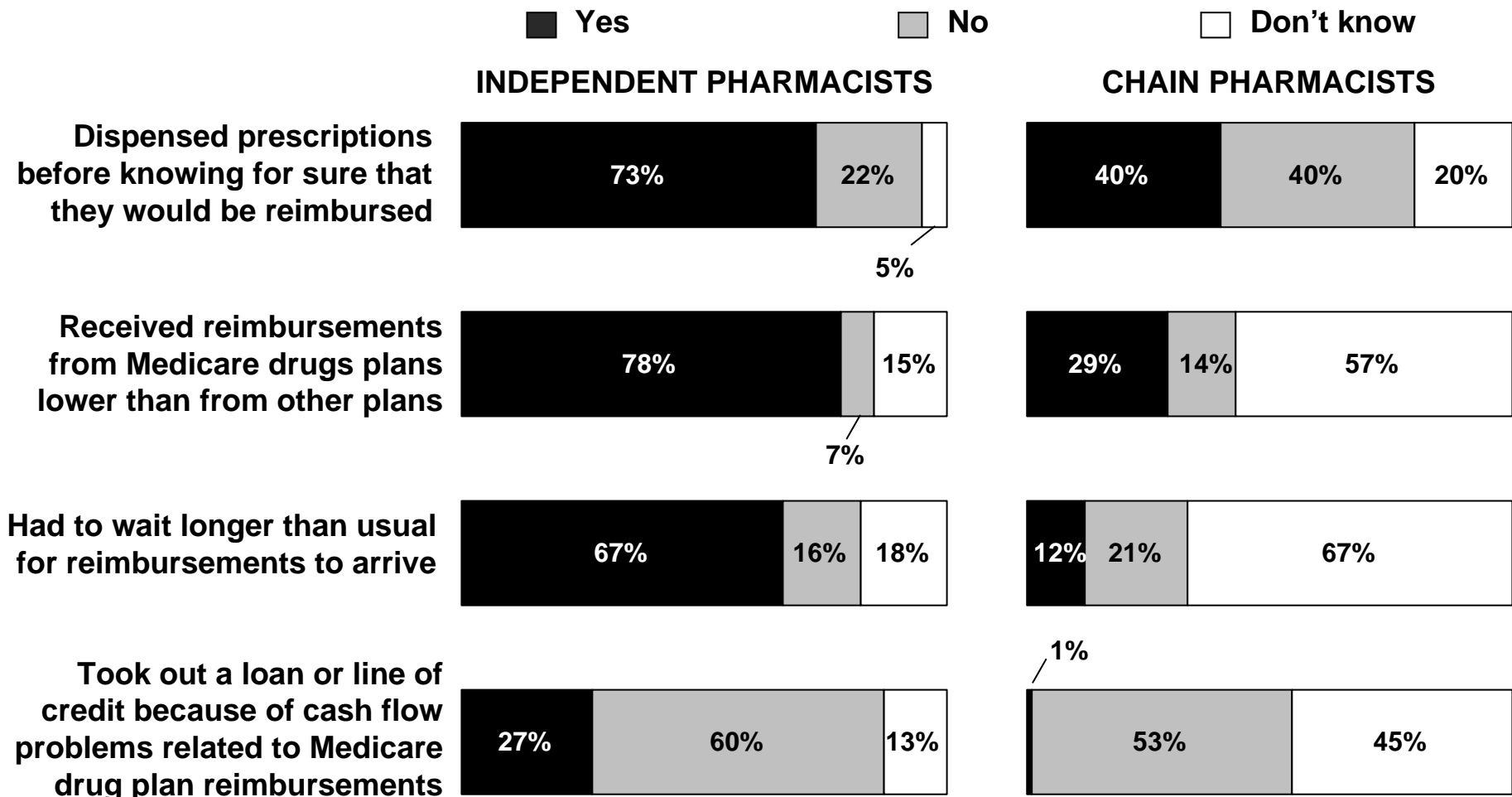
Pharmacists' Reported Financial Problems Related to Medicare Prescription Drug Benefit

Since the new drug benefit went into effect, has your pharmacy experienced any of the following financial problems, or not...



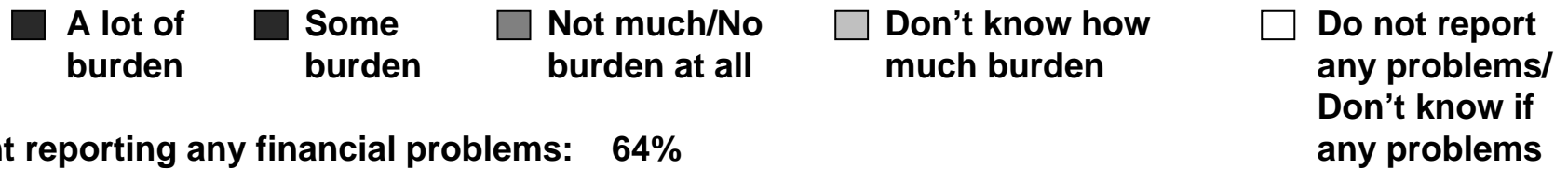
Differences Between Chain and Independent Pharmacists' Reported Financial Problems

Percent saying their pharmacy has experienced the following financial problems related to the Medicare prescription drug benefit...

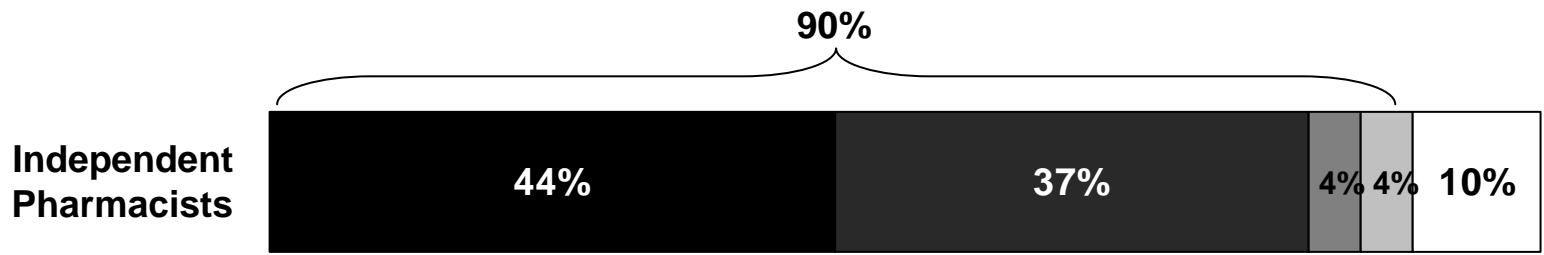
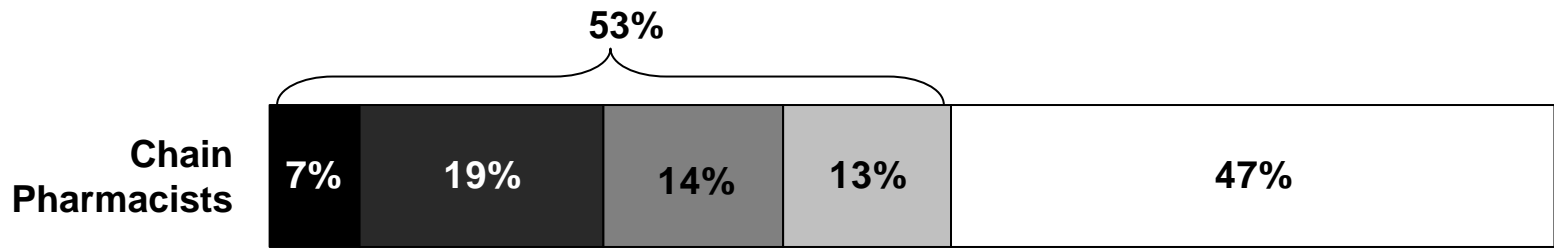
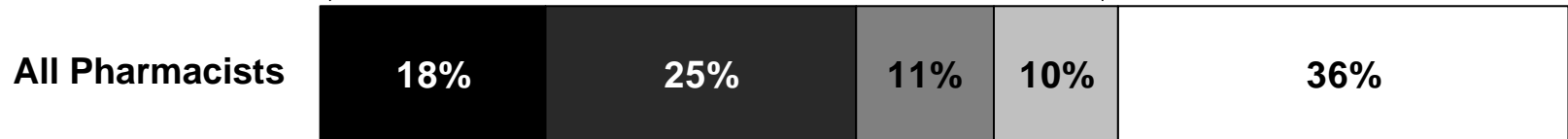


Pharmacists' Reported Burden of Financial Problems

Overall, would you say that these financial problems have placed a lot of burden on your pharmacy, some burden, not too much, or no burden at all?



Percent reporting any financial problems: 64%



Section Two: Survey of Physicians

Most doctors say they have a responsibility to advise patients about Medicare drug plans, and most say they have helped patients make decisions in some way.

- Nearly six in ten doctors (57%) say they think they have at least some responsibility to advise patients about Medicare drug plans (Chart 22).
- More than half (54%) say their patients have asked them for advice about the plans (Chart 22).
- Many say they have helped patients with their Medicare drug plans in various ways, most commonly talking to patients about switching from brand-name to generic drugs (46%), talking to patients about concerns related to out-of-pocket costs (44%), helping patients figure out if specific drugs are covered under their plans (33%), and helping patients decide whether or not to enroll in a Medicare drug plan (30%) (Chart 23).
- Most doctors say that helping patients make decisions and get drugs under their Medicare drug plans has placed “a lot of burden” (27%) or “some burden” (37%) on them and their staff (Chart 24).

Despite reporting helping patients, many doctors say they do not understand the Medicare prescription drug benefit well themselves.

- Nearly two-thirds (64%) of doctors say they understand the benefit “not too well” or “not well at all” (Chart 25).
- Nearly half (45%) say they do not have enough information about the benefit to help their patients understand how it will impact them (Chart 25).
- More than nine in ten (92%) agree that the benefit is too complicated, including 62% who strongly agree (Chart 28).
- Most doctors say they have not used Medicare telephone help hotlines (65%) or Medicare.gov (58%) as a source of information about the benefit.

Section Two: Survey of Physicians (continued)

More doctors have unfavorable than favorable impressions of the Medicare prescription drug benefit. Still, many doctors recognize the positive aspects of the new benefit.

- Twice as many doctors say their impression of the benefit is unfavorable (56%) as say it is favorable (28%) (Chart 26).
- A plurality (43%) give the implementation of the benefit a grade of C for average (14% give it an A or B, and 41% give it a D or F) (Chart 26).
- Nearly half (46%) of doctors say their views of the benefit are based mainly on their experiences with patients, while a quarter (25%) say their views are based on what they've heard in the news media. Fewer say their views are based on what they've heard from other providers (10%) or experiences with friends and family (7%) (Chart 27)
- Majorities of doctors agree that the new drug benefit helps people on Medicare save money on their prescriptions (71%) and that it is especially helpful for low-income people on Medicare (61%) (Chart 28).

Among the 78% doctors who say that at least a few of their patients have enrolled Medicare drug plans, most say the benefit is working well for their patients.

- Among doctors with any patients enrolled in a Medicare drug plan, about half say the benefit works “very well” or “somewhat well” for their patients in lowering their prescription drug costs and getting them access to the drugs they need, compared with about three in ten who say it works “not too well” or “not well at all.” About two in ten doctors with enrolled patients say they don't know how well the benefit works for their patients in each of these areas (Chart 29).

Section Two: Survey of Physicians (continued)

Most doctors with patients enrolled in Medicare drug plans report that at least some of their patients have experienced problems getting prescriptions filled, and a significant minority report that their patients have experienced serious consequences as a result of these problems.

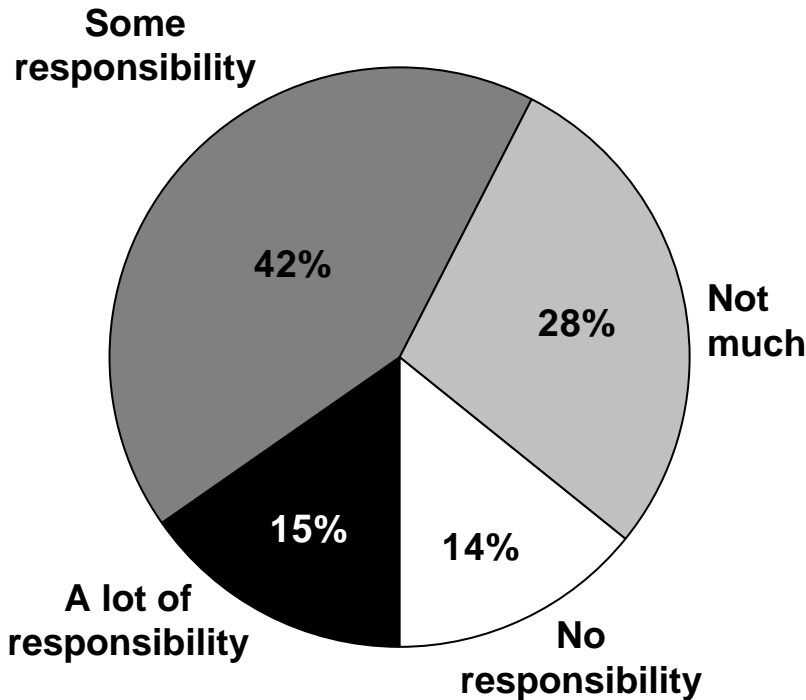
- About six in ten doctors (59%) with any patients enrolled in a Medicare drug plan say that their patients have experienced problems getting prescriptions filled since joining their plan, and 15% say *most* of their Medicare patients have experienced problems (Chart 30).
- One in ten (10%) doctors with any patients enrolled in a Medicare drug plan say that a patient has experienced serious medical consequences due such problems (Chart 31).

Most doctors who have patients enrolled in Medicare drug plans say the formularies for these plans lack coverage for drugs their patients need; however most of these doctors say they do not have a great deal of familiarity with the plans' formularies. Most doctors with enrolled patients report that they have been asked to change a prescription or document reasons why a patient should get a specific drug they prescribed.

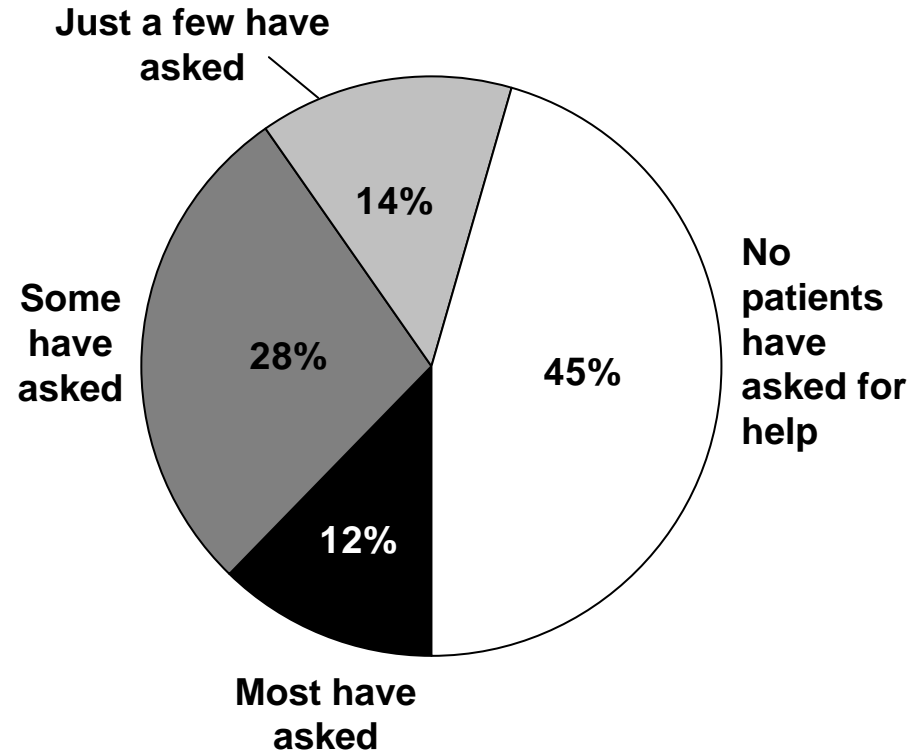
- More than half (53%) of doctors with any patients enrolled in a Medicare drug plan say the formularies for the plans most of their patients are enrolled in lack coverage for drugs their patients need (Chart 32).
- Among doctors with any enrolled patients, seven in ten (69%) say they are “not too familiar” or “not at all familiar” with the formularies for their patients’ plans, and six in ten (59%) say they rarely or never check the formulary when prescribing a drug for a Medicare patient (Chart 32).
- Large shares of doctors with patients enrolled in Medicare drug plans say they have been asked to (Chart 33):
 - Change a prescription to a different drug so it would be covered under a Medicare drug plan (74%);
 - Document reasons why a patient should get a specific drug they prescribed (59%);
 - Assist with filing an appeal or getting an exception from a Medicare drug plan for a specific drug (45%).
- A plurality (46%) of doctors with enrolled patients say the administrative burden of dealing with prescriptions under Medicare drug plans is worse than under typical commercial insurance plans, while 42% say it is about the same and 8% say it is better than under typical commercial plans (Chart 34).

Doctors' Reported Responsibility and Experience Helping Patients with Medicare Drug Plans

How much responsibility, if any, do you think you have to advise your patients about Medicare drug plans?



Have any of your customers asked you for help or advice about the Medicare drug plans? (If yes: Would you say most, some or just a few of your Medicare patients have asked for help?)



Note: Don't know responses not shown

Source: Kaiser Family Foundation *National Survey of Physicians* (conducted April 25-July 8, 2006)

Ways Doctors Report Helping Patients with Medicare Drug Plans

Percent of doctors who say they have...

Talked to a patient about switching from a brand-name to a generic drug to save them money under their Medicare drug plan

46%

Talked to a patient about concerns related to their out-of-pocket costs under the Medicare drug plan

44%

Helped a patient figure out if a specific drug is covered by a Medicare drug plan

33%

Helped a patient decide whether or not to enroll in a Medicare drug plan

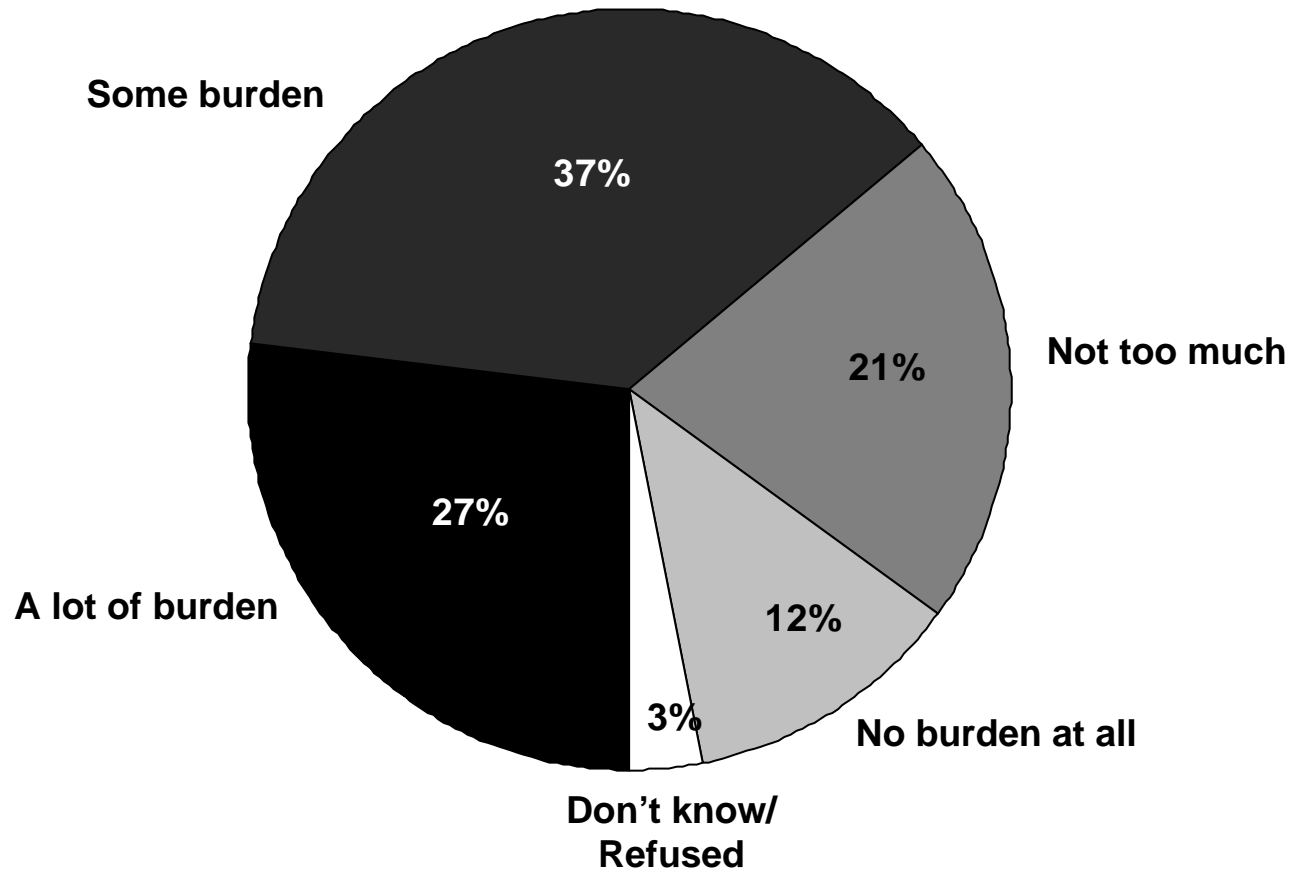
30%

Helped a patient decide which Medicare drug plan they should enroll in

19%

Doctors' Reports of Administrative Burden of Benefit

Overall, would you say that helping patients make decisions about the new Medicare drug plans and helping them get their drugs under the plans has placed a lot of burden on you and your staff, some burden, not too much, or no burden at all?

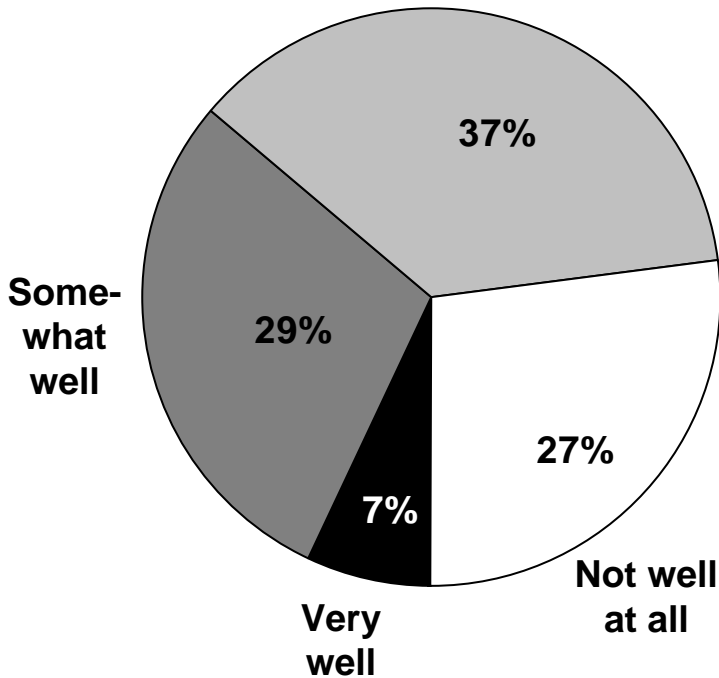


Doctors' Reported Understanding of Medicare Drug Benefit

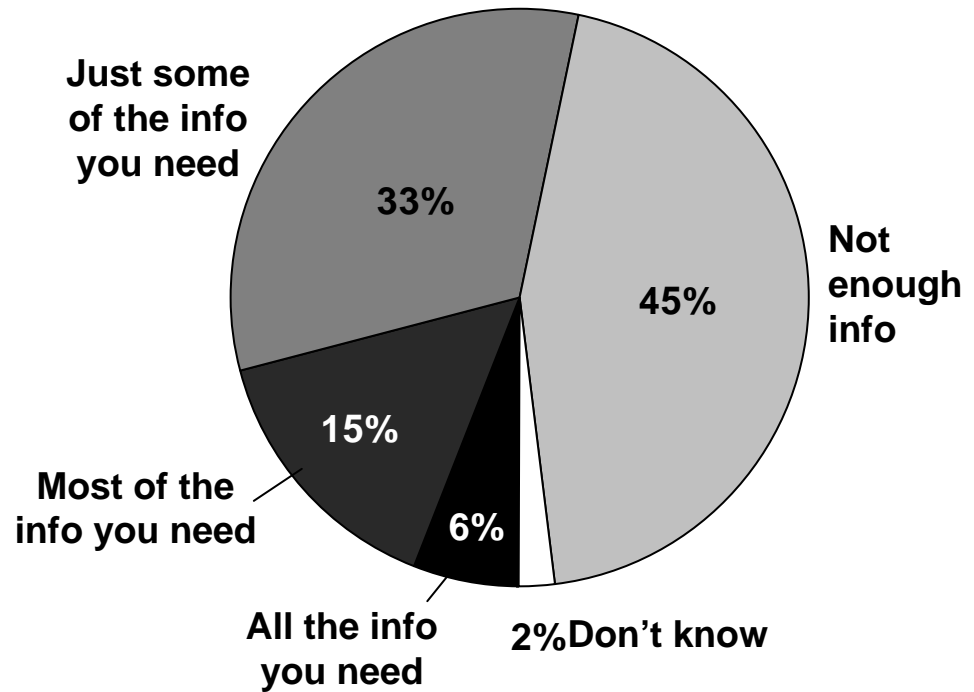
How well would you say you understand the new Medicare prescription drug benefit that went into effect in January 2006? Would you say you understand it very well, somewhat well, not too well, or not well at all?

Would you say you have all the information you need to help your Medicare patients understand how the new drug benefit will impact them, most of the information you need, just some of the information you need, or not enough information?

Not too well

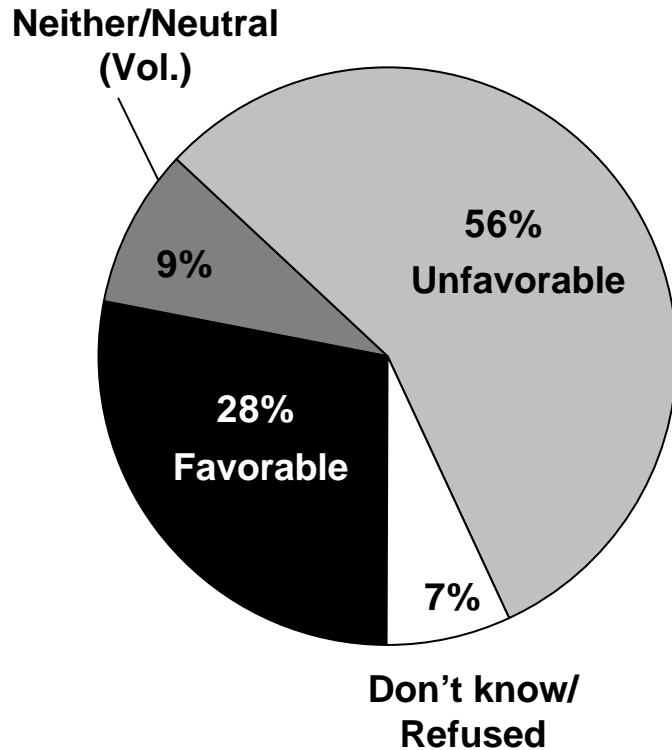


Just some of the info you need

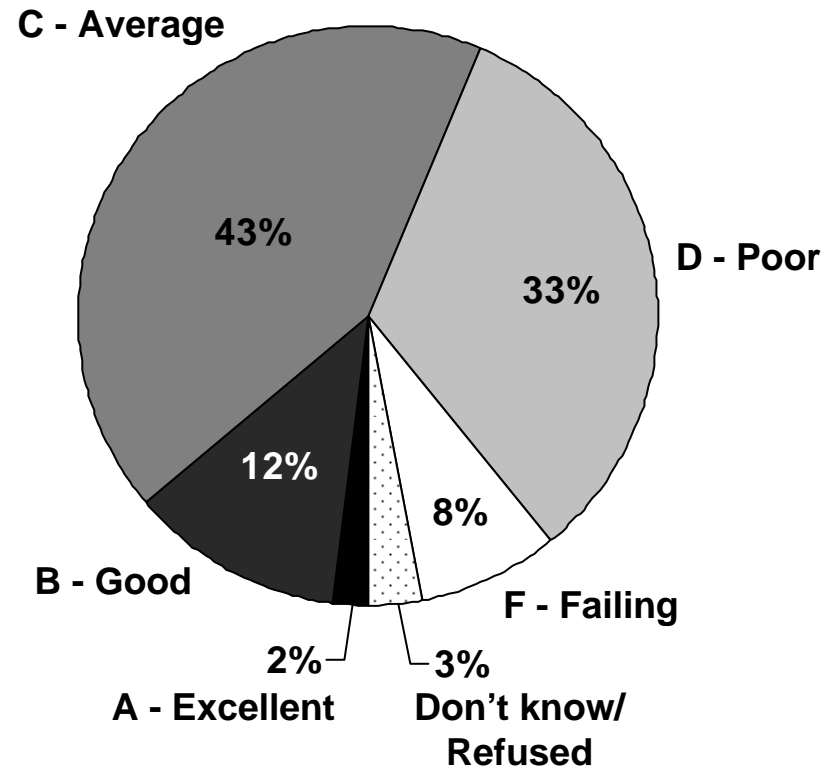


Doctors' Reported Views of the Benefit and Implementation

Given what you know about it, in general, do you have a favorable or unfavorable impression of this new Medicare prescription drug benefit?

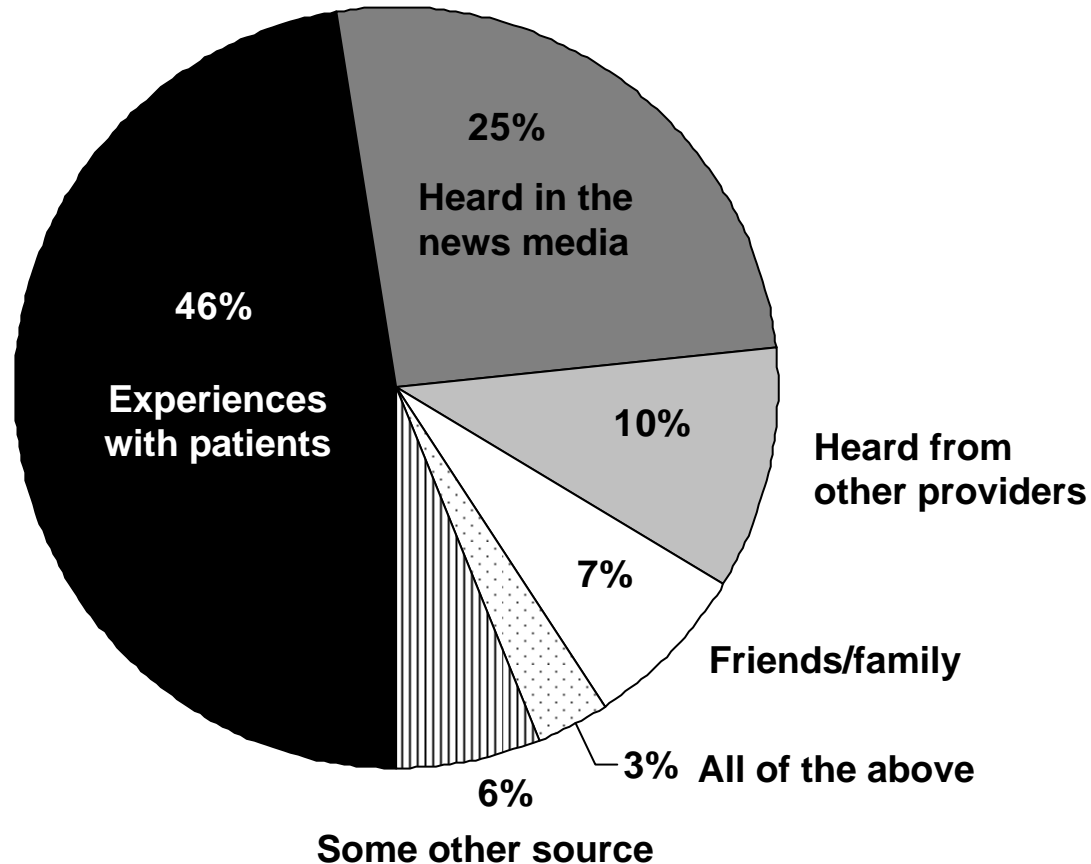


Overall, what grade would you give the implementation of the new Medicare drug benefit so far?



Doctors' Reported Source of Views of the New Medicare Drug Benefit

Are your views of the Medicare drug benefit based mainly on your experiences with your patients, experiences with friends and family members, what you've heard from other doctors and health care providers, what you've heard in the news media, or from some other source?



Note: Don't know responses not shown.

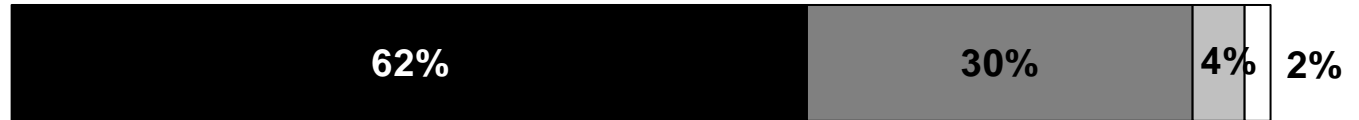
Source: Kaiser Family Foundation *National Survey of Physicians* (conducted April 25-July 8, 2006)

Doctors' Beliefs About the New Benefit

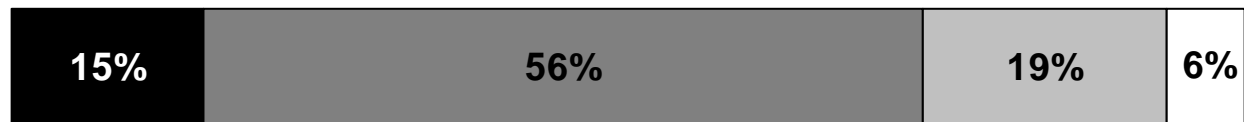
I'm going to read you some things some people have said about the Medicare prescription drug benefit, and I'd like you to tell me how much you agree or disagree with each...

Strongly agree
 Somewhat agree
 Somewhat disagree
 Strongly disagree

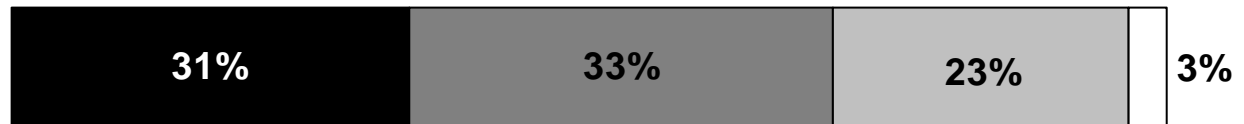
It is too complicated



It helps people on Medicare save money on their prescriptions



It benefits private health plans and pharmaceutical companies too much



It is especially helpful for low-income people on Medicare



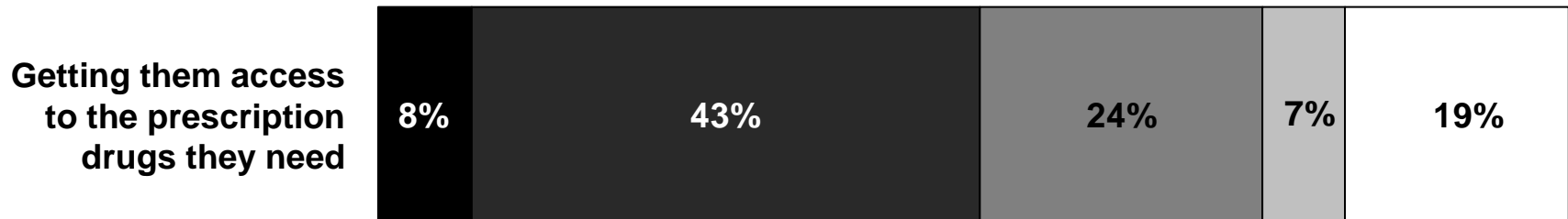
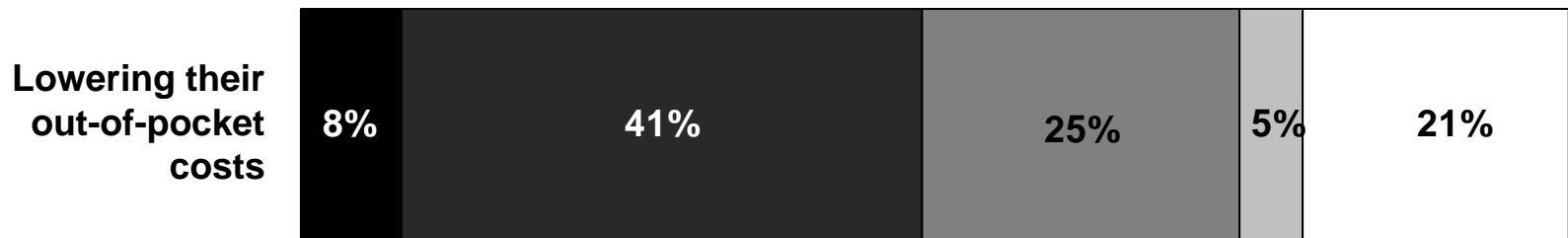
Note: Don't know responses not shown.

Source: Kaiser Family Foundation *National Survey of Physicians* (conducted April 25-July 8, 2006)

Doctors' Evaluation of How Well the Benefit Works for Their Patients

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans: How well would you say the new Medicare drug benefit works for your patients in each of the following areas...

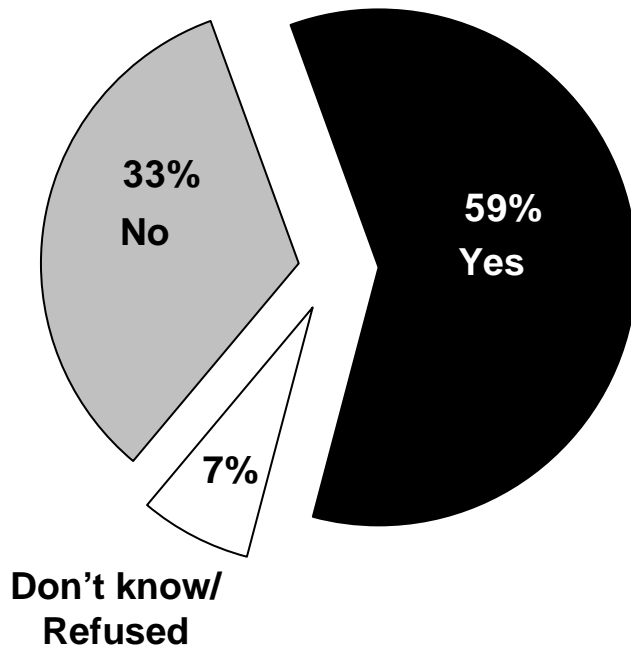
Very well
 Somewhat well
 Not too well
 Not well at all
 Don't know/Refused



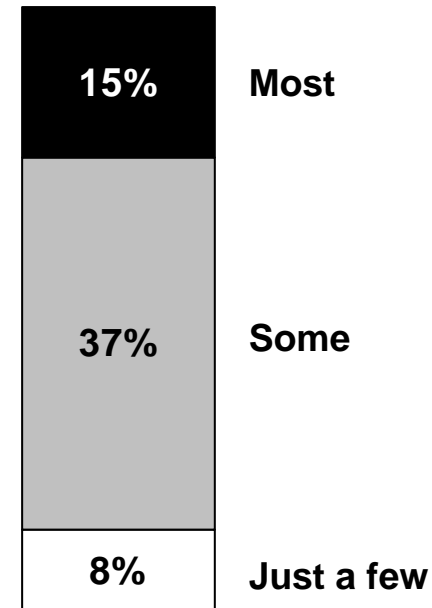
Doctors' Reports of Medicare Patients' Problems Filling Prescriptions

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans...

To the best of your knowledge, have any of your Medicare patients experienced problems getting their prescriptions filled since joining a new Medicare drug plan, or not?



Would you say that most, some, or just a few of your patients who joined Medicare drug plans have had problems filling prescriptions?

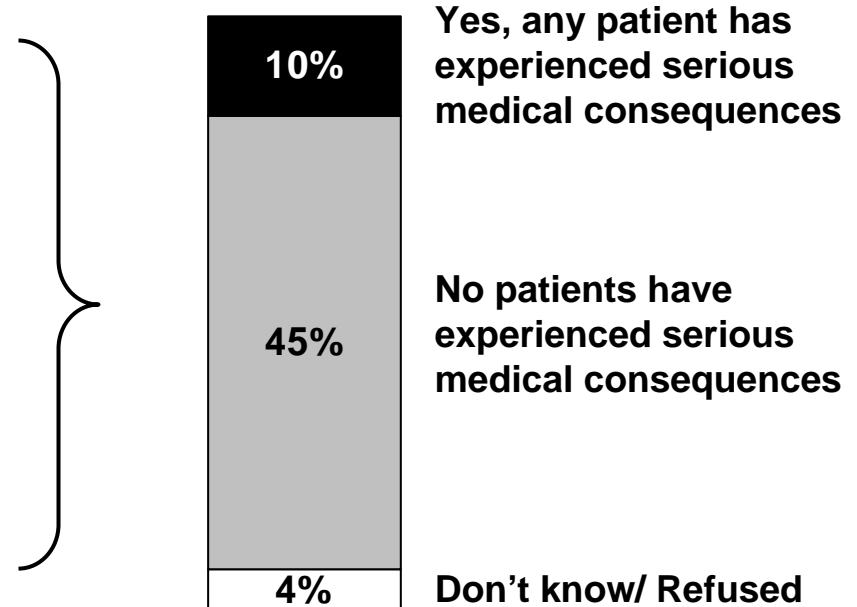
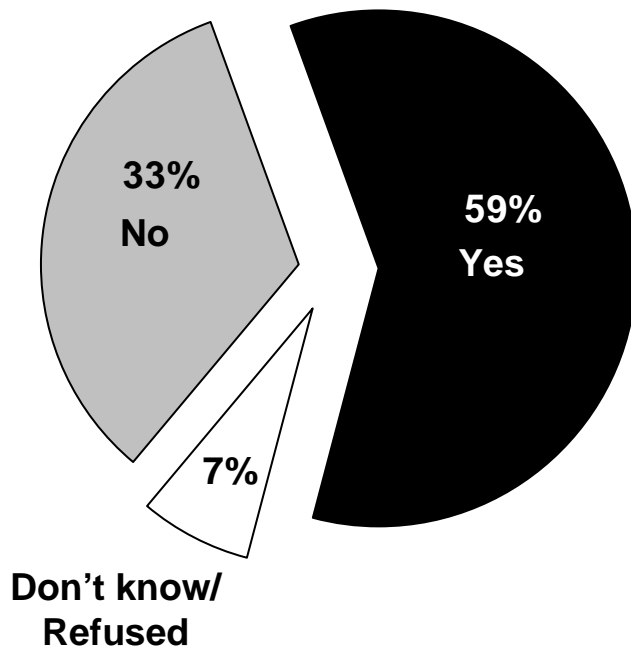


Doctors' Reports of Medical Consequences of Medicare Patients' Problems Filling Prescriptions

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans...

To the best of your knowledge, have any of your Medicare patients experienced problems getting their prescriptions filled since joining a new Medicare drug plan, or not?

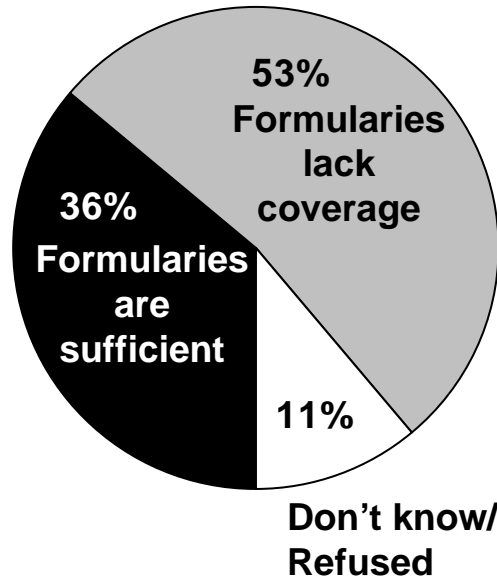
Have any of your patients who had problems filling prescriptions since joining a Medicare drug plan experienced serious medical consequences due to these problems, or not?



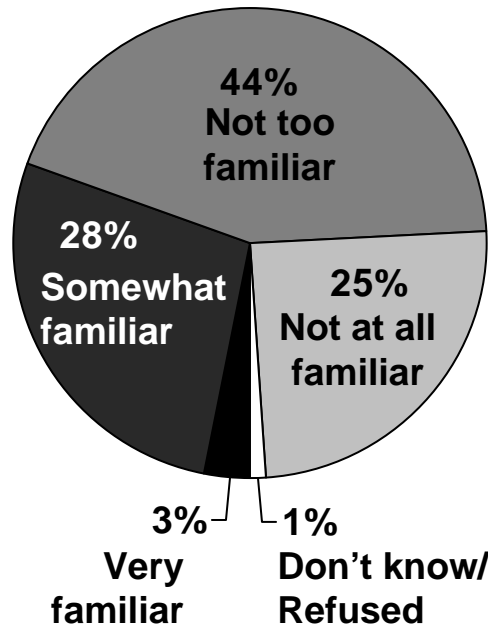
Doctors' Views of Medicare Part D Formularies

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans...

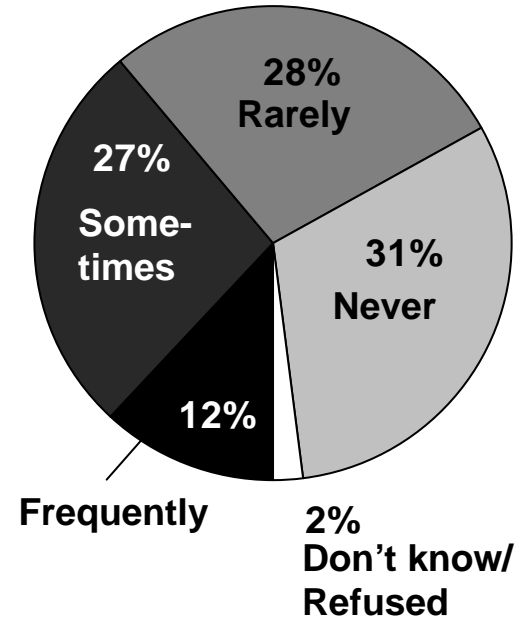
Do you think the plans that most of your Medicare patients are enrolled in have formularies sufficient for your patients' needs, or do the formularies lack coverage for drugs they need?



How familiar are you with the drug formularies for the Medicare drug plans that your patients are enrolled in?



When prescribing a medication for a Medicare patient, how often do you check the formulary for their drug plan?



Doctors Reported Administrative Tasks Related to Medicare Prescription Drug Benefit

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans, percent who say they have...

Been asked by a pharmacy or by a Medicare patient to change a prescription to a different drug so that it would be covered by their Medicare drug plan

74%

Been asked by a pharmacy or by a Medicare drug plan to document reasons why your patient should get the specific drug you prescribed

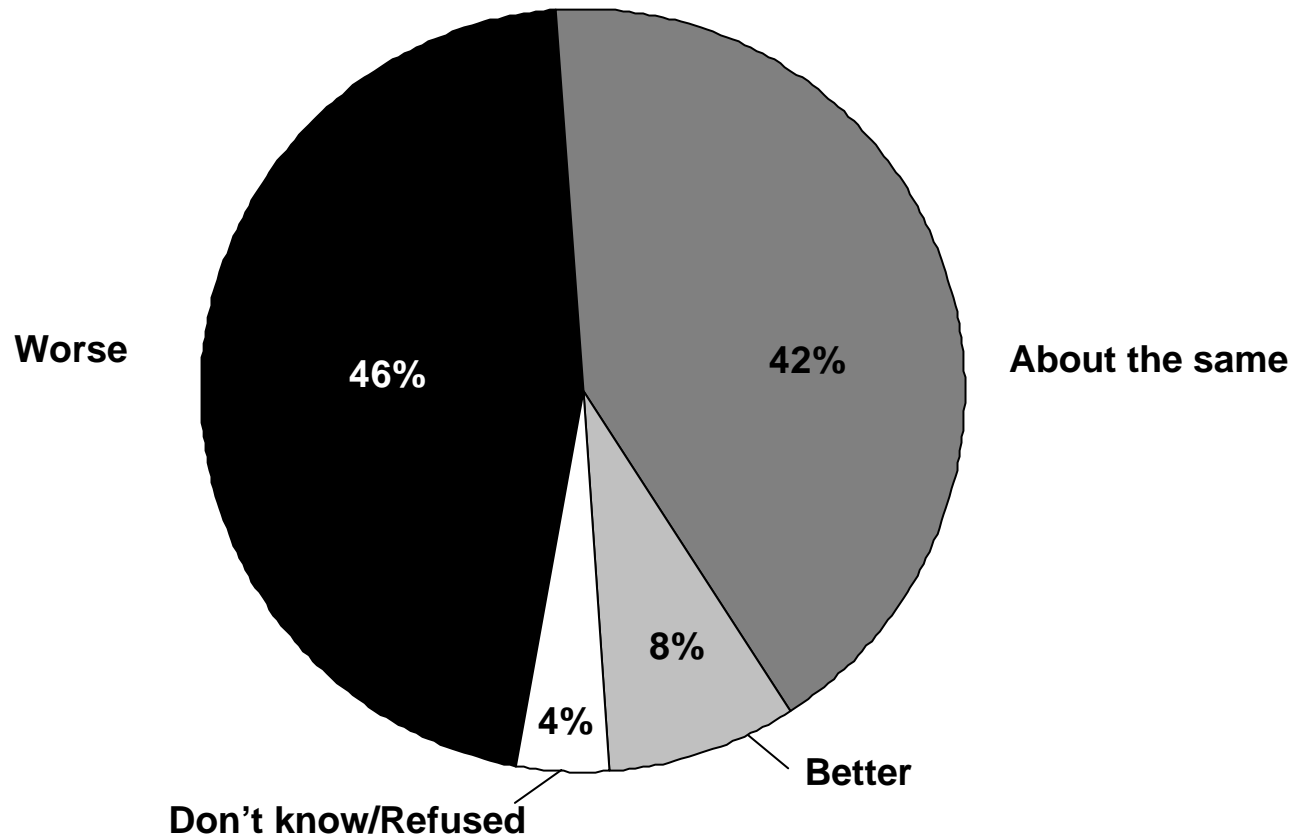
59%

Been asked by a patient to assist with filing an appeal or getting an exception from their Medicare drug plan to get coverage for a specific drug you prescribed

45%

Doctors' Evaluation of Administrative Burden of Benefit Compared with Typical Private Plans

Among the 78% of doctors who say at least a few of their patients are enrolled in Medicare drug plans: Based on your own experience, would you say that the administrative burden of dealing with prescriptions for patients covered by the new Medicare drug plans is better, worse, or about the same as the administrative burden under typical commercial insurance plans?



Section Three: Comparisons

Overall, pharmacists feel better informed and report having more experience with the Medicare prescription drug benefit than doctors. Pharmacists are more likely than doctors to say:

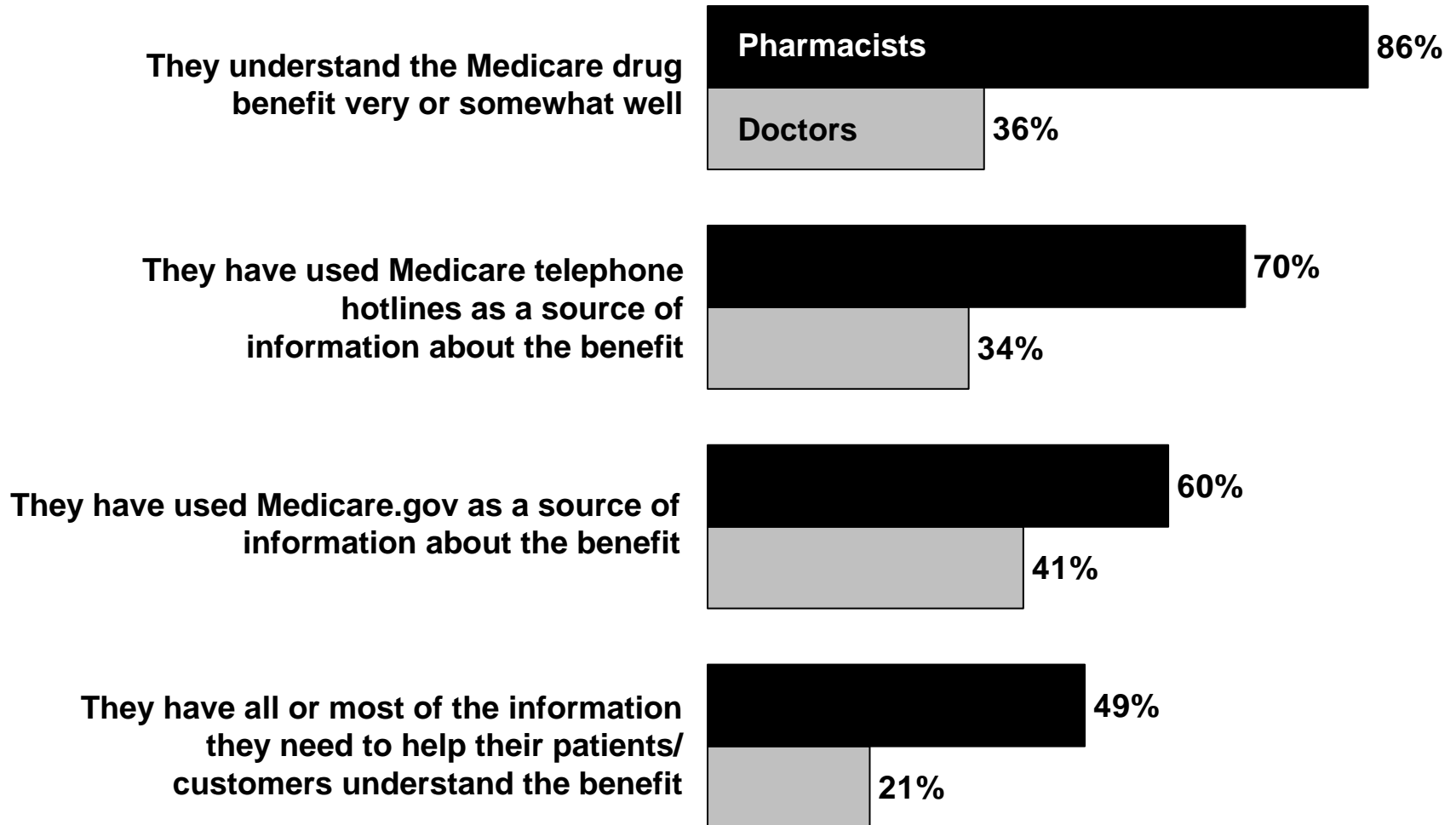
- they understand the Medicare prescription drug benefit very or somewhat well (Chart 35);
- they have all or most of the information they need to help patients/customers understand the benefit (Chart 35);
- they have used Medicare telephone hotlines and/or Medicare.gov as a source of information (Chart 35);
- their views of the benefit are based mainly on experiences with patients/customers (Chart 36);
- they feel a lot of responsibility to advise patients/customers about Medicare drug plans (Chart 36);
- most of their patients/customers have asked them for help with the benefit (Chart 36);
- they have helped patients/customers make decisions about the benefit in a variety of ways (Chart 36).

Pharmacists have a somewhat more favorable view of the benefit than doctors.

- A majority (56%) of doctors say they have an unfavorable impression of the benefit in general, while a plurality (45%) of pharmacists have a favorable impression. In a similar question asked of seniors in June 2006, seniors were about equally likely to say their impression was favorable (32%) as unfavorable (30%); however, seniors were much more likely than either doctors or pharmacists to say they had a neutral impression (22%) or they didn't know (17%) (Chart 37).

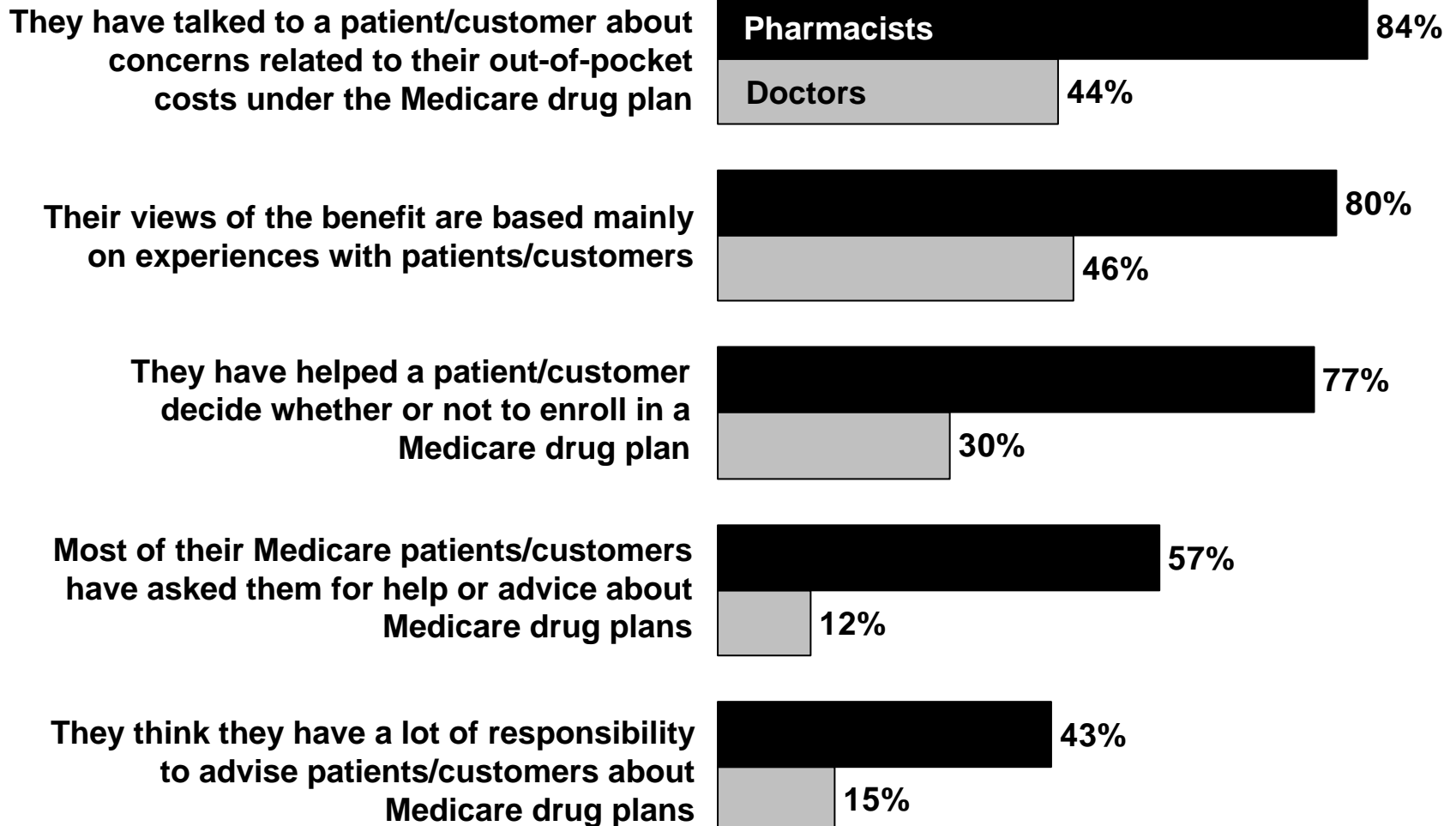
Pharmacists Report Being Better Informed About Medicare Drug Benefit Than Doctors

Percent of doctors and pharmacists who say...



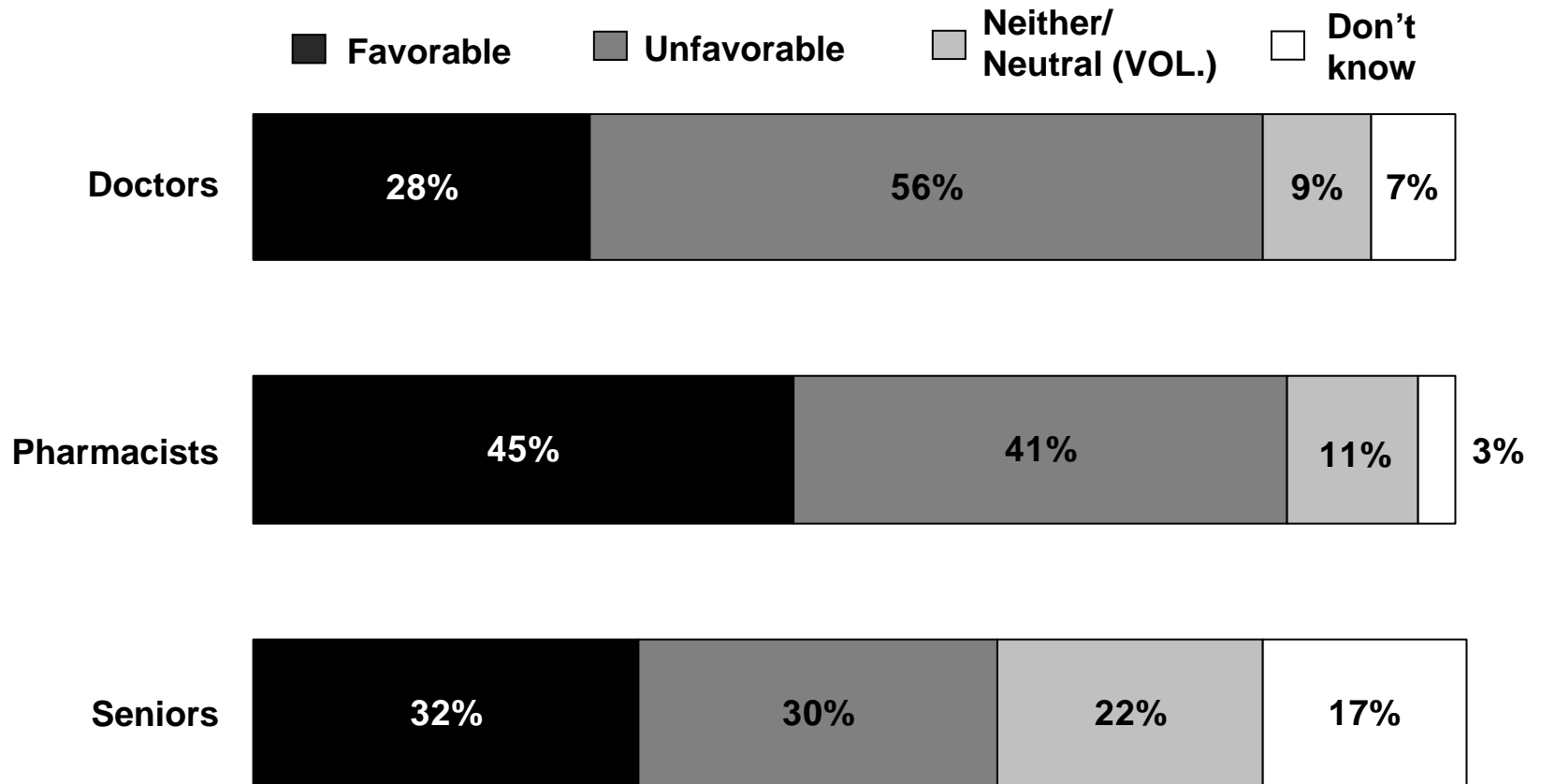
Pharmacists Report More Experience With Medicare Drug Plans Than Doctors

Percent of doctors and pharmacists who say...



Comparison: Impressions of Medicare Drug Benefit

Given what you know about it, in general, do you have a favorable or unfavorable impression of the new Medicare prescription drug benefit?





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