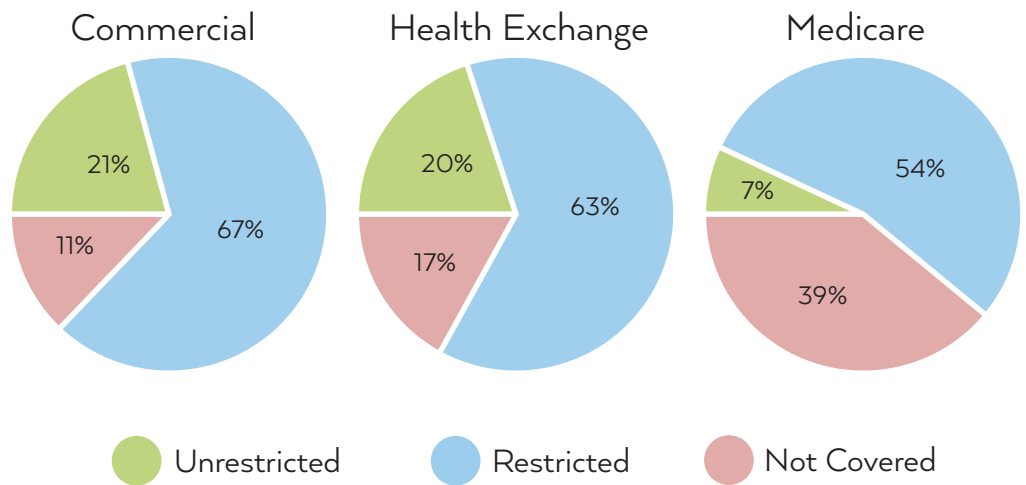


# Reality Check: Multiple Sclerosis

## Coverage

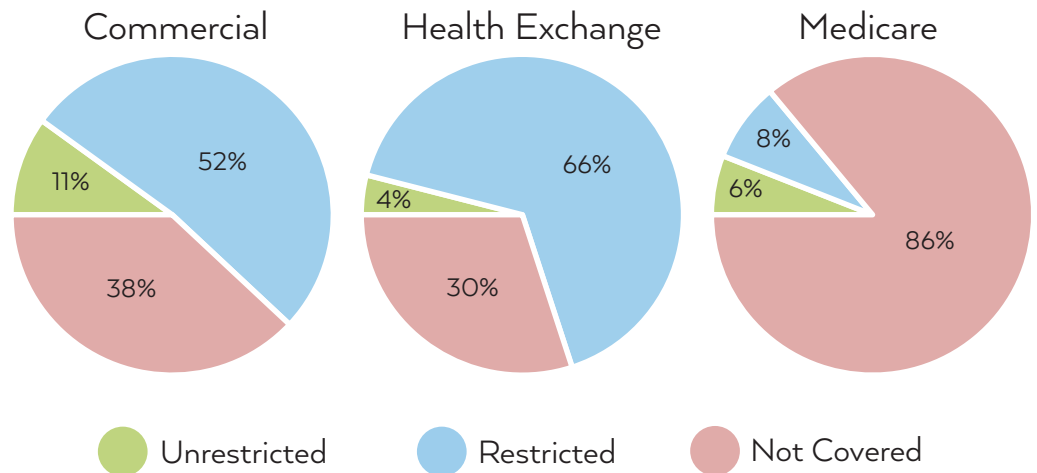
### Pharmacy Benefit

Based on market access data for payer-controlled pharmacy benefit lives from the past two quarters, we see that overall coverage hasn't changed significantly. Each channel saw an increase in restricted lives but only by a few basis points.



### Medical Benefit

A review of medical benefit market access for select products in MS reveals some differences between channels. Medicare coverage is almost non-existent while commercial and health exchange average market access is similar.



### Key Players



Biogen



NOVARTIS



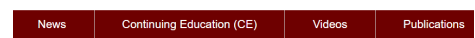
# Reality Check: Multiple Sclerosis

## Trends

### Increasing LTC Setting Utilization

Recent data from Specialty Pharmacy Times shows that the past year was the first in which neurologists led the way in scripts by LTC facility patients. While we see this trend in this segment specifically, this may signal a shift in prescribing across other channels in coming years.

[Via Specialty Pharmacy Times](#)



#### 2016 Specialty Trend in Senior Care

Kimberly Binaso, PharmD, Rph, CCP, FASCP, CGP, FASHP and Stacey Ness, PharmD, CSP, MScS, AAHI



**SPECIALTY DRUG TREND IS NOT ONLY INCREASING IN THE COMMUNITY SET** pharmacies that service patients (i.e. residents) who live in senior care settings such as facilities.

The 2016 Managed Health Care Associates (MHA) Independent Long Term Care Men section on specialty medications, which consisted of an analysis of LTC pharmacy dis this is MHA's sixth year looking at specialty within LTC. due to methadone channels fi

### Pricing Pressures from Complex Treatments

Treatments in the highly managed disease area of MS are often lumped in with other "expensive drugs". Prescribers in this space are challenged by both complex patient treatment plans as well as drug coverage and access decisions.

[Via NPR](#)



# Reality Check: **Multiple Sclerosis**

## Key Findings

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### Complex Coverage

With the exception of Tysabri and Lemtrada, most brands process exclusively through pharmacy benefit, but convoluted coverage and restrictions complicate market access in Multiple Sclerosis. The prevalence of prior authorizations and step therapies in the space drives competition across all channels and geographies.

### Market Events Shift Landscape

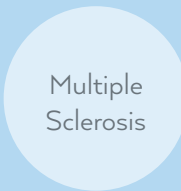
The recently approved Ocrevus is the fourth infused product approved and the only drug approved to treat progressive forms of MS. Over the past year, the breakthrough designation provided to progressive MS drugs means that in-market products will be impacted sooner rather than later. Major clinical trials currently test novel approaches to treating all forms of Multiple Sclerosis, including progressive MS. Several treatments in the near-term pipeline will emerge over the coming years.

### Treatment Pathway Nuances

Interferons and Copaxone are considered to be first line in the treatment path. After the initial rush of activity on the back of Copaxone going generic, there is still room for access shifts and contracting. The MS market's pipeline will increase the momentum of these changes in this disease area in years to come.

## Characteristics

### Indications



Multiple Sclerosis

### Step Therapy Policies

Payers require products to step through a competitor product for a little under 1/4 of covered pharmacy benefit lives, with roughly an even split between single and multiple steps.

### PA Policies

Payers require a prior authorization policy for over 3/4 of covered pharmacy benefit lives, with 1/3 of PAs restrictive to the FDA approved label

### Medical Benefit

Medical benefit policies only apply for select MS treatments. Please refer to the market access snapshot on page 1. Medicare formularies are the most restrictive when compared to commercial and health exchange.