

# Pharmacy in Long-Term Care Report - 2021



# AMI has been developing reports on and building its database of long term care pharmacies since 2014

## LTC Pharmacy

### Market Research/Analysis

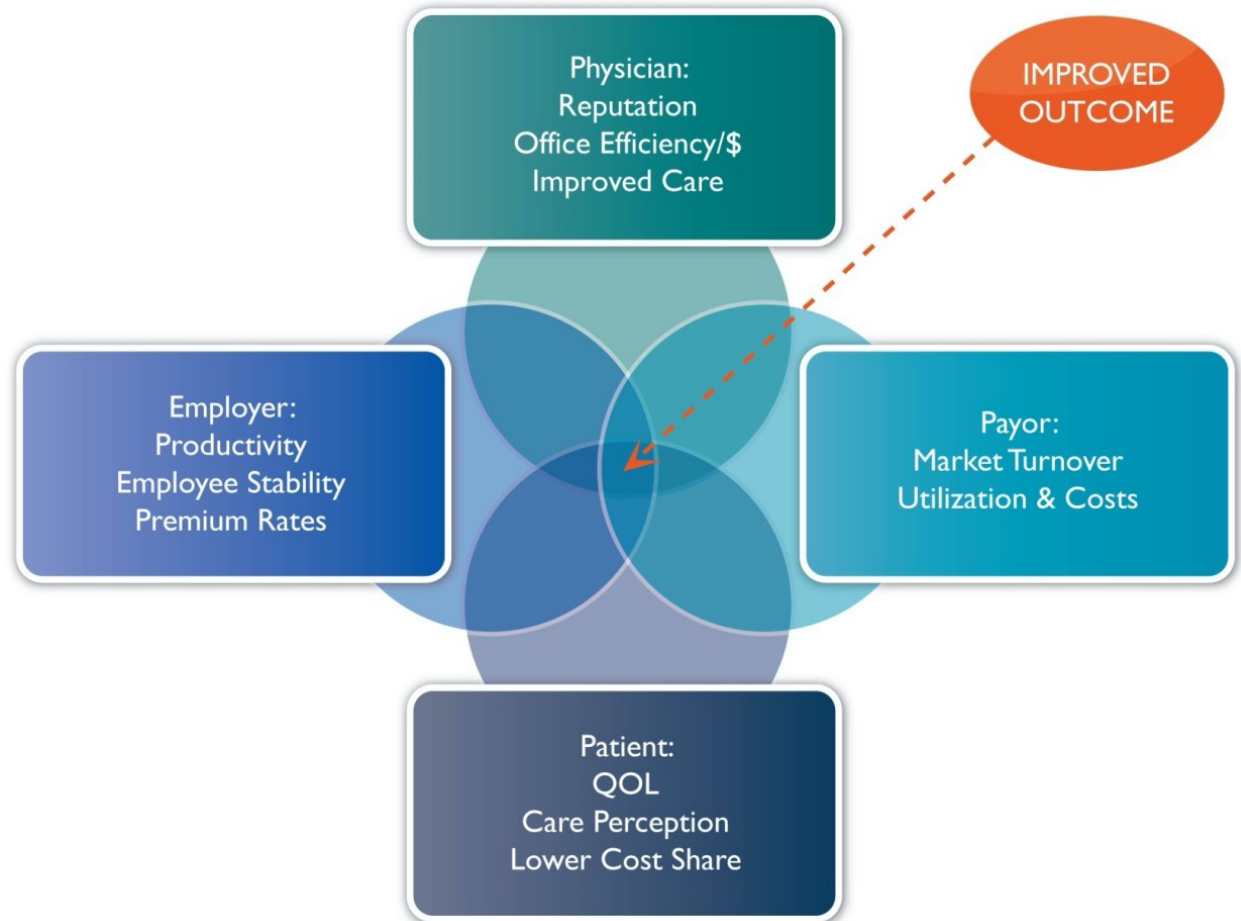
- Customer/Competitor
- Merger & Acquisition
- Key Decision-Maker(s)

### Solutions

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Industry Reports/EBooks

Insights Blog



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SavaSeniorCare

Consulate Health Care

Trilogy Health Services

Signature HealthCARE, LLC

National HealthCare Corporation

Prestige Care

Cedarhurst Senior Living

Trinity Health Senior Communities

Genesis HealthCare

Life Care Centers of America

Good Samaritan Society of Sanford Health

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# Most older Americans need some type of care as they age

Percentage/ Years	People
52%	Turning age 65 who will need some type of long-term care services in their lifetimes
47%	Men 65 and older who will need long-term care during their life
58%	Women 65 and older who will need long-term care during their lifetimes
2.5 years	Average number of years women will need long-term care
1.5 years	Average number of years men will need long-term care
14%	People who will need long-term care for longer than five years
10%	Americans over age 65 who have Alzheimer's dementia
33%	Americans over age 85 who have Alzheimer's dementia
64%	Americans with Alzheimer's dementia who are women
22%	People over 65 in the highest income quintile who will have a long-term care need of two years or longer
31%	People over 65 in the lowest income quintile who will have a long-term care need of two years or longer
45%	People requiring assistance with two or more activities of daily living who are under age 65
8%	People between the ages of 40 and 50 who will have a disability that will require long-term care services
	Source: Morningstar. 75 Must-Know Statistics About Long-Term Care: 2018 Edition; Christine Benz, August 2018; AML work product 2021

## A long-term care pharmacist provides ongoing support and care to patients in a variety of facilities and settings, specifically in areas where patients are admitted or treated over longer periods of time than during regular office visits

This may include skilled nursing centers, rehabilitation facilities, long-term care pharmacies, and nursing homes. The long-term care pharmacist will likely work with an aging demographic, though there are long-term care facilities that work with residents that are not elderly. Those may include treatment centers for specific diseases, or for developmentally challenged residents, or even for the incarcerated. A pharmacist in these settings will be involved in the following:

- Dosage requirements
- Formulary decisions
- Drug therapy regimens
- Drug interactions

Special consideration is also given to drug interactions among elderly patients. In general, long term care pharmacists work with vulnerable populations that need additional considerations and care in order to benefit from drug therapies.

Occasionally, the term “long-term care pharmacist” is used interchangeably with the term “consultant pharmacy”. Both of these roles of pharmacy emerged from the need to better plan and facilitate long-term drug therapy, while taking into consideration drug interactions and assisted living environments, including psychiatric hospitals, hospice program and community-based care facilities.

Source: Pharmacist.com

# Stakeholders – Skilled Nursing

Company	States	Total Senior Facilities	Company	States	Total Senior Facilities
ProMedica Senior Care	26	335	Signature HealthCare	10	108
Genesis HealthCare	24	325	Saber Healthcare Group	7	105
The Ensign Group	13	231	National HealthCare Corp.	10	104
Life Care Centers of America	28	200	PruittHealth	4	90
SavaSeniorCare	19	169	Prestige Care	8	80
Good Samaritan Sanford Health	26	150	American Senior Communities	2	78
Consulate Health Care	10	140	Cedarhurst Senior Living	9	54
Extendicare	Canada	120	Ascension Living	12	50
Trilogy Health Services	4	109	Trinity Health Senior Communities	7	40
Americare Senior Living	5	109	Golden LivingCenters	1	23

Source: Provider Magazine, IQVIA, and Access Market Intelligence work product; --- Assisted Living services also offered

## ProMedica operates more than 335 senior care operations, spanning nursing homes, assisted living and memory care communities, and home health agencies

### **ProMedica Senior Care**

Toledo, OH 43607

[www.promedicaseniorcare.org](http://www.promedicaseniorcare.org)

David Parker – President

Connie Sullivan – Pharmacy Director

1801 Richards Road

419-291-3800

In 2018, ProMedica acquired HCR ManorCare, now ProMedica Senior Care, and charted a new course of care for the nation's aging population. There is a basic understanding that the health and well-being of patients not only occurs within the walls of a particular facility, but outside factors need to be considered as well. ProMedica is bringing new ideas, innovative partnerships and momentum to change where and how health care can be delivered.

ProMedica Senior Care is dedicated to providing compassionate quality care no matter where a patient is in their healthcare journey. Skilled Nursing & Rehabilitation, Memory Care, Assisted & Independent Living, Home and Hospice Care, Palliative Care.

ProMedica is phasing out the HCR ManorCare name. The non-profit health system announced that it's moving its HCR ManorCare chain of nursing homes and senior living communities under the new "ProMedica Senior Care" name.

The company is changing the name of facilities that operate under its senior living brand, Arden Courts, as well as its Heartland and ManorCare brands. ProMedica will change those facilities' names and signs over the next 18 months.

## Offering LTC services opens up an opportunity for pharmacists to increase the volume of their business

According to some estimates, nearly 12 million people over the age of 65 will need LTC services by 2020. These patients suffer from multiple comorbidities, taking 12 prescriptions per month, 71 percent of which are brands, according to a report by McKesson (*Becoming a Long-Term Care Pharmacy*). Gross margins average 30 to 40 percent.

According to the report, “With the average facility housing 100 residents, with each resident taking approximately 12 prescriptions per day, and with gross margins of 30% or even more, LTC pharmacy can represent a significant, attractive, and growing opportunity.”

The pharmaceutical industry rewards those who participate in long-term care relationships. Because working with the compliance packaging required by LTC facilities can be costly and time consuming, insurers will pay a higher price when pharmacies dispense those medications.

Full-time, closed-door LTC pharmacies and combination pharmacies also see the added perk of not having to deal with DIR fees that eat away at profits. The lack of DIR fees alone has been enough to attract many traditional community pharmacies into the long-term care business, making the market increasingly competitive.

Independent pharmacies are building relationships with long-term care facilities like nursing facilities, assisted living facilities, group homes, and more, by providing medications and services like nutrition assessment, infusions, and other medical equipment. This year’s *Digest* reported that 47 percent of pharmacies provide some sort of long-term care service in their community.

Source: PBA Health; Long Term Care Opens the Door to Long Term Pharmacy Profits, September 23, 2019

## **AlixiaRx combines Long-Term Post-Acute Care (LTPAC) pharmacy services, on-site medication dispensing and certified geriatric clinical pharmacists to deliver innovative pharmacy services nationwide**

### **AlixiaRx**

Plano, TX 75024

<http://www.alixarx.com>

Brad Savage – President

Jason Lewis – National Director, Pharmacy Supply Chain

6400 Pinecrest, Suite 200

214-778-0300

AlixiaRx provides prescription and over-the-counter medications, IVs and supplies, and clinical pharmacy services to more than 25,000 patients in over 300 locations across the country. AlixiaRx provides long term care pharmacy services across the nation from pharmacies in Minneapolis, Kansas City, Indianapolis, Pittsburgh and Fresno.

AlixiaRx utilizes proprietary, automated dispensing technology to provide on-site access to more than 400 medications. The AlixiaRx on-site dispensing system is a completely automated medication dispensing and delivery system. Located at the nursing facility, it enables immediate access to more than 400 medications.

AlixiaRx is the first post-acute care pharmacy to combine an Automated Dispensing Unit (ADU) that packages patient-specific oral-solid medications on-demand and an Electronic Medication Cabinet (EMC) that stocks unit-dose medications, including IV kits and refrigerated items, for first and STAT doses.

A local pharmacy service technician provides service, support, and training, and restocks and maintains the on-site dispensing systems. AlixiaRx provides 24/7 telephone support and a team of regional field service engineers to help ensure maximum uptime and system reliability. AlixiaRx's certified geriatric clinical pharmacists take a proactive approach to collaborate in patient care.

## AmeriPharma's premier pharmacy services are available in multiple states throughout the U.S.

### **AmeriPharma**

Orange, CA 92868

<https://ameripharmaltc.com>

Andrew A. Harper, PharmD. – CEO and President

Laurel Shea – Senior Pharmacist, LTC

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Harper's Pharmacy operates four divisions in 22 states and U.S. territories: AmeriPharma Long Term Care, AmeriPharma Specialty Care; AmeriPharma Infusion Center, and MedBox. MedBox is a free service by AmeriPharma pharmacy.

In 2006, AmeriPharma opened its doors for the first time as a community pharmacy. AmeriPharma quickly became the pharmacy of choice for many LTC facilities in the surrounding areas. As patient and facilities' demands grew, AmeriPharma adapted to cater to them, fulfilling their mission of providing pharmacy services and enhancing its patients' quality of life.

AmeriPharma's pharmacy is able to handle high volumes of medication orders quickly and provide hard-to-find drugs in a variety of packaging options. AmeriPharma serves:

- Assisted Living
- Group Home
- Skilled Nursing Facility
- Correctional Services
- Board & Care
- Senior Care
- Residential Care Facilities

As part of its Senior Health Outcomes program, specialized pharmacists work directly with healthcare providers to review each patient's medication regimen for potential drug interactions and opportunities for cost saving.

## Cano Pharmacy fills prescriptions daily at its conveniently located pharmacies in Florida: Tampa, Hialeah, Miami (2), Pembroke Pines, and Miami Lakes

### **Cano Health**

Miami, FL 33178

<http://www.canohealth.com>

Dr. Marlow Hernandez – CEO

Jennifer Llanes - VP of Pharmacy

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Cano Health operates primary care centers and supports affiliated medical practices in Florida, Texas, Nevada, and Puerto Rico that specialize in value-based care for seniors. As part of its care coordination strategy, Cano Health provides high-touch population health management programs such as wellness activities, pharmacy services, home visits, telehealth, transition of care, and high-risk and complex care management.

Founded in 2009, Cano Health provides value-based care for more than 103,000 members through its network of 564 primary care physicians across 14 markets in Florida, Texas, Nevada and Puerto Rico. The company focuses on providing high-touch population health and wellness services to Medicare Advantage members, particularly in underserved communities where it can make the greatest impact.

Cano Health's proprietary CanoPanorama technology platform enables the delivery of high-quality health care services to its members, resulting in superior clinical outcomes at lower costs. Cano Health partners with leading health plans, including Humana, UnitedHealthcare, Anthem, Aetna, Centene and Devoted, to improve health outcomes and member experience.

Cano Health and Jaws Acquisition Corp., a special purpose acquisition company, recently announced entered into a definitive merger agreement that will support Cano Health's vision of becoming America's leader in primary care for seniors.


Cano offers daily prescription filling to seniors at conveniently located pharmacies or at-home delivery of prescriptions for no added cost. Cano Health can also transfer your existing prescriptions from other pharmacies or call your doctor for additional refills.



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