

A photograph of a female pharmacist with short blonde hair, wearing a white lab coat over a green and yellow striped shirt. She is smiling and looking at a patient whose back is to the camera. The patient has short brown hair and is wearing a grey sweater. The pharmacist is holding a small green and white box of medication. In the background, there are shelves stocked with various boxes of medicine.

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RxIMPACT

Leading the way on reform



Editor in Chief
Rob Eder

As the editor of *Drug Store News*, I often feel like the stories we tell in the magazine reach far beyond the industry we cover. These days, as our nation wrestles with health reform, that feeling has never been stronger.

And that is precisely why we have decided to compile this special report for members of the 112th U.S. Congress. We thought we could help illustrate some of the things community pharmacy does every day to address the two biggest problems facing the U.S. healthcare system: access and affordability.

Pharmacists do a lot more than just fill prescriptions. They work with physicians to optimize therapeutic choices, and help patients understand their medications and how to take them. These types of services help save billions of dollars each year in unnecessary hospitalizations and emergency room visits by preventing dangerous interactions and adverse effects.

Each year, Americans waste about \$300 bil-

lion in healthcare costs just from not taking their medications as they are supposed to — that's about 13% of total healthcare costs. On average, only about half of us ever take our medications as prescribed, and as many as 1-in-5 prescriptions written by physicians NEVER even make it to the pharmacy.

According to research from CVS Caremark, chronically ill patients who take their medications save the healthcare system up to \$7,800 annually per patient. As many as 50% of all chronically ill patients stop taking their medications within one year of starting therapy.

Every day, more pharmacists are engaging in a practice called medication therapy management. Basically, this is a practice whereby community pharmacists work more closely with patients to help them better understand how to use their medications, and why it's important. According to research, for every \$1 invested on these types of services, there is as much as a \$12 to \$13 savings in total healthcare costs.

So how is it that community pharmacy can lead the way on health reform? If you could see what I see, you'd see they're already doing it.

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Pharmacists are face of health care in community

By ALARIC DeARMENT

It's no secret that health care faces a crisis of public confidence these days. While surveys tend to show that a majority of people trust their healthcare providers, attitudes regarding drug companies and health insurers often take a huge dip by comparison.

But one of the most enduringly trusted class of professionals in the healthcare industry is the neighborhood pharmacist, with polls showing pharmacists following nurses and military officers in terms of the percentage of people who put trust in their ethics and honesty, according to a 2010 Gallup poll. In effect, pharmacists have become the face of neighborhood health care, able to dispense their advice and expertise about health conditions, ranging from the temporary to the chronic, in addition to dispensing medicines.

And that is important because there is a major provider shortage in America that only stands to make patient access even more of a problem, in the face of a number of critical headwinds. The number of U.S. medical school grads choosing a residency in family medicine is down 54% since 1997. As of 2010, that added up to a shortage of roughly 9,000 primary care providers, a number that is expected to reach almost 30,000 by 2015 and more than 65,000 by 2025.

That is adding up to longer wait times for patients. Currently, on average, it takes almost three weeks for a patient to get an appointment with a general practitioner, and as many as 59 days in Los Angeles and 64 days in Boston — this de-

The average American lives within 5 miles or less of the nearest community pharmacy. And that puts community pharmacy in a unique position to help America close the gap on patient access, and bring greater affordability to healthcare costs.



spite the fact the state of Massachusetts has the highest number of primary care physicians in the country.

A growing number of Americans have no medical home — anywhere from one-third to 50% of patients. One-third of Americans are clinically obese, with that number expected to reach 50% by 2030. In the next 10 years, it is expected that 75 million Americans will have diabetes. With the aging of the baby boomers, 10,000 people will turn 65 years old every day for the next 20 years. And health reform will add 32 million newly covered patients in 2014.

Yet the average American lives within 5 miles or less of the nearest community pharmacy. And that puts community pharmacy in a unique position to help America close the gap on patient access, and bring greater affordability to healthcare costs. Just consider the value of a pharmacist-patient disease management interaction. A study of medication therapy management programs (*for more see page 6*) conducted among Minnesota Blue Cross/Blue Shield patients found reductions in healthcare costs of 31.5% per person, from \$11,965 to \$8,197. The total cost of the MTM services was an estimated \$49,490, but total healthcare costs for all patients involved in the programs were reduced from \$2,225,540 to \$1,524,703 — that's a return of \$12.15 for every \$1 invested in MTM.

Another study that examined the effects of pharmacist care on 2,000 patients with heart failure — a leading cause of hospitalizations — from 1998 to 2007 found a 29% reduction in heart-failure hospitalizations.

Honesty and ethical ratings of different professions

PROFESSION	% VERY HIGH/ HIGH	% AVERAGE	% LOW/ VERY LOW
Nurses	81	16	1
Military officers	73	23	3
Druggists or pharmacists	71	25	4
Grade school teachers	67	24	6
Medical doctors	66	28	5
Police officers	57	33	10
Clergy	53	35	8
Day care providers	47	41	7
Judges	47	37	14
Auto mechanics	28	55	16
Nursing home operators	26	48	24
Bankers	23	48	28
TV reporters	23	47	29
Newspaper reporters	22	49	27
Local officeholders	20	55	24
Lawyers	17	47	35
Business executives	15	52	32
State officeholders	12	49	37
Advertising practitioners	11	48	37
Members of Congress	9	32	57
Car salespeople	7	42	49
Lobbyists	7	29	61

Source: Gallup Poll 2010, Honesty/Ethics in Professions

Average distance to nearest pharmacy*

LOCATION	AVERAGE DISTANCE IN MILES
Within CBSAs	1.16
Outside CBSAs	4.51
Within CBSAs, distance > 5 miles	9.21
Outside CBSAs, distance > 5 miles	12.88
OVERALL	1.37

*By core based statistical area (CBSA) status in 2011; CBSA is the official term for a functional region based around an urban center of at least 10,000 people, based on standards published by the Office of Management and Budget in 2000. Source: NCPDP Pharmacy File, arcGIS Census Tract Files, and NACDS Economics Department

Urban/rural breakdown of retail community pharmacies, 2010

TYPE OF PHARMACY	CBSA	NON-CBSA	TOTAL
Independent	16,865	3,970	20,835
Mass merchant	7,499	774	8,273
Supermarket	8,990	343	9,333
Traditional chain	21,499	1,096	22,595
Independents as % of total store	30.7%	64.2%	34.1%
% of independents in CBSAs	80.9%		
% of chains in CBSAs	94.5%		
OVERALL	89.9%		

Source: NCPDP Pharmacy File, July 2011, and NACDS Economic Department

Prescriptions

TYPE OF PRESCRIPTION	AMOUNT
Estimated total prescriptions written	4.60 billion
Estimated unfilled prescriptions	919 million
Prescriptions dispensed	3.68 billion
New and renewal prescriptions	1.93 billion
New prescriptions	960 million
Renewal prescriptions	973 million
Refill prescriptions	1.74 billion

Source: Medical Expenditure Panel Survey and NACDS Economic Department; Verispan Vector One National Audit database, data drawn 5/15/08.

Boosting MTM, adherence could mean big savings

By ALARIC DeARMENT

Anyone who steps within a mile of Capitol Hill knows that \$290 billion is no chump change, especially in this economy. But that’s the amount of money that the country has to spend every year when people don’t take their medications as directed by their physicians. Medication nonadherence occurs for many reasons and comes in many forms, but ultimately it is a result of flawed behavior. But it can be mitigated, and no setting is better suited

than the corner pharmacy. One way that community pharmacy is helping reduce these costs is through a practice known as medication therapy management, or MTM, which optimizes therapeutic outcomes for individual patients through one-on-one interactions.

So far, the results have been impressive: In North Carolina’s ChecKmeds NC program, MTM services for Medicare patients were shown to deliver a return on investment of \$13.55 for each \$1 invested, and studies have shown that improving medication adherence reduces healthcare costs overall.

Prescription utilization by age and gender			
AGE GROUP	MALE*	FEMALE*	OVERALL*
< 5 years	2.37	2.93	2.63
5 to 14 years	2.71	1.88	2.30
15 to 24 years	2.04	3.97	2.96
25 to 34 years	2.31	6.08	4.22
35 to 44 years	5.61	8.76	7.22
45 to 54 years	11.45	14.50	13.02
55 to 64 years	18.19	21.96	20.12
65 to 74 years	24.71	29.62	27.33
75 years and older	27.25	34.48	31.62
OVERALL RETAIL PRESCRIPTIONS	8.51	12.12	10.35
TOTAL PRESCRIPTIONS	1,270,736,523	1,879,178,440	3,149,914,963
PERCENT	40.34%	59.66%	

*Prescriptions filled at retail pharmacies

Source: Medical Expenditure Panel Survey, 2008; NACDS Economics Department

Percent of population and prescriptions accounted for by people taking chronic medications						
NUMBER OF CHRONIC MEDICATIONS*	POPULATION	PRESCRIPTIONS	POPULATION SHARE	PRESCRIPTIONS PER YEAR	PRESCRIPTIONS PER MONTH	PRESCRIPTION SHARE
<i>Chronic medications only</i>						
6-plus	21,060,061	1,230,317,090	6.9%	58.4	4.9	40.8%
5-plus	28,130,767	1,447,243,120	9.4	51.4	4.3	48.0
4-plus	37,812,274	1,680,863,279	12.5	44.5	3.7	55.8
3-plus	51,521,609	1,928,147,483	17.1	37.4	3.1	64.0
2-plus	73,003,437	2,173,807,398	23.8	29.8	2.5	72.1
1-plus	108,249,786	2,375,285,092	35.7	21.9	1.8	78.8
<i>All medications filled by population</i>						
6-plus	22,512,032	1,421,410,424	6.9	63.1	5.3	47.2
5-plus	29,852,529	1,668,676,820	9.4	55.9	4.7	55.4
4-plus	39,704,056	1,937,427,113	12.5	48.8	4.1	64.3
3-plus	53,629,656	2,227,676,486	17.1	41.5	3.5	73.9
2-plus	75,165,444	2,527,904,920	23.8	33.6	2.8	83.9
1-plus	110,092,497	2,807,914,098	35.7	25.5	2.1	93.1
TOTAL	304,375,942	3,014,547,281		9.9	0.8	

*Chronic medications are defined as those filled more than three times per year
Source: Medical Expenditure Panel Survey, Prescribed Medicines File, 2008; and NACDS Economics Department

Average annual prescription drug spending by patients with given diagnosis				
DIAGNOSIS	ANNUAL PRESCRIPTION DOLLARS PER PERSON	ANNUAL PRESCRIPTIONS PER PERSON	DOLLARS PER PRESCRIPTION	TOTAL Rx SPENDING BY INDIVIDUALS WITH DIAGNOSIS*
Essential hypertension	\$2,289	33.0	\$69.39	\$131,564
Diseases of lipid metabolism	2,545	32.9	77.26	124,750
Diabetes mellitus	3,304	42.9	76.99	69,985
Depressive disorders	2,930	34.5	84.87	56,638
General symptoms	3,634	44.1	82.46	56,100
Diseases of esophagus	3,151	35.8	87.99	52,095
Joint disorder	2,012	26.6	75.57	45,948
Chronic ischemic heart disease	3,532	50.1	70.46	41,581
Neurotic disorders	2,703	34.9	77.47	40,496
Arthropathies	2,679	36.5	73.42	40,018
Asthma	2,165	25.8	83.99	38,612
Back disorders	2,050	26.6	76.95	27,798
Intestinal infection	1,019	13.2	77.34	27,078
Other soft tissue disorder	3,109	37.5	82.86	26,039
Acute nasopharyngitis	881	11.3	77.96	24,121
Acute myocardial infarction	3,565	51.1	69.75	20,121
Fluid/electrolyte disorder	4,325	60.7	71.30	19,507
Acquired hypothyroidism	2,281	32.8	69.60	17,652
Chronic sinusitis	1,281	17.1	75.09	17,555
Chronic bronchitis	3,074	41.3	74.39	17,512
Other inflammatory polyarthropathy	3,004	39.9	75.35	16,969
Stomach function disorder	2,417	29.2	82.77	15,673
Angina pectoris	3,812	53.3	71.56	15,602

*In millions

Source: Medical Expenditure Panel Survey, 2008; NACDS Economics Department

Reasons for using a specific pharmacy				
ISSUES	VERY IMPORTANT	IMPORTANT	NOT VERY IMPORTANT	NOT IMPORTANT AT ALL
<i>Service issues</i>				
Pharmacists’ ability to address questions and concerns	73%	23%	3%	1%
Pharmacists and pharmacy staff	65	36	4	1
Pharmacists coordinate care with doctor/others	60	31	7	2
Items for purchase other than medications	34	33	20	13
<i>Convenience issues</i>				
Ability to call ahead to have Rx ready for me	76	20	4	1
Overall convenience	75	24	1	0
Pharmacy is conveniently located/accessible	73	24	2	1
Pharmacy hours are convenient for me	70	27	2	1
Wait times to pick up prescriptions	68	29	3	1
Pharmacy provides reminders to refill prescriptions	39	28	22	10
<i>Cost issues</i>				
Pharmacy accepts my insurance card	91	7	1	1
Cost at primary pharmacy	74	18	2	1
\$4 or less generic program	58	26	11	6

Source: Pharmacy Satisfaction Pulse 2011 Household Study



Pharmacies aid economy

By ALARIC DeARMENT

It goes without saying that pharmacies carry a plethora of benefits for consumers, patients and healthcare professionals alike. But there's one more important thing they also benefit: the economy. Given continued worries over the vitality of the country's economy among the public, that's an important benefit indeed.

According to the National Association of Chain Drug Stores, retailers that operate pharmacies — which can include drug stores, supermarkets and mass merchandisers — have a total effect on the economy of \$1.76 trillion per year, or the equivalent of 12% of the country's gross domestic product.

Economic benefits include the ripple effect of money spent in pharmacies throughout the economy — \$1.81 for every dollar spent, according to NACDS. This effect is felt in sectors ranging from real estate to finance and insurance, from manufacturing to agriculture, and from construction to transportation, warehousing and more.

Channel by channel estimates of number of stores, sales, employment, payroll and taxes paid across all 50 states in 2010

CHANNEL	NUMBER OF STORES	NUMBER EMPLOYED DURING YEAR	ESTIMATED PAYROLL*	ESTIMATED PAYROLL PER STORE*	ESTIMATED TAXES PAID*	ESTIMATED TAXES PAID PER STORE*
Traditional chain drug stores	22,424	425,827	\$15,030,205	\$670	\$5,283,756	\$236
Independent drug stores	20,160	130,872	4,654,153	231	1,627,750	81
Supermarkets with pharmacies	9,333	1,136,931	25,185,210	2,699	7,850,201	841
Mass merchants with pharmacies	8,217	1,945,725	40,824,377	4,968	26,433,801	3,217

*In thousands

Source: U.S. Bureau of Labor Statistics Quarterly Census of Employment and Wages for 2010; NCPDP; Chain Store Guide Information Services database, November 2010



Pharmacies in Profile

One of America's most intractable challenges is the staggering cost of health care. Policy-makers agree that Medicare and Medicaid — not to mention the nation's frayed health system overall — can't continue to sustain the costs of care. One vital but underutilized resource that could help break the cost cycle is the nation's 56,000 community pharmacies — and the pharmacists who staff them. Pharmacists are equipped to provide a wealth of patient care services beyond prescription dispensing and basic counseling. They prevent health conditions from spiraling out of control for millions of Americans, catch dangerous diseases in their early stages, and help patients manage chronic diseases and complex medication regimens. What's more, they're a community's most accessible and cost-effective health professional. "It's not just about reducing the costs of drugs," said Debbie Garza of Walgreens. "It's the role we can play in ... helping reduce the total medical spend." This special report offers a close-up look at the health contributions provided by pharmacy companies across the United States — and the additional solutions they could provide if pharmacists are made full members of an integrated, outcomes-driven health team.

Old-time service, new initiatives thrive at Bartell Drugs

Since 1890, Bartell Drugs has catered to the health needs of residents in Seattle and the Pacific Northwest. And despite intense competition from an influx of national pharmacy chains, the pioneering 58-store company still is serving several generations of longtime customers and winning new converts with an effective blend of old-time personal service and new clinical care initiatives.

"We're the oldest family-owned drug chain in America; we've been around a long time," observed Bartell COO Ed Littleton.



Bartell Drugs pharmacist Steve Anderson counsels a patient.

"We support a lot of local community programs."

Indeed, the chain is well known for events like "Health & Beauty Week," occurring each spring and fall in Bartell stores and featuring such services as mobile digital mammography screenings in partnership with a local hospital.

"Bartells has been a longtime resource for flu and pneumonia immunizations, and the company also offers a range of health screenings, including those for bone density, as well as testing for cholesterol, blood glucose and blood pressure," noted VP marketing Theron Andrews. "Bartells has extended its immunization outreach to local businesses and community groups as a convenient way to leverage health-and-wellness services within the community."

The company is a local resource for travelers with its international travel clinics, now available at 11 Bartell locations. The clinics provide consultation, medications and/or vaccinations for travelers for such conditions as motion sickness, typhoid, malaria and yellow fever.

"With the travel clinics, our pharmacists have some prescriptive protocol. They can prescribe several of the shots and write several of the prescriptions travelers need to take ... under the auspices of the physician," Littleton explained.

Costco leverages size, low-cost proposition in pharmacy

It may surprise some that Issaquah, Wash.-based Costco Wholesale is the nation's top-selling warehouse club operator and one of the biggest retail companies in the world.

The company operates some 530 in-store pharmacies within its roughly 600 club stores in the United States, Canada, Mexico, Puerto Rico and overseas, and pursues at its prescription counters the same low-price philosophy that rules every aisle within a Costco outlet. The focus is on providing its pharmacy customers the lowest possible prices, focusing on lower-cost generic drugs wherever possible and holding down operating costs to deliver value.

Result: Programs like the Costco Member Prescription Program and the Costco Pharmacy Benefit Partnership for uninsured and lower-income members. "Our pharmacies continue to receive recognition ... for their low prescription prices," noted CEO Jim Sinegal in Costco's fiscal 2011 report. "One contributing factor is our central-fill concept, and we now have three central-fill facilities ... helping reduce the cost of a prescription refill by almost half."

That focus on value doesn't keep Costco from pursuing other innovations and health services for its 64 million card-holding customers. The company is working to make it easier for members to access prescription services and health information through its website, and offers mail-order prescriptions and home delivery to its members. Recently, Costco also launched an



Costco operates some 530 in-store pharmacies within its roughly 600 club stores.

automatic refill program for patients concerned about running out of their medications.

One advantage of operating huge warehouse stores and rapidly turning merchandise is the ability to carry lots of inventory, including such bulky items as wheelchairs, bath safety products and other durable medical equipment for homebound and mobility-challenged patients. Costco makes the most of that ability, offering a huge array of DME through its online shopping service.

CVS Caremark successfully merges healthcare spheres

Wielding some 7,300 drug stores, the nation's largest pharmacy benefit management company and MinuteClinic, the industry's biggest operator of ambulatory care centers, CVS Caremark successfully has merged the spheres of retail pharmacy, routine clinical interventions and managed pharmaceutical care. The result is a vertically integrated pharmacy-PBM model with enormous power in the healthcare marketplace.

CVS is using that power to drive a bolder vision of pharmacy practice and a more engaged role for pharmacists in the lives of millions of patients. Among its programs in 2012:

- Free community-based health screenings valued at tens of millions of dollars;
- New efforts to improve Americans' medication adherence;
- An expansion of the company's Pharmacy Advisor program. The chain opened the initiative by helping diabetic patients better manage and monitor their conditions. Beginning in April, CVS will expand the program's clinical care efforts to include patients with cardiovascular disease, followed later by asthma/COPD, depression, cancer and osteoporosis, with additional launches set for 2013; and
- New ways to integrate the care provided by MinuteClinic nurse practitioners with the needs of Caremark's health plan sponsor clients and its 60 million plan members.

"For the past several years, CVS Caremark has been an active player in helping to reshape the healthcare system," said Helena Foulkes, EVP and chief healthcare strategy and marketing officer.



CVS will roll out more free community-based health screenings in 2012.

"As we help consumers and clients adapt to the evolving healthcare system, it is important for us to bring together all of our capabilities to identify more innovative ways to improve pharmacy care delivery and help customers better manage costs."

CVS Caremark president and CEO Larry Merlo cited several fundamental forces that he said are driving the company's efforts, including the need for low-cost solutions like preventive care and improved medication adherence; the growing primary care shortage and the need for better integration between physicians and other healthcare providers; and the increasing role of the consumer in healthcare decisions.

Pharmacists front and center at Delhaize America

Delhaize America, a division of the Belgium-based firm Delhaize Group, has emerged as the fifth-largest food retailer in the United States and a major source of supermarket-based pharmacy services from Maine to Florida. Its two largest divisions are Food Lion, one of the nation's largest food retailers with more than 1,300 supermarkets — some of which include pharmacies — and Hannaford, a 177-store chain based in Scarborough, Maine, which serves patients in New England and New York through nearly 140 in-store pharmacies.

Pharmacists at all these locations "do more than just fill prescriptions," Delhaize noted. "We counsel patients on the proper use of medication and provide information on maintaining a healthy lifestyle."

All pharmacies within the company's Hannaford, Food Lion, Harvey's and Sweet Bay supermarkets also offer free blood-pressure screenings and membership in the Healthy Saver Plus program, which helps customers save money on prescriptions, diabetic supplies, hearing aids, vision care prod-

ucts and more. Select stores also offer free nutrition classes, led by registered dietitians and covering such topics as eating to lower cholesterol or blood-sugar levels and prenatal nutrition.

"Our pharmacists not only help you with prescription and over-the-counter medications, they can also help put you in touch with our staff of nutritionists and registered dietitians," the company noted on its Hannaford website. "Together, they can provide nutrition information that may affect medications you're taking, and give helpful advice on vitamins, herbs and supplements that complement your diet and your prescriptions."

"We're also the first supermarket to provide Guiding Stars — a nutrition navigation system that helps you find foods with more nutrition easily throughout the store," the company noted.

Some Hannaford pharmacists also are skilled at drug compounding, preparing patient-specific medications to meet unique physician and patient needs.

H-E-B pharmacists working to fill gap in health care

Community pharmacists, Texas-based pharmacy leader Denis Wiesner said, could do more to help solve the nation's health-care crisis if given the chance. Wiesner is senior director of privacy, pharmacy and government affairs for H-E-B, the San Antonio-based supermarket chain that commands a powerful share of the state's food and pharmacy business. He said pharmacists remain an "underutilized healthcare resource" that "complement other healthcare providers ... and help fill that gap to make our health-care capacity go further. ... We're looking for anything we can do to expand our outreach into the community and supplement the primary healthcare providers who are out there," Wiesner added.

To wit: The chain has become a leading provider of immunizations not only for influenza, but also a variety of other health threats, such as hepatitis, meningitis and shingles. "All 230 of our pharmacies provide [seasonal vaccine for flu], and the vast majority of our pharmacists — about 90% — are certified immunizers," Wiesner explained.

Those pharmacists sometimes provide immunizations outside the stores at employee and government health fairs and other events. Through its "Second Saturday" initiative, H-E-B pharmacists also now provide health screenings for blood pressure, glucose and cholesterol on the second Saturday of every

month except December, as well as quarterly A1C exams for patients with diabetes. Increasingly, the company also provides medication therapy management, both face to face and through a centralized call center, Wiesner said. Either way, he added, pharmacists initially provided the service to Medicare Part D beneficiaries under the Medicare Modernization Act, "but we've seen it start to expand out to some commercial programs that have an interest in it."

H-E-B pharmacies also provide programs to help patients manage their disease, particularly diabetes. "That's a huge issue in Texas," Wiesner said. "We have continued to expand that, beginning with our own employees ... through pharmacist-provided education and patient monitoring. We've been able to build upon that and work with some other entities" among employers and local governments, he added. More recently, the chain also has begun testing an asthma management program.

H-E-B also has launched a new initiative aimed at merging its health and nutritional expertise on behalf of healthier customers. "We are starting to put dietitians in many of our stores," Wiesner explained. "They'll work side by side with the pharmacists ... so that we can tie the pharmacy and medical perspective together with the dietitian's expertise."

Michigan chain provides services with 'HomeTown' feel

HomeTown Pharmacies: It's a name that conjures images of the drug store as a personalized neighborhood health center, and of the pharmacist as an accessible and knowledgeable patient care resource. It's exactly the expectation that Newaygo, Mich.-based HomeTown Pharmacies aims to serve.

Founded in 1995 by second-generation pharmacists and brothers Tim and Fred Grice Jr., the company's business model was based on a simple premise: to blend the personalized service of independently owned community pharmacies with the bargaining power and efficiencies of a drug store chain.



HomeTown Pharmacies aims to blend personalized service with back-end efficiency.

It was an effective combination. Over the past 17 years, HomeTown has blossomed into a 28-store network of pharmacies in Michigan. The company describes itself as "a trusted community wellness provider that supplies customers and patients with everything from prescriptions and vaccinations to specialty pharmaceuticals and wellness services."

HomeTown's service network includes both retail community settings and three long-term care pharmacies in Kalamazoo, Ann Arbor and Rockford, Mich., that serve nursing homes. Besides medication management and wellness services, all stores provide canes, crutches and incontinence items. Some locations also serve homebound patients with a full selection of bath safety products, lift chairs, wheelchairs and other durable medical equipment.

Besides vaccinations for shingles, flu and pneumonia, HomeTown pharmacies also provide in-depth consultations by pharmacists and nurses, home delivery of emergency medicines, home infusion therapy for patients with serious conditions, insurance billing services and help for patients transitioning from the hospital to home setting. The company also maintains medical record systems for long-term care centers.

HomeTown also operates a medication compounding pharmacy in Monroe, Mich., for patients in need of hormone replacement therapy or other specialized, made-to-order dosage formulations.

Kerr Drug health services continue to lead innovation

Ask any chain pharmacy executive to name the top innovators in pharmacy-based retail health concepts, and North Carolina's Kerr Drug is sure to be at or near the top of the list. The company has built its reputation on a groundbreaking array of health services offered through a variety of drug store formats, from full-service drug stores to combination pharmacies and clinical care centers that provide blood-screening labs and private offices for treatment, counseling and health education classes.

The drug store chain is an active participant in the Asheville Project — a groundbreaking health delivery model that for more than a decade has reduced health-care costs for Asheville city workers and their families through an integrated web of preventive care and wellness programs delivered by physicians, pharmacists and other providers.

Kerr's pharmacists also have been active contributors to the CheckMeds NC program since its launch in October 2007. CheckMeds NC was established by the North Carolina Health and Wellness Trust Fund Commission with the primary goal of improving patient outcomes and prescription adherence through medication therapy management by pharmacists, and is free to any North Carolina resident 65



Kerr Drug's "Just Ask" marketing effort is meant to encourage patients to talk with pharmacists.

years or older who takes part in a Medicare Prescription Drug Plan.

According to Mark Gregory, Kerr's VP pharmacy and government relations, an independent auditor has found that for every dollar invested in the CheckMeds program, Medicare is saving an average of \$13.55 in reduced hospitalizations and other acute care costs for seniors. "We're wide open to new pay-for-performance reimbursement systems, because at the end of the day, we have a proven model," Gregory said. "We have an asset that can create tremendous savings for the [healthcare] system."

Kerr also is allied with North Carolina's Medicaid in a program aimed at cutting prescription costs by encouraging the substitution of generic drugs for higher-cost branded medicines wherever possible. "We're working with doctors

and creating solutions where everybody wins, because it's saving the system money," Gregory said.

Emblematic of Kerr's focus on direct patient care is "Just Ask," a new marketing effort to encourage patients to talk with its pharmacists. "The 'Just Ask' campaign will encourage conversations and a sharing of information because it's the best way to avoid poor health outcomes," Kerr CEO Tony Civello said.

Personalized care, convenience reign at Kinney Drugs

Since its first store opened in 1903, Gouverneur, N.Y.-based Kinney Drugs has excelled at the kind of personalized patient care and convenience usually associated with independent pharmacies.

Kinney is a deeply rooted part of the life of upstate New York and neighboring Vermont, with 91 retail pharmacies serving a dense cluster of communities from as far south as Ithaca, N.Y., to the Canadian border region in the north. Its mantra: "to provide the highest-quality pharmacy, health and retail services at fair and competitive prices in our communities."

Kinney has made a priority of serving homebound or time-strapped customers. Examples include free delivery of prescriptions and other store products, and a refill system called ReadyScripts that generates prescription reorders automatically for store pickup or free home delivery. Patients also can order medications online and receive messages via Kinney's EzRefill program.

Partnering with a local hospital, the chain also is now able to provide computer-assisted dispensing machines linked to Kinney pharmacists for some patients confined to their homes.

Uninsured or underinsured residents in its trading area can take advantage of the KinneyCare Discount Prescription Plan. On the last Saturday of every month, customers can bring their unwanted prescriptions and over-the-counter medicines to any Kinney pharmacy for safe disposal.

Another innovation, particularly for older or at-risk patients with serious conditions, is the Kinney Drugs Life Vial, a bottle containing a patient's medical history. "It's stored on the inside door of your refrigerator," the company explained to customers. "Life Vial stickers on the front and back doors of your house and a magnet on your refrigerator door tell paramedics to look for this vital information in the event of an emergency."

Hospital network affiliation supports Lovelace patients

As part of Albuquerque, N.M.-based Lovelace Health System, a multihospital group that comprises one of New Mexico's largest and most innovative healthcare networks, Lovelace Pharmacy is equipped to handle any patient's medication needs, from basic prescription dispensing to compounding, to hard-to-find drugs and specialty pharmacy services.

The group includes 11 pharmacies in Albuquerque, Santa Fe and Rio Rancho, N.M., and a large team of clinically oriented pharmacists, many of them with broad experience working in the hospital setting. That means "educating healthcare professionals and patients on medication use, as well as compounding and dispensing prescribed medications for patient care," according to the company.

Lovelace pharmacies promote both low prescription prices and fast prescription dispensing times for patients, usually less than 10 minutes. Members of the Lovelace Health Plan now are automatically enrolled in its pharmacies' Generic Medication Discount Program, providing access to more than 300 generic drugs at a monthly cost of \$4.99, or \$12 for a 90-day prescription supply.

Among its other services: online prescription refills and community education classes in health topics in coordination with Lovelace Health System. Indeed, the close affiliation between



Lovelace MedicalTowers Pharmacy staff (L-R): Kimberly Laumann, CPhT; Mallory Ortiz, CPhT; Clair Seelinger, RPh; and manager Sam Sanchez, RPh

Lovelace community pharmacies and the regional hospital network that supports them gives patients access to a huge array of health resources, clinics for everything from allergies to oncology, specialty pharmacy and an advanced Cardiac Care Center. Patients in New Mexico also have access through the system to the latest technology in noninvasive brain surgery via a unique process known as the Gamma Knife Perfexion, which allows for precise treatment of previously inoperable brain tumors, according to Lovelace Medical Center, the flagship of the health network.

PSP blends personal attention, tech convenience

"What a Pharmacy Should Be." That's the tagline for a small but thriving drug store network in western Pennsylvania owned and operated by Professional Specialized Pharmacies.

Based northeast of Pittsburgh in Kittanning, Pa., PSP oversees a group of seven retail pharmacies and Mission Pharmacy Services, which provides medication and patient care services for long-term care centers.

PSP's retail pharmacy network epitomizes the special brand of personalized patient care that has made pharmacists such a vital asset to communities across the United States. Operating under a variety of locally branded and venerable store logos like Bill's Home-town Pharmacy, the drug stores offer a deft blend of old-fashioned personal attention and up-to-date technological conveniences.

Among them: a robust website with an extensive library of health-and-wellness information, including interactive online tools to help patients assess things like



Professional Specialized Pharmacies oversees a group of seven retail pharmacies in Pennsylvania.

body fat and daily nutritional requirements, and RxMap, a combination pill box and prepackaged medication schedule to assure patients take the right dosage at the right time of day.

As the company's long-term care division, Mission has become a critical health resource for nursing homes and other extended care centers. Its clinical pharmacists support the care provided by those facilities, providing a range of pharmacy services, such as drug regimen review, assessment of the medication needs of patients and training of nursing home staff.

Indeed, Mission's pharmacists routinely provide clinical education on-site at those facilities, conducting classes for staff members on such topics as diabetes, heart disease, pain management and medication side effects. "Mission's many ... services and

clinical wellness programs help educate caregivers and improve the care of the residents," a company report noted.

Immunization program boosts Rite Aid's efforts

One of the drug store industry's most innovative health providers is also one of its biggest. Rite Aid, the 4,700-store giant operating in 31 states, continues to explore new ways to engage its pharmacists with patients and broaden pharmacy practice. In the process, the company is partnering with employers, health advocacy groups, educational institutions and doctors to bring immunization and disease management programs to specific patient populations around the United States.

The company also is gaining recognition for its efforts. In early February, for instance, Rite Aid won an American Pharmacists Association Immunization Champion Award for its comprehensive inoculation efforts — including extending APhA's Immunization Certificate Training Program to more than 11,000 of its pharmacists. Rite Aid pharmacists provided Americans with more than 1.4 million flu shots last year, according to the company — more than double its 2010 total.



Rite Aid partnered with various organizations in 2011 to reach individuals in need of immunizations.

"Rite Aid made a companywide commitment to boosting public immunization rates for flu and other vaccine-preventable diseases," said Robert Thompson, EVP pharmacy.

The company also maintains an aggressive battle against diabetes. Recent examples include its "Wellness+ For Diabetes" initiative, a free program that offers resources and savings to diabetics in collaboration with WebMD. "Customers enrolled in Wellness+ For Diabetes will have exclusive 24/7 online access to a special Rite Aid-sponsored section of WebMD's 'Diabetes head2toe' online lifestyle management tools," a Rite Aid representative reported.

Recently, Rite Aid also joined with OptumHealth to create NowClinicSM Online Care. The service is a virtual clinic in a retail pharmacy setting, giving patients in select stores real-time access to medical care, information and resources from doctors and OptumHealth nurses.

Ritzman touts compounding tradition, homeopathy

For more than 60 years, family-owned Ritzman Pharmacies has brought a strong blend of clinical pharmacy expertise and personalized hometown service to customers in northeast Ohio.

The 20-store chain's healthcare reputation is built on a strong foundation. Among its core competencies are drug compounding — Ritzman has long been known for its pharmacists' ability to compound drugs — and a pharmacy that deals in expensive and highly targeted specialty medications and home-infusion services for patients with serious and chronic conditions.

Ritzman's menu of services includes twice-a-week free home delivery, highly accessible pharmacists who provide in-depth counseling and medication therapy management, and its own brand of nutritional supplements.

Ritzman also has emerged as a leading exemplar of more "natural" approaches to wellness and disease prevention, with a broad selection of homeopathic products positioned as alternatives to traditional over-the-counter remedies. The gradual expansion in homeopathy came in response to the rise in self-treatment for minor ailments by many Americans and fears over the side effects of traditional OTC medicines, according to the company.

"We have combined the prescription and natural health phar-



Ritzman pharmacist Sue Milward assists a customer in choosing a nutritional supplement from the retailer's private label.

macies to offer complementary services, such as massage therapy, diabetic supplies, home infusion, natural products, organic foods, high-quality vitamins and supplements," Ritzman reported.

The company's natural approach to wellness, clinical expertise and above-and-beyond brand of personal service have won it a loyal following among three generations of Ohioans, allowing it to purchase 11 in-store pharmacies from Buehler Food Markets last fall.

Preventive program, screenings promoted at Sam's Club

Warehouse club giant Sam's Club has always appealed to consumers' quest for value, and with its Plus Member program, its low-price appeal extends to the prescription centers found in most of its 610 U.S. club stores. But the company is equally serious about pharmacy-based care and disease prevention for its millions of members.

How serious? Last May, the chain launched a preventive health program for its small-business customers in partnership with U.S. Preventive Medicine. Called The Prevention Plan, it's a step-by-step management program designed to assess an individual's health risks and create a personalized plan to reduce those risks. The program features online health risk appraisal, personal health coaching and a comprehensive blood test available through Quest Diagnostics to measure for a host of potential conditions.

In line with the program, small businesses can access a resource center for guidance about such issues as creating a more healthful culture for their employees and applying for state and federal wellness grants. "Reducing healthcare costs and supporting employee health are extremely integral to the success of small businesses," said Jill Turner-Mitchael, SVP in charge of health and wellness.

Sam's Club also reaches members more directly through monthly health events. Each month, its pharmacies have spon-



Sam's Club reaches members directly through monthly health events, including health screenings to test for such conditions as allergies.

sored, free health screenings — both for members and non-members — to test for diabetes, colon cancer, ulcers, digestive and thyroid disorders, skin cancer, allergies, poor vision and other conditions.

That effort continues in 2012. In recognition of American Heart Month in February, Sam's hosted free tests at most locations for cholesterol, body mass index, glucose and blood pressure. One example of a highly innovative screening program is the men's health program it conducts in June — the event includes high-cost PSA testing.

Supervalu positions efforts for changing perceptions

As the parent company for 2,500 stores operating coast to coast under such banners as Acme, Albertsons, Cub Foods, Jewel-Osco and Shop 'N Save, Supervalu is one of the nation's biggest supermarket operators. But the Eden Prairie, Minn.-based retailer also wields a national pharmacy network, with 800 in-store pharmacies across those divisions and a long-standing commitment to engage customers with clinical care and comprehensive wellness programs.

"Pharmacists are the most accessible healthcare professionals. We try to take that role and expand it even further," noted Dan Salemi, VP pharmacy for Supervalu.

The company offers a growing list of pharmacy-based clinical programs, including education and disease management for diabetic patients, a rotating schedule of health screenings, adherence programs to keep patients on track with their medications, and one of the industry's most active and well-documented medication therapy management programs. In addition, more than 2,100 of Supervalu's pharmacists are now certified to immunize patients for flu and other conditions, Salemi said.

"Our pharmacy teams are geared to go above and be-

yond," he noted. For instance, "we're looking at additional health screening opportunities this year," perhaps delivered by Supervalu pharmacists within some company worksites for their own employees.

Through programs like "Nutrition iQ," Supervalu also is helping customers make better nutritional choices in its stores. That means that in its food/drug combo stores, "there's a great opportunity for the patient to have access not only to a health professional, but also to healthy food choice information," Salemi said.

As a result of the profession's clinical and wellness efforts, he added, Americans' perceptions of pharmacy have changed markedly. "Just a couple of years ago, virtually all of our flu shots were given during a flu shot day or a clinic. Today, almost all of our flu shots are given on a walk-up, everyday basis," Salemi noted. "People just expect the pharmacist to accommodate it ... in their normal workday."

"The community has changed in its view of what we can do for them," he added. "People now expect different things from their pharmacy. There's momentum there."

Target aims to help consumers find their 'feel good'

"Find your Feel Good." That's the health-and-wellness tagline that now accompanies Target's outreach to consumers around the United States.

The goal is to convey the giant retail company's ability to provide for "all your health essentials in one place." The message is driven home by one of America's most widespread networks of retail pharmacies: a vast, coast-to-coast web of some 1,580 prescription and wellness centers housed within Target's nationwide network of 1,767 stores.



Target has invested heavily to expand its pharmacists' ability to better serve prescription customers and to help them toward healthier lives.

The upscale discount chain has invested heavily to expand its pharmacists' ability not only to better serve prescription customers, but also to help them toward healthier lives and more successful medication regimens.

That includes spending millions on pharmacy technology upgrades to boost efficiencies in the dispensing process and drive a more integrated approach to patient therapy and outcomes. It also includes a range of wellness initiatives, such as smoking cessation, free medicine flavoring and innovations like ClearRx, a revolutionary prescription bottle designed to make it as easy as possible for patients to identify their medicines, comply with the dosage regimen and avoid confusion. ClearRx was enough of a breakthrough to be named the Industrial Designers Society of America's Design of the Decade.

For "wired" patients on the go, Target now offers a mobile web pharmacy option that lets customers refill prescriptions with any smartphone, at any time day or night. Customers who sign up for its Auto Refill program have it even easier: Target automatically will refill any regularly used prescription and contact the patient when it's ready.

Target pharmacists are trained to connect with all their patients and make sure they fully understand their medication regimens. It's clearly one reason its pharmacies have ranked highest in overall customer service among mass merchandisers for the fourth consecutive year in a poll by J.D. Power and Associates.

"Target has a long history of operating successful pharmacies within its stores in the United States and is a recognized leader in the pharmacy profession," the company noted in late January.

Telepharmacies help Thrifty White serve remote areas

Thrifty White, the venerable Maple Grove, Minn.-based drug store chain, calls its pharmacy operation "the reason we open our doors in the morning." It's not hyperbole: Pharmacy represents 80% of the company's business and serves as the springboard for a broad array of services to customers and patients in the Upper Midwest.

Among those services: immunizations at all stores, medication management programs for diabetics, free daily blood-pressure checks, periodic brown bag reviews, automated refills and generic discounts.

Thrifty White dates back to the founding of White Drug in the Dakota Territory in 1884, staffed by the territory's first female pharmacist. With more than 80 drug stores in Iowa, Minnesota, Montana, North Dakota, South Dakota and Wisconsin, the company describes its mission as "providing health care to small towns and cities in the rural Midwest that range from 1,000 to

90,000 in population."

Given the chain's vast and far-flung operating region, serving that population can be a challenge. Thrifty White meets that challenge by operating a network of telepharmacies in remote towns within its sphere of business, through which technicians and pharmacists dispense and verify prescriptions and communicate with patients via an audio-video link. "This allows a community to continue pharmacy services even though the local drug store has closed or the community is too small to support a traditional drug store," according to the company.

One key factor in Thrifty White's success is the fact that its pharmacists, managers and many of its store employees own the company. "Our commitment to our community starts with our local store employee owner," a company report noted. "Many of our pharmacists have chosen to live and work in towns and communities similar to where they were born and raised."

Walgreens leads with wellness initiatives

Try to picture an America without Walgreens. It's hard to imagine: With stores in all 50 states and thousands of communities, the drug store chain has been part of the nation's fabric for more than a century.

More important, Walgreens in the 21st century means a whole range of cost-efficient and easily accessible healthcare services. The company has transformed itself in pursuit of a new model for health and pharmacy retailing that, in its own words, improves patient care while lowering costs for employer-sponsored health plans, Medicare and Medicaid.

Walgreens is advancing patient wellness and disease prevention with a host of immunization, disease-prevention, health-testing and patient-education programs through its more than 7,800 pharmacy locations and 27,000 pharmacists.

Walgreens pharmacists now deliver flu shots to more Americans than any other entity besides the federal government, including free inoculations to hundreds of thousands of low-income people. They also provide medication therapy management to thousands of Medicare and private health-plan beneficiaries, participate in collaborative community and employer-driven health initiatives, and engage patients in a slew of programs designed to improve medication compliance and adherence.

One recent example is a program under which Walgreens pharmacists help patients with hepatitis C better manage their condition and adhere to their medication therapy. The program, offered through Walgreens' specialty pharmacy division and in-store at its community pharmacies nationwide, has achieved medication adherence rates as high as 96%.

"In this environment of cost containment, we think we have underused healthcare professionals who can do a lot more," said Debbie Garza, Walgreens' divisional VP government relations.



Walgreens has transformed itself in pursuit of a new model for health and pharmacy retailing that improves patient care while lowering costs for health plans.

"They're the front-line providers of health care in this country." They also provide "tangible" cost savings, she added, through immunizations, health testing, disease management and other programs that improve wellness and keep patients out of hospitals.

"There is a need on Capitol Hill to recognize the value of pharmacy and the role that pharmacists play in health care," Garza said. "It's not just about reducing the costs of drugs — which we do every day by recommending more cost-effective generic medications — but it's [also] the role we can play in that other 87 cents on the [healthcare] dollar, which is helping to reduce the total medical spend."

"With everything going on today around deficit reduction and ... entitlement programs, there needs to be a recognition of pharmacists' value in coverage of medication therapy management broadly, but also in the payment of pharmacists for other clinical services they can provide to reduce total healthcare costs," Garza added.

Community approach, tech tools aid USA Drug

Family-owned USA Drug is based in Pine Bluff, Ark., not far from the Bentonville home of mega-retailer Walmart. That hasn't kept the 140-store chain from capturing the loyalty of hundreds of thousands of consumers in Arkansas, Missouri, Mississippi, Oklahoma, Kansas and Tennessee.

Operating through a variety of local retail nameplates, including USA Drug, Super D Drugs and Med-X, the company has built a strong image for health services, convenience and value. Its stores are a deft blend of hometown-style, personalized care by pharmacists and staff deeply entrenched in their communities, a sophisticated pallet of health and clinical services, and powerful automated dispensing and information technology tools in the pharmacy and warehouse.

Most recently, its list of technology-aided customer conveniences includes a new smartphone application allowing patients to refill their prescriptions at any USA Drug store by ordering through their iPhones. Online refills and other Web-driven applications, however, will never supplant the personal relationships between pharmacists and patients at the company's drug stores, its leaders insisted.

In March alone, the chain is conducting 16 broad-based health screenings, wellness clinics and/or cholesterol testing events at stores in Arkansas and Oklahoma. Wellness events cover a variety of screenings for blood pressure, blood-glucose levels, body mass and cholesterol. USA Drug pharmacists at the events also will answer any other health questions patients have.

Walmart leverages size in bid to improve Americans' health

The world's largest retailer is known for attacking prescription costs, but innovative and comprehensive health services are just as vital to Walmart's commitment to keeping budgets and patients healthy. Walmart's nearly 3,800 U.S. pharmacies are playing a significant role in helping America's consumers and public and private healthcare payers save money, company leaders said. The savings, they added, come through both lower prescription costs at its pharmacies and a slew of community wellness and preventive care initiatives designed to improve Americans' overall health and keep them out of hospitals.

The company's oft-repeated invitation to the nation's consumers to "save money, live better" is a prime driver of its health-and-wellness strategies, said John Agwunobi, president of health and wellness for Walmart U.S. "We want to lower the cost of health care so more people have access to it," he told panelists at a recent conference hosted by the Center for Retailing Excellence at the University of Arkansas' Sam M. Walton College of Business.

Agwunobi and other Walmart executives see that effort as part of the national effort to get control of America's spiraling healthcare bill. "Every employer in this environment is facing amazing increases in the price of health care, and we think we might have a way to help them," Agwunobi said.

Walmart is bringing its message of lower prices for pharmaceutical and over-the-counter medicines, health services and even groceries to health benefit managers. The goal: to encourage those plan administrators to adopt a broader, more holistic view of their employees' health, and send those members to its stores

for prescriptions, preventive health services and better nutritional choices. The company also joined with First Lady Michelle Obama in February and announced it will donate \$9.5 million to promote healthier eating habits and nutritional awareness.

In partnership with insurance giant Humana, Walmart already serves as the prescription provider for more than 1 million Medicare Part D beneficiaries under contract with the Centers for Medicare and Medicaid Services, for a low monthly premium of \$15.10 and low co-pays.

Besides its massive network of in-store pharmacies, Walmart also operates a major specialty pharmacy, providing high-cost and high-maintenance medication therapy across the United States to patients with serious and life-threatening conditions.



Walmart is leveraging its size and purchasing clout to lower prescription costs for consumers and improve overall health through wellness initiatives.

N.Y.-based Thriftway touts personal touch in busy city

Since 1960, Thriftway Pharmacy has managed to thrive in New York City by providing for a diverse array of healthcare needs and sticking to an overriding principle: Even the most sophisticated urban consumers in one of the busiest cities in the world respond to friendly, personal service by pharmacists with longtime ties to their neighborhoods, who know their names and who listen to their concerns.

Thriftway has earned a place in the lives of New Yorkers, particularly in Brooklyn where most of its stores are located. The company operates seven drug stores in the borough, and an eighth on 10th Avenue in Manhattan.

Driving Thriftway's continued success in the face of big-chain competition is a determination to maintain a full spectrum of health services for its highly fragmented customer base, while striving to remain "a friendly neighborhood drug store." Its pharmacists have become skilled at caring for patients with HIV/AIDS and other serious conditions. Clinically trained Thriftway pharmacists will help patients manage their

conditions and adhere to their drug therapies, and stores will deliver prescriptions, OTC medicines and other products to patients' homes or workplaces as needed.

The company also excels at caring for diabetic patients through a centralized Diabetes Center. To improve medication adherence, some of its pharmacies offer Medicine-On-Time, a bubble-pack drug-dispensing system that organizes medicines into color-coded calendar packs.

Thriftway also operates a full-service specialty pharmacy to serve patients with serious and chronic conditions, such as HIV, hepatitis and other diseases. Through its Pharmacy Support Program, the company establishes for chronic care patients a one-on-one personal relationship with one of its pharmacists to coordinate enrollment, billing, refills and renewals.

"Education, adherence, support and empowerment are the core components of our program and allow patients to take charge of their medication regimens," the company told customers in its marketing messages.



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