

2024 EDITION

SAMPLE

MORSE CONSULTING'S

Canadian Reimbursement & Forecasting Timeline Report

A comprehensive source of reimbursement timelines and insights to inform forecasting and planning needs.

MORSE | DECIPHERING
CONSULTING | MARKET
ACCESS

OBJECTIVE

This report aims to provide detailed analysis and MORSE insights on files processed by CADTH and the pCPA, as well as the associated timelines for processing & provincial funding in Canada.

This analysis is meant to serve as a forecasting resource for setting internal expectations & objectives regarding CADTH reviews, pCPA negotiation and provincial access for pharmaceutical professionals.



SAMPLE CONTENT

Section

CRaFT Sample

- Executive Summary
- Market Access Timelines
- CADTH Metrics
- pCPA Metrics
- pCPA Targeted Negotiation Process (TNP)
- Jurisdictional Funding

Monthly Market Access Updates

Monthly pCPA Updates

Note that more detailed sections and metrics are included in the CRaFT full report and sub-report

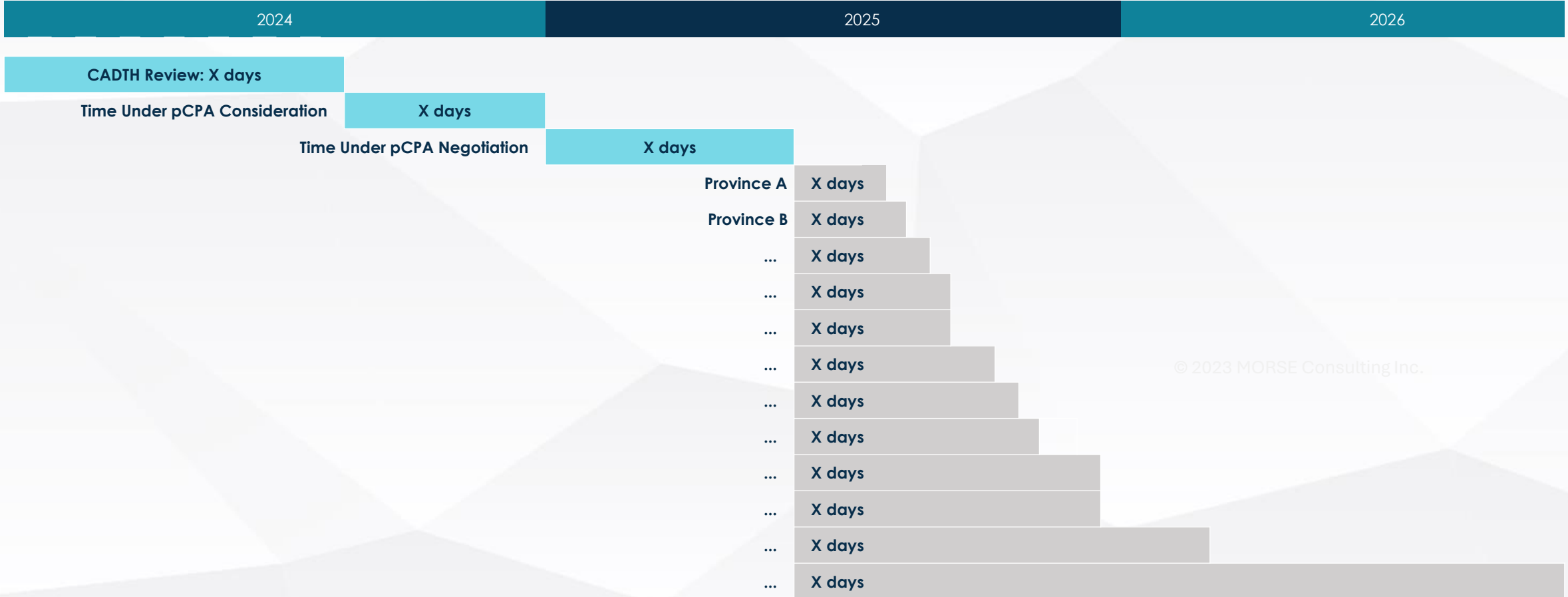




CRaFT Sample Market Access Timeline

MARKET ACCESS TIMELINE FOR PHARMACEUTICALS

The average time between CADTH submission and first provincial funding is **XXX days (~XX months)**.



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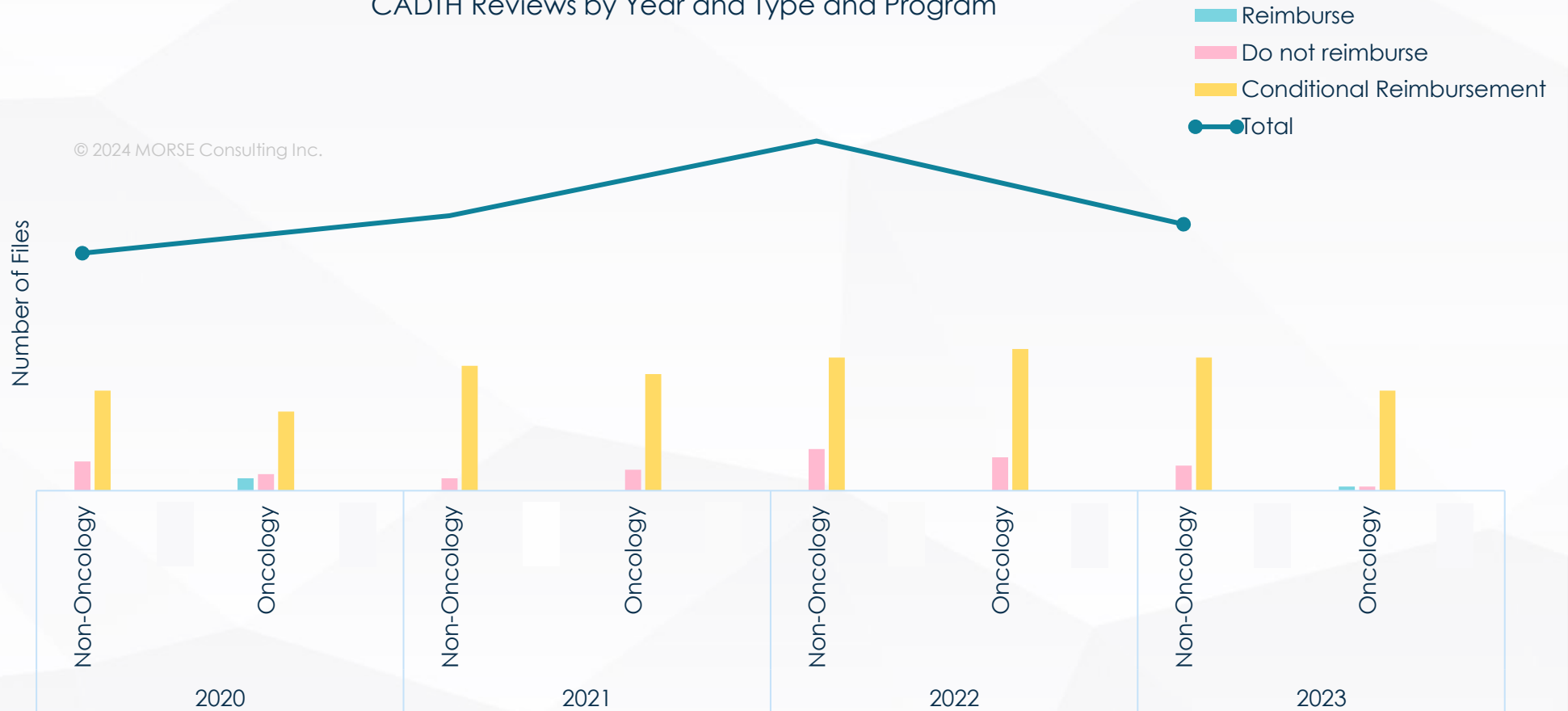


CRaFT Sample CADTH Metrics

CADTH REVIEW: VOLUME – 2024

CADTH reviewed X files in 2024, X less than in 2023 (X)

CADTH Reviews by Year and Type and Program



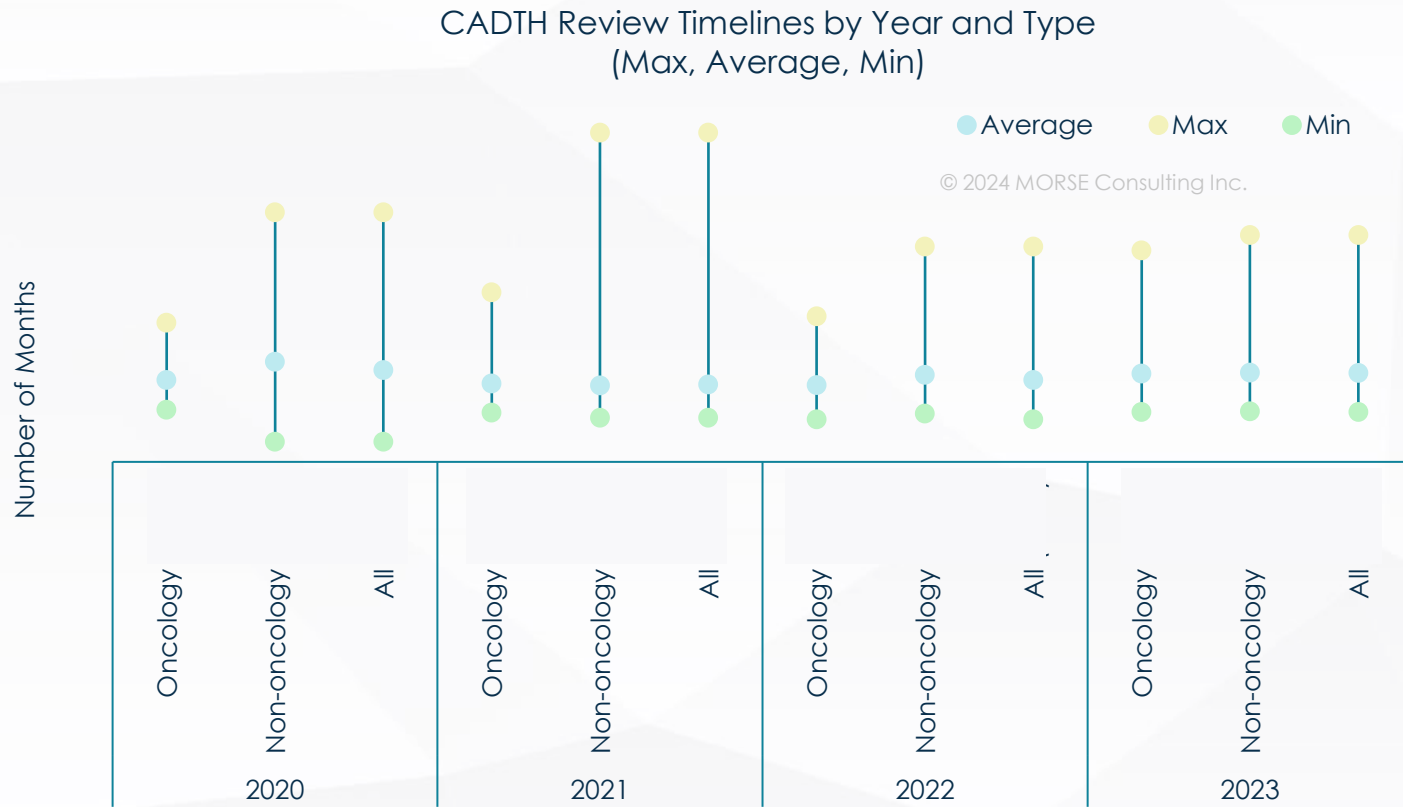
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CADTH REVIEW: TIMELINE - 2024

The average CADTH review timeline has been fairly consistent across 2020-2024, with some outliers seen throughout



2023 Outliers (n=X)			
Drug Name	Indication	Type	CADTH Review Time
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX

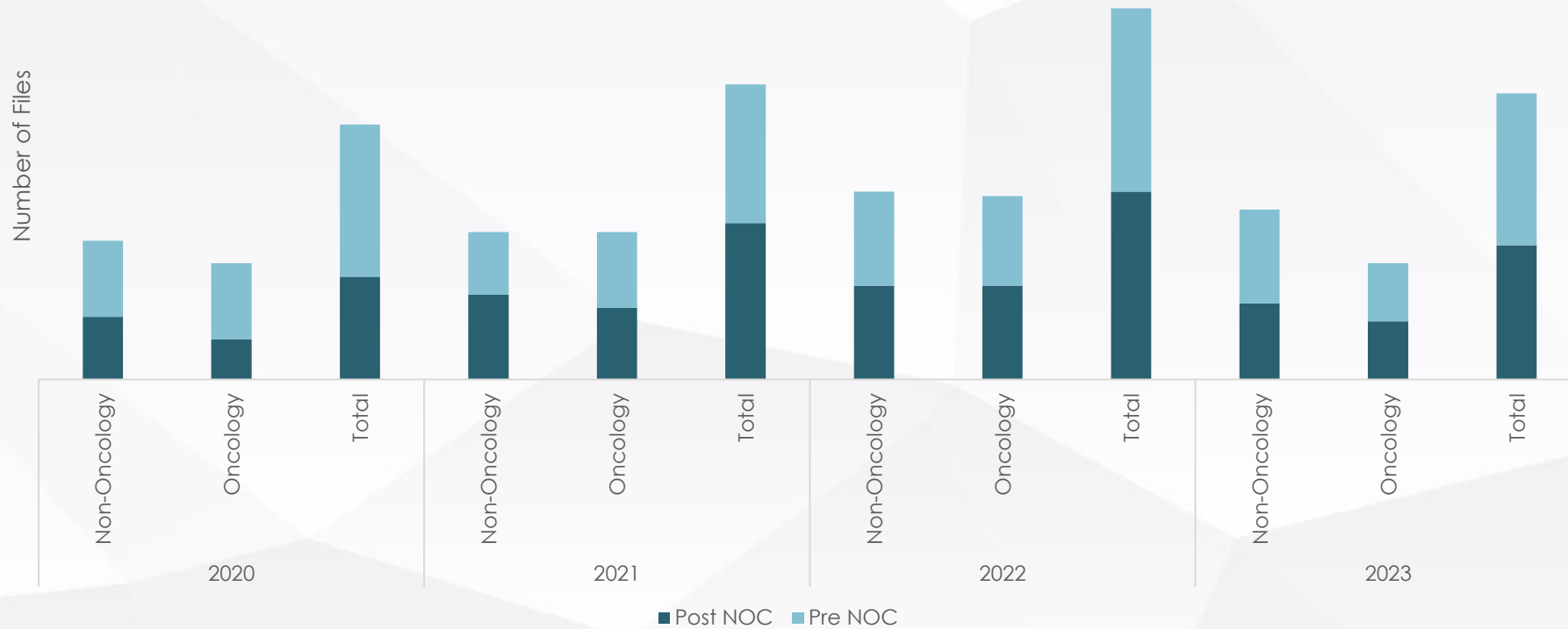
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CADTH REVIEW: PRE- OR POST-NOC SUBMISSION

Number of CADTH Reviews Submitted Pre-NOC and Post-NOC



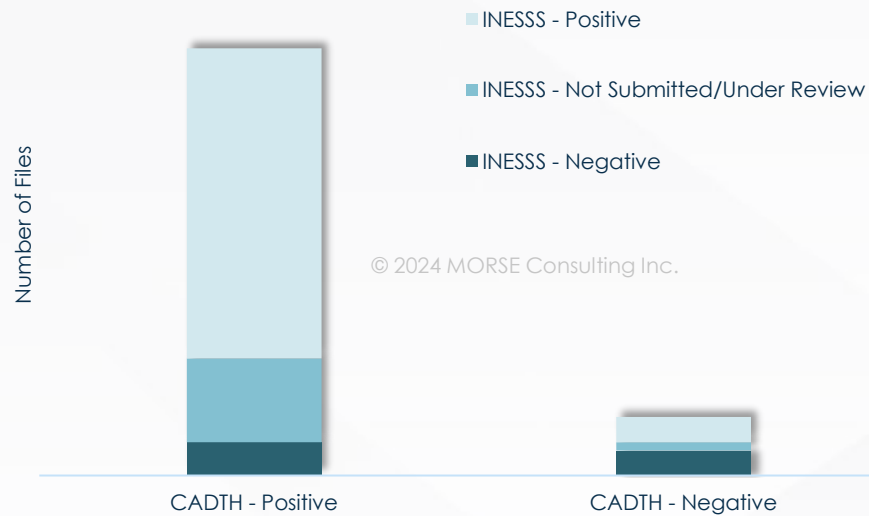
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CADTH & INESSS ALIGNMENT – 2023

CADTH & INESSS Recommendation Alignment



Note:

- CADTH – Positive includes files that received ‘Reimburse with conditions’ and ‘Reimburse’ recommendations; CADTH – Negative includes files that received ‘Do not reimburse’ recommendations.
- INESSS – Positive includes files that received ‘Registration - With conditions’, ‘Registration’, and ‘Refusal to list unless conditions were met’; INESSS – Negative includes ‘Refusal of registration’.
- Some of these recommendations may have been reconsidered by CADTH or INESSS since the MORSE data cut off

Files that received a positive recommendation from CADTH and a negative recommendation from INESSS (n=X)

Drug Name	Indication	Type
XXX	XXX	XXX
XXX	XXX	XXX
XXX	XXX	XXX
XXX	XXX	XXX

Files that received a negative recommendation from CADTH and a positive recommendation from INESSS (n=X)

Drug Name	Indication	Type
XXX	XXX	XXX
XXX	XXX	XXX
XXX	XXX	XXX
XXX	XXX	XXX



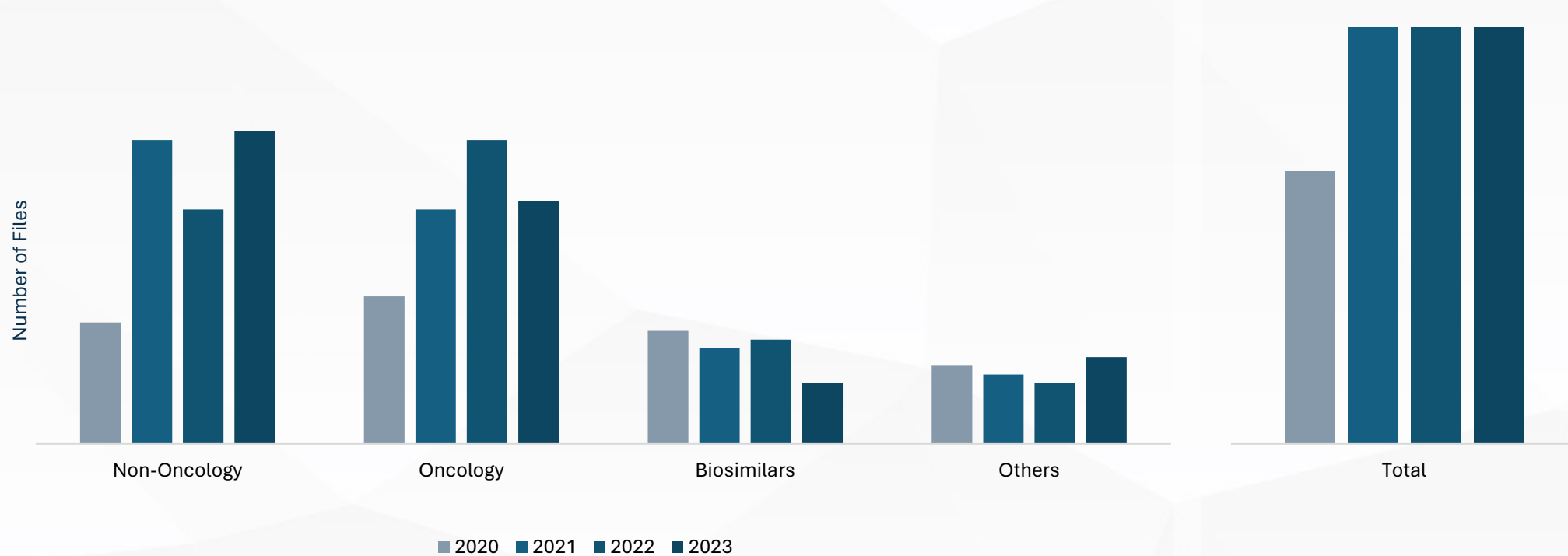


CRaFT Sample pCPA Metrics

pCPA INITIATION: VOLUME

SAMPLE

Volume of pCPA Initiated Files by Year and Type



CRaFT full report: Note the current slide is for illustrative purposes and the same analysis is also performed for **pCPA completed, closed, and not negotiated** files in the CRaFT full report

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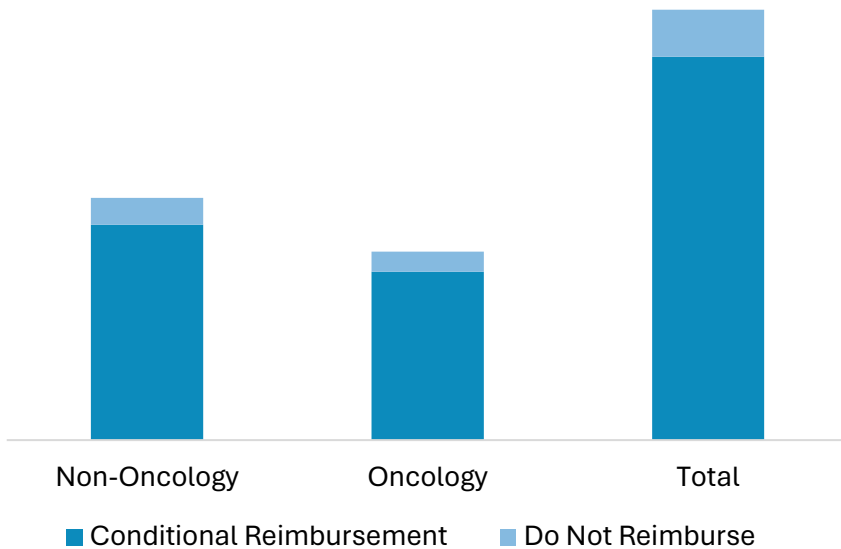


pCPA INITIATION: VOLUME

SAMPLE

CADTH Decision for Files Initiated by pCPA in 2023

Number of Files



CADTH “Do Not Reimburse” Files (n=X)

Drug Name	Indication	Type	Time under Consideration
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX

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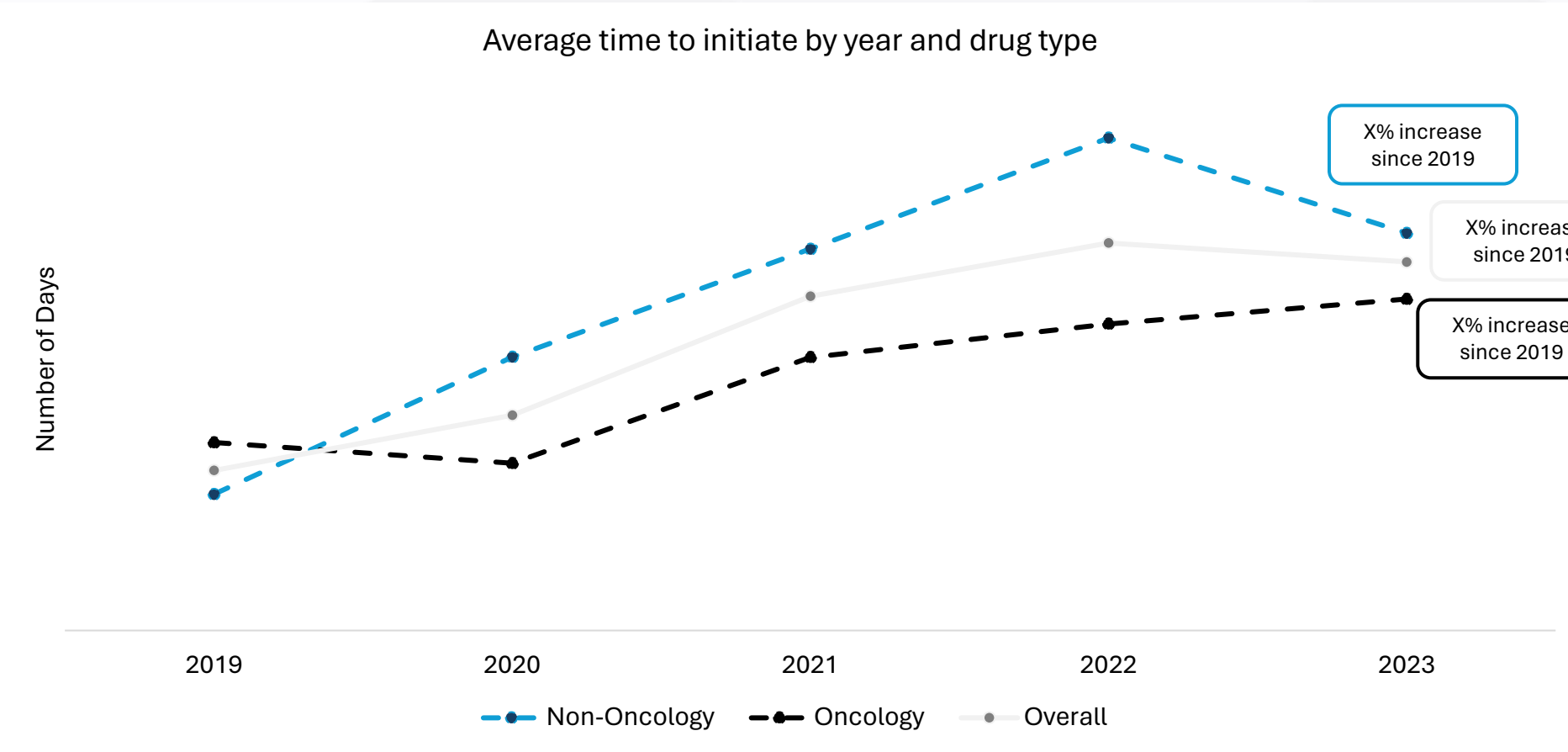
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pCPA INITIATION: TIMELINE

SAMPLE



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pCPA INITIATION: TIMELINE

Time Under Consideration for Files Initiated in 2023
(Average, Max, Min; **including outliers**)



Time Under Consideration for Files Initiated in 2023
(Average, Max, Min; **excluding outliers**)



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pCPA INITIATION: TIMELINE OUTLIERS

SAMPLE

Slow Outliers (n=X)			
Drug Name	Indication	Type	Time under Consideration
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX

Fast Outliers (n=X)			
Drug Name	Indication	Type	Time under Consideration
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX

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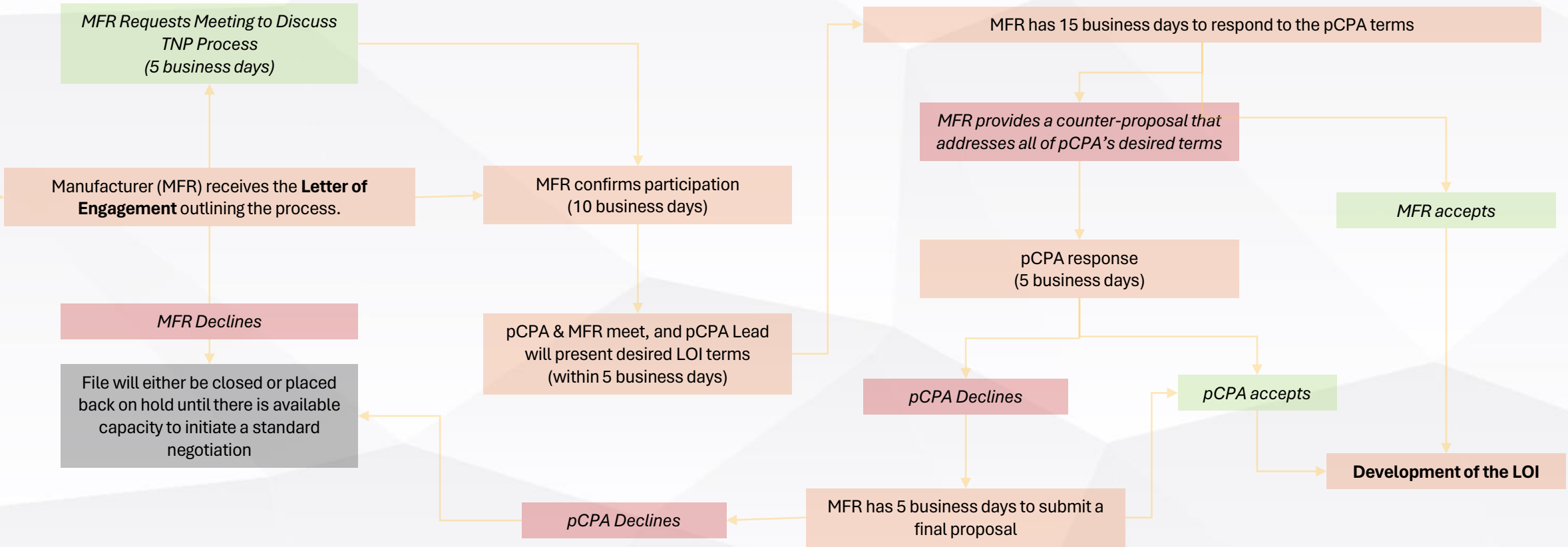


CRaFT Sample

pCPA Targeted Negotiation Process (TNP)

TARGETED NEGOTIATION PROCESS (TNP)

The TNP is a structured process that streamlines negotiations in order to reach resolution in a defined time period.



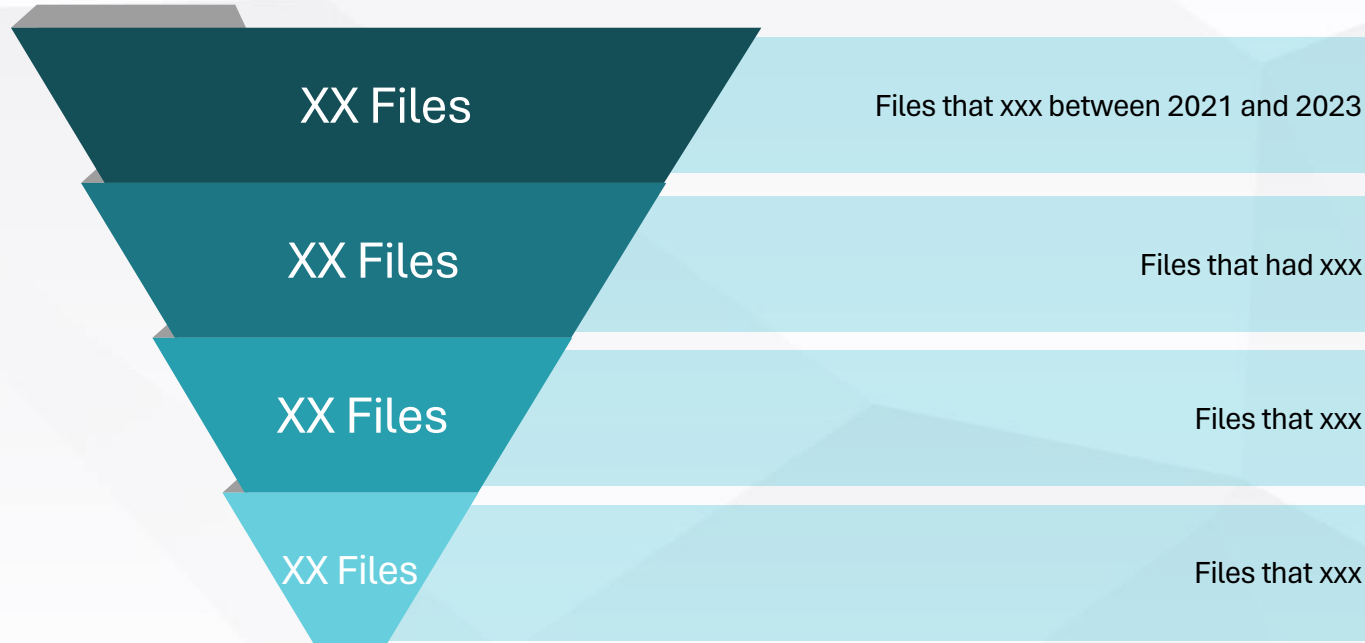
Source: pCPA Office Communication: Targeted Negotiation Process



MORSE APPROACH

This analysis was undertaken using publicly available information to attempt to determine files that MAY have gone through the TNP process.

METHODOLOGY:



LIMITATIONS:

This analysis is purely speculative and there may be files included that did NOT go through TNP and conversely, files that did go through TNP that were not captured. Therefore, these results are considered 'exploratory' in nature.

*xxx days was chosen based on the following considerations:

- There is no public disclosure of which files have gone through TNP; thus MORSE developed an internal methodology to identify such files.
- The entire TNP requires 45 business days to complete, which translates into 63 calendar days;
- Holidays and special occasions might impact timelines and introduce certain delays.
- There is some flexibility in deadlines for response.

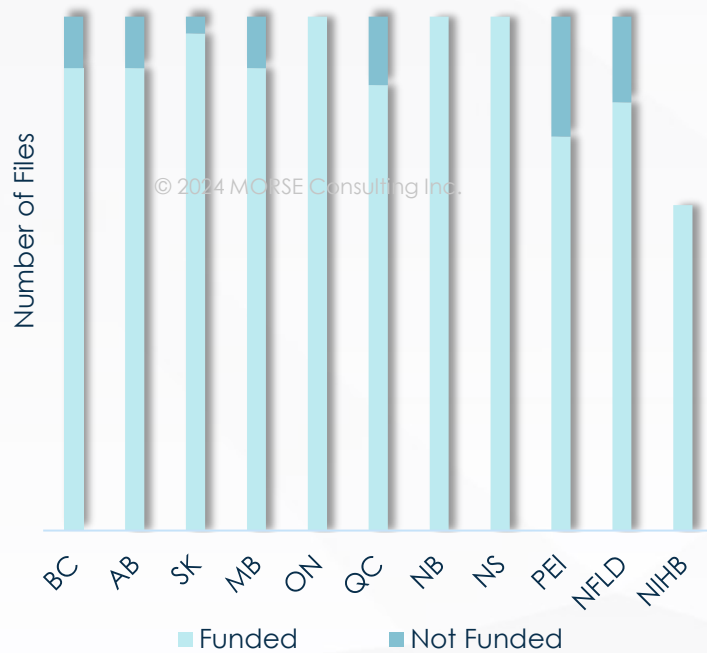




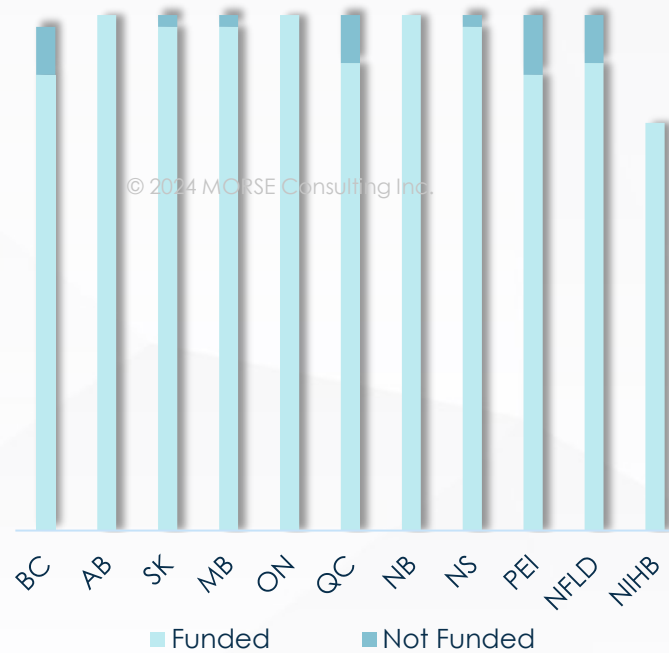
CRaFT Sample Jurisdictional Funding

FUNDING VOLUME BY JURISDICTION AND YEAR

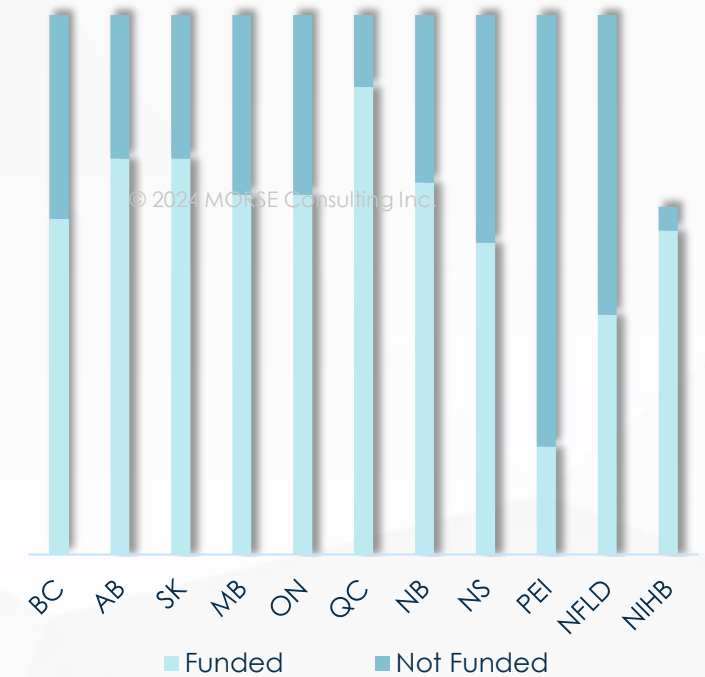
Funding Volume for Files Completed in 2021 (n=X)



Funding Volume for Files Completed in 2022 (n=X)



Funding Volume for Files Completed in 2023 (n=X)



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FUNDING VOLUME BY JURISDICTION AND YEAR

Funding Volume by Jurisdiction & Year



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DRUGS NOT FUNDED BY THE JURISDICTIONS THAT HAD THE HIGHEST FUNDING VOLUMES FOR FILES COMPLETED IN 2022 & 2023

Files Completed in 2022	
Jurisdiction	Drugs not funded
A	XXX, XXX, XXX
B	XXX, XXX, XXX
C	XXX, XXX, XXX
D	XXX, XXX, XXX

Files Completed in 2023	
Jurisdiction	Drugs not funded
A	XXX, XXX, XXX
B	XXX, XXX, XXX
C	XXX, XXX, XXX
D	XXX, XXX, XXX

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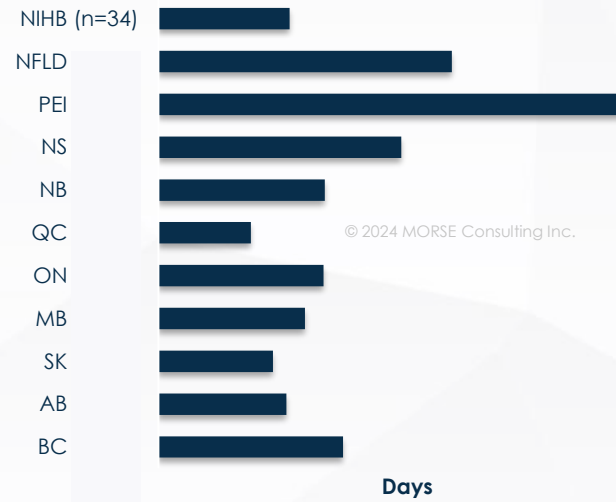


AVERAGE FUNDING TIMELINE BY JURISDICTION AND YEAR

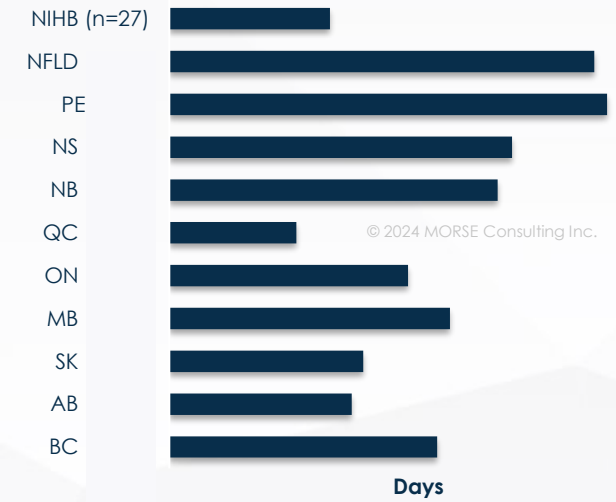
Average Funding Timeline (post-LOI) for Files Completed in 2021



Average Funding Timeline (post-LOI) for Files Completed in 2022



Average Funding Timeline (post-LOI) for Files Completed in 2023



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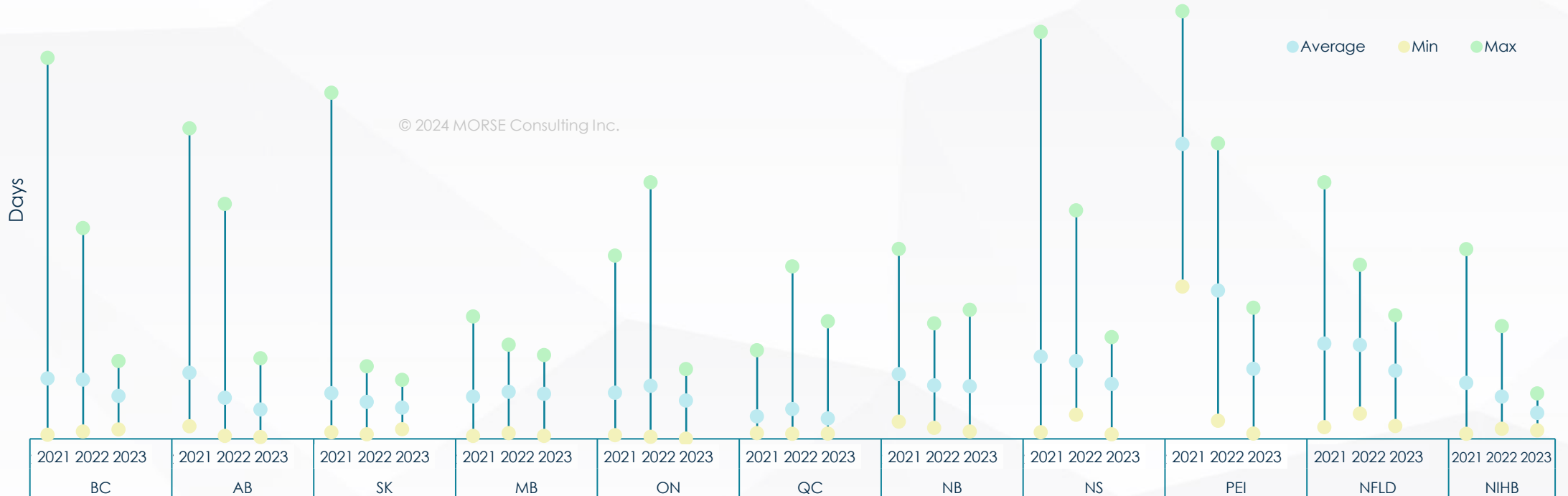
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AVERAGE FUNDING TIMELINE BY JURISDICTION AND YEAR

Min, Average, and Max Time-to-Fund (LOI to Funding) by Jurisdiction & Year



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Monthly Market Access Updates



HEALTH CANADA

There are **X new drug submissions** posted as under review with Health Canada.

MEDICINAL INGREDIENT(S)	THERAPEUTIC AREA	SUBMISSION ACCEPTANCE DATE	MANUFACTURER	SUBMISSION 'CLASS'
XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX

Note that the Market Access Update is released monthly and available for all CRaFT full report purchasers.



Canada's Drug and Health Technology Agency

CADTH

SAMPLE

This week, CADTH released **X final reimbursement recommendations** and **X draft reimbursement recommendations**, and a **draft provisional funding algorithm report for XXX**, and the **final algorithm for XXX**.

DRUG NAME	INDICATION	PRODUCT TYPE	MANUFACTURER	STAGE	RECOMMENDATION	SUBMIT BY DATE	PROJECT NUMBER
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

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pan-Canadian
Pharmaceutical
Alliance

pCPA

SAMPLE

This week, the pCPA **completed negotiations with a LOI for X files.**

DRUG NAME	MANUFACTURER	INDICATION	PRODUCT TYPE	STATUS	ENGAGEMENT DATE	PROCESS CONCLUSION DATE	TTI/TTN*
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note that the Market Access Update is released monthly and available for all CRaFT full report purchasers.

Updated as of Month X



*TTI: Time to Initiation (in days); TTN: Time to Negotiate (in days)

**Time to Initiation was not collected since the file was not connected to a CADTH project number



Monthly pCPA Updates

pCPA ACTIVITY

pCPA ACTIVITY



Initiated 14 files
(Q3 2023: 15 files)



Completed 18 files
(Q3 2023: 14 files)



Closed 3 files
(Q3 2023: 5 files)



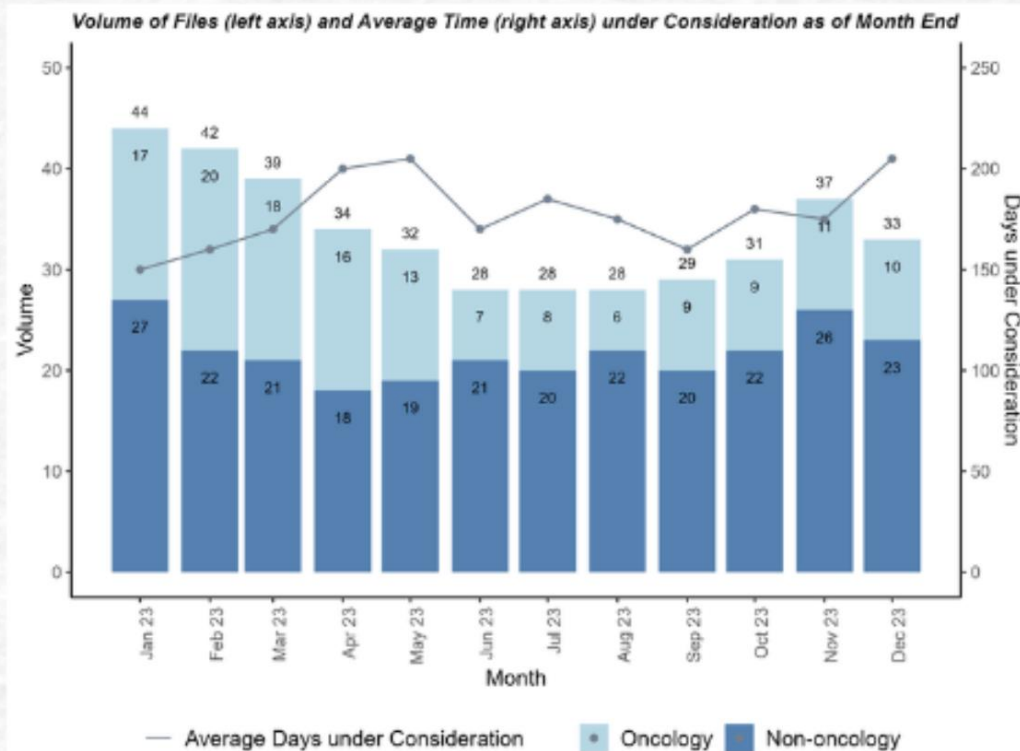
Declined 1 file
(Q3 2023: 1 file)

Note that the pCPA Update is released monthly and available for all CRaFT full report purchasers.



Updated as of Month X

FILES UNDER CONSIDERATION



Insights

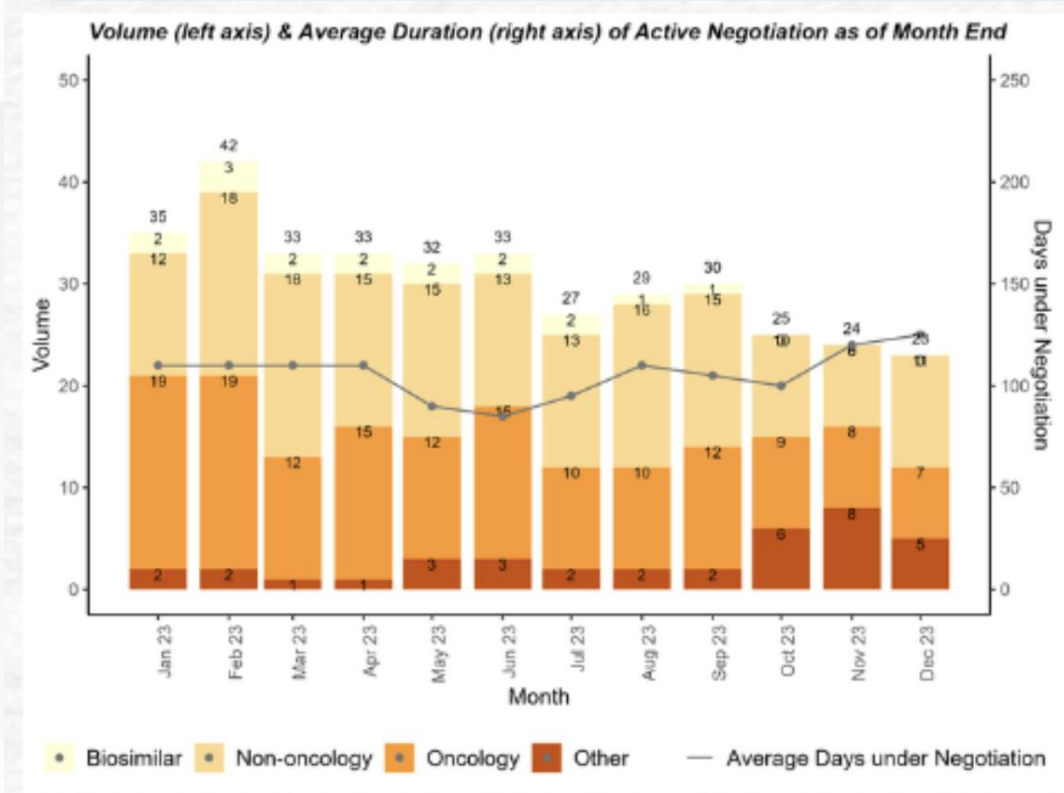
- CADTH issued 11 positive and 1 'Do Not Reimburse' recommendations in Q4 2023. 7 recommendations were non-oncology and 5 were oncology.
- The volume of files under consideration was steady throughout Q4, slightly higher than the volumes seen in Q3.
- The average days under consideration increased slightly in Q4, bringing the average for year 2023 to 177 days.
- pCPA initiated 4 non-oncology files and 3 oncology files in Q4, while also initiating 7 files that did not follow a specific CADTH recommendation.

Note that the pCPA Update is released monthly and available for all CRaFT full report purchasers.



Updated as of Month X

FILES UNDER NEGOTIATION



Insights

- The volume of files under negotiation at pCPA was lower in Q4 compared to the rest of the year.
- The volume of oncology files under negotiation was slightly lower than non-oncology files throughout Q4.
- The average days under negotiation in Q4 2024 was 115 days, bringing the annual average for 2024 to 105 days.

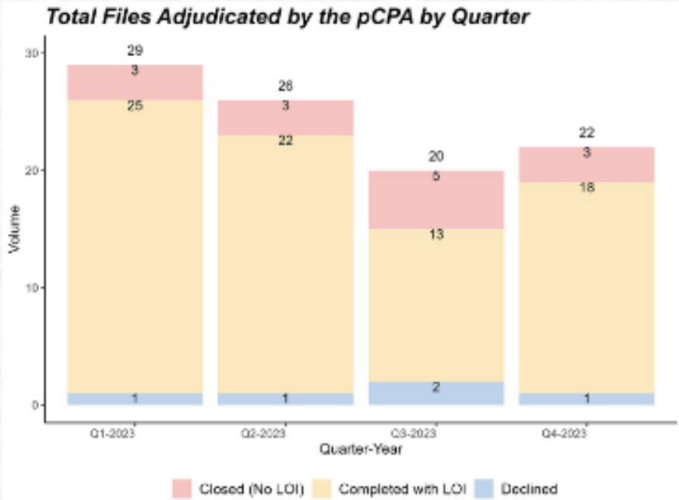
Note that the pCPA Update is released monthly and available for all CRAFT full report purchasers.



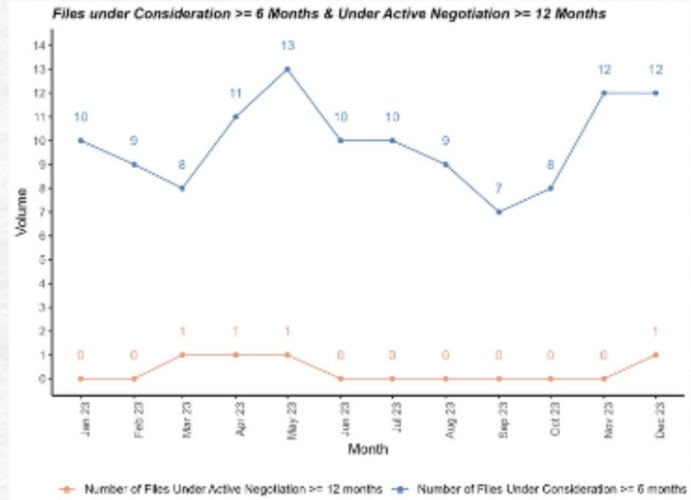
Updated as of Month X

pCPA CAPACITY

Volume of Processed Files



Long Term Files



Insights

- pCPA completed 18 negotiations (6 oncology, 7 non-oncology, and 5 "other") with LOIs in Q4 2023, closed 3 negotiations (2 oncology and 1 non-oncology) without LOIs, and declined to negotiate 1 oncology file.
- 2 of the files that closed, Rybrevant and Ferriprox, had a positive CADTH recommendation.
- The file that was not negotiated, Atriance, had a positive HTA recommendation. Note that the Atriance file was a clinician submission for a generic product.
- The number of files under consideration for more than 6 months increased over the quarter from 8 to 12. 1 file, Poteligeo, had been under negotiation for more than 1 year at the end of 2023.

Note that the pCPA Update is released monthly and available for all CRaFT full report purchasers.



Updated as of Month X

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