

From Novelty to Necessity: Prescription Delivery Solutions Today

ScriptDrop Industry Status Report, October 2023

Executive Summary

In order to investigate the patient experience of prescription delivery and the solution's increasing importance to the healthcare industry, ScriptDrop conducted two patient surveys in Q2 and Q3 2023. The findings confirmed our beliefs that home prescription delivery is beneficial, namely by supporting medication adherence, by providing medication access to patients who lack other means of acquiring prescriptions, and by helping patients start therapy more quickly than they would with a traditional mail-order pharmacy.

Currently, delivery is conducted by a range of providers, including prescription delivery technology companies like ScriptDrop. While the details of prescription delivery solutions vary greatly from business to business, we believe that it is now accepted as an essential element of any pharmacy service. Furthermore, this acceptance of delivery appears to be a bellwether for the industry's overall acceptance of technology and innovation.

Welcome to ScriptDrop's 2023 Industry Report

Newsflash: patients' needs and expectations have evolved since 2020. Thanks to the overwhelming push towards digital and delivery experiences during COVID-19, patients have learned that it's possible to get what they need, when they want it, with a minimum of fuss - even when it's something as complex as healthcare. As a result, omnichannel, consumer-focused strategies are becoming the norm for the entire healthcare industry.¹

In the past year, we've seen major mass retailers like Walmart, grocery chains like Kroger, pharmacy chains like CVS, and disruptors like the Mark Cuban Cost Plus Drug Company expand their pharmacy operations to be increasingly omnichannel in strategy. This move isn't a surprise. But even as solutions like same-day prescription delivery become commonplace, many retailers have begun to shift the cost of delivery back to the patient. Pharmacy margins have been thin for a long time, and will remain so for the foreseeable future.

For this reason, all healthcare stakeholders need a clear understanding of the challenges patients face in accessing their medications, how they perceive solutions like mail-order pharmacies and same-day delivery, and what they expect from these solutions.

So this year, we examined two elements in particular:

1. The patient experience of prescription delivery.
2. The current state of prescription delivery in the United States.

To understand the former, ScriptDrop conducted two anonymous surveys of American adults who take prescription medications. These surveys examined patients' pharmacy habits and measured their sentiment towards access and adherence solutions. Selected data from these surveys is visualized in the following infographic.

Home Prescription Delivery:

Delivery of prescriptions from the pharmacy to the patient's address, usually the same day or next day. Delivery is conducted by local couriers, pharmacy contractors, rideshare drivers, etc.

Digital Pharmacy:

Pharmacies with an online presence and ordering system but few or no physical locations. Generally, prescriptions are shipped to the patient's address, but same-day delivery may be available in specific regions.

Mail-Order Pharmacy:

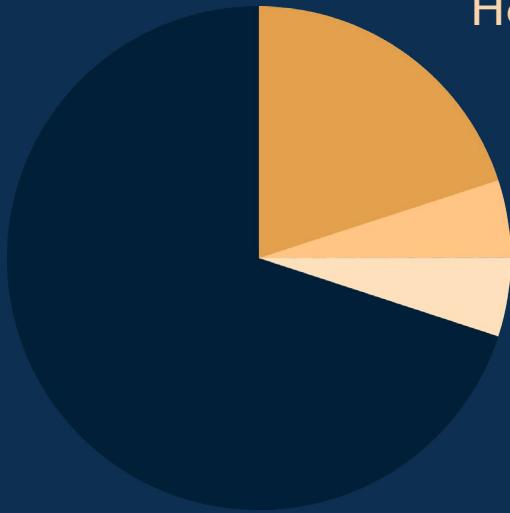
Closed-door pharmacies or central-fill pharmacies, many of which are owned by pharmacy benefit managers, which ship prescriptions to the patient's address.



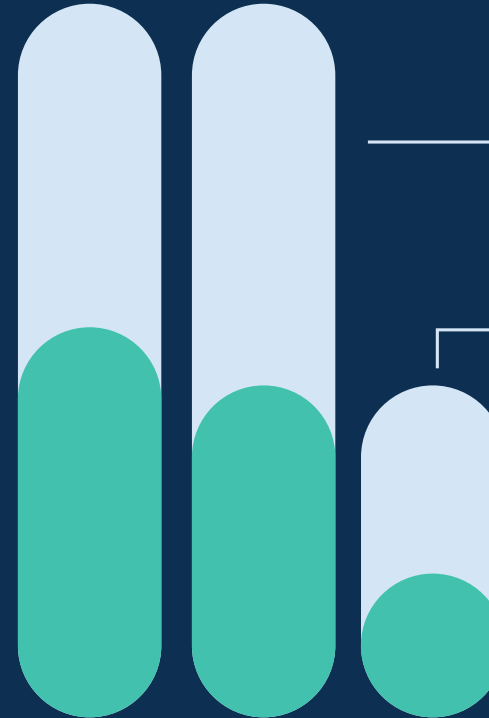
2003-2023

In 2003, the World Health Organization (WHO) reported that **20-30%** of prescriptions are never filled. ²

Even now, two decades later, our data supports that.



Of patients surveyed:



38%

stopped taking a medication that a doctor recommended they continue taking

31%

failed to start a new therapy that was prescribed to them

10%

of these patients who failed to start a new therapy did so because they forgot to pick it up at the pharmacy

Patients Need and Want Home Delivery

Home prescription delivery supports medication adherence

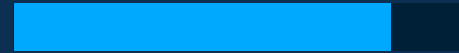
Patients believe delivery is valuable

We know that a significant portion of Americans skip healthcare services or delay filling medications due to cost.³

35%

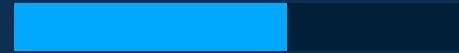
of patients who prefer to go in person to the pharmacy say that they haven't tried delivery because they're concerned about the cost.

Had not tried home prescription delivery:



78% of these respondents valued delivery in any form as worth no more than \$5

Had tried home prescription delivery:



57% of patients valued on-demand delivery within 2 hours as worth up to \$20



27% valued 2-hour delivery as worth more than \$20

Patients who currently use some form of delivery depend on it for **reliable, consistent access** to their medications



42% of patients who use home delivery can't get to the pharmacy otherwise

68% of these patients who couldn't get to the pharmacy also lack reliable transportation

But our survey found that patients who have tried prescription delivery understand its value. They intuit, as with other delivery models, that faster delivery will cost more.



After being notified that their prescription is ready, 95% of patients said up to 3 days elapse before they pick it up, potentially delaying their therapy.



POTENTIAL
3 DAY
DELAY

95%

But approximately 30% of patients who use home delivery said that receiving their medications at home positively impacted their medication adherence.

Patients want a faster delivery experience

Over **50%** of patients who currently use mail-order pharmacies report that it can take up to 7 business days to receive their medications.

Comparatively, **77%** of patients who use home delivery report that it takes no more than 2 business days to receive their medications.

The Impact of Prescription Delivery

Home Delivery Benefits Patients

Barrier	Obstacle to Patient	Patient Pickup	Same-Day Delivery	Mail Order
Location	Lack of transportation	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Pharmacy desert; pharmacy too far away	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Condition	Post-discharge from hospital	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	Acutely contagious, symptomatic	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
	Immunocompromised	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Homebound	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Chronic illness	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Time	Inconvenient pharmacy hours	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Other responsibilities (work, school)	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Social Environment	Disease stigma	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
	Caregiving	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Cost	Unable to pay for 90-day fill	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Convenience	Wants choice of home delivery or pickup	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

In 2020, 13% of adults 70+ years old were homebound.⁴ Delivery reduces their chances of prescription abandonment.

Patients with chronic illnesses, like diabetes, generally have better adherence to therapy with home delivery.⁸

Over 38 million Americans provide unpaid care to a family member or non-relative, often spending between 23 and 37 hours per week on caregiving duties.⁷ Delivery can reduce their care burden.

In addition to improving patients' health outcomes, **delivery also offers benefits to the businesses that invest in it.**

Pharmaceutical Manufacturers

- Delivery can be part of a launch strategy, especially for brands seeking support services for patients who can benefit from home delivery
- Compliments brand adherence strategies by reducing prescription abandonment in the retail environment and protecting investments into other access solutions
- Can simplify clinical trials by sending medication directly to trial members

Pharmacies

- Reduces prescription abandonment, which can improve adherence and reduce return-to-stock
- Improve patient experience, which can reduce loss of customers to competitors

Health Systems and Hospitals

- Gives providers the power to set up delivery at the point of prescribing, reducing uncertainty about the patient's medication access
- Can reduce hospital readmissions by ensuring patients get their medications upon discharge, ultimately improving CMS Star Ratings

Payors

- Improves medication adherence and reduces rehospitalization, which reduces healthcare spend and boosts CMS Star Ratings

Changes in the Prescription Delivery Landscape

At the beginning of the COVID-19 pandemic, digital pharmacies and telehealth platforms that offered home prescription delivery were lauded as one-stop-shops for patients in need of discreet, efficient healthcare. By now, many of those delivery providers have gone by the wayside. Don't be mistaken: these losses represent a sort of natural selection in the prescription delivery space rather than an indictment of the solution. The fact that so many delivery solutions continue to thrive and grow demonstrates that prescription delivery has been embraced as a need-to-have service.

Nevertheless, there are lessons to be learned from the delivery providers who did not survive. For example, The Pill Club, a women's health telehealth platform, allegedly billed Medi-Cal for services not rendered and dispensed large quantities of costly products to beneficiaries who did not request them. Within a few months, the company had paid a \$15 million settlement to Medi-Cal, filed for Chapter 11 bankruptcy, transferred their patient files to Nurx, and dissolved altogether.

Cerebral, a mental health telehealth solution, is on a downward trajectory after being accused of poor prescribing practices, especially for controlled drugs like Adderall. Meanwhile, several highly-advertised digital pharmacies ceased operations after spending more than they could afford.^{5,6}

December 9, 2022
Medly pharmacy paid a \$10 million settlement to their investors, then filed for Chapter 11 bankruptcy.

March 27, 2023
GeniusRx pharmacy's patient services were taken over by their fulfillment partner, HealthWarehouse.com pharmacy.

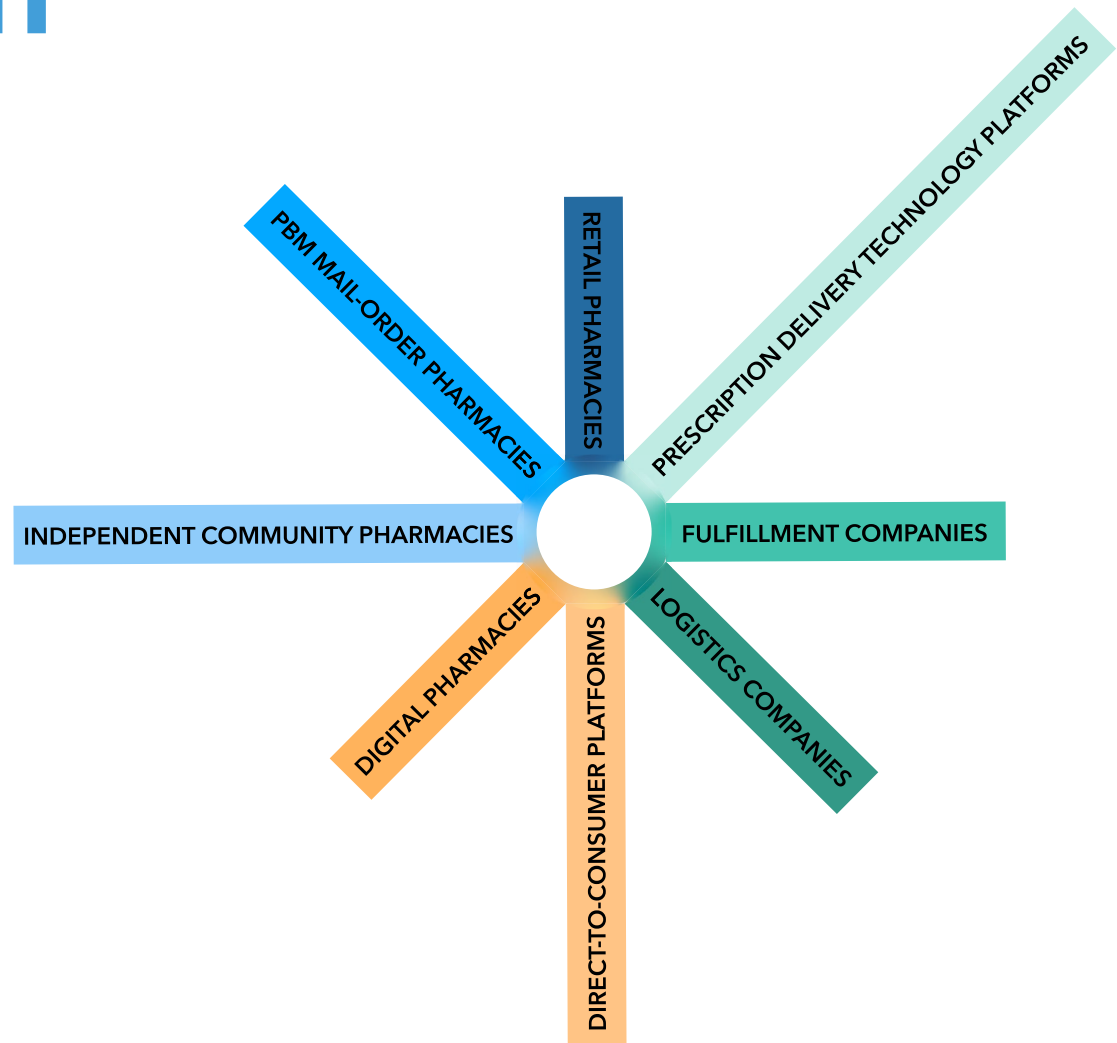
November 30, 2022
NowRx pharmacy sold their patient files to Alto pharmacy (California customers) and Capsule pharmacy (Arizona customers). The company has since dissolved.

February 10, 2023
Medly pharmacy announced they would be selling their assets to Walgreens for \$19.35 million.

Prescription Delivery Today

The following list is not comprehensive, but is meant to represent the scope of prescription delivery options currently active in the United States.

We've divided these into categories to avoid comparing apples and oranges.



Delivery solution essentials |

Ease of use

Multiple service levels

Ability to scale service up or down as needed

Security and privacy

Responsive, reliable customer support

On-time delivery

Large service areas and flexible delivery network

PBM MAIL - ORDER PHARMACIES

What are they?

The country's biggest pharmacy benefit managers (PBMs) offer prescription delivery through mail-order pharmacies that they themselves own. In some cases, patients must use mail-order to gain access to reduced prices, 90-day supplies, and automatic refills. Specialty medications are also usually dispensed only through mail-order specialty pharmacies.

Why they're notable:

PBM pharmacies can only be used by patients who are members of that PBM. In general, while they do support long-term adherence, mail-order pharmacies tend to be fairly inflexible. Patients may become frustrated when attempting to change prescription dosages, track shipments, or cancel orders for medications they no longer need.⁹

Optum Rx[®]



caremark[®]

Delivery Snapshot: [OptumRx](#)

Only available to members of insurance plans that use OptumRx as their PBM (e.g. UnitedHealthcare plans), OptumRx mail-order pharmacy offers free nationwide shipping of most prescriptions. While OptumRx will ship refrigerated medications like insulin, Schedule II controlled drugs like Adderall, and medical supplies (with a prescription), specialty medications are supplied by a separate mail-order pharmacy, Optum Specialty.

Medications ship 7-10 days after a prescription is received. Patients may pay an additional fee to upgrade to 2-day or next-day shipping.

RETAIL PHARMACIES

What are they?

Owned by major pharmacy companies, grocers, or mass retailers, nationwide or regional pharmacy chains have hundreds or thousands of locations. On average, across all companies, each retail store location dispenses approximately 138,000 prescriptions per year.¹⁰

Why they're notable:

Chains are extremely prevalent in urban and suburban areas. However, their national footprint has shrunk in recent years as companies like CVS and Walgreens have closed locations in exchange for expanding in-store healthcare services and omnichannel solutions.

Delivery Snapshot: [CVS](#)

CVS is a massive, nationwide chain, but not all patients can use their delivery solution. For example, prescriptions paid through Medicare Part B and most Medicaid plans are not eligible for delivery. Specialty medications are supplied by the mail-order CVS Specialty Pharmacy.

Eligible prescriptions can be:

- Shipped via ground and air carriers in 1-2 days, which is free for CVS CarePass members and \$4.99 for non-members.
- Delivered same-day by Shipt, which is free for CVS CarePass members and \$7.99 for non-members.

The Walgreens logo is written in a red, cursive script font.The Kroger logo features the word "Kroger" in a blue, sans-serif font with a stylized blue arch above the letter "o".The Costco Wholesale logo consists of the word "COSTCO" in a bold, red, sans-serif font above the word "WHOLESALE" in a blue, sans-serif font, with three horizontal blue lines underneath.

INDEPENDENT COMMUNITY PHARMACIES

What are they?

Independent or community pharmacies are owned by an individual or group and serve a specific community. On average, each independent pharmacy location dispenses approximately 63,228 prescriptions per year.¹¹ Included in this category would be pharmacies that have joined organizations like Health Mart and Good Neighbor Pharmacies. Pharmacies that become part of these networks remain independent, but gain support from affiliations with larger companies that help them compete against bigger chains.

Why they're notable:

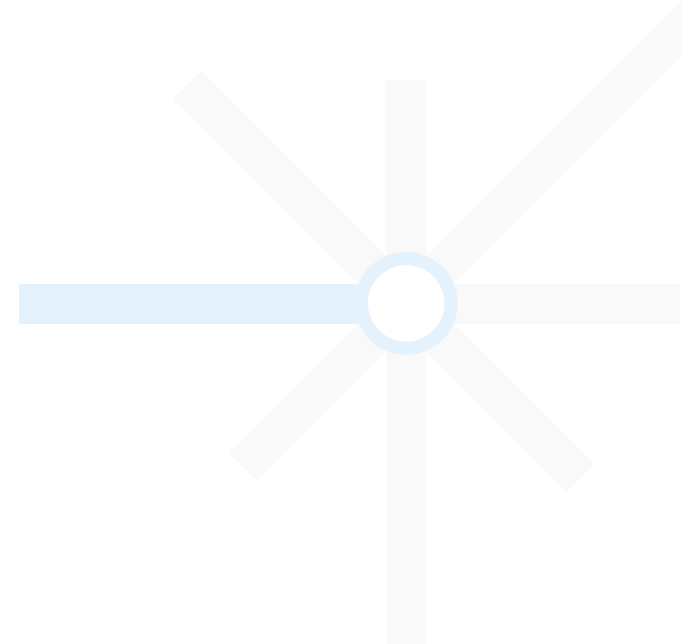
Independently-owned pharmacies have offered home delivery for generations to better serve their communities. While smaller stores may rely on an in-house driver (or even a pharmacy tech, in a pinch) to conduct deliveries, others choose to partner with technology companies that can handle the logistics of delivery and offer a smoother, in-workflow experience for staff.

Delivery Snapshot: [Blueberry Pharmacy](#)

Founded and run by Dr. Kyle McCormick, Blueberry Pharmacy has received national attention for its transparent pricing. Blueberry Pharmacy does not accept insurance, allowing them to offer lower prices overall.

While Blueberry Pharmacy is based outside of Pittsburgh, Pennsylvania and primarily serves that community, the pharmacy also offers a membership program that ships medications to patients on a quarterly basis.

As of June 2022, approximately
20,000
independent pharmacies were
operating nationwide.¹¹



DIGITAL PHARMACIES

What are they?

Pharmacies that conduct business almost entirely online. Some of these pharmacies contract with fulfillment companies to dispense medications, while others handle the pharmacy processes themselves.

Why they're notable:

Digital pharmacies have existed for many years, but they were largely ignored until COVID-19 drove patients into lockdown. Digital pharmacies, with their built-in online shopping platforms and delivery options, were well-positioned to meet patients' needs. Even with the proliferation of the COVID-19 vaccine, many patients still appreciate the convenience of ordering medications online.

Delivery Snapshot: [Alto](#)

Alto has found their niche. They offer the convenience of free same-day delivery, the potential to save money on prescriptions, and availability in high-density urban areas. Compared to other digital pharmacies, Alto's footprint is fairly small, covering NYC and a few big cities on the West Coast and in Texas. While that limits their overall impact, it does allow them to employ their own couriers and offer fast local delivery instead of shipping. Alto will deliver specialty and over-the-counter medications, but not refrigerated or Schedule II drugs.

Alto also provides prescription transparency through Alto Connect. Alto Connect is their clinician app that makes it easy for the pharmacy and providers to communicate about a patient's coverage, prior authorizations, and refills.



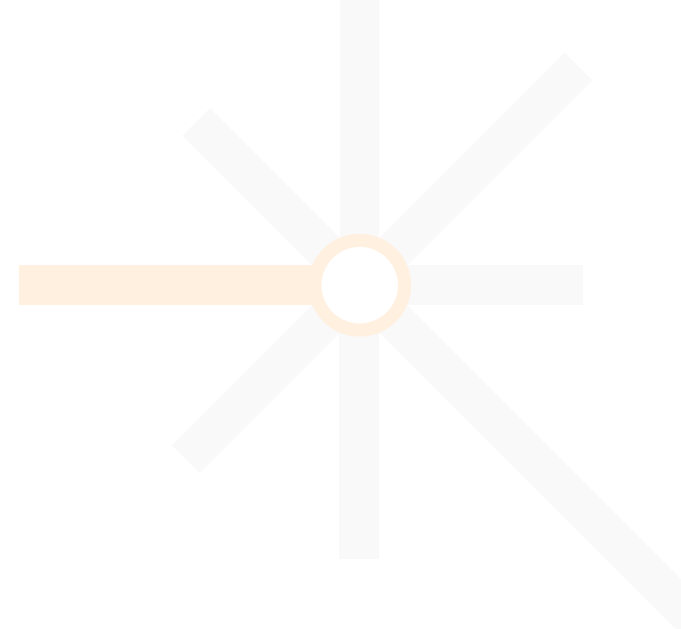
DIRECT - TO - CONSUMER PLATFORMS

What are they?

DTC platforms typically combine telehealth services, digital pharmacy services, and prescription delivery. In most cases, they rely on a fulfillment partner to dispense and deliver the medications that DTC providers prescribe.

Why they're notable:

DTC platforms are not full-service pharmacies. They offer a very small number of medications and cater to patients with specific illnesses and conditions. Nevertheless, due to their perception as “more discreet,” they remain a popular way of receiving care and therapy for hair loss, skin conditions, sexual or reproductive conditions, and weight loss.



ro
THIRTY MADISON
hims & hers

Delivery Snapshot: [Folx](#)

FOLX specializes in sexual health, gender-affirming care, mental health, and even some primary care services for the LGBTQ+ community. Patients pay \$39.99 a month for a membership that grants access to telehealth visits, community groups, peer support, and the company's referral network. Visits and medications cost extra, but FOLX accepts several insurance plans and offers transparent pricing to patients who pay out-of-pocket for services and prescriptions. FOLX's partner pharmacies (Capsule and an unnamed pharmacy) include shipping, fees, and supplies (e.g. injection supplies) in the price of their medications. The standard delivery is two-day FedEx shipping, but medications can also be picked up at local pharmacies or transferred to Capsule, if available, for local delivery.

LOGISTICS COMPANIES

What are they?

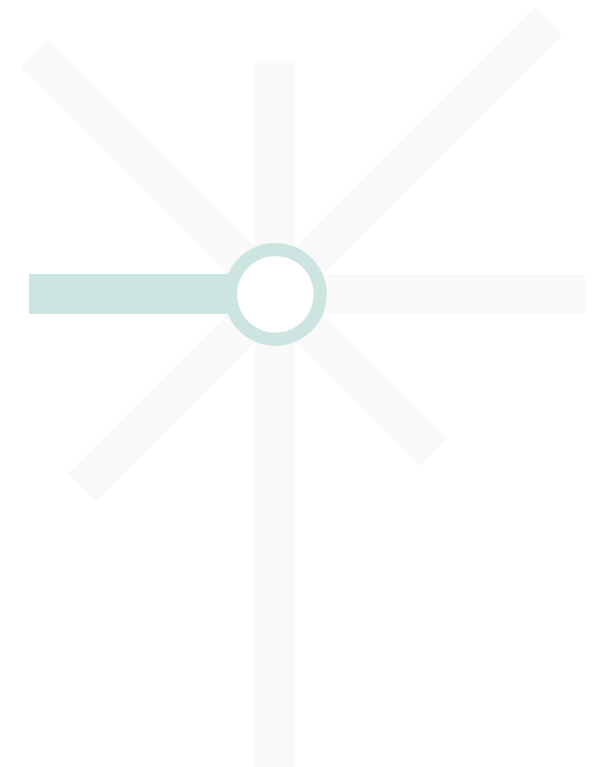
Third-party logistics companies focus purely on moving products from one place to another. They may also be called “last-mile delivery,” “custom courier services,” etc. Typically these companies only work with other businesses. Drone delivery companies such as Zipline or Wing can also be included in this category. Some companies specifically serve the medical industry; very few specialize in prescription delivery.

Why they’re notable:

Many logistics companies work with the pharmacy and medical industries to provide prescription delivery, transportation of lab samples, etc. However, since these companies focus on logistics over anything else, they generally cannot integrate with industry-specific software, like pharmacy systems, and lack the levels of privacy required to transmit that kind of data.

Delivery Snapshot: [Roadie](#)

Roadie, a crowd-sourced delivery platform, offers fast delivery of “just about anything,” anywhere in the country. Roadie’s options are remarkably robust, offering STAT, same-day, and next-day delivery, as well as returns – a key element for prescription delivery, as undelivered medications must be returned to the pharmacy.



FULFILLMENT COMPANIES

What are they?

These companies are the “wizard behind the curtain” for telehealth providers, DTC platforms, pharmaceutical manufacturers, and digital pharmacies like the Mark Cuban Cost Plus Drug Company.

Why they’re notable:

These companies conduct pharmacy services on behalf of their partners. By combining unique digital infrastructure with pharmacy processes, logistics, data collection, and delivery, these companies have made many healthcare startups possible. Notably, their solutions are generally “white-labeled,” so their clients’ patients may not even be aware the fulfillment company exists.

Delivery Snapshot: [Phil](#)

Phil didn’t begin life in pharmaceutical fulfillment. In fact, as of 2017, they were called “Phil Rx” and looked much more like a prescription delivery technology platform (see next page). Now, they support life science companies at strategic points in the life cycle of a pharmaceutical brand. They accept e-prescriptions from providers, fulfill the prescriptions, and ship them to patients. While available nationwide, shipping is their only service level.



PRESCRIPTION DELIVERY TECHNOLOGY PLATFORMS

What are they?

Neither pharmacy nor logistics company, these technology platforms focus on one of the trickiest parts of the prescription delivery journey: the last-mile(s) from the pharmacy counter to the patient's front door. By closing this gap, prescription delivery technology companies can help reduce prescription abandonment and poor medication adherence.

Typically, these companies are software-as-a-service (SaaS) based, designing proprietary software that pharmacies can use to easily queue up deliveries, choose service levels, assign couriers, and keep track of delivery details for audit purposes.

Why they're notable:

Prescription delivery technology platforms help pharmacies with the logistics of delivery, but unlike pure logistics companies, these platforms have the healthcare and pharmacy experience to provide streamlined, smart solutions for their clients.

BLINK HEALTH

 **Nimble**

 **scriptdrop**

Delivery Snapshot: [ScriptDrop](#)

ScriptDrop is a connector between healthcare stakeholders and patients. Pharmacy- and payor-agnostic, ScriptDrop helps pharmacies of any size, health systems, PBMs, pharmaceutical manufacturers, and other healthcare entities give patients access to their medications. Their proprietary software is already integrated with most major pharmacy systems and their flexible solutions allow clients to choose from multiple service levels, set the price of delivery, and even target specific patient populations. Their courier-agnostic network is particularly robust, allowing clients to deliver prescriptions in all 50 states - and not just in densely-populated urban centers.

A Look to the Future

As we've mentioned in previous years' reports, prescription delivery isn't a new concept. Independent pharmacies have offered home delivery for generations. However, since COVID-19 it has become such an integral part of the pharmacy experience that it is becoming increasingly difficult to describe it as separate from other patient-focused care solutions.

But now that we've demonstrated that patients want prescription delivery, either for access or convenience reasons, and we've shown the breadth and depth of delivery solutions across the industry, where does that leave us? What does it all mean for healthcare's future?

We're taking it as a sign. In accepting prescription delivery as a necessity, the industry is demonstrating its willingness to absorb innovations that work.

To put it metaphorically, the industry is sitting not at a fork in the road, but at a river delta. Behind us is the long waterway that led us to healthcare's current state. Ahead of us lies a whole sea of possibilities.

After all, despite investments in health tech remaining low, healthcare innovation hasn't let up.¹² Consumer-focused strategies and the influence of high-profile innovators like the Mark Cuban Cost Plus Drug Company are actively changing how insurers design benefits.¹³ Emerging technology, like generative AI, is opening up new possibilities for providers. Patients' ever-increasing level of connectivity through smart devices offers new opportunities to remotely monitor patients, deliver customized patient education, and so much more.

American healthcare is complicated. But complex problems require complex solutions. Together with our health tech colleagues, ScriptDrop is working to improve patients' long-term outcomes. We believe the future is bright. Come sail with us.

Advisory Council



Rear Admiral Pamela Schweitzer

Rear Admiral Pamela Schweitzer served as Assistant Surgeon General and Chief Professional Officer of Pharmacy for the United States Public Health Service. While she has retired from these positions, previous assignments include the Indian Health Service, Veterans' Administration, and the Centers for Medicare and Medicaid Services. A well-known leader in the pharmacy field, Pamela remains active in all things healthcare.



Lee Ann Stember

Lee Ann Stember is President & CEO of the National Council for Prescription Drug Programs (NCPDP) and has led the organization for 40 years. Her work with NCPDP continues to push the pharmacy industry to embrace technology and standards that will improve patient health and safety.



Sloane Salzborg, MS

Sloane Salzborg is Vice President of Horizon Government Affairs, Executive Director of the Campaign for Transformative Therapies, and Vice President of the Council for Affordable Health Coverage. A constant presence on Capitol Hill, Sloane is passionate about using legislation to help patients get their medications easily and affordably.



George Lazenby

George Lazenby is the CEO and co-founder of OrderInsite, a pharmacy inventory software company. George is laser-focused on innovation that removes barriers to medication access and on delivering valuable, effective pharmacy solutions.

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