COVID-19 Weekly Trend Insights

Data Week Ending 9/18/2020
Compiled on 10/2/2020
Executive Summary

COVID-19 in the News & Latest Trends

- Since our last COVID-19 insight report on September 4th, global cases have increased by 12%. Global recovered cases have increased by 15%. The United States is still observing large increases in cases in southern & mid-western states. Wisconsin observed an increase of roughly 28% since the last report, but does not yet fall within the top 10.
- The PRA RWE COVID tracking data shows 56% of the diagnosed patients are 50 years or older. In most recent weeks, patients under 30 make up 30% of the diagnosed population. As mean patient age declined, patients with overall lesser risk factors made up higher proportions of Covid-19 diagnosed patients. There were less severe symptoms and care is being managed in outpatient locations.
- Azithromycin and dexamethasone continue to be the most common treatments. However when looking at possible treatments after diagnosis, PRA observed use of apixaban (13%) and rivaroxaban (4%).

Deep Dive Analysis

- Our analysis this week takes a regional and age based view of the COVID-19 Pandemic impact on Elective Procedure Volume, Adoption of Telemedicine, and Prescription Volumes
- Elective procedure volumes are off substantially in most states compared to 2019 with the exception of the Mountain West where rates have increased over the previous year. The rate of decline and recovery for specific procedures is largely tied to the extent to which they can be deferred with Cataract Surgery dropping to just 2% of previous year volumes, whereas Mastectomy and prostatectomy dropped by only 35% in April. Hip and Knee Replacement's bounced back most significantly with volume now reporting at 119% of 2019 levels.
- Younger patients resumed elective procedures slightly faster than older patients, except with select procedures such as Cystoscopies where older patient volumes rapidly rose to near pre-COVID levels
- The Mid-Atlantic region had the greatest uptick in the use of telemedicine followed by New England and West South Central. Populations 65+ adopted Telemedicine at a higher rate than younger populations. Office Visits have been most severely impacted in the Pediatric patient population with rates of only 20% of 2019 volume during the height of the pandemic and now seeing a modest recovery to 40% of 2019 levels.

Health Checks

- Telemedicine and Office visit trends are stable WoW from our last report. With office visit volume continuing to rebound and telemedicine visit volume significantly above 2019 but have leveled off week over week since their peak in April
- NATIONAL TRENDS: Reporting thresholds were higher than anticipated with week ending 9/18/2020. Total prescription counts were just -2% under 2019 volumes compared to a -4% average difference in the weeks leading up to Labor Day weekend.
- Looking at Channel usage differences by Patient Age, Pediatric and Long Term Care patients saw the greatest shifts in Prescription Volumes
- Mail Order continues to trend above prior year thresholds while Retail stores are just shy of regular reporting volumes
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COVID-19: Current Events & Latest Trends
Timeline: Latest COVID-19 Developments

- **Sep 21st**
  - The U.S. Centers for Disease Control and Prevention has warned that COVID-19 could spread through airborne particles that can remain suspended in the air and travel beyond six feet.
  - Studies have shown that the new coronavirus could spread through aerosols in the air, and the World Health Organization has said it is monitoring “emerging evidence” of possible airborne transmission.

- **Sep 28th**
  - Blue Cross and Blue Shield of North Carolina will offer $200 million in health and wellness retail cards to more than 600,000 eligible members to assist with their social needs during the pandemic.
  - The cards will be made available to people under the age of 65 enrolled in fully insured employer plans. The cards are set to be dispersed between Oct. 19 and Nov. 7, and will be valued between $100 and $500 depending on the members’ plan design.

- **Sep 18th**
  - Europe’s healthcare regulator has endorsed the use of dexamethasone to treat COVID-19 patients with breathing difficulties, paving the way for the steroid to become the region’s second approved treatment for the respiratory illness.

- **Sep 28th**
  - The coronavirus pandemic has now killed at least 1 million people worldwide according to a tally maintained by Johns Hopkins University. This sobering milestone was reached just nine months after the first reported fatality in China last January. Public health experts believe the actual toll – the recorded deaths plus the unrecorded deaths – is much higher.

- **Sep 30th**
  - Oxford University will study whether the world’s best-selling prescription medicine Humira (adalimumab) is an effective treatment for Covid-19 patients in the latest effort to repurpose existing drugs as potential coronavirus therapies.

Sources:
Global cases continue to rise as COVID-19 cases surge due to increased testing & lifting of social distancing guidelines. Six countries (Argentina, Brazil, France, India, Spain, and US) have observed an increase of over 100,000 new cases in the last two weeks.

Since our last COVID-19 insight report on September 18th, global cases have increased by approximately 3.66 million or 12%.

Global recovered cases reached over 23.7 million, increasing by 15%.

Global deaths have passed 1 million as of 9/28/2020.

Confirmed Cases
33,868,564

Deaths
1,009,420

Recovered
23,700,368
COVID-19 INSIGHTS

Confirmed Cases in the USA

- The United States is still observing large increases in cases in southern & mid-western states. Wisconsin observed an increase of roughly 28% since the last report, but does not yet fall within the top 10.

- Three southern states (North Carolina, Tennessee, and Texas) all observed an increase of 10% or more in confirmed cases.

<table>
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<th>State/Territory</th>
<th>Tests</th>
<th>Test % Change</th>
<th>Confirmed Cases</th>
<th>Case % Change</th>
<th>Deaths</th>
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<td>Arizona</td>
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Through patient activity observed for diagnosis, testing, exposure or symptoms of Covid-19 infection, Symphony/PRA is now tracking about 15.2 million patients overall for our Research and Analysis, with 1.52 million diagnosed patients in its US real world data during the time period Feb 2 to Sep 24, 2020. Patients could be reported in multiple status categories based on claims captured and mapped to status.

**COVID-19 INCEPTIVE PATIENT DEMOGRAPHICS BY SEGMENT**

- **15,245,325 UNIQUE PATIENTS**
  - Patients with COVID-19 claims Feb 02, 2020 - Sep 24, 2020

- **1,520,777** Diagnosed
- **11,961,901** Tested (COVID-19)
- **9,854,251** Exposed
- **269,485** Tested (COVID-19 complications)

**NEW PATIENTS BY FIRST DIAGNOSIS OR TEST DATE**

- Total new patients: 10,000,000

Symphony Health
A PRA Health Sciences Company
PRA is tracking 153,083 Covid-19 patients during the most recent 4-week time period of August 30 to September 26, 2020.

Amongst the Covid-19 diagnosed patients:

- 56% of the diagnosed patients are 50 years or older.
- Median age is 53.
- 17% of the diagnosed patients had at least one record of inpatient care for their diagnosis.
Amongst the most common locations of care for Covid-19 diagnosed patients, patients seen in inpatient hospital setting are almost 20 years older than patients seen through outpatient, office, and telehealth.

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes
Observed Treatments Within +/- 30 Days of COVID-19 Diagnosis

PRA evaluated Covid-19 diagnosed patients for observed treatments within a 30-day window of diagnosis. Over the most recent 4 weeks from August 23 - September 19, 28% of these patients had an observed steroid use.

Over the most recent 4 weeks from August 30 to September 26, 2020, 28% of Covid-19 diagnosed patients had an observed steroid use. The observed treatments by age within +/- 30 days of Covid-19 diagnosis for 39,377 patients are shown in the diagram.

Observed Treatments by Age within +/- 30 days of Covid-19 diagnosis

N= 39,377

AZITHROMYCIN (22%)  DEXAMETHASONE (16%)  ALBUTEROL (15%)  PREDNISONE (7%)

Covid-19 diagnosed patients within +/- 30 days of diagnosis

AZITHROMYCIN 22%
DEXAMETHASONE 16%
ALBUTEROL 15%
ONDANSETRON 12%
BENZONATATE 9%
SALINE 7%
PREDNISONE 7%
AMoxicillin 6%
CEFTRIAXONE 5%
DOXYCYCLINE 5%
KETOROLAC 5%
LOW OSMOLAR CONTRAST MATERIAL 6%
METHYLprednisolone 4%
PROMETHAZINE HCL 4%
ACETAMINOPHEN 4%
IBUPROFEN 3%
GUAINFENESIN 3%
APIXABAN 3%
HYDROCODONE 3%
FLUTICASONE 3%

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes.
Possible Treatments within 30 Days after COVID-19 Diagnosis

PRA evaluated Covid-19 diagnosed patients for possible treatments within a 30-day window after diagnosis. Azithromycin and dexamethasone continue to be the most common treatments. However, when looking at possible treatments after diagnosis, PRA observed use of apixaban (13%) and rivaroxaban (4%).

Possible Treatments by Age within 30 days after Covid-19 diagnosis
N= 6,469

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes.
What was the impact of changing patient demographics of Covid-19 diagnosed patients?

**Younger and less sick patients**

In most recent weeks, **patients under 30** make up 30% of the diagnosed population.

As mean patient age declined, patients with overall lesser risk factors made up higher proportions of Covid-19 diagnosed patients. There were less severe symptoms and **care was managed in outpatient locations**.

Post initial weeks, there have consistently been **more female patients diagnosed with Covid-19** than male patients. More female patients were diagnosed through telemedicine settings than male patients.

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**COVID-19 DIAGNOSED PATIENT AGE BY WEEK**

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes; Data Period Feb 4 - Sep 24, 2020
How have Covid-19 diagnosis and care locations changed?

Currently, more than 50% of Covid-19 patients are receiving diagnosis at outpatient and office settings.

Insights into Covid-19 diagnosis and care locations are key to knowing physicians, sites with the most insights into Covid-19 patients with different severity of illness, and potential enrollment in clinical trials.
The decrease in severe symptoms has enabled care of Covid-19 patients outside of hospitals

As mean patient age decreased, fewer Covid-19 diagnosed patients had respiratory failure, pneumonia, and sepsis over time than in the earliest months.

ACUTE DIAGNOSIS DISTRIBUTION WITHIN +/- 30 DAYS OF FIRST COVID-19 DIAGNOSIS
(% OF PATIENTS BY WEEK)

PRA US patient longitudinally linked medical and hospital claims data, raw patient volumes; Data Period Feb 4 - Sep 24, 2020
The decrease in more serious symptoms and acute diagnoses has enabled care of Covid-19 patients outside of hospitals.

As mean patient age decreased, fewer Covid-19 diagnosed patients had respiratory symptoms such as shortness of breath, chest pain, and respiratory distress over time than in the earliest months.
As mean patient age decreased, fewer Covid-19 diagnosed patients had chronic comorbid conditions over time than in the earliest months.
Deep Dive

COVID-19: Impacts by Region & Age

• Elective Procedures
• Telemedicine Adoption
• State Profiles
Elective procedure volumes are off substantially in most states compared to 2019 with the exception of the Mountain West where rates have increased over the previous year.

- During the height of the COVID pandemic when states were locked down, the number of elective procedures plummeted resulting in generally lower 2020 YTD volumes compared to the same months in 2019.
- The mountain west (Montana, Idaho, Utah, Nevada and Wyoming) saw little to no net impact, with Montana and Idaho up significantly from 2019 levels.
- Rates of elective surgeries in the northeast and other hotspot states (Arizona, Georgia and Florida) are down anywhere from 20-30% compared to 2019.
- One interesting outlier in the northeast is Vermont, which is almost on par with 2019 rates.

Select Procedures
- CABG
- Cataract Removal
- Cholecystectomy
- Cystoscopy
- Hip Replacement
- Hysterectomy
- Knee Replacement
- Mastectomy
- Prostatectomy

Calculated by dividing January – August 2020 patients with select elective surgeries by January – August 2019 patients.
The rate of decline and recovery for specific procedures is largely tied to the extent to which they can be deferred.

- Cataract surgery dropped to only 2% of 2019 levels in April, but has since largely recovered.
- Mastectomy and prostatectomy dropped the least (each down 35% in April), perhaps a reflection of the higher criticality of these procedures compared to cataract surgery.
- Hip and knee replacements snapped back the most, reaching 119% of 2019 levels for hip replacements by June and 116% of 2019 levels for knee replacements in August.
Elective procedures (Px) dropped precipitously in April, but had largely recovered to 2019 levels by July/August with a few exceptions.

- States begin to limit elective procedures.
- Mountain region Px remained near 2019 levels.
- All states severely curtailed elective procedures.
- Western states allowed more than other regions.
- Early signs of recovery across the nation.
- Mountain states snap back quickly (Montana).
- Widespread recovery.
- New York and New Jersey lagging behind.
- Retrenchment in Arizona, Texas and Florida as their COVID rates spike.
- Px recovery resumes across the nation.
- Arizona, Georgia and Arkansas lag behind.

Change from 2019: 10% - 100%

Calculated by dividing 2020 current month patients with select elective surgeries by patients in the same month of 2019.
• The differences in utilization rates by age group were minimal, ranging from 2-12 percentage points in July and August.

• All five procedures increased again in August, reaching levels at or above 2019 rates. Prostatectomies among patients 18-49 are the exception which remained at 88% compared to 2019 rates.

States hit by a spike in COVID infection rates during June/July did not pull back on procedures nearly as much as they had during the peak decline in April.
Younger patients resumed elective procedures slightly faster than older patients.

- Elective procedures for patients 65+ dropped further than those among patients 18-64 in all 50 states in April.
- Younger patients also resumed elective procedure more quickly by anywhere from 5 to 50 percentage points.
- The one notable exception is Montana, where the June rates for patients 65+ was 71 percentage points higher than the rate for patients 18-64.

In some cases, the older population was quicker to resume elective procedures.

- Compared to 2019, Cystoscopies in June among patients 65+ were equal to or greater than the rate for patients 18-64, especially in the mountain states as well as Nebraska and Kansas.

- The rate of cholecystectomies had little geographic variation, but, as expected, the drop among older patients was greater than that observed for younger patients.

- In general, the recovery to 2019 levels was slightly slower among the older populations (50+), although all age groups had returned to 2019 levels by June.

Calculated by dividing January – August 2020 patients with select elective surgeries by January – August 2019 patients.
Telemedicine Adoption By Census Region

- The Mid-Atlantic region had the greatest uptick in the use of telemedicine followed by New England and West South Central. West North Central was the slowest to adopt telemedicine.
- Office visits dropped the most in New England, Mid-Atlantic and East North Central regions.
- The East South Central region had a fairly typical drop in office visits during April, but rebounded to have the highest index by the end of August.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019).
Pediatric patients (0-17) and adult patients (18-64) adopted telemedicine at virtually identical rates, but far below the rate at which seniors (65+) utilized telemedicine.

For office visits, the age group most affected were pediatric patients. Office visits for this patient cohort were only 20% of 2019 rates in mid-April. While rates have recovered somewhat by July, they are still down by almost 40% compared to 2019.

Office visits by seniors, while initially down by 70%, has recovered to 2019 rates as of late August.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019).
State Profiles: The “Wild West” (Idaho, Montana and Utah) was a significant outlier compared to other regions.

- The “Wild West” was the least affected region during the pandemic (these states didn’t shut down as hard or as fast as others).
- Elective procedures did decline dramatically, but not nearly as much as in other regions.
- TRx volume declines followed the national average closely, but Utah and Idaho had slightly less of a decline than the nation.
- Idaho had a huge increase in telemedicine use, while Utah and Montana tracked well below the national average.
- All three states had significantly higher rates of office visits through most of the pandemic, although Idaho’s numbers fell in July and have tracked more closely to the national average since.
State Profiles: Northeast states (New York, New Jersey and Massachusetts) were the early epicenter of the pandemic with lingering effects.

- The shut down in New York, New Jersey and Massachusetts was swift and severe, virtually eliminating all elective procedures.

- Once these states started to reopen, their recovery to 2019 levels was more gradual than observed in other regions of the country.

- TRx volume declines followed the national average closely, but has continued to lag behind the national average significantly in all states (even more so in Massachusetts).

- Massachusetts adopted telemedicine at a much lower rate than New York and New Jersey in April, but now exceeds the rate of either state.

- Office visits in Massachusetts remain significantly below the national average while New York and New Jersey have seen a quicker recovery.
State Profiles: South and Southwest states (Arizona, Georgia and Texas) were the epicenter of the summer spikes.

- The states with significant spikes in COVID infections during June and July saw a less dramatic drop in elective procedures in April, but had a small setback during the height of their outbreaks in July.

- Elective procedures in Texas dropped the most among these three states, but also recovered the quickest.

- TRx volume for all three states closely track to the national average.

- Texas had the greatest adoption of telemedicine, but also showed the steepest decline in usage since May.

- Arizona maintained the highest relative rate of office visits during the height of the April shut down and consequently had the lowest adoption of telemedicine during that period.
General Market Pulse

Care Delivery Trends: Telemedicine & Office Visits

National / Channel Summaries & Elective Therapy Monitoring
Telemedicine Visits: Diagnosis

- While telemedicine visit remain WELL above 2019 levels, they have leveled off or declined from the COVID-19 peak for most diagnoses.

- Neoplasms and disease of the blood currently have the highest relative increase in use of telemedicine.

- With the exception of disease of the blood and mental/behavioral health, all diagnosis groups are down 60-80% from their peak in the week of May 1, but still many times their 2019 levels.

- Respiratory, genitourinary and infectious/parasitic diseases initially spiked, but since have return to pre-COVID levels.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

- An index of 1 means the current week has the same number of claims as the 12 week rolling average from 2019 (100% of 2019 volume).

- An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).

- An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).
Office Visits: Diagnosis

- Office visits have been gradually increasing from their lowest point during the week of March 27.
- As of the week of September 25th, office visits for infectious/parasitic disease, nervous system, respiratory and mental health still remain below 2019 levels.
- Visits for pregnancy and childbirth were the least affected diagnosis group.
- Diseases of the respiratory system and mental and behavioral health which bottomed out during the week of April 17th have improved but still remain +40% below 2019 levels.

Office Visits by Diagnosis

![Office Visits by Diagnosis](image)

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

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- An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).
- An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).
• Telemedicine use by provider specialty has leveled off or declined slightly since the peak in mid-April.

• Among cardiologists, the use of telemedicine peaked at 365 times 2019 levels, but has since declined to 100 times 2019 levels.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

- An index of 1 means the current week has the same number of claims as the 12 week rolling average from 2019 (100% of 2019 volume).
- An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).
- An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).
Office Visits: Specialty

- Office visits continue to increase from their low point in the week of March 27th for all specialties.
- Psychiatry office visits remain down by more than 60% compared to 2019 levels and show no signs of improvement.
- All other specialties, except Pediatrics, are at least 80% of 2019 levels.
- Pediatrics remains down by -33% compared to 2019 levels.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

- An index of 1 means the current week has the same number of claims as the 12 week rolling average from 2019 (100% of 2019 volume).
- An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).
- An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).
Visits: Payment Type

- Use of telemedicine for Medicaid patients initially increased by a factor of 57 of 2019 levels, but has declined to 30 times 2019 levels.
- Telemedicine use by Cash patients has fluctuated wildly.
- Use of telemedicine by Commercial and Medicare patients increased significantly but has declined since May, likely because mandates on reimbursement and waiving of fees was only temporary during the pandemic.
- Office visits for Cash patients remain down over 45% from 2019 levels. This may be due, at least in part, to increased unemployment.
- Office visits for all other payment types reached a low in the week of April 17th, down 60-80%. Since then, office visits for all payment types other than Cash have gradually increased, reaching 90-100% of 2019 levels as of the week of September 25th.

Index = Current Week divided by the 12 Week Rolling Average (from the same time period in 2019)

- An index of 1 means the current week has the same number of claims as the 12 week rolling average from 2019 (100% of 2019 volume).
- An index of 5 means there are 5 times as many claims in the current week as in the 12 week rolling average from 2019 (500% of 2019 volume).
- An index of 0.5 means the current week had 50% fewer claims than the 12 week rolling average from 2019 (50% of 2019 volume).
NATIONAL TRENDS: Reporting thresholds were higher than anticipated with week ending 9/18/2020. Total prescription counts were just -2% under 2019 volumes compared to a -4% average difference in the weeks leading up to Labor Day weekend.

Data: Week 38: September 18th, 2020
Projected Retail, Unprojected Mail Order, Projected LTC, All Other NRx/TRx Counts

Labor Day Holiday (week ending 9/11/2020)
NATIONAL TRENDS: Mail Order continues to trend above prior year thresholds while Retail stores are just shy of regular reporting volumes.

March 20th: Peak Week of COVID-19 Response

Data Week 38: September 18th, 2020
Projected Retail TRx Counts
Unprojected Mail Order TRx Counts
Pediatric and LTC patients had the greatest impacts to prescription volume during the pandemic.

**TRx by Patient Age**

Pediatric patients have the most significant decline, dropping by almost 40% by early May and still 20% or more below 2019 levels.

**TRx by Channel**

Long Term Care had the greatest decline in prescription volume while Mail Order has held at or near 2019 levels throughout the pandemic.

TRx volume for all products in the current week 2020 vs. the TRx volume from the same week in 2019.
ELECTIVE THERAPIES: Despite a positive recovery outlook at a national level with week ending 9/18/2020, recovery for key therapies remains stagnant.