



“Creating a culture of wellness at the workplace”[©]

Symbol CareClinic Executive Summary

Symbol CareClinic

Symbol CareClinics (SCC) provide primary care services to employees, spouses and dependents (ages 2 years-old and up) of employers that are self-funded on their health and prescription plans. These clinics also engage in comprehensive Disease Management (DM) that includes evaluation of previous claims data and ongoing coaching and plan-of-care management for the improvement of disease states. The presence of onsite clinics has seen a tremendous increase over the last several years and with the coming onset of the Affordable Care Act (ACA) it will be even more advantageous for self-funded employers to provide access to convenient and affordable care in order to continue to control the costs associated with their health plan.

Typically, the SCC incorporates all levels of Primary Care, Urgent Care, Preventative Medicine, Pre-Employment Screenings, Annual and New-Hire Physicals and many other services. All Preventative Medicine is practiced according to the standards established by the United States Preventive Service Task Force (<http://www.uspreventiveservicestaskforce.org/>). These services include, but are not limited to, the coordination or actual testing for gynecology, colon cancer, breast cancer, diabetes, hypertension and many other risk factors facing our population today and are provided primarily by a Physician Assistant (PA) in cooperation with a registered Medical Doctor (MD). Other staff members and providers include Medical Assistants (MA), Licensed Practical Nurses (LPN), Registered Nurses (RN), receptionists and MD's.

All Symbol CareClinics are based on the foundation of Wellness. With that in mind, depending upon the size of the clinic and the number of participants in the clinic, Symbol will provide additional wellness activities like Tobacco Cessation initiatives, Corporate Challenges and Lunch and Learns.

Disease Mangement is vital to the success of any wellness initiative, including Symbol CareClinics. Disease Management begins with a thorough evaluation of the medical and prescription claims data. This data is evaluated using the Johns Hopkins ACG model for predictive modeling and results in the triage of all participants into one of four categories. These four levels include the following:

- 1) Low Risk – No coaching required in order to comply with the program
- 2) Moderate Risk – Requires 2 to 4 coaching sessions per year
- 3) High Risk – Requires 4 to 6 coaching sessions per year
- 4) Severe Risk – Requires 6 to 12 coaching sessions per year

All coaching sessions are performed in the clinic by trained professionals including the PA's, RN's and others depending upon the severity of the individual.

At Symbol, all wellness programs start with an Initial Screening that includes biometric data and blood work. This data is incorporated into the claims data and an immediate result is provided to the participant so they are able to schedule their initial visit before leaving the screening.

Engagement Strategies are paramount to the success of any wellness program and the Symbol CareClinic is no exception. In order to be successful a wellness program must have effective engagement strategies that work. The success of all Symbol CareClinics is built on a Disease Management Program that is participation or results based and whereby the participants are incentivized to maintain compliance with the program in order to reach the maximum incentive level. In order to be compliant a participant must do two things: 1) Complete the Initial Screening, and 2) Complete all required coaching sessions based on the requirements established by the employer using the guidelines listed above.

Other forms of engagement strategies include free prescriptions dispensed through the clinic and zero co-pay for clinic visits. All medications dispensed through the clinic are done so according to the employers current plan design and formulary. The clinic does not dispense any controlled or brand medications with the exception of Insulin, which is typically only available as a brand medication.

All marketing efforts are coordinated and provide by Symbol. Since every employer is different it is imperative that a customized plan for effective communication be designed based on the specific needs of the customer and the employees. Examples of communication include postcards, emails, letters, posters and many others.

Contract Terms and Financial Arrangements are an important part of the relationship between Symbol and the employer. In order to provide a Symbol CareClinic with zero risk to the employer and zero upfront cost it is important to establish an effective relationship that works for both parties. Symbol asks for a three year commitment in order to offer the zero risk model with zero upfront cost. In return for that commitment from the employer Symbol will agree to hold the encounter rate for that same period without any increases. Billing is provided on a monthly basis. On or around the 5th of each month the employer will receive an invoice for the previous month and then an ACH draft will occur on or around the 10th of the month. The first month the employer will receive three invoices including screenings, visits (acute + coaching) and medications. Subsequent months will only have invoices for the visits and medications unless there are any make-up or new-hire screenings that take place after the Initial Screenings are performed.

For a snapshot of expected visits and potential ROI please see the attached Financial Summary or request one from your broker.

Customer Provides:

- Appropriate incentive design and implementation in conjunction with the launch of the Symbol CareClinic;
- Acceptable Clinic Location – land, office space, etc.;
- Acceptable phone, internet, water, trash and cleaning services;
- Access to medical data and sufficient time for Symbol to perform analytics (usually 6-8 weeks);
- Access to PBM data and sufficient time for Symbol to perform analytics (usually 2-4 weeks);
- Employee access to screenings and clinic during normal working hours;
- Clinic access for all fulltime employees that are eligible for the health plan;
- Clinic access for all Spouses and Dependents that are enrolled on the health plan;
- Clinic access and dispensed medications at no cost to the employee, spouse or dependent (no co-pays).

Symbol Provides:

- Onsite screenings for all employees and spouses/dependents that are on the health plan;
- Screenings = analysis of claims data, blood-pressure, full lipid profile (total-cholesterol, triglycerides, HDL & LDL), glucose and immediate results coaching;
- Screenings utilize a simple finger stick and not a venipuncture (needle in arm);
- On-going chronic care management for screened individuals – 12 month program;
- Care Management and Plan of Care provided by trained personnel;
- Dispensing of medications (generic and non-controlled only and according to formulary);
- Rapid tests and lab work for diagnosis and management of illness and disease;
- Building, supplies and equipment are included in the price of the visits;
- Encounters billed to the employer at \$79 per encounter;
- Screenings billed to the employer at \$52 per screen;
- Monthly, quarterly and annual reporting with detailed information regarding encounters, dispensing, savings and success factors;
- Physician Assistant's and Nurse Practitioners are utilized for the best possible patient care;
- Access to care for those that are 2 years old and above;
- Support staff includes Medical Assistants, LPN's and others as needed;
- Network of referrals for specialists in the area;
- Direct bill contract pricing for necessary tests such as imaging;
- Health Maintenance included in clinic services, including but not limited to annual well-visits, immunizations, preventive medicine as recommended by the US Preventive Service Task Force;
- Access to the clinic by appointment or walk-in;
- No up-front cost to open the clinic – your first bill will arrive following the end of your first month;
- Unparalleled patient satisfaction and visit times of at least 20 minutes per encounter.