

# About American Health

Founded in 1993, American Health Holding, Inc. (American Health) believes that the combination of building partnerships with clients and delivering innovative and cutting-edge methods of containing health care costs is vital to our continued growth and development. We provide comprehensive services through a professional staff of physicians and registered nurses who are highly qualified in cost management issues including quality assurance standards.

## Who We Are

- More than 20 years in the care management business
- Serving clients in all 50 states
- Approximately 600 employees, including 420 nurses
- Multiple URAC accreditations: Utilization Management, Case Management, Disease Management
- State licensure in all required states
- 2.5 million lives under management
- World-class service and single-source provider for health and medical management services

## What Makes Us Unique

- Integrated Utilization Management, Case Management and Disease Management programs
- Registered nurses trained in oncology, transplants, high-risk maternity, behavioral health and other specialties
- Client-focused flexibility and componentized solutions
- Custom-designed programs and private-label services
- Made-to-order onsite solutions
- Leading-edge technology (iSuite)
- Scalability to increase efficiency, reduce cost
- Balance between patient needs and cost containment
- Comprehensive Total Quality Management (TQM)

## Who We Serve

- Third-party administrators
- State and local governments
- Health/welfare funds
- Self-insured companies
- Reinsurance carriers and MGUs
- Health care/business coalitions
- Health insurance carriers
- PPOs, HMOs, MCOs and IPAs

## Services You Can Depend On

We hold the belief that “when you’ve seen one customer, you’ve seen one customer.”

Because no two customers are alike, we deliver a medical management process that uniquely meshes what our clients need and want with our full spectrum of medical management services:

- Utilization Management
- Case Management
- Specialty Case Management (Maternity, Neonatal and Pediatric, Oncology, Transplant)
- Pre-Admission and Post-Discharge Counseling
- Population Health Management, including Wellness, Disease Management and Performance-Based Wellness
- Bariatric Care Management
- Maternity Management
- Medical Transportation
- Onsite Medical Management
- Medical Review
- Independent External Review
- Medical Disclosure
- Integrated Behavioral Health
- 24/7 Physician Consultations
- 24/7 Nurse Line and Health Information Library
- Medical Cost Containment – Bill Audit and Negotiations
- iSuite Medical Management Software



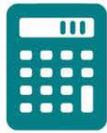
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# 2015 Client Satisfaction Survey

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**99%** of clients say our services are a good value



**98%**  
overall client satisfaction



**97%** believe American Health is innovative



**97%** would recommend American Health



**100%** say that American Health is easy to work with

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responsive and knowledgeable

thorough

They allow us flexibility for our programs to work well. Other companies make you stay with a cookie cutter approach.

They go above and beyond.

They have an understanding of the benefits and the plan structure. They handle differences in plans better than anyone else.

They have excellent reporting, and our cost savings have been excellent.

best in class

They are always working on bringing about new products that are helpful.

dependable

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*Full-scale customer satisfaction survey commissioned in 2015 to meet URAC requirements. Administered by independent consultant, Saperstein Associates.*

# Wellness Programs

American Health partners with ActiveHealth Management to offer Wellness solutions designed to help improve health outcomes and lower medical costs. ActiveHealth's data analytics, evidence-based clinical decision support and targeted health and wellness programs help customers engage at-risk individuals, promote better care coordination and enable sustainable health care models. Components of the Wellness program include a Wellness Portal with online digital coaching, a Health Risk Assessment, Personal Health Record and much more; telephonic Lifestyle Coaching and Biometric Screening.

## Wellness Portal

The personalized Wellness Portal is the gateway to all online services and is designed to engage participants in their health and drive positive behavior change. Through the portal, members can access a wide variety of online products, including a proprietary Health Risk Assessment, online digital coaching, a full featured Personal Health Record and a number of other engaging tools, educational resources and access to health-related videos from Emmi Solutions. A differentiator of the Wellness Portal is the ability to provide members with a personalized and actionable list of action items, referred to as Health Actions. The Health Actions are derived via the complex clinical algorithms in ActiveHealth's CareEngine system.

## Health Risk Assessment

Through its electronic format and sophisticated branching logic, our Health Risk Assessment (HRA) dynamically customizes itself to each user based on age, gender, and any previously answered questions. Available in English and Spanish, the HRA may be updated by the member at any time. Members are encouraged to complete the HRA at least annually, although more frequent updates are encouraged. A telephonic version is also available as a buy up option to accommodate those members without computer access. The HRA covers the following topics:

- Allergies (environmental, medications)
- Demographics and biometrics (height/weight, BMI, waist circumference)
- Women's health (pregnancy, menopause)
- Mental health (depression screen, stress level)
- Preventive care (dental, vision, and hearing exams)
- Health screening (abdominal aortic aneurysm, osteoporosis, cancers of the breast, cervix, colon, prostate and skin)
- Vaccinations (tetanus, pneumonia, chickenpox, shingles, meningitis, HPV)
- Lifestyle (tobacco and alcohol use, physical activity, sleep habits)
- Safety (fall risk, seatbelt use)
- Lab data (blood pressure, cholesterol level)
- Medication use (prescribed, over-the-counter, polypharmacy)
- Productivity and absenteeism (related to personal and family health)



## Program Highlights

- ▶ Seamless program is designed to improve and maintain the health of all members
- ▶ 1:1 primary coaching model builds trusting relationships between members and their coaches
- ▶ Online tools let participants manage their health and track progress toward achieving personalized health goals
- ▶ NCQA accredited through ActiveHealth Management in Wellness & Health Promotion
- ▶ NCQA accredited through Interactive Health in Performance Reporting in Wellness & Health Promotion



**ACCREDITED**  
Disease Management  
Expires 10/01/2017

- Complementary or alternative medical therapies
- Advance directives

Aggregated information is analyzed by the CareEngine system in real-time. Member-provided information from the HRA, such as biometric data, tobacco use, diet, test and procedures, allergies and over the counter medication, is fed into the CareEngine system to complete the member's clinical profile. Where appropriate, additional questions are asked of the member to create a holistic view of that member's health that is immediately fed back to the CareEngine system to analyze for any potential adverse outcomes or provide suggestions to the member for their care management. The HRA is designed to provide assessments and identify candidates for our Disease Management and Lifestyle Coaching programs (if purchased).

### **Personal Health Record**

Embedded in the Wellness Portal, the electronic Personal Health Record (PHR) provides a view for members into their health information. Features of the PHR include:

- Pre-population of biometric screening results feeds if preferred screening vendor used
- Pre-printed forms, including emergency wallet card and immunization record
- Ability to upload and store health-related documentation
- Spanish translation of the Personal Health Record
- Organization of personal health records 'topically' (i.e., conditions, tests and procedures, immunizations, insurance information, health care team, health summary page)
- Bi-directional persistency of data between PHR and HRA (a member only has to input information in one place and it will pre-fill in other applicable areas)

### **Digital Coaching**

As a buy-up to the Wellness Portal, members have access to the following interactive digital coaching programs:

- |                        |                               |
|------------------------|-------------------------------|
| ▪ High Blood Pressure  | ▪ Sleep Health                |
| ▪ Back Pain Management | ▪ Smoking Cessation           |
| ▪ Cholesterol          | ▪ Stress                      |
| ▪ Nutrition            | ▪ General Wellness/Prevention |
| ▪ Fitness/Exercise     | ▪ Metabolic Syndrome          |
| ▪ Depression/Anxiety   | ▪ Women's Health/Maternity    |
| ▪ Weight Management    | ▪ Healthy Aging               |

Digital Coaching includes motivational interviewing techniques and is personalized to members, predicting the best tools for each individual based on their profile and behavior. Activities include a mix of articles, videos, graphics, surveys and quizzes. As members complete activities, they earn Heart Beats, which track progress and can be incentivized. A limited number of Heart Beats can be earned per week to encourage long-term behavior change. For those members also engaged telephonically, online programs supplement and support the telephonic program, and the coach will encourage the member to complete various activities online.

### **Webinars, Tools and Educational Resources**

All members have access to a wide variety of educational resources, including:

- Message Center
- Calendar with export function
- Member goal setting
- Condition/lifestyle topic detail pages
- Health Links
- Recommended Materials (based on member's clinical profile and indicated interests)
- Resource Center with tools and trackers, health-related videos from Emmi Solutions, audio files, health education content, and daily news feeds
- Grant access control feature where member can give health care provider access to portal
- Quarterly Wellness Webinars on various health topics
- Accessible by smart phones, including the iPhone and Android, and supports calendar reminders

## Rewards Center

As an additional option to the Wellness Portal, the Rewards Center is a member-facing incentive tracking tool that supports various types of programs, including points-based designs, and allows members to view their Wellness activities. The following standard packages are included in the costs of the Rewards Center, along with extract files that provide completion activity to the client for incentive tracking purposes. Activities can be removed from the packages as required.

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### Introduction Package (completion activity to track – completion definition)

- HRA – All required HRA questions must be answered
- Biometric screening – Participation in the biometric screening event offered by American Health vendor

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### Intermediate Package (completion activity to track – completion definition)

- HRA – All required HRA questions must be answered
- Biometric screening – Participation in the biometric screening event offered by American Health vendor
- Digital coaching – Completion of at least one of the 14 digital coaching categories
- Telephonic coaching – Completion of at least 2 calls

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### Advanced Package (completion activity to track – completion definition)

- HRA – All required HRA questions must be answered
- Biometric screening – Participation in the biometric screening event offered by American Health vendor and meeting outcome targets
- Digital coaching – Completion of at least one of the 14 digital coaching categories
- Telephonic coaching – Completion of at least 2 calls
- Activity tracking – Completion of tracker 3 days per week for 3 months
- Tobacco-free attestation – Member attests to being tobacco-free by checking box on Wellness Portal, certifying they have been tobacco-free for at least 6 months

For an additional cost, a client can add up to five data feeds for tracking of non-Wellness Portal and Lifestyle Coaching activities. A standard format is required for sending the data and the following categories must be used: 1) Physician Visit/Preventive Screening, 2) Physical Activity, 3) Wellness Activity, 4) Physical Activity and 5) Stress Management. Note: Categories members see on the Rewards Center can be changed; however, the categories of the data feed file cannot.

## Lifestyle Coaching

The dynamic and interactive Lifestyle Coaching programs provide qualified members with telephonic and online coaching. An integrated approach is taken for identification, outreach and engagement for Lifestyle Coaching which prioritizes program recommendation and subsequent outreach based on the member's acuity. Members are stratified as low, moderate or high risk based on risk factors such as at-risk for diabetes or cardiovascular disease, and negative lifestyle behaviors such as tobacco use or elevated BMI. Lifestyle Coaching is based on a primary coach model to focus on the following lifestyle issues: weight control, tobacco cessation, healthy eating, physical activity and stress management.

### Identification

All member data including Health Risk Assessment, lab/test results and biometric data is analyzed by the CareEngine to identify and stratify members who will benefit from Lifestyle Coaching. Members are stratified as low (1-2), moderate (3-4) or high risk (5+).

### Outreach and Engagement

Once the member has been identified, the outreach process starts. Low-, moderate- and high-risk members are targeted for telephonic engagement with a lifestyle coach. Low-risk members receive one outreach call and one letter and are encouraged to participate in online digital coaching (but can opt into telephonic coaching if interested). Moderate- and high-risk members receive five outreach calls and three letters and are targeted more aggressively for telephonic coach engagement with the support of the online program. At any point in the outreach process members may opt to engage with a coach, thereby completing the outreach process and beginning the engagement process. Engaged members are individuals who have been identified for coaching or who have self-enrolled and have elected to work with a dedicated coach on an ongoing basis. Our engagement process includes targeted member assessment and supportive coaching to assist the member in establishing goals with a personal plan of care to achieve the goals.

## Care Plan Development

Lifestyle Coaching applies motivational interviewing and other coaching techniques to facilitate healthy behavior changes across the continuum of health related life choices including weight, tobacco use, stress mitigation, nutrition and activity. Lifestyle Coaching uses a primary coach model where the same coach supports the member throughout the course of their engagement in the program.

Member interaction with the coach may include discussion of Care Considerations, identification of base motivation, goal setting using SMART goals, and review of and support of strategies to achieve goals.

Members also receive personalized follow up letters along with topic-specific brochures from their coach to reinforce information

discussed during the telephone call. The coach will also suggest the member participate in various online educational follow-up activities on the Wellness Portal, such as picking up brochures, reading articles, documenting biometrics such as weight and blood pressure, and participating in other interactive online programs. Materials are available in English and Spanish and health literacy standards are incorporated to make our materials more effective tools for our members.

Our personalized goal-oriented coaching approach addresses where the member is on the health continuum and incorporates cultural competency in order to make discussions and recommendation more relevant and meaningful to the member. The Lifestyle Coaching program is designed to customize member engagement and education activities – and their intensity – according to the member’s specific needs. The program also creates a strong value proposition in that it targets resources to those members most likely to benefit from coaching interventions. The program provides the following resources to help members take charge of their health:

- Telephonic access to lifestyle coaches, dietitians, and other qualified educators
- Online coaching through the Wellness Portal including health and wellness educational tools and optional interactive coaching modules
- Access to award winning program materials, including comprehensive manuals on weight management and tobacco cessation
- Real-time email access to lifestyle coaches
- Access to customized analysis and planning services, including seven-day meal and exercise plans
- Member outreach program to drive program enrollment
- Over-the-counter quit aids (NRT) in the form of gum, lozenges and patches for members engaged in tobacco cessation
- Complimentary one-year subscription to *Eating Well* or *Diabetic Living* magazine for members engaged in Lifestyle Coaching

The frequency of contact for engaged members is guided by their opportunity level and results of the assessment conducted by the lifestyle coach with the member. Coaches use judgment and are flexible to provide additional coaching sessions as needed. Calls are taken in between scheduled appointments if members have a new concern or question that they would like to discuss with a coach. In addition, outreach to members is made in between appointments if the coach learns about new issues about a member.

Low-, moderate- and high-opportunity members may schedule coaching sessions as frequently as weekly. Moderate- and high-opportunity members are offered unlimited coaching sessions; low-opportunity members who self-refer may engage in up to four sessions. At the end of each call, the coach will set up the next appointment. Appointment reminder calls are made; if the appointment is missed, another outreach attempt is made to reschedule the missed appointment. All members in the program are continuously monitored by the CareEngine regardless of level of engagement. Once

## Lifestyle Coaching Philosophy

- Primary coach model
- Helps members make behavior changes that last
  - Teach how to set meaningful goals
  - Guide in creating strategy/plan
  - Support with information, tools, encouragement
  - Challenge through timelines and interim goals
  - Reward with positive feedback and incentives to increase coaching engagement
- Supports compliance with the physician’s treatment plan and enables sustained behavior

members are identified for the program, member stratification may change based on new administrative data, member-derived information and member progress.

### **Lifestyle Coaching and Wellness Portal Integration**

Online components that members access through the Wellness Portal are a standard component of Lifestyle Coaching. Available by smart phone or web browser, the online program serves as both a supplement for a member who is working with a coach as well as an additional engagement avenue for members who have not responded to our outreach efforts or who prefer to work at their own pace rather than telephonically with a coach. Online features include:

- Condition- and topic-specific pages that present general and member-specific health education information
- The ability for members to add comments about their lifestyle, for example, smoking status, weight, stress, sleep habits, etc., or to indicate they no longer have a condition such as asthma, obesity etc.
- Online communication allows members to add a message to their coach to provide feedback, e.g., some Health Actions require member feedback to indicate an improvement or action taken
- Display of assigned coach's name, toll-free number and direct extension
- The ability for members to email their coach (if currently working with a coach)
- Activities recommended by a coach, including health-related articles, podcasts, videos and other online tools
- Appointments scheduled with a coach will display on the member's website
- Access to a robust online "Digital Coaching" program that provides members with support and information to make necessary lifestyle and behavioral changes
- "Call Me" form on specific Health Actions and Health Report
- Data persistency between Wellness Portal and Lifestyle Coaching
- Ability for member to complete an online form to self-refer into program

Additionally, system integration points exist between the Wellness Portal and ActiveAdvice, the system platform lifestyle coaches use when working telephonically with members. Although this system integration is not visible to members, it is important in terms of overall care management. It prevents a member from having to provide the same information twice: once using the Wellness Portal and then a second time while speaking with a coach. ActiveAdvice also ensures that the coach is current on all important information.

For example, information that a member enters into the Personal Health Record is exported to ActiveAdvice so the coach is made aware. Another example is when a member provides information to complete a coach-assigned homework item, that information is displayed in ActiveAdvice. With a single click, that member's coach can open the member's Wellness Portal site through the ActiveAdvice system. With the member's permission, the coach will have a read-only view to assist the member with any questions.

### **Lifestyle Coach Credentials and Training**

Coaches are trained to understand how to incorporate the Transtheoretical Model as developed by James Prochaska and Motivational Interviewing as developed Stephen Rollnick, Ph.D., & William R. Miller, Ph.D. The training takes place over a five week period with role play, home work, and case reviews to help the coach take these theories from the abstract to everyday practical application.

### **Healthy Heart Biometric Screening**

American Health partners with Quest Diagnostics to offer onsite and offsite biometric screening options for clients interested in a basic healthy heart screening. Screenings are available throughout the U.S. and offer total program management that includes oversight, scheduling, onsite staffing, data collection and phlebotomy, testing, physician review, result reporting, data feeds to the ActiveHealth Wellness Portal and much more. For a group to purchase biometric screening through this relationship, the ActiveHealth Wellness Portal must also be purchased.

## Onsite Screening Options

The following onsite screening options require a minimum of 40 participants for each clinic.

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### Healthy Heart non-fasting fingerstick includes:

- TC, HDL, TC/HDL ratio
  - Blood glucose
  - Blood pressure and pulse
  - Paper-based BMI, self-reported height and weight
  - Counseling during the screening to review results and answer questions
  - Counseling brochure with national guidelines
  - Online appointment system
  - Health screening standard promotional materials
  - Aggregate report by site, company, and 5-year trend
  - Member specific participation report
  - Electronic upload of member data to the ActiveHealth Management Wellness portal
  - Program management and shipping
  - High risk referral form and counseling
- 

### Healthy Heart fasting fingerstick includes:

- TC, HDL, TC/HDL ratio, LDL, triglycerides
  - Blood glucose
  - Blood pressure and pulse
  - Paper-based BMI, self-reported height and weight
  - Counseling during the screening to review results and answer questions
  - Counseling brochure with national guidelines
  - Online appointment system
  - Health screening standard promotional materials
  - Aggregate report by site, company, and 5-year trend
  - Member specific participation report
  - Electronic upload of member data to the ActiveHealth Management Wellness Portal
  - High risk referral form and counseling
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## Offsite Screening Options

The following offsite screening options can be offered in conjunction with an onsite event or as standalone. There is no minimum participation required (for billing); however, a minimum of 40 participants is required to receive an aggregate report.

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### Lab service center includes:

- Online registration system to schedule appointment and find a lab
  - Mailing of lab results letter with explanatory table
  - Data upload to the ActiveHealth Wellness Portal
  - Inclusion in aggregate report
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### Physician form includes:

- Data entry of faxed results into Quest Diagnostics database
  - Research and correction of illegible writing, as necessary
  - Electronic upload of member data to the ActiveHealth Wellness Portal
  - Inclusion in aggregate report
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### At home test kits include:

- Screening for lipid panel (TC, HDL, TC/HDL ratio, LDL, triglycerides) and glucose
  - Mailing of kit to member, processing results and mailing results letter to participant
  - Electronic upload of member data to the ActiveHealth Wellness Portal
  - Fee still applicable if member does not follow instructions and provides insufficient blood sample
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## Wellness Planning for Today – and Tomorrow

One of the unique features of the program is our dedicated director of Disease Management and Wellness who provides ongoing support before, during and after implementation. Her expertise is included at no additional charge and she is readily available to meet with clients to help kick off the program, assist with customizing the program to fit their specific needs, help educate and communicate the program's many benefits to employees, and to provide ongoing evaluation and continuous support of the program.

The director also works with an employer’s Human Resources team to assist in developing and implementing a successful incentive program that can help promote more active participation in the program, such as one that ties incentives to the company’s benefit plan (e.g., premium reductions for participation). Most important, she can help clients achieve long-term success by implementing a program that is effective today and that can grow to meet the changing needs of tomorrow.

# Group Level Standard Reports

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The following is a summary of our standard reports. We are able to create customized reports and make changes to standard reports for an hourly fee. Reports are subject to change to reflect enhancements and/or changes to the product offering or processes.

## ActiveHealth Wellness Reports

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### **Wellness Solution Report (available quarterly)**

- Provides an aggregate overview of all Wellness products purchased; includes:
    - Executive summary
    - Member engagement overview
    - HRA activity
    - Risk reduction summary
    - Health Actions detail
- 

### **Wellness Completion Report (available monthly)**

- Provides members specific program completion information for all Wellness products purchased
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### **Bad Phone Number Report (available quarterly)**

- Provides a list of members identified for Lifestyle Coaching that have a bad phone number and the phone number of record
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### **Healthy Heart Biometric Screening Aggregate Report (available 6 weeks after last screening event)**

- Provides an aggregate overview of the populations results; includes:
    - Demographics
    - Average risk stratification for each screening and national average comparison
    - Company critical values summary and conclusions
- 

### **Healthy Heart Biometric Screening Completion Report (available 10 business days after last screening event)**

- Provides a list of members that participated in the biometric screening

# Proposed Services and Pricing

## ActiveHealth Management Wellness Programs

### Wellness Portal

Based on options selected:

- \$0.65 PEPM for Wellness Portal without digital coaching; or
- \$0.83 PEPM for Wellness Portal with digital coaching
- \$26.00 per participant for telephonic Health Risk Assessment
- \$0.21 PEPM for online Rewards Center; the additional cost for the external activity file feeds through the Rewards Center is as follows:
  - Fee per group to program/display choice of two external data fields in Rewards Center – \$6,000
  - Fee per group to program/display an additional external data field on top of the initial two in Rewards Center – \$2,500 each
  - A maximum of 5 external data fields can be purchased. If all 5 are purchased by a group, the total fee to program/display in Rewards Center is \$12,500. The standard PEPM cost still applies.

### Lifestyle Coaching Program (includes Wellness Portal with digital coaching)

- \$2.86 PEPM

### Lifestyle Coaching – Weight Management Only (includes Wellness Portal with digital coaching)

- \$2.46 PEPM

### Lifestyle Coaching – Tobacco Cessation Only (includes Wellness Portal with digital coaching)

- \$1.21 PEPM

### Healthy Heart via Quest Diagnostics

Based on option selected:

- Onsite Screening Event
  - \$66.00 per participant – Healthy Heart Non-Fasting (TC, HDL, TC/HDL ratio, Blood Glucose, Blood Pressure, Self-Reported BMI, Counseling)
  - \$69.00 per participant – Healthy Heart Fasting (TC, HDL, TC/HDL ratio, LDL, Triglycerides, Blood Glucose, Blood Pressure, Self-Reported BMI, Counseling)
  - Minimum participation per event is 40 participants. Requires purchase of the ActiveHealth Wellness Portal. Additional Clinic Event fees may apply. Final pricing and fee projections will be provided for each Event after order of acknowledgement has been approved.
- Offsite Screening Options – Available options:
  - Lab Service Center – \$88.00 per participant: Fasting Lipid Profile (TC, HDL, LDL, ratio, Triglycerides) and Blood Glucose. Includes online registration system to register for appointment and find a lab, mailing of lab results letter with explanatory table, data upload to ActiveHealth Wellness Portal and inclusion in aggregate report.
  - Physician Form – \$17.00 per form faxed. Includes data entry of faxed results into database, research and correction of illegible writing, as necessary, data upload to ActiveHealth Wellness Portal and inclusion in aggregate report.
  - At-Home Kits (lipid panel plus glucose) – \$34.60 per kit mailed out and \$31.10 to process each kit mailed back; telephonic ordering (kits ordered by phone) service fee – \$1.85 per order; results sent to member’s physician – \$6.20; data upload to ActiveHealth Wellness Portal and inclusion in aggregate report. Note – Outbound fee is still charged if patient does not follow instructions or provide a sufficient blood sample. Inbound includes processing of results, mailing of results letter to participant and electronic upload of data.
  - Requires purchase of the ActiveHealth Wellness Portal. Additional fees may apply. Final pricing and fee projections will be provided for each Event after order of acknowledgement has been approved.

## Reporting

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### **Customized reports, changes to standard reports, correspondence, documents or other materials**

- \$175.00 per hour
- Standard reports are provided at no additional charge

# Business Assumptions

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## General

- Fees quoted are good for 90 days from the date of this proposal.
- A minimum of 90 days lead time is required to implement Wellness programs.
- A service agreement will be signed before the “go live” date.
- Payments for services are due on the first day of the month.
- Fees apply to the services as described in our proposal. Services above and beyond what has been described may have an impact on these fees.
- Options to private label programs and services are available for select programs.
- Quoted fees include:
  - Ongoing sales support, including marketing assistance with proposals and sales presentations to large group prospects
  - Development of one standard import/export interface
  - Standard management reports
  - Disaster recovery services, URAC accreditations as applicable, state-specific licensures, liability coverage and Total Quality Management program
- Standard flat files will be used for importing eligibility data to American Health and for exporting certification data to your site. American Health must be provided with member eligibility IDs 30 days in advance of the program start date. Custom interface development services, including the development of non-standard EDI and/or HIPAA electronic transactions are available. Additional interfaces or changes to the standard interface post-implementation are available.
- Eligibility files compliant with HIPAA's 834 Benefit Enrollment and Maintenance transaction format are required; a full file is required annually and an update file with any changes is required monthly. The data is sent to us securely using PGP encryption on our SFTP server. As part of the implementation process, we will work with you to ensure successful loading of the eligibility to iSuite.

# Implementation and Account Management

We recognize the importance of implementing your choice of our medical management services efficiently and seamlessly. To do that, we manage each implementation in a “project management” mode that entails the following:

- An implementation project manager (IPM) from our Business Support Team (BST) will be assigned to your implementation.
- The IPM will establish a kickoff meeting with you to begin this process.
- Between the kickoff meeting and the “go-live” date, status meetings will be conducted as requested by the IPM and our team (usually weekly).
- A detailed project plan will be designed for your implementation, including clearly defined activities, responsibilities and timelines, to ensure the desired “go-live” date is met.
- A dedicated account executive will be assigned to your account prior to implementation and will remain with you to serve your needs consistently.
- General workforce training typically consists of a two- to three-week period before the “go live” date to cover American Health’s systems and procedures. Training can be conducted at American Health’s training center or at your location.

Ongoing account support and leadership is provided by one of American Health’s account executives whose primary responsibility is to ensure the voice of the customer is communicated throughout American Health. Our account executives also ensure the resolution of issues or concerns, and work to understand the client so that our partnership with customers results in satisfaction levels that exceed expectations. Account executives are given direct responsibility for the dealings with our clients and customers and are dedicated to serving the needs of the transactions and relationships with the customer. They also:

- Consult with clients and review reports for recommendations
- Attend initial implementation meetings
- Function as liaison between the client and operations
- Respond and resolve any service-related problems
- Identify new product needs and coordinate with Sales and Product Development
- Coordinate and maintain close working relationships with clients.

