Retail Health Care
A Disruptive Innovation

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CMO, MinuteClinic
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New Name, New Era for CVSHealth

Purpose-driven company: Helping people on their path to better health
CVS Eliminates Tobacco

Tobacco Control Debate

480,000 deaths from smoking in the United States annually

80% of smokers start as kids

$300 billion annual estimated economic costs

14 years earlier smokers die than non-smokers

42 million American adults and 3 million middle and high school students still smoke

9 in 10 lung cancers are caused by smoking
National Environment

1 in 5
Americans currently lack access to primary care for their basic health needs

By 2025, the shortage of primary care physicians (PCP) will grow to more than 50,000

30 million
potential newly insured lives as a result of Health Care Reform, placing additional strain on already limited health care resources

~14% percent of all emergency department visits could be treated in a lower-cost retail clinic, leading to annual savings of ~$4.4 billion

Need for convenient, cost-effective, high quality complimentary care alternatives

4. “Many Emergency Department Visits Could Be Managed At Urgent Care Centers and Retail Clinics.” Health Affairs, September, 2010.
MinuteClinic Fills the Gap and Provides Additional Access Points

MinuteClinic offers value through access to care

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MinuteClinic®: High-Quality, Lower-Cost Care

Largest retail clinic provider: over 28 million visits since inception

1100+
Full-time Clinics in 33 States and D.C.

>2,600
Providers (NPs/PAs) nationwide

50% of visits evenings and weekends

Up to 80%
savings over higher cost settings

92%
overall patient satisfaction

70+
major health system affiliations

Nationally 40-50% of MinuteClinic Patients Do Not Have PCP

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**MinuteClinic® Services**

**MINOR INJURY / ILLNESS**
- Minor Illness
  - Allergy symptoms
  - Bronchitis and coughs
  - Earaches and ear infections
  - Flu-like symptoms
  - Mononucleosis
  - Pink eye and styes
  - Sinus infections and congestion
  - Sore and strep throat
  - Upper respiratory infections
  - Urinary tract infections
- Minor Injury
  - Bug bites and stings
  - Minor burns
  - Minor cuts, blisters and wounds
  - Splinter removal
  - Sprains and strains
  - Suture & staple removal
  - Tick bites
  - Miscellaneous
    - EpiPen® refill
    - Ear wax removal
    - Motion sickness prevention
    - One-time medication renewal
    - Pregnancy evaluation
    - Vitamin B12 injections
    - A1c check
- Skin Condition
  - Acne
  - Athlete’s foot
  - Chicken pox
  - Cold, canker and mouth sores
  - Eczema
  - Impetigo
  - Lice
  - Poison ivy and poison oak
  - Ringworm
  - Scabies
  - Shingles
  - Sunburn (minor)
  - Wart evaluation

**VACCINATIONS AND INJECTIONS**
- Flu (seasonal)
- Hepatitis A (child and adult)
- Hepatitis B (child and adult)
- Meningitis
- MMR (measles, mumps, rubella)
- PPSV (pneumonia)
- Tdap (tetanus, diphtheria, pertussis)
- TD (tetanus, diphtheria)
- Birth control injections, prescribed by PCP

**WELLNESS**
- Start to Stop® Smoking cessation
- Weight loss program
- Diabetes monitoring
- High blood pressure monitoring
- High cholesterol monitoring
- Camp/Sports Physical

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**MinuteClinic Facility**

Clinic Exterior

Interior

Interior

Interior
Rapidly Growing to Meet Access Needs:
Goal is comprehensive national network of clinics

More than 1100+ locations in 33 States and D.C. as of January, 2016

Greater than 50% of US are within 10 miles of a MinuteClinic

MinuteClinic Patient Satisfaction 2012-2014

<table>
<thead>
<tr>
<th>MinuteClinic Net Promoter Scores</th>
<th>2014 Net Promoter Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>USAA Home Insurance</td>
<td>84%</td>
</tr>
<tr>
<td>MinuteClinic</td>
<td>84%</td>
</tr>
<tr>
<td>Amazon.com</td>
<td>64%</td>
</tr>
<tr>
<td>Integrated Delivery Network</td>
<td>40%</td>
</tr>
<tr>
<td>Medicare</td>
<td>27%</td>
</tr>
<tr>
<td>Health Insurance Sector Average</td>
<td>17%</td>
</tr>
</tbody>
</table>

Our Quality Standards

THE FIRST RETAIL CLINIC IN THE U.S. TO ACHIEVE JOINT COMMISSION ACCREDITATION.


MINUTECLINIC ADHERES TO NATIONAL STANDARDS OF PRACTICE, AS ESTABLISHED BY:
- American Academy of Pediatrics & APA Red Book
- Institute for Clinical Systems Improvement regional guidelines

MINUTECLINIC ALSO ADHERES TO:
- AAFP and AMA Desired Attributes for Retail Health Clinics
- NCQA Guidelines for Credentialing

Comparing Cost and Quality of Treating Common Illnesses Across Medical Settings

High Quality & Affordable Care

<table>
<thead>
<tr>
<th>Medical Setting</th>
<th>Quality Indicators</th>
<th>Non-Pharmacy Cost</th>
<th>Pharmacy Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emergency Departments</td>
<td>55%</td>
<td>$44</td>
<td>$26</td>
</tr>
<tr>
<td>Physician Offices</td>
<td>61%</td>
<td>$145</td>
<td>$21</td>
</tr>
<tr>
<td>Urgent Care</td>
<td>63%</td>
<td>$134</td>
<td>$22</td>
</tr>
<tr>
<td>MinuteClinic</td>
<td>64%</td>
<td>$89</td>
<td>$21</td>
</tr>
</tbody>
</table>


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Quality of care at MinuteClinic for Three Common Conditions

- Study of 75K episodes of care with severity-matched controls

MinuteClinic performed better than Ambulatory Primary Care Visits and Emergency Departments across all quality measures.1

1 Shrank WH et al. “The quality of care received at retail clinics for three common conditions”, American Journal of Managed Care. 20(10): 794-801, 2014

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MinuteClinic HEDIS Performance

AVOIDANCE OF ANTIBIOTICS IN BRONCHITIS IN ADULTS

PUBLIC DATA FROM MN

Medical Group Average = 26%

Source: HealthCare Quality Report from Minnesota Community Measurement http://mncm.org

HEDIS = Healthcare Effectiveness Data and Information Set

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MinuteClinic Operating Principles

- SUPPORT OF PRIMARY CARE MEDICAL HOME
- MEDICAL DIRECTOR PHYSICIAN COLLABORATION WITH PROVIDERS
- CONNECT PATIENTS WITHOUT PCP TO MEDICAL HOME PRACTICES
- ALL VISIT NOTES SENT TO PRIMARY CARE PHYSICIANS
- COMMITMENT TO EHR INTERCONNECTIVITY NATIONALLY
- SUPPORTIVE ROLE IN ACOS AND PCMH PRACTICES, PARTICULARLY FOR CHRONIC DISEASE MONITORING, BIOMETRIC SCREENING AND WELLNESS

Developing Alliances with Health Systems Across the Country
Creating Digital Solutions to Meet Provider Needs

• EHR APPROACH FOCUSED ON QUALITY AND EFFICIENCY
  • Standardized Work Flow
  • Decision Support
  • Chart Review
  • Patient Call Backs
  • EHR Integration

SmartSets to Quickly Guide Workup, Diagnosis, Treatment and Plan

Most appropriate care at the provider’s fingertips:
• Recommended medication links to e-prescribing
• Test orders
• Diagnosis with CPTs
• Common plan items
• Patient education
• Populates visit summary for patient
Decision Support Brings Guidance to the Provider’s Fingertips

Timely Chart Review Enhances Quality and HEDIS Scores

- Flag for action
- Review chart
- Common findings
- Feedback to provider or manager
Organized Call Backs Support Quality and Delight Patients

- Organized work list
- Links to record

Increased Connectivity Improves Patient Care

Electronic Clinical Exchange

1. Patient Presents at MinuteClinic
2. Nurse Practitioner Accesses MinuteClinic EMR
3. MinuteClinic EMR Link To Health System
4. Nurse Practitioner Treats Patient
5. Affiliated Health System

Health System Patient Notes:
- Allergic to Penicillin
- Current medications
- Hypertension: needs BP check
Creating Digital Solutions to Meet Evolving Patient Expectations

• Patients value convenience
  • EVENING AND WEEKEND ACCESS
  • WALK-IN
  • NO WAIT
  • ON THEIR TIME

Creating Digital Solutions to Meet Evolving Patient Expectations

• Patients Value Convenience
  • INITIAL MINUTECLINIC DRAW
    • Evenings, Weekends
    • Walk-In
    • Price Transparency
  • SUCCESS BREEDS CHALLENGES
    • Increase volume results in lines
    • Innovation does not stand still
      • Uber, Supercuts, Amazon
Creating Digital Solutions for Patients

**TEXT-YOUR-NEXT**

- MinuteClinic offers walk-in service evenings and weekends
- Increase volume created lines

Sign into Kiosk → Agree to text alert → Patient decides where to wait → Receive text for return → Return for visit

4.7 Million Users of “TEXT-YOUR-NEXT” to date

Online Wait Time Details

View Wait Times at your favorite Clinic…

…or view Wait Times at nearby clinics and either walk in or choose to Hold Your Place in Line.
Remote Queuing Details

You provide the basics and let us know the reason for your visit...

...and we will confirm your place in line. We will text you when it is just about time to head to MinuteClinic.

Looking Ahead: Partnering To Expand TeleHealth

- Continuing to refine MinuteClinic stand-alone TeleHealth model
- Partnering with 3 vendors for a Direct-to-Consumer TeleHealth offering

THANK YOU!

QUESTIONS?