

Personify Health Reporting

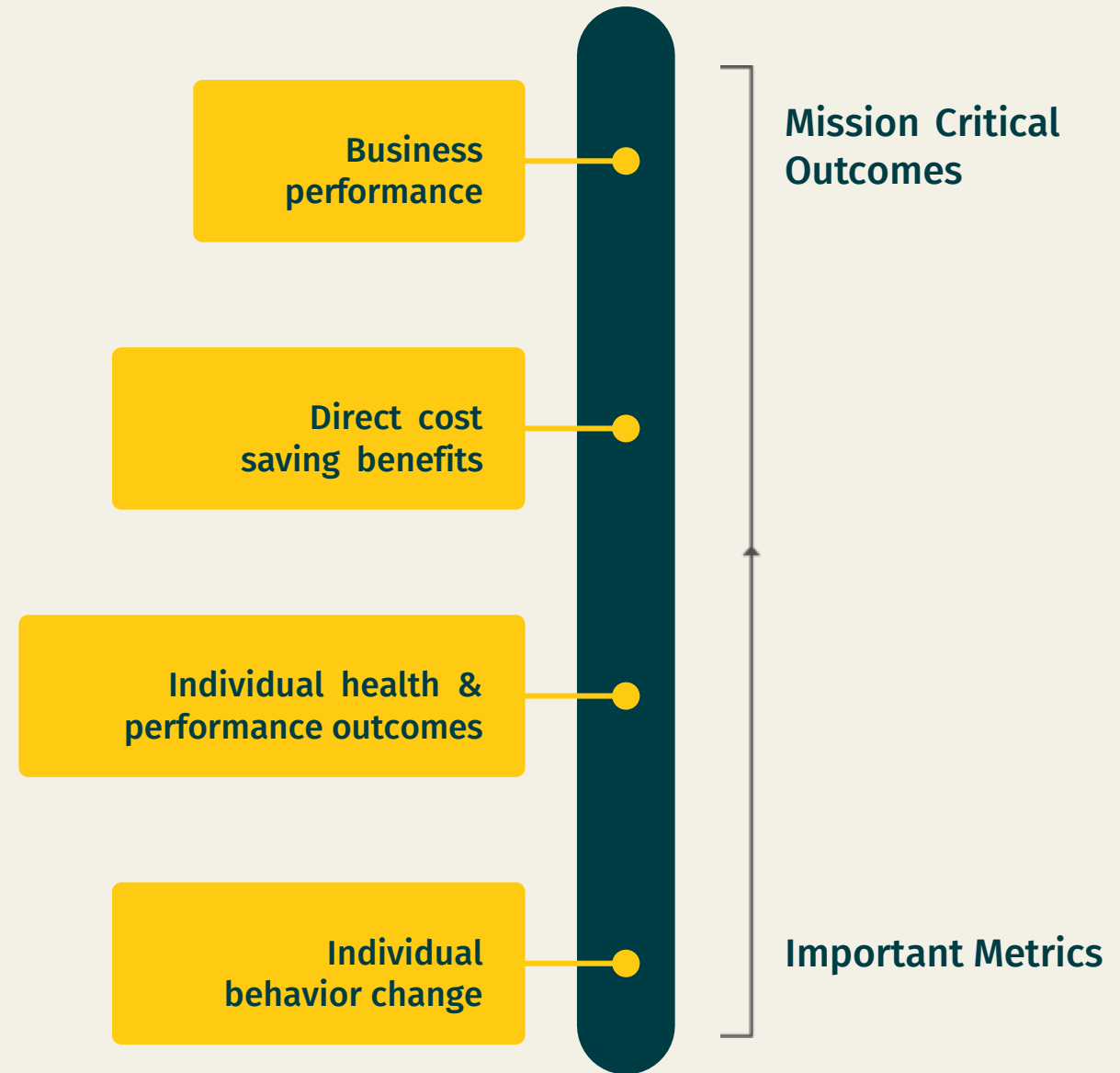
Reporting Lookbook

Personify Health reporting

Measure impact and optimize success with intuitive analytics tools and strategic support.

We collaborate closely with our clients to identify the specific indicators that hold the most significance for their organization. We then develop and integrate tailored solutions into their existing systems to meet specific goals and needs.

- Flexible measurement framework
- Easy-to-use, on-demand, and user-friendly
- Dedicated Personify Health Account Team
- Data-informed decisions and strategy
- Reliable data and expertise



Reporting & Insights Package



Personify Health's standard reporting package



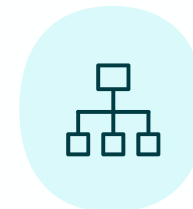
**Business
Reviews**



**Reporting
Dashboards**



**Administrative
Data Extracts**



**Configurable
Data Extracts**



**Incentive Qualified
Data Extracts**



Personify Health reporting tools detail

Unlock strategic insights with Personify Health's intuitive suite of reporting tools.

- Reviewed by our internal data experts for data quality and integrity.
- Trusted and used by over 700 clients to evaluate engagement, eligibility, program outcomes and performance.
- Engaging & simple reports are easy to use and on-demand.
- Proven value to identify key areas to focus on and support discussions with clients and internal stakeholders.



Reporting Dashboards

A suite of intuitive, self-serve tools help you measure the impact of your program in real-time. Desktop or mobile app.



Business reviews

Receive a detailed analysis across all program data to evaluate and uncover program highlights, trends, insights and opportunities. Strategic recommendations and action plans.



Claims data & insights

Claims data provides a member experience that addresses the whole healthcare continuum for your members, from prevention to condition reversal. Claims drive cost savings and ROI for our clients.



Data extracts

Our data extracts are modeled after our best practices. These extracts provide you data points across many areas in the program.



Platform report archive

Standard reporting for billing, member activation and subsidies provided on a monthly cadence via your admin portal.



Rewards driven data extracts

Rewards data extracts are provided to evaluate usage from a rewards or incentives point of view. These reports can also be used to recognize members with off platform rewards.



Third party extract requests

Data extracts for third party vendors are used to evaluate member participation or measure outcomes depending on the vendor. These are sent through our secure FTP network.



Outbound eligibility extracts

File extracts can seamlessly be sent outbound to third party vendors through our secure FTP network.

Reporting Dashboards

Reporting Dashboards

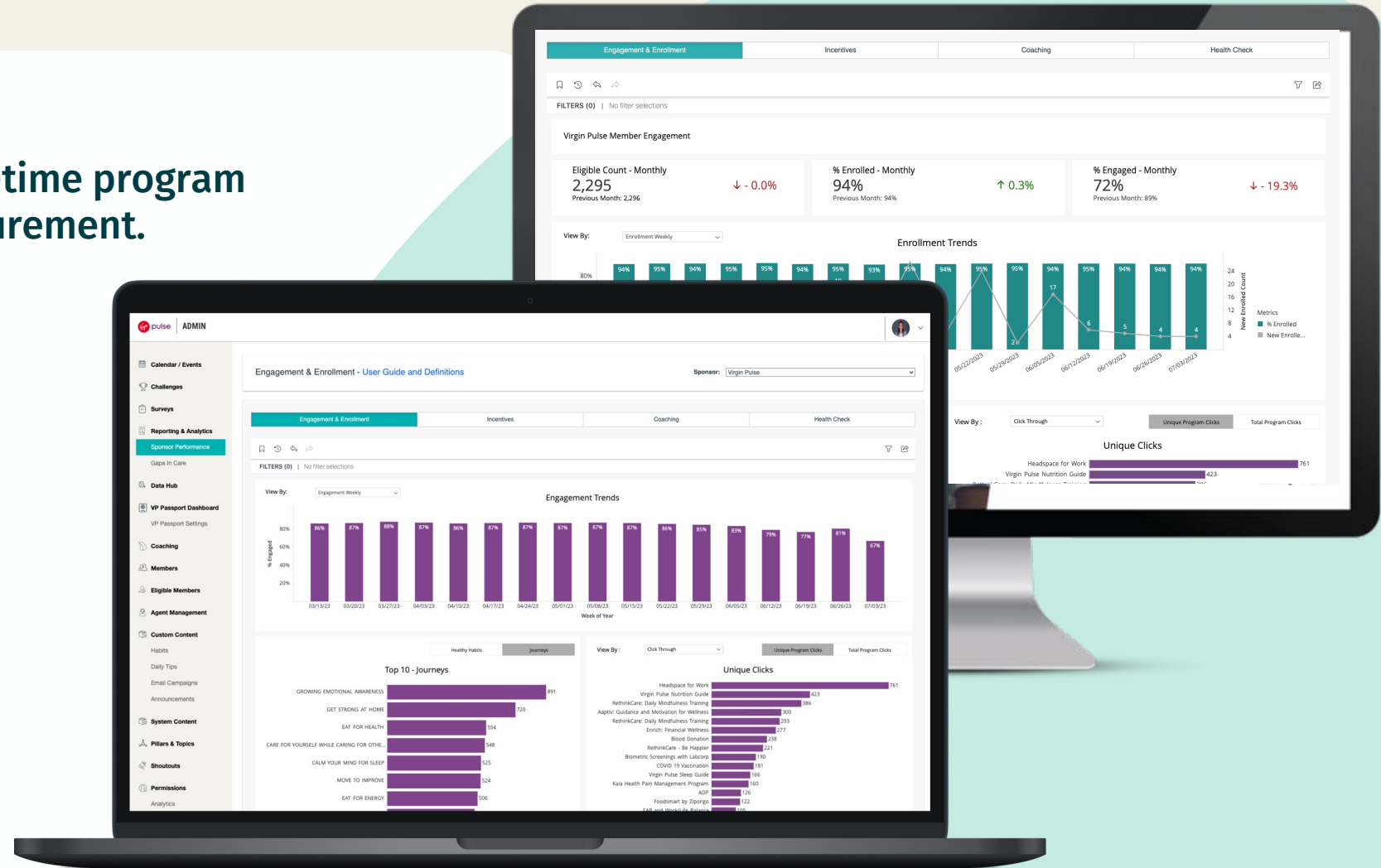


A suite of intuitive tools, real-time program monitoring and impact measurement.

On-demand aggregate program reporting

Extensive filtering and segmentation options to quickly drill down on important data

Export and subscription tools to easily share insights with internal stakeholders



Reporting Dashboards and the Personify Health Admin Portal have permission-based controls for your Clients and Lines of business*



Reporting Dashboards



Engagement

- % Enrollment
- % Engagement
- Top Journeys
- Top Healthy Habit

Coaching

- % Engagement
- Calls Over Time
- Topics

Coaching Plans

- # of Completed Member Facing Goals
- # of Completed Member Outcome Tasks
- # of Opened Coaching Plans

Health Risk

- Assessments Completed
- % Members Assessed
- Avg Health Check Score
- Change in Risk
- Top Risks Risk Metrics (BMI, BP)

Incentives

- Avg earnings per month
- Avg earnings per member
- Avg Level
- Total Dollars Earned

Login Activity

- All Logins
- Average Logins per Day
- Total Logins per Month

Biometrics

- Total screenings
- % Validated vs. Self-Reported
- Risk stratification by measure
- Changes in risk
- Top risks (Blood glucose, BP, BMI)

Partners

- Members eligible
- Members engaged
- Monthly partner engagement
- Partner actions
- Partner actions over time



Personify Health 2024 Reporting Dashboards roadmap



Navigate

Unique Users with a Benefit View

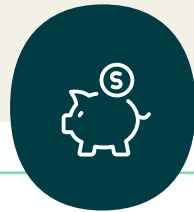
% of Users Who Have Viewed

% of Users Who Have Clicked Through

Q1



complete



Medical & Rx Claims Costs

Total & average costs

Cost by condition

High-cost claims

YoY & monthly trends

Q1



complete



Gaps in Care

Gaps in care closure trends

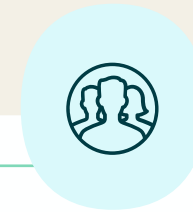
Total members with multiple care gaps

Care gaps by condition categories

Q1



complete



Population Risk

Risk distribution & condition prevalence

Comparison to benchmarks

Likelihood of program engagement

Opportunity prioritization based on highest ROI

Q2



On time



Challenges

Participation type (corporate vs. self)

Trends over time

Q3



On time

*Requires claims

*Enhanced by claims

*Enhanced by claims

Business Results



Business Review

Tailor the Business Review to view the program details and results that matter most to you.

- ✓ **Executive Dashboard:** summary program results, member satisfaction & engagement
- ✓ **Wellbeing Dashboard:** summary of member health and wellbeing progress and outcomes
- ✓ **Recommendation Summary:** opportunities for improvements or changes and detailed action plans
- ✓ **Insights:** detailed analysis on the program details that matter most to you/client
- ✓ **Product Roadmap:** review planned innovations, product launches and program enhancements





Business reviews

Recommendations

Your Account Team is continuously assessing program data and analyzing it against your organizational goals. During the Business Review, your value map will guide any program recommendation made by your AM.

Discover Compare program outcomes, trends, and contributing factors to identify opportunities for improvement

Develop & Implement Pinpoint actionable, strategic recommendations based on proven best practices aligned to your goals

Deliver Revisit your value map top integrate recommendation and update action planning

Demonstrate Value Continually report progress on your KPIs to measure program performance and impact

Recommendation Summary

Solutions to Boost Enrollment
(Currently 5% Below Tier/Industry/Goal)

Address Champions Network Fatigue

- Meeting frequency/attendance
- Number of champions per location
- Define/re-define role of Champions; build out recruitment plan using Champions charter
- Discuss potential reward or incentive for Champions and/or incentive

Revisit Enrollment Communications

- Add email campaign with enrollment information to provide enrollment instructions prior to program year start
- Reduce ongoing email communications to quarterly
- Include information about platform enhancements to enrollment communications

Add Enrollment Incentives

- Discuss potential reward or incentive for achieving an enrollment goal
- On-platform points rewarded for first-time enrollment and inviting peers to enroll
- Competition across locations/companies with reward/recognition for highest enrollment

Data Extracts

Personify Health data extracts



Monthly & bi-monthly

Personify Health uploads user data extracts to the Report Archive within the Client Admin Portal by the second of each month.

3 types of data extracts can be delivered to the Report Archive.

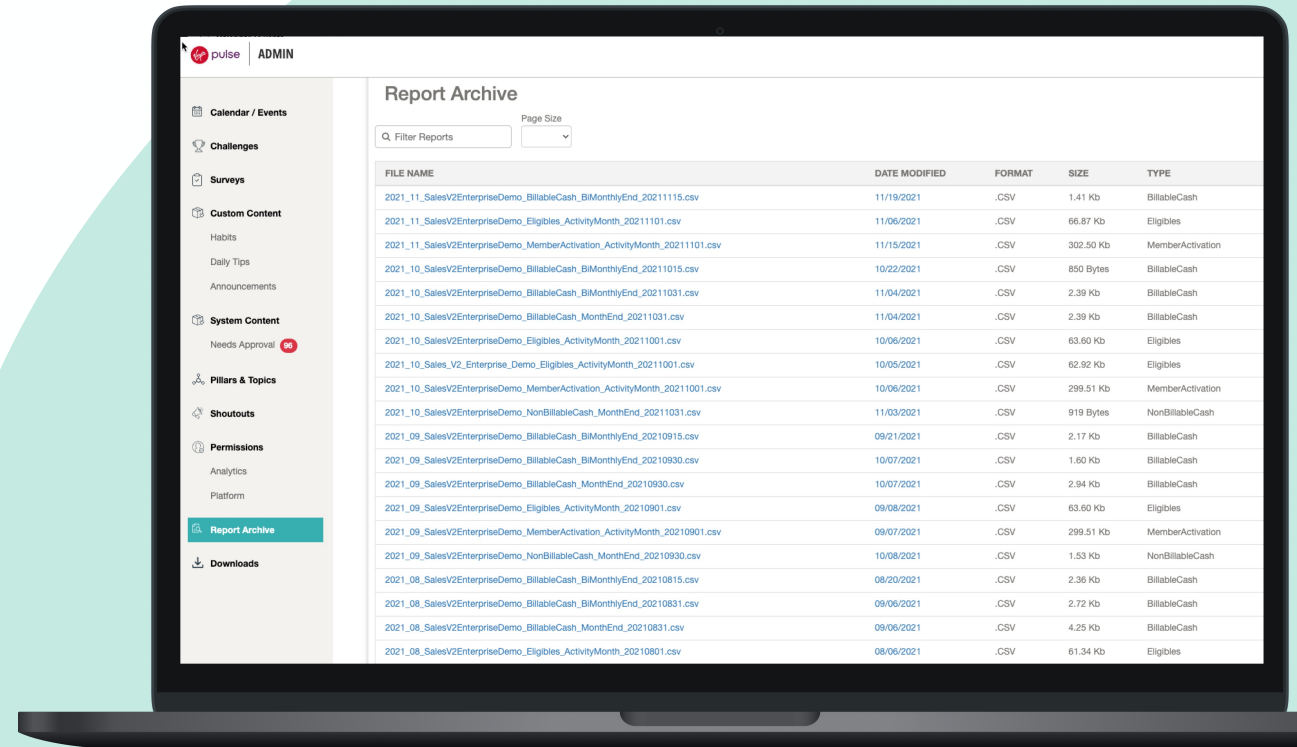
1. Admin Data Extracts include insights on earnings, redemptions, and activities, delivered monthly. Samples below.

- ✓ Eligible members
- ✓ Member activation
- ✓ Billable cash
- ✓ Non-billable cash
- ✓ Coaching backup*
- ✓ Billable Cash FSA HSA *
- ✓ Device subsidy*

2. Configurable Data Extracts* are tailored extracts that allow clients to incorporate relevant information, and segment data as needed.

3. Incentive Qualified Data Extracts* supports financial initiatives like payroll deposits and HSA contributions.

Report Archive via Client Admin Portal





Member level data extracts



Table 1:
Standard columns included

Column Name	Definition
Sponsor Name	Unique Client name
Sponsor ID	Unique Client ID
Employee ID/Member ID	Unique ID for each member
Platform ID	Internal VP unique identifier for each member
First Name	The member's first name included on the eligibility file.
Last Name	The member's last name included on the eligibility file.
Date of Birth	The member's date of birth included on the eligibility file.
Email Address	The member's email address.
Enrollment Status	The member's VP enrollment status.
User Category	Identifies the member as Employee/Spouse.
Member Type	Identifies the member as Employee/Spouse.
Office Location	The client supplied Office Location
Business Unit	The client supplied Business Unit
Company	The client supplied Company Location
Rewards Segment	The client supplied Reward Segment
Medical Plan	The member's medical plan included on the eligibility file
Address Fields	The member's address included on the eligibility file
Filter Fields	20 columns called Filter Values that display up to 20 additional client supplied person segmentation fields

- Collection of 30 different extracts
- Columns in table 1 included across all extracts
 - Additional specific variables included per file (e.g., redeemed amount on the redeemed rewards file)

- Delivered by request to admin portal report archive or SFTP
- Additional eligibility data can be added for configurable data extracts
- Flexible aggregations available for configurable data extracts
- File type: txt, csv, xlsx, & dat.

Additional collection of member level and aggregate reports that are included at no cost



Types of member level extracts

Default or configurable data extracts can be automatically split based on company codes, medical plans, or other group criteria



Incentives

- Cash Earnings and Redemptions (Billable Cash)¹
- Other types of Earnings (Non-Billable Cash)¹
- Level achievement history
- Level & points
- Level & incentives
- Redeemed rewards
- Rewarded actions



Activity

- Member Activation¹
- Program activity
- Program clicks
- Social groups
- Attestation forms
- Coaching activity
- Promoted healthy habits
- Steps challenge dashboard
- Health Check Q&A²
- NPS & Survey
- Journeys
- Biometric completion²
- ICR Form Processing²



Informational

- Eligible Members¹
- History of eligibility changes
- Coaching billing data extracts
- Email communications

Data extracts and access



Reporting Access – Current

- Subscribe to up to 30 aggregate and member level reports that can be delivered on an automated schedule
- Receive versions of each extract by segments – automatically parsed & delivered



Data Hub – Future

- Review details and download data extracts directly in the client admin portal
- Subscribe to and segment extracts by sponsor, company, and more
- User access to data can be restricted to specific segments



Snowflake – Future

- Access and query your data directly via Snowflake data sharing