Innovative Strategies to Enable Payment Reform

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We are a Fortune 500 Global Major…

Founded in 1994
(CTSH, Nasdaq)

Headquarters
Teaneck, NJ

75+ Global Delivery
Centers

211,500+
employees (Dec 2014)

Revenue
$10.26b in 2014 (up 16% YOY)
~$12.21b guidance for 2015

20,000+ Projects in
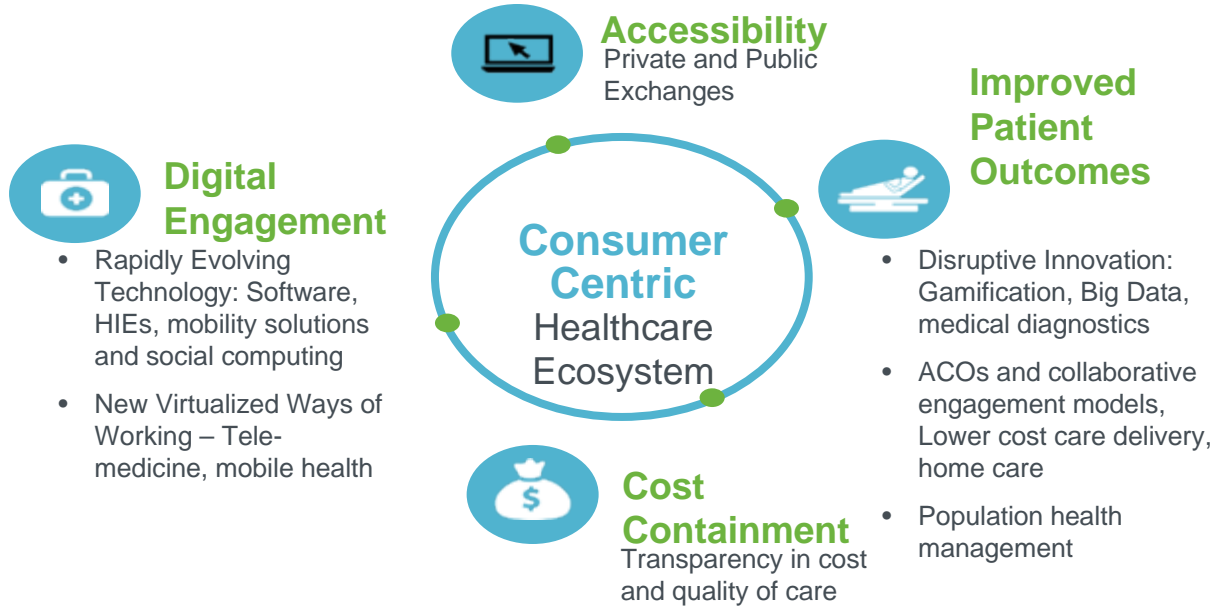40 countries

25+ Regional
sales offices

Forbes
Global 1000 company

FORTUNE 500
Ranked 308

FORTUNE
World's Most Admired Companies
for 7 years in a row

BEST AWARD WINNER

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Healthcare is at a Turning Point

Shift to Retail
Member/Patient is the Key Decision Maker

Growth in Government Programs
Across Payers and Providers

Redistribution
of Risk and Accountability

Cost Efficiency
Critical Across the Industry

Increased Compliance & Regulatory
Across all Market Participants

Accessibility
Private and Public Exchanges

Improved Patient Outcomes

Digital Engagement
- Rapidly Evolving Technology: Software, HIEs, mobility solutions and social computing
- New Virtualized Ways of Working – Tele-medicine, mobile health

Consumer Centric
Healthcare Ecosystem

- Disruptive Innovation: Gamification, Big Data, medical diagnostics
- ACOs and collaborative engagement models, Lower cost care delivery, home care
- Population health management

Cost Containment
Transparency in cost and quality of care

The new "Normal" for Healthcare organizations

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Alignment with Market Trends

Shift to Retail
Member/Patient is the Key Decision Maker

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Across Payers and Providers

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of Risk and Accountability

Cost Efficiency
Critical Across the Industry

Increased Compliance & Regulatory
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Payer
- Individual & Consumerism
- Government Programs
- Technology Advancement
- Administrative Efficiency

Provider
- Segment & Solution Expansion
- Revenue Analytics
- Workflow Adoption
- Payment Reform & VBR

Payer-Provider Collaboration
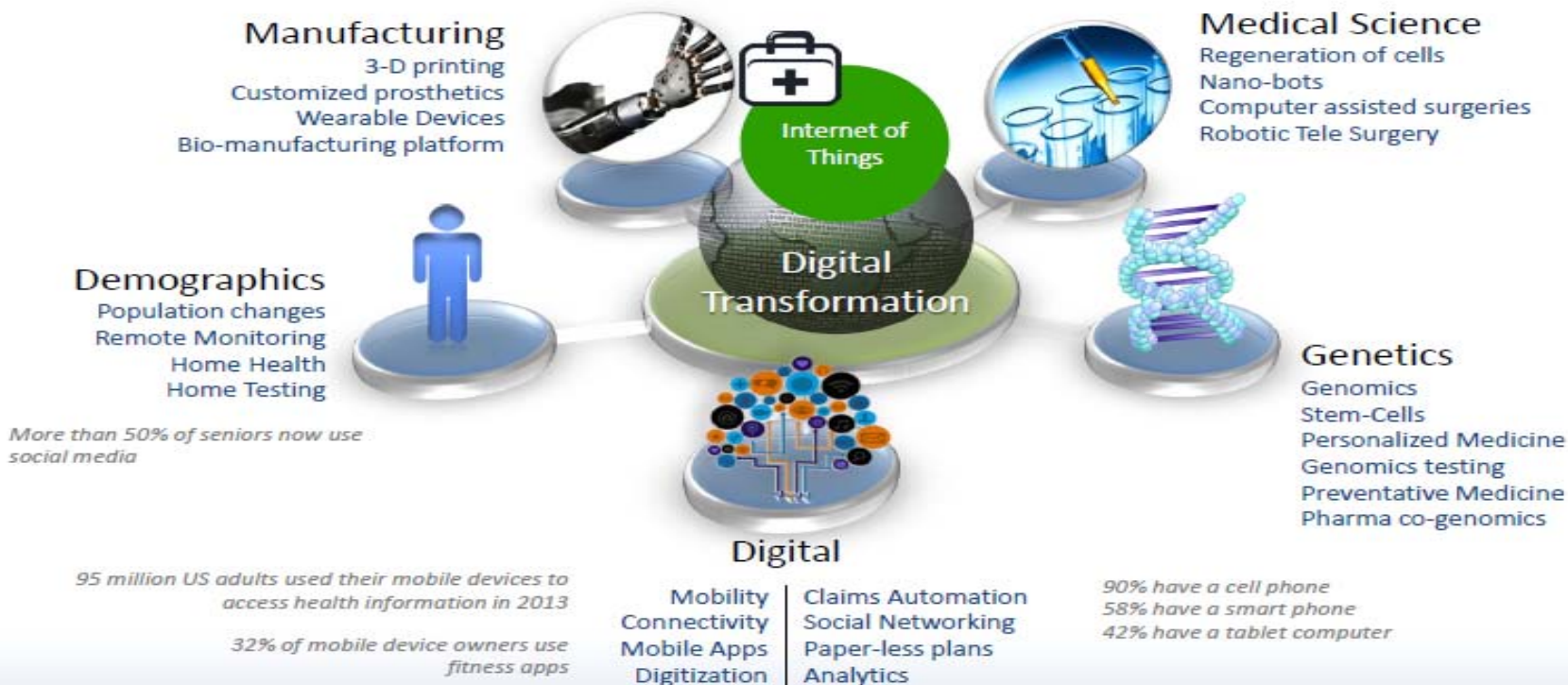- Population Health Management
- Digital Transformation
- Compliance
- Enabling New Market Entrants

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Digital Health .... And Beyond.

Digital health is "more than a doc and a smart phone" ... it is the convergence of digital, genomics, medical science and manufacturing innovations to address the health problems and keep or get an individual to good health ... efficient health may be within our grasp
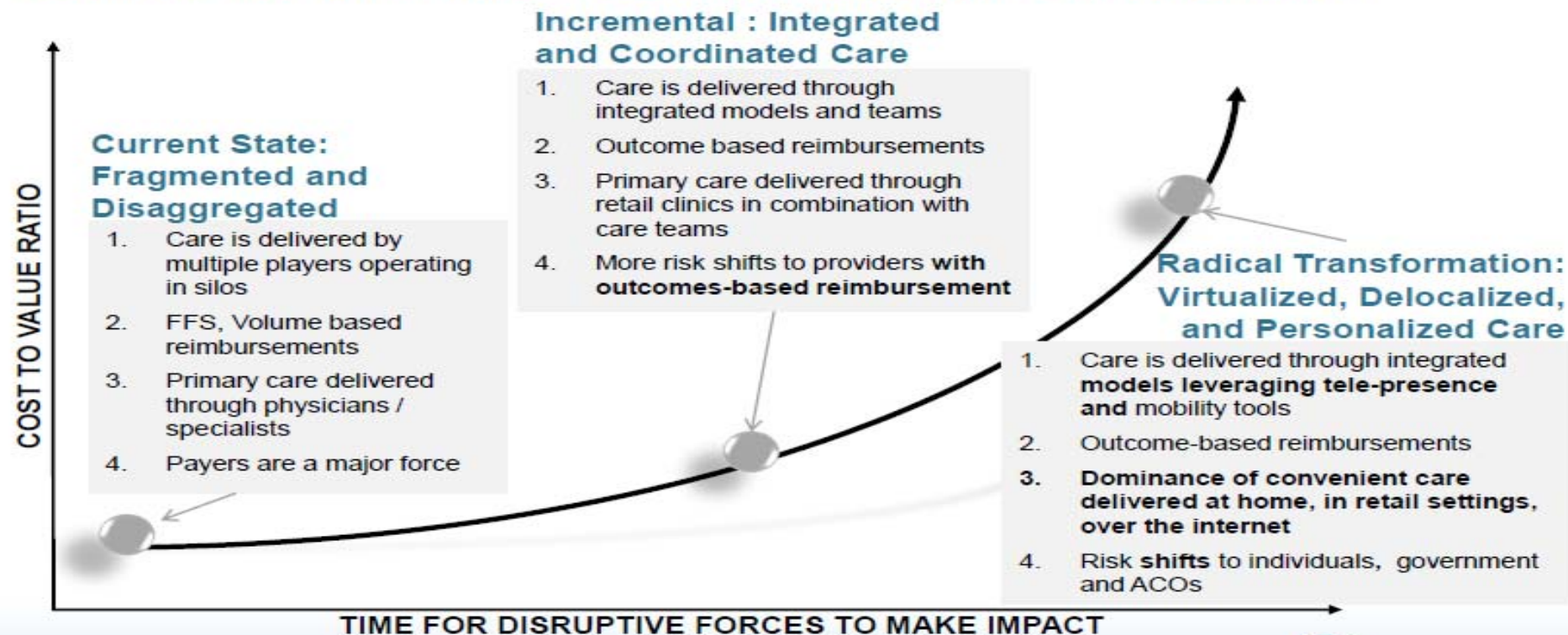
Manufacturing
3-D printing
Customized prosthetics
Wearable Devices
Bio-manufacturing platform

Medical Science
Regeneration of cells
Nano-bots
Computer assisted surgeries
Robotic Tele Surgery

Internet of Things

Digital Transformation

Demographics
Population changes
Remote Monitoring
Home Health
Home Testing

More than 50% of seniors now use social media

Genetics
Genomics
Stem-Cells
Personalized Medicine
Genomics testing
Preventative Medicine
Pharma co-genomics

95 million US adults used their mobile devices to access health information in 2013

32% of mobile device owners use fitness apps

Digital

Mobility	Claims Automation
Connectivity	Social Networking
Mobile Apps	Paper-less plans
Digitization	Analytics

90% have a cell phone
58% have a smart phone
42% have a tablet computer

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All players are competing for the Healthcare Consumer

The Sustainable Healthcare Model Circa 2020

This evolution driven by technology, virtualization and globalization is underway and areas of incremental improvement are emerging. These forces will quickly accelerate, dis-intermediating and delocalizing large portions of the industry.
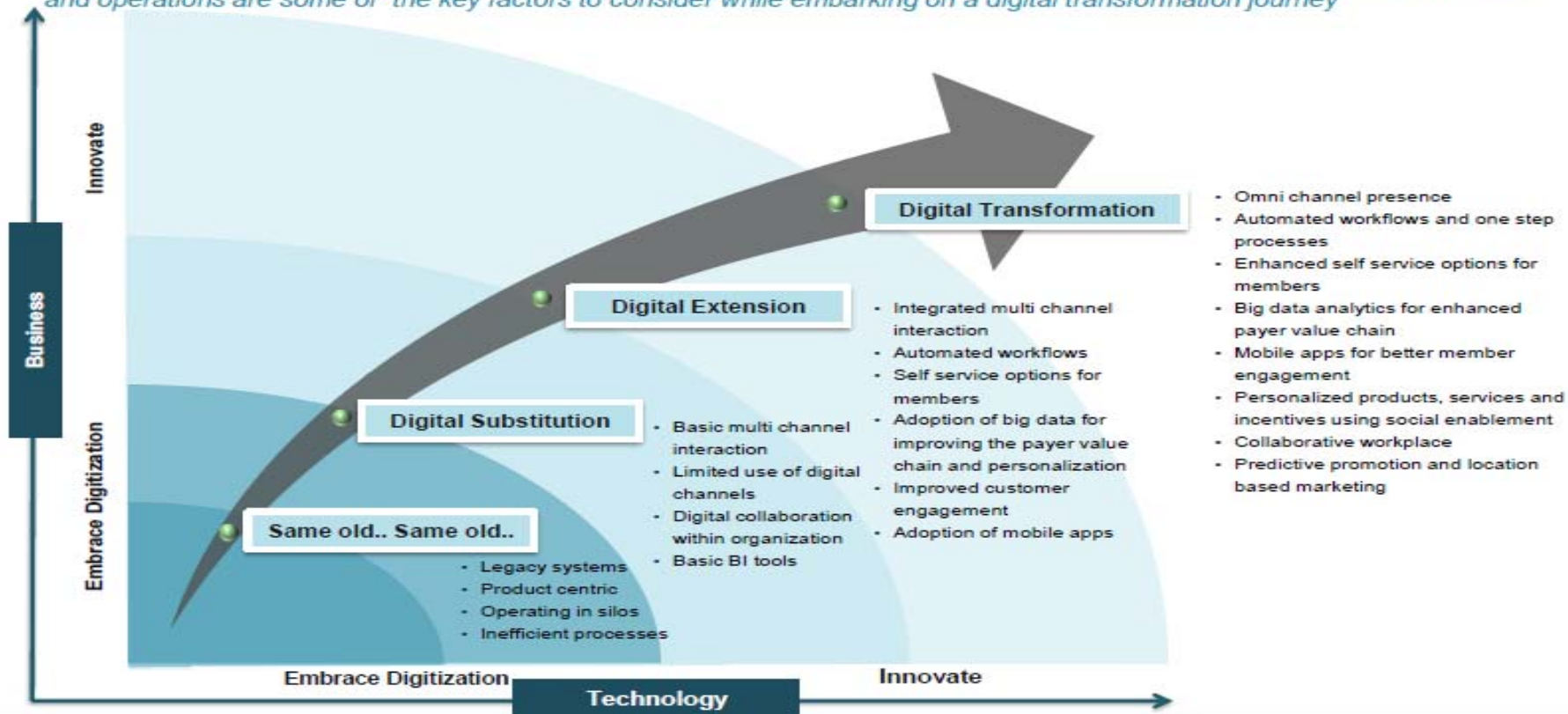
Incremental : Integrated and Coordinated Care

1. Care is delivered through integrated models and teams
2. Outcome based reimbursements
3. Primary care delivered through retail clinics in combination with care teams
4. More risk shifts to providers **with outcomes-based reimbursement**

Current State: Fragmented and Disaggregated

1. Care is delivered by multiple players operating in silos
2. FFS, Volume based reimbursements
3. Primary care delivered through physicians / specialists
4. Payers are a major force

Radical Transformation: Virtualized, Delocalized, and Personalized Care

1. Care is delivered through integrated **models leveraging tele-presence and** mobility tools
2. Outcome-based reimbursements
3. **Dominance of convenient care delivered at home, in retail settings, over the internet**
4. Risk **shifts** to individuals, government and ACOs

COST TO VALUE RATIO

TIME FOR DISRUPTIVE FORCES TO MAKE IMPACT

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Disruptive Innovation Expected... and Feared

Consumer-Focused Integrated Health Management Core Competencies

- Consumer Brand and Trust
- Consumer Innovation
- Health Management Expertise
- Health Wellness and Integrated Financial Expertise
- Clinical Quality Performance Management Expertise
- Personal Services, Coaching and Intimacy
- Clinical Community Expertise
- Local Market Knowledge
- IT, Integration, Decision Support and Procurement

Pharmacy & Biotech
Health Benefits Services
Financial Services
Disease Management
HC Delivery
Medical Products & Services
Insurance Products
Provider & Payer Solutions
Consumer Software & Services
Retailers
Consumer Products

Digital Transformation Maturity

Adaptability to the changing healthcare eco system, ability to create consumer centric services/products and capability of IT and operations are some of the key factors to consider while embarking on a digital transformation journey

Business — Innovate / Embrace Digitization

Digital Transformation
- Omni channel presence
- Automated workflows and one step processes
- Enhanced self service options for members
- Big data analytics for enhanced payer value chain
- Mobile apps for better member engagement
- Personalized products, services and incentives using social enablement
- Collaborative workplace
- Predictive promotion and location based marketing

Digital Extension
- Integrated multi channel interaction
- Automated workflows
- Self service options for members
- Adoption of big data for improving the payer value chain and personalization
- Improved customer engagement
- Adoption of mobile apps

Digital Substitution
- Basic multi channel interaction
- Limited use of digital channels
- Digital collaboration within organization
- Basic BI tools

Same old.. Same old..
- Legacy systems
- Product centric
- Operating in silos
- Inefficient processes

Embrace Digitization — **Technology** — **Innovate**

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Portfolio of Products and Services for Bundles

Management consulting services and organization assets span the "Plan, Build, Run" life cycle

Plan "What bundle activities to prioritize?"	Build "How to manage a bundle?"	Run "How to improve performance?"
• Gather detailed clinical, data and quality metrics requirements • Define and/or redesign clinical workflows and transitions • Detailed planning, tool selection, and implementation plan finalization	• Implement/configure selected tools • Build data integration components • Test to validate workflows and data • Execute a pilot program • Generate and analyze quality and performance metrics	• Training and education rollout • Scale program • Increase automation of bundle identification • Automate alerts and notifications • Real-time performance dashboards • Optimize resource utilization
• Business Architecture/Solution Design • Ethnographic studies • Business Case Development • Risk Assessment Services • Product/Vendor Evaluation RFP Services • Implementation Roadmap Development and Planning	• Program Management • Business Process Re-engineering • Requirements Management • Change Management • Testing Strategy • Release Planned • User Acceptance Testing • Vendor Management and coordination	• Operational Improvement • "Best-in-Class" Benchmarking Services • Continuous Quality Improvement Programs • Productivity Measurement and Enhancement
• Business Requirements Templates • Vendor Evaluation Accelerators • Capability/Criticality Matrix • Data Mapping Templates • IHM Process Library	• Bundling Engine (PBA) • Care Coordination Platform (OnVida) • Analytics and Risk Stratification Solution (WellServ) • Patient Engagement and Wellness (HealthActivate)	• Bundling Engine (PBA) • Care Coordination Platform (OnVida) • Global Clinical Services • Analytics and Risk Stratification Solution (WellServ) • Patient Engagement and Wellness (HealthActivate)

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End-to-End Solutions

Cognizant as the single partner for today and tomorrow

Software & Tools	Consulting	IT Professional Services	Business Process Services	Infrastructure Services	Next Generation Technologies
- Core Administration - Network Management - Payment Bu - Care Management - Workflow - Portals	- Advisory - Implementation - Business Optimization - Integrated Health Management - Consumerism - Health Intelligence & Analytics - Regulatory and Compliance	- Systems Integration - Application Dev & Maintenance - Configuration - Program Management - Migration - Requirements - Portals and Mobile - Testing - Enterprise Architecture - Infrastructure Services	- Enrollment - Billing - Claims Administration - Medical Management - Provider Credentialing - Provider Data Management - Revenue Cycle Management - Fraud & Subrogation - Appeals & Grievances - Contact Center Services	- Availability Services - Productivity Services - Connectivity Services - Cloud Solutions - Integrated Value Management	- Social - Mobile - Analytics - Cloud - Code Halo™

As-a-service solutions that deliver operational efficiencies (run better) and advanced capabilities (run different) through **integrated people, process & technology**

Pre-built IP platforms

Solutions across industries & technologies

As-a-service

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