



SESSION HIGHLIGHTS

DAY 1 - TUESDAY, OCTOBER 15, 2024

Welcome

SPEAKER

Laura Crown, Vice President, Regulated Markets Client and Market Strategies, Express Scripts by Evernorth

OVERVIEW

Welcome to Regulated Markets Summit 2024. We are thrilled to be together for our 8th Annual Summit in a new location and excited to engage over the next few days as we emerge beyond 2024's abundance of regulatory transformations. We hope you walk away with insights, best practices, inspiration, new ideas and some new friends. Thank you for your time, engagement and active participation over the next few days.

KEY TAKEAWAYS

- The regulatory landscape continues to challenge the way we work
- We are committed to our partnership and your success
- Together through being resilient and persevering we will succeed

IF YOU REMEMBER NOTHING ELSE

We are your partner in these evolving markets and are committed to your success.

DAY 1 - TUESDAY, OCTOBER 15, 2024

Welcome

SPEAKER

Adam Kautzner, President of Express Scripts by Evernorth

OVERVIEW

Adam Kautzner will share perspectives surrounding the PBM industry and the impact on Health Plans downstream followed by an audience question and answer session.

IF YOU REMEMBER NOTHING ELSE

Together we will drive value and achievements as we overcome challenges today, while preparing for what's ahead.

DAY 1 - TUESDAY, OCTOBER 15, 2024

Navigating regulatory shifts and preparing for what lies ahead

MODERATOR

James Michel, Government Affairs Senior Principal, Cigna

PANELISTS

Ben Klein, Senior Vice President, Co-Chair of Health Care Practice, Invariant; Kate Weis, Senior Vice President, Chair of Health Care Practice, Invariant

OVERVIEW

Join Washington, DC industry insiders Katie Wise and Benjamin Klein, co-chairs of Invariant's health care practice group, as they explore the overall political landscape and the upcoming election's impact on pharmacy, PBMs and healthcare.

Key Themes

- Understand what legislative issues will be considered in a potential end of year package and the impact they have on Health Plans and PBMs.
- Hear about what issues are important to each of the presidential candidates and how the outcome of the election could influence future health care policy for regulated markets.
- Understand how the next Administration is likely to shape regulatory policy going forward.

IF YOU REMEMBER NOTHING ELSE

Change brings opportunity

DAY 1 - TUESDAY, OCTOBER 15, 2024

Market disrupters impacting drug pricing and the growing drug pipeline

SPEAKER

Jeremy Fredell, PharmD, BCPS, Vice President Pharma Strategy & Contracting, Express Scripts by Evernorth

OVERVIEW

During this session, we will discuss scenarios and strategies for medication management and therapeutic areas impacting plans. Topics include market disruptors such as biosimilars, GLP-1s, Medicare Maximum Fair Price and AMP Cap drugs, and high-cost therapies in the pipeline. Throughout our discussion, we will explore economic perspectives of government, health plans and members as well as potential strategies for mitigating risks.

KEY TAKEAWAYS

- Maximum Fair Price (MFP) may not drive significant savings when reaching lowest net price
- Manufacturers will adjust to new economics
- Holistic management and benefit design innovation are key success factors

IF YOU REMEMBER NOTHING ELSE

The impact of drug price negotiations on pharma's contracting strategy will be fully realized in early 2025 for the 2026 contract year.



DAY 1 - TUESDAY, OCTOBER 15, 2024

Table Talk: Getting to know your peers

MODERATOR

Ember Montunnas, Senior Director, Regulated Markets Health Plan Client & Market Strategy, Express Scripts by Evernorth

OVERVIEW

Opportunity to talk to fellow health plans about similar plan challenges, wins, and strategies. Take this designated time to learn more about your peers by engaging in conversation on topics important to you and discover new ways of meeting the challenges ahead.

CONVERSATION STARTERS

- Top trends in the market
- Regulatory challenges
- Quality and cost savings solutions
- Strategies / best practices
- Market and enrollment expansion
- Vendor Management
- Service excellence

IF YOU REMEMBER NOTHING ELSE

“Alone we can do so little; together we can do so much.” – Helen Keller



DAY 1 - TUESDAY, OCTOBER 15, 2024

Meet the 1%: Delving into healthcare's costliest patients

SPEAKERS

Urvashi Patel, PhD, MPH, Vice President, Data & Analytics, Evernorth Research Institute; Maggie Rausa, Director, Oncology Solution Growth & Clinical Account Management, EviCore by Evernorth; Roseleen Charania, M.D., Associate CMO of Oncology Solutions, EviCore by Evernorth

OVERVIEW

Leveraging research findings from the Evernorth Research Institute, this session delves into the 1% of members responsible for the majority of plan spend. We will look at who these members are, expense drivers, and best practices to help manage the financial strain.

KEY TAKEAWAYS

- Smaller slice of membership is driving bulk of costs
- Savings potential with improved medical & pharmacy integration
- Oncology capabilities are critical to the 1%
- High quality of oncology care leads to improved patient experience and outcomes

IF YOU REMEMBER NOTHING ELSE

Plan specific analysis is available if you are interested in learning more about the top 1% of your population

DAY 1 - TUESDAY, OCTOBER 15, 2024

Navigating market complexity

SPEAKERS

Susan Thomas, Managing Director, Health Plan Growth, Express Scripts by Evernorth; Steve Foote, Senior Director, Competitive Intelligence, Evernorth Health Services, Todd Wanta, Principal & Consulting Actuary, Milliman; Tracy Margiott, Principal & Consulting Actuary, Milliman; Lora Saunders, Associate Principal, Health Management Associates (HMA)

OVERVIEW

Presenters will discuss market trends and approaches to sustained growth across Medicare, Medicaid and Marketplace. Focus will be on competitive market insights, observations from the 2025 Medicare Bid Year considering IRA, and unintended aspects of Medicaid redetermination both on Medicaid and Marketplace.

KEY TAKEAWAYS

- Noteworthy growth opportunities in the macro competitive environment
- Insights on the changing landscape from the 2025 Medicare bid and trends supporting the development of your 2026 Medicare bid
- Implications from Medicaid unwinding will continue to present challenges in the coming years
- The Marketplace has witnessed gains from the unwinding of Medicaid
- Unique contracting elements are being considered as Medicaid agencies look for cost savings, better outcomes, and less provider abrasion

IF YOU REMEMBER NOTHING ELSE

Express Scripts Health Plan Growth Consultants are market experts offering proactive data and insights for competitive differentiation in support of enrollment growth.

DAY 1 - TUESDAY, OCTOBER 15, 2024

IRA: The time is now

SPEAKERS

Laura Crown, Vice President, Regulated Markets Client & Market Strategies; Ember Montunna, Senior Director, Regulated Markets Health Plan Client & Market Strategies; Laura Leech, Vice President, Regulated Markets, Product Strategy Services; Madras Perlson, Managing Director, Financial Analyst; Nicole Casey, Business Development Director, Regulated Markets Client Strategy, Express Scripts by Evernorth

OVERVIEW

This session will highlight our efforts to stand up the Medicare Prescription Plan (M3P) and benefit changes stemming from Medicare Redesign and our 1/1/2025 readiness plan. Followed by our first look into call center stats and call trends since opening the phone lines on 9/15/2024. We wrap our presentation with a look at the drug price negotiations impact on the 2026 Bid and will conclude with a Q&A.

KEY TAKEAWAYS

- We are ready to support your member elections beginning at open enrollment
- Final phases of the 1/1/2025 redesign is underway
- Call Center and vendor, monitoring and surveillance, is our top priority
- Financial guarantee adjustments process coming soon
- Rebate guarantees will be adjusted assuming negotiated drugs will not be further rebated

IF YOU REMEMBER NOTHING ELSE

We are committed to finding value amidst the unpredictable market forces.

Join us for the next IRA Client Advisory Forum

Thursday, October 24, 2024 at 3 pm EST

- 1/1 Go-Live and Readiness
- M3P Call Stats and Trends

DAY 2 - WEDNESDAY, OCTOBER 16, 2024

Express Scripts leaders react to the shifting industry landscape

MODERATOR

Laura Crawn, Vice President, Regulated Markets Client & Market Strategies, Express Scripts by Evernorth

PANELISTS

Dan Chambers, Vice President & General Manager, Regulated Markets, Express Scripts by Evernorth; Adam Stacy, Senior Vice President, Supply Chain, Evernorth; Katie Walsh, Senior Vice President, PBM Operations, Express Scripts by Evernorth

OVERVIEW

Healthcare is experiencing significant changes - from unprecedented regulatory pressures to evolving market dynamics. Hear from Executives on how Express Scripts is navigating these changes.

KEY TAKEAWAYS

- Express Scripts is focused on and investing to ensure our plans are prepared for regulatory and operational requirements
- Express Scripts has an unwavering commitment to address and influence the challenging environment ahead
- Together we are cultivating new and innovative opportunities to prosper in this changing environment

IF YOU REMEMBER NOTHING ELSE

Investment, commitment, and partnerships are essential to ensure our collective success

DAY 2 - Wednesday, OCTOBER 16, 2024

Focusing on quality the pharmacy delivers

SPEAKERS

Ashley Holzworth-Nash, Vice President, Product Strategy & Solutions – Network, Express Scripts by Evernorth; Stephanie Cooney Smith, Senior Director, Independent Pharmacy Affairs, Express Scripts by Evernorth

OVERVIEW

Explore emerging opportunities to improve care, quality, and value for populations that need it the most at the network location of their choice.

KEY TAKEAWAYS

- Evolving needs of complex populations are being explored
- Enhancing quality outcomes and empowering pharmacists to have a greater hand in the overall member health is a key strategy
- Understanding your Medicare and Medicaid network expectations

TABLE ACTIVITY

During this session, use the index card on your tables to jot down responses to questions posed by the speakers. These will be collected to further future conversations.

IF YOU REMEMBER NOTHING ELSE

We are embarking on the next frontier in pharmacy to provide improved quality and expanded care services at retail point-of-sale.

DAY 2 - WEDNESDAY, OCTOBER 16, 2024

Flexible provider centric approaches to complex issues

MODERATORS

*Julie Nowfar-Rad, Client Business Lead, Health Plan, Express Scripts by Evernorth;
Jonathan Holder, Senior Account Executive, Health Plan, Express Scripts by Evernorth*

SPEAKERS

Jill Noehren, Senior Director, Clinical Programs, Evernorth Health Services; Omar Daoud, Senior Director, Pharmacy, Community Health Plan of Washington (CHPW); Logan Fox, Director of Enterprise Quality Improvement Programs, CareSource; Melinda Odom, Clinical Program Senior Advisor, Provider Engagement, Express Scripts by Evernorth

OVERVIEW

Learn more about Academic Detailing through the lens of client successes seen to improve high-cost drug affordability, improved metric performance, decreased adverse drug event incidents and what more this solution can do for you.

KEY TAKEAWAYS

- Every Academic Detailer is uniquely leveraged and customizes provider outreach initiatives to help meet your Plan goals
- Academic Detailers are experienced clinical pharmacists who use proven provider engagement strategies
- Extensive data mining and assessment by your Academic Detailer, in collaboration with your Plan, identifies meaningful opportunities that drives measurable outcomes

NEXT STEPS

Take a moment to brainstorm ideas in the notes section of this workbook where an Academic Detailer could help you address specific needs within your organization or new ideas you have for additional areas of focus.

At the end of the session, use the index cards on your tables to share some of your ideas that will be collected to further future conversations.

IF YOU REMEMBER NOTHING ELSE

Academic detailing is a tailored, provider-centric service designed to solve the most complex challenges you are facing

DAY 2 - WEDNESDAY, OCTOBER 16, 2024 Closing Thoughts

Thank you for attending Regulated Markets Summit 2024.

We appreciate your time, engagement and conversation.

Your market strategist(s) will be available to continue the dialogue around topics from this event that are of interest to you and your organization.

Please remember to take a few minutes to complete your survey. Your feedback and perspectives will be used in the planning of future events.

Here's to a successful 1/1 and upcoming bid season! Wishing you all safe travels home.