ROUNDSTONE

● LIVE WEBINAR

Shop Smarter, Save Bigger: A Roadmap to Optimal Self-Funded Health Plans

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CEO & Co-Founder HealthRosetta

OUR APPROACH

Nautilus

We provide three essential tools that transform any health plan because we know that open, shared standards create a virtuous cycle of improvement.
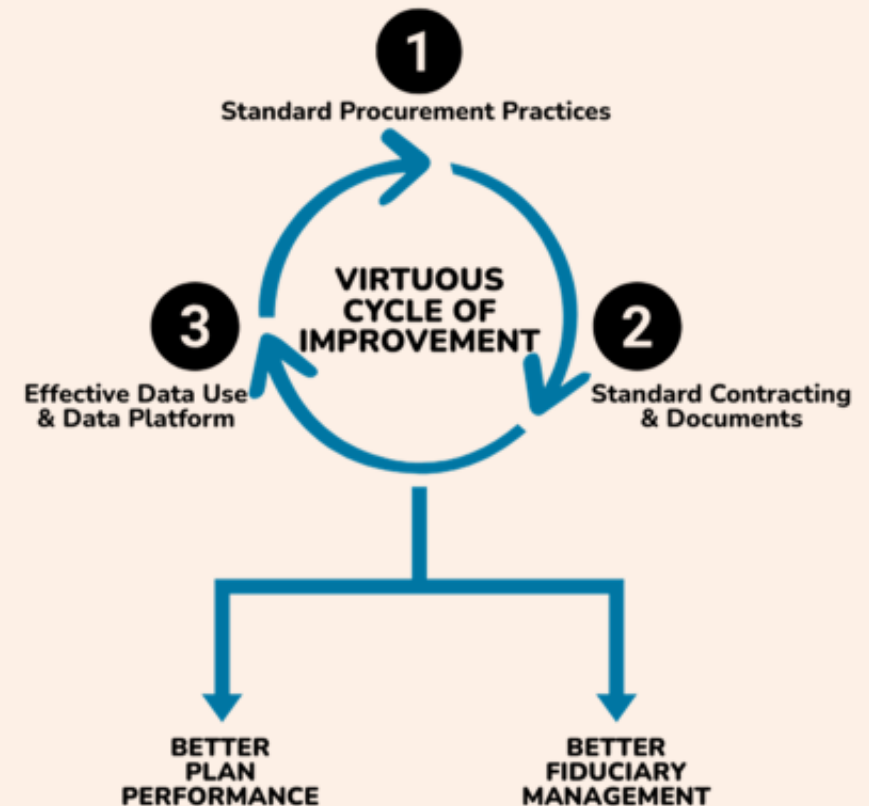
1. STANDARD PROCUREMENT

Open-source templates and scoring criteria that help employers select high-value vendors instead of getting exploited

2. MODEL CONTRACTS

Legal language that protects employers from the abusive practices buried in fine print that have become industry standard

## 3. EFFECTIVE DATA USE & DATA PLATFORM (METL)

Technology that gives employers access to their own data, the ability to use it, and breaks vendor lock-in
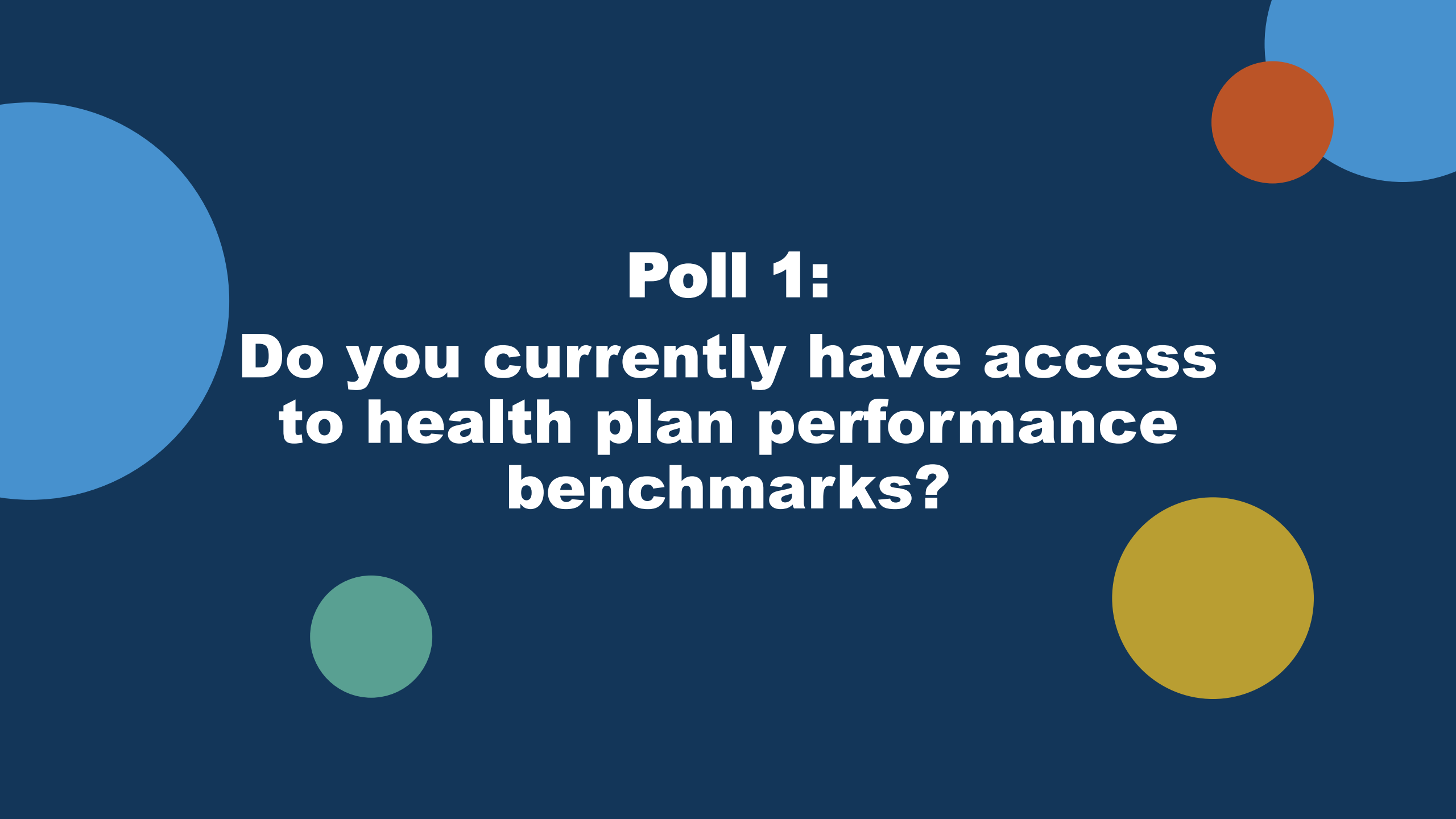

1 Standard Procurement Practices

VIRTUOUS CYCLE OF IMPROVEMENT

3 Effective Data Use & Data Platform

2 Standard Contracting & Documents

BETTER PLAN PERFORMANCE

BETTER FIDUCIARY MANAGEMENT

Nautilus Three-Pillar Strategy for System Change

Pillar 1 Procurement:
Create Standards of Excellence

- Free, accessible database of proven tools and contract language
- Industry-wide credentialing system making high-quality plans the norm
- Objective scoring (Plan Grader) that reveals exactly where to improve
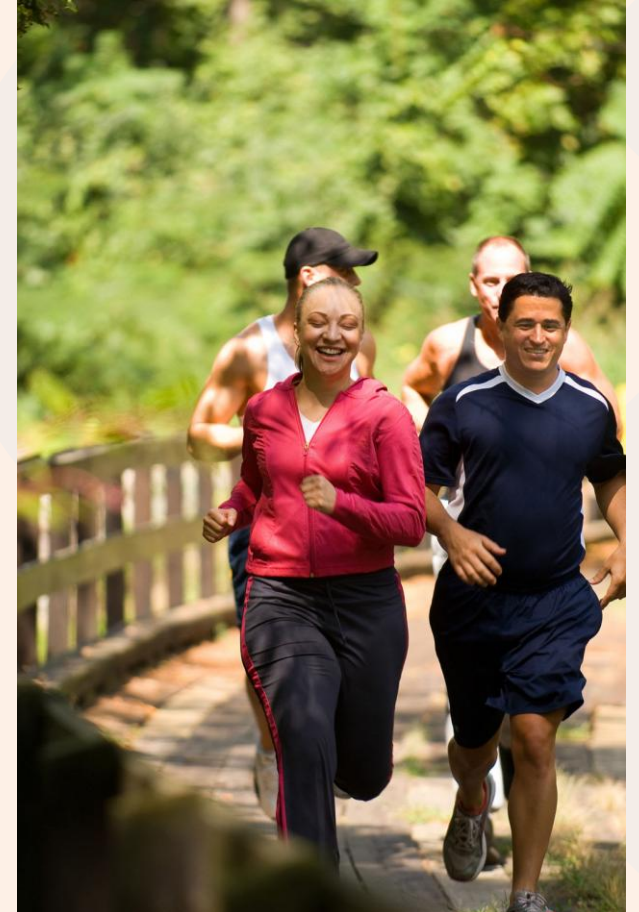
Poll 1:
Do you currently have access to health plan performance benchmarks?

Nautilus Three-Pillar Strategy for System Change

Pillar 2 Contracts:
Build an Adoption Network

- Train benefits advisors on value-based approaches
- Educate employers across all sizes and sectors
- Create peer-to-peer learning community
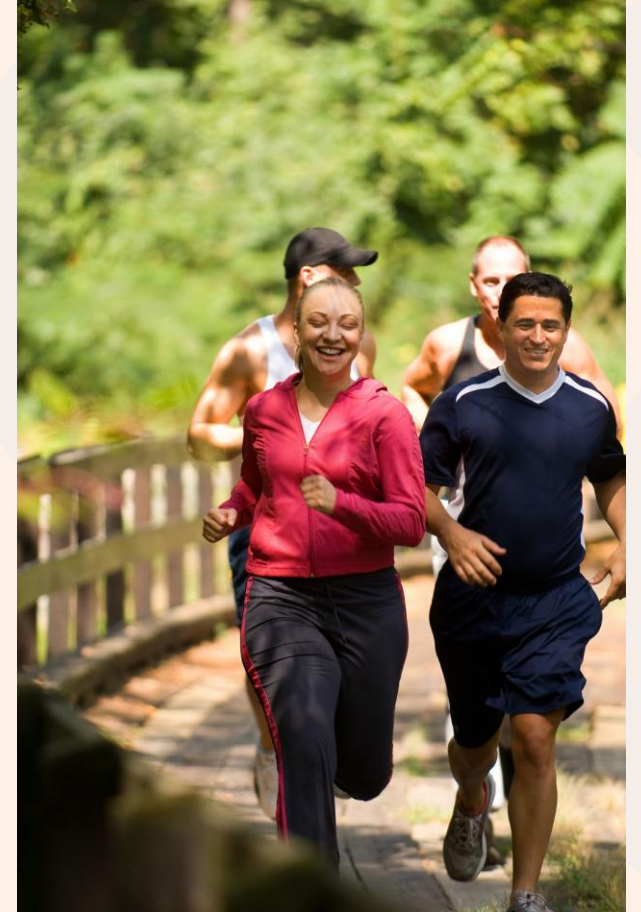
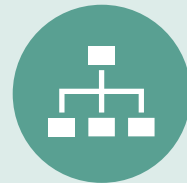# What Makes a Good Partner?

- Reputation & Experience
- Data Handling & Claims Submissions
- Transparency & Reporting
- Business Model
- Service Structure & Outcomes

Poll 2:

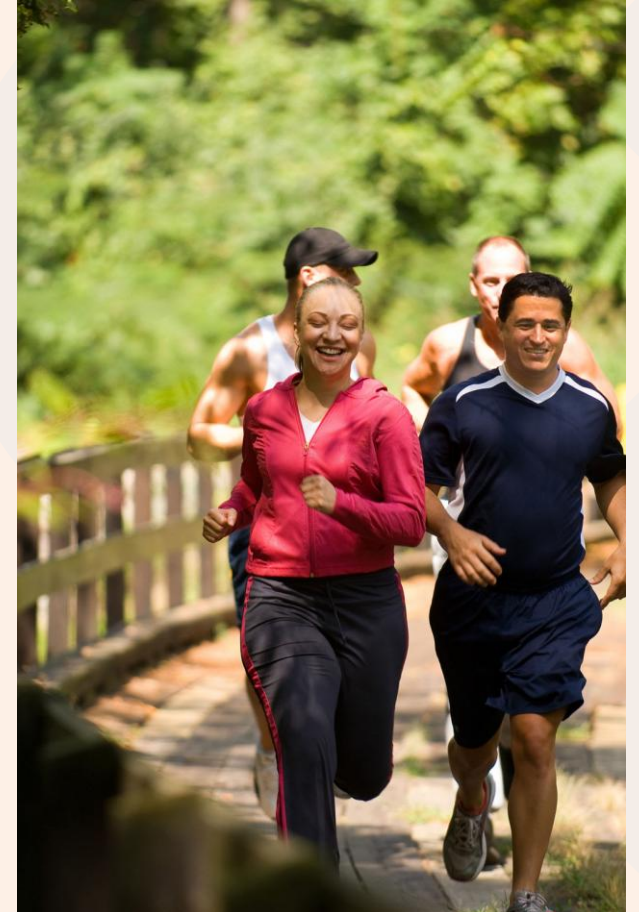## Do you understand high-performance plans with cost-optimizing strategies?

Nautilus Three-Pillar Strategy for System Change

Pillar 3 Efective Data Use:
Drive Market Transformation

- Open-source approach benefits all stakeholders
- Technology platform (METL) breaks vendor lock-in
- Collective action creates new market standards

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Poll 3:
Do you have complete access to claims data?

Contract Language Example
If working w/ TPA, specific defined language may be possible.
If working w/ a carrier, assessment of their language is likely the only available approach.

How does the ASA define the term "claim?"	Claim is defined in a detailed manner and sets forth all of elements necessary to be considered a "clean claim."
How does the ASA define the term "claim?"	Claim is defined generally as a notification that service has been rendered or furnished to a Plan member
How does the ASA define the term "claim?"	Claim is not defined.
How does the ASA define the term "claim?"	Other

"**Claim**" will mean notification in a form acceptable to Claims Administrator that service has been rendered or furnished to a Plan member. This notification must set forth in full the details of such service including, but not limited to, the member's name, age, sex and identification number, the name and address of the provider, a specific itemized statement of the service rendered or furnished, the date of service, applicable diagnosis, the Claim charge, and any other information which Claims Administrator may request in connection for such service.

This approach could be applied to Consultant Service Agreements

Health Rosetta

Data Source Scoring

Health Rosetta Data Medical F	Reporting Field Weight	Field Presence 5 - Field Present in Layout 0 - Field Not Present in Layout	Field Data Population 5 - Consistently Populated 1 - Inconsistently Populated 0 - Never Populated	Field Data Usability/Validation 5 - Consistently Usable field value 4 - Consistently Usable via definable logic 1 - Inconsistently Usable field value 0 - Never Usable	Weighted Score	Possible Score
Field						
Claim Number	7	5	5	5	105	105
Claim Paid Date	7	5	5	5	105	105
Claim Processed Date	3	0	0	0	0	45
Claim Received Date	3	5	5	5	45	45
Claim Status Code	7	5	5	5	105	105
Claim Type	7	5	5	5	105	105

Medical Fields	# of Fields Present
	0
1	67
3	65
7	69
Grand Total	**201**

This approach could be applied to Consultant Service Agreements

PROVEN IMPACT AT SCALE

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BY THE NUMBERS

- **$4 million** invested in battle-tested technology and standards – now available free to everyone
- **5+ million** Americans already able to benefit from Health Rosetta ecosystem solutions
- **20-50% cost reduction** while improving outcomes and member experience

RECENT IMPACT EXAMPLES

- 2,500-employee public sector: Better advisor transparency and performance via Nautilus Advisor RFP
- 16,000-employee company: Superior plan administration & measurement via Nautilus TPA RFP

Pipeline: 20+ organizations implementing METL, hundreds more in evaluation since RosettaFest 2024 launch

Poll 4:

Has your organization updated or benchmarked your healthcare service contracts using open-source tools in the past 12 months?

REAL-WORLD IMPACT

Russell DuBose's Healthcare Revolution at Phifer: From Crisis to Transformation

When Phifer Inc faced crushing healthcare costs threatening their competitiveness, they could have followed other manufacturers overseas. Instead, they used Health Rosetta methods (now available via Nautilus) to transform their challenge into competitive advantage. Five+ years of flat healthcare spending.

- **Wake-Up Call:** In 2017, Phifer's health plan scored just 37/100 on the Health Rosetta Plan Grader™ – revealing critical gaps in plan design, transparency, and access to high-quality care.
- **Roadmap for Change:** The Plan Grader provided a clear and actionable blueprint for improvement across 8 key areas, igniting a multi-year transformation of the company's healthcare strategy
- **Tangible Impact:**
  - By 2024, Phifer's overall Plan Grader score **nearly doubled to 74/100**, with **375% improvement** in specialty care access and **100% improvement** in advanced primary care and plan design
  - Transparent pharmacy benefits score **increased 91%**, leading to eliminated copays for 1,700+ employees
  - Phifer reinvested savings to fund scholarships, childcare support, wellness incentives, and more, improving employee financial wellness and retirement readiness by over 20 points
  - Phifer opened PhiferCares, a zero cost-share advanced primary care clinic for all plan members

**Phifer's story is now a national model for employers seeking to
align healthcare spending with employee well-being and business performance.**

Q&A

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