

∴ one medical

# A modern approach to primary care



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Exceptional primary care for employees and their families.

- Improved access to care
- Superior member experience
- Lower total cost of care



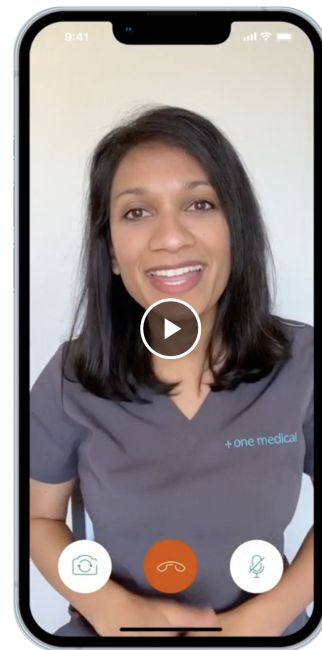
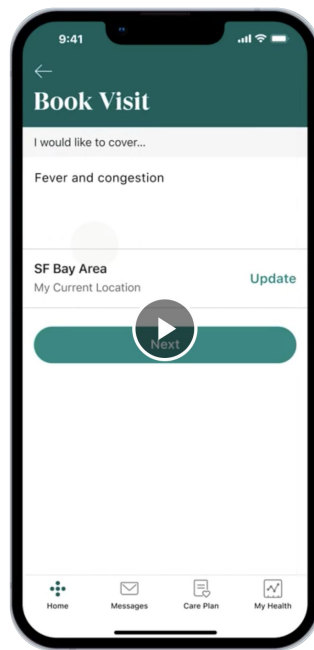
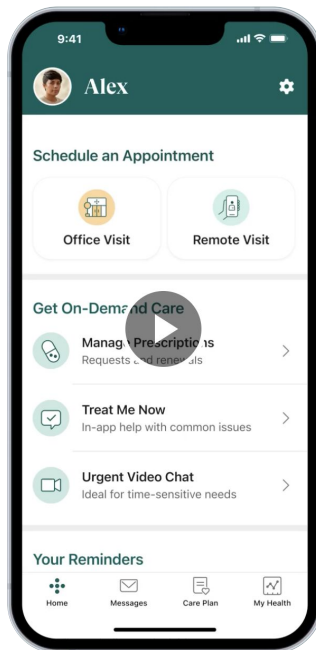


# Technology-enabled access that drives engagement

We make it fast, easy, and more enjoyable for members to look after their health with the One Medical app.

~45% of members visit our web or mobile app monthly<sup>1</sup> to:

- Schedule an appointment— in-person or virtual
- Manage prescriptions
- Message their care team
- Speak with a provider over Video Chat
- Access their care plan and health records



*Ratio of 4x digital to in-person encounters<sup>1</sup>*

<sup>1</sup>Data from December 31, 2022 measuring the previous twelve months.



# The primary care patient experience in America is deficient



Lack of access

21 days  
to see a provider<sup>1</sup>



Inconvenience

20 mins  
in PCP waiting room<sup>2</sup>



Challenge building trusted  
provider relationship

10-15 min  
with provider<sup>2</sup>

Source: 1.Renken, Elena. 2020. As Out-Of-Pocket Health Costs Rise, Insured Adults Are Seeking Less Primary Care. NPR. ; 2.Merritt Hawkins. 2022. Survey of Physician Appointment Wait Times. 3.Phreesia. 2020. The High Cost of Long Wait Times.

# Leading to higher costs and worse outcomes long-term



## Unnecessary use of expensive care options

**37%** of personal healthcare expenditures spent on hospital care<sup>1</sup>

**21%** Projected increase in revenue for the urgent care market from 2019 to 2023<sup>2</sup>



## Worsening chronic conditions

**40%** of adults in the US suffer from two or more chronic diseases<sup>3</sup>

**75%** of healthcare spending in the US is used to treat chronic conditions<sup>4</sup>



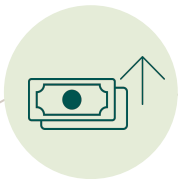
## Lower life expectancy

**43<sup>rd</sup>** is where the US ranks on life expectancy when compared to the rest of the world<sup>5</sup>

**13.5x** Greater drop in life expectancy for the US between 2019 and 2021 than for peer countries<sup>6</sup>

Source: 1. Centers for Medicare & Medicaid Services, National Health Expenditures Accounts (2019). 2. IBISWorld as cited in CNN Business Article *Why urgent care centers are popping up everywhere*. <https://www.cnn.com/2023/01/28/business/urgent-care-centers-growth-health-care/index.html> 3. National Center for Chronic Disease Prevention and Health Promotion, 2022. 4. Munira Z. Gunja, Evan D. Gumas, and Reginald D. Williams II, U.S. Health Care from a Global Perspective, 2022: Accelerating Spending, Worsening Outcomes (Commonwealth Fund, Jan. 2023). <https://doi.org/10.26099/8ejy-yc74>; 5. <https://www.worlddata.info/life-expectancy.php#:~:text=Life%20expectancy%20for%20men%20and%20reaching%20an%20age%20of%2079>; 6. PETERSON-KFF Health System Tracker. *How does US life expectancy compare to other countries?* Dec 6, 2022.

# Employers struggle to get value out of healthcare spend



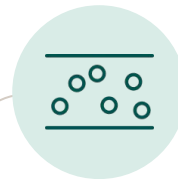
## Increasing healthcare costs

**4.2%** increase per year on average<sup>1</sup>



## Benefits parity challenges

**8 in 10** employees work hybrid or remote roles<sup>2</sup>



## Point solution fatigue

**63%** of employers agree that managing benefits has become increasingly complex<sup>3</sup>

Source: 1.Centers for Medicare and Medicaid Services. "Historical," Download "NHE Summary, Including Share of GDP, CY 1960-2018. 2.Wigert, Ben and Agrawi, Sangeeta. 2022. Returning to the office: The current, preferred and future state of remote work. Gallup, 3. Quantum Leap: Real-time connectivity is the next frontier in employee benefits administration, April 2023.<https://www.guardianlife.com/reports/quantum-leap>



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**IN-PERSON CARE**



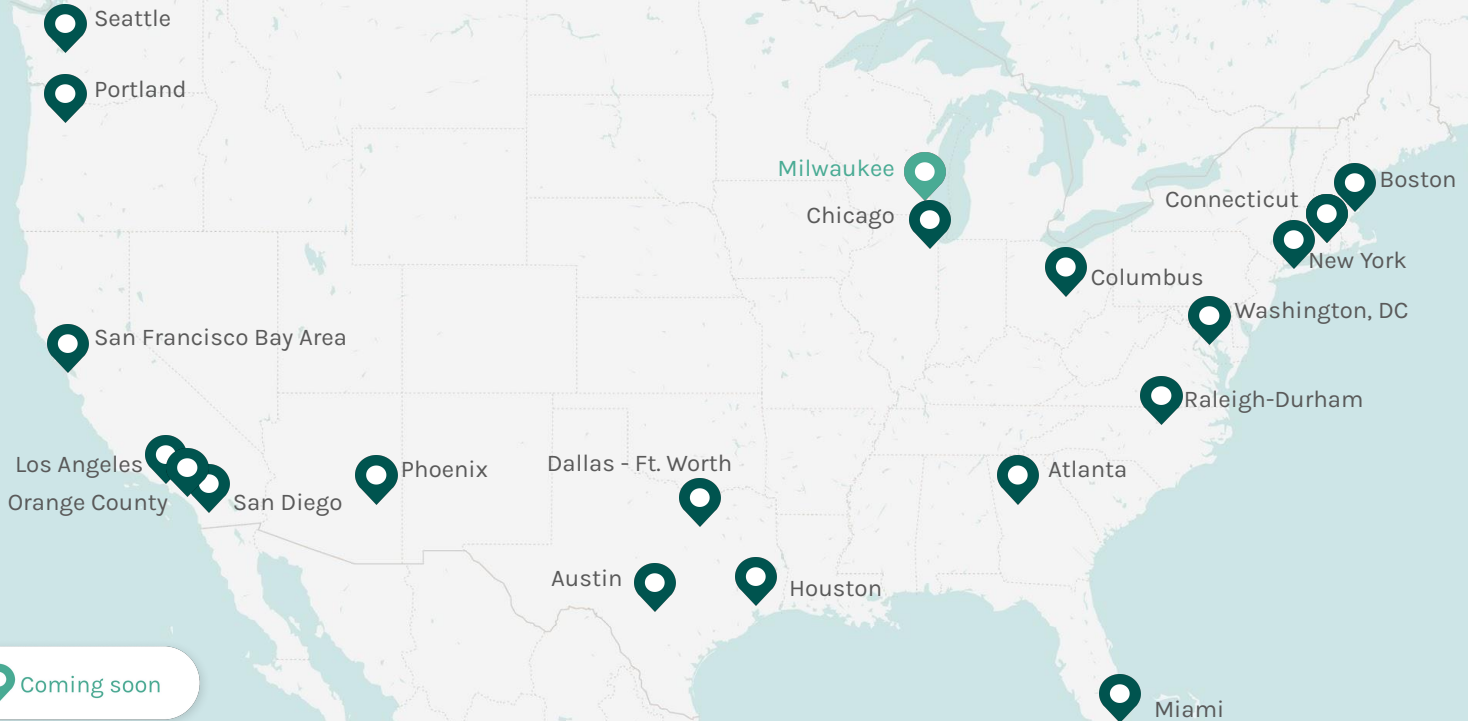
**24/7 VIRTUAL CARE**

**Transform how  
your population  
experiences and  
consumes  
healthcare**

Employer onsite clinics are also available.

# Convenient locations and 24/7 virtual care nationwide

Coming soon: Milwaukee, WI



 Open  Coming soon



# Offices in the Bay Area

**San Francisco**  
(19 locations)

**Burlingame**  
Downtown

**Palo Alto**  
University South

**Menlo Park**  
Sharon Heights

**Redwood City**  
Veterans Blvd

**San Jose**  
The Alameda  
North First

**Sunnyvale**  
Cherry Orchard

**Berkeley**  
North Berkeley  
University Ave

**Oakland**  
Grand Lake  
Uptown Station

**Emeryville**  
Powell St

**Greenbrae**  
Bon Air Center

**San Rafael**  
Northgate

**Walnut Creek**  
The Orchards

**San Ramon**  
Crow Canyon

**Mill Valley**  
Strawberry Village

**Dublin**  
Dublin Place

**Concord**  
The Veranda

**San Mateo**  
Bay Meadows



**UCSF**



Open



Coming soon





# We offer a suite of primary care services and more



## In-Person Visits

Schedule in-person care online or in-app

Same / next day appointment availability

In-office labs, testing/diagnostics

⊕ Onsite employer services and clinics



## Remote Visits

App-based access to scheduling for care

Virtual-first primary care visits

Virtual group visits (behavioral health, metabolic disorders/ chronic disease and sleep disorders)



## 24/7 Virtual Care

Synchronous video, real-time care

Asynchronous digital health (Treat Me Now)

Request prescription refills and renewals

Claim and co-pay free on demand Video Chat



## Specialty Services\*

Chronic care management

Integration with health system partners for specialty referrals

Care navigation

⊕ Preventative screening and diagnostics



## Behavioral Health

Virtual wellness groups (Stress & Anxiety, Depression)

⊕ Virtual therapy and coaching







⊕ In-person therapy at onsite clinics

⊕ Optional Service Offerings with the exception of some preventative screenings that are included in our core OM Primary Care offering.

\*All specialty services are in-person or virtual.



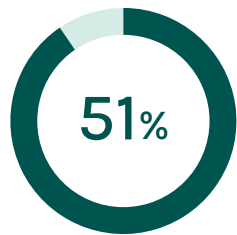
# One centralized healthcare source for your employees

	 One Medical	 Telemedicine Solutions	 Urgent Care Clinics	 Mental Health Solutions	 Chronic Care Solutions	 Well Being Vendors
Virtual Care	✓	✓				
In-Person Care	✓		✓			
Chronic Care Management	✓	✓			✓	
Preventive Screenings	✓				✓	
Behavioral Health	✓	✓		✓		
Care coordination / Specialty referrals	✓					
Lifestyle Management	✓					✓
Relationship-Based Care Model	✓					

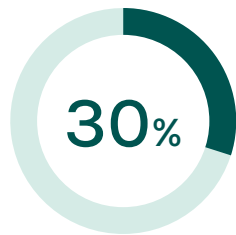


# Leading to results that make a real impact

## Member Experience



Of visits booked same-day<sup>1</sup>

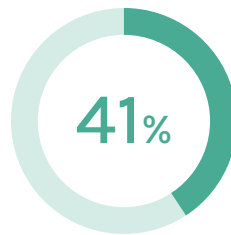


Virtual care after hours<sup>1</sup>

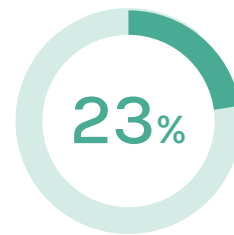


Net Promoter Score<sup>1</sup>

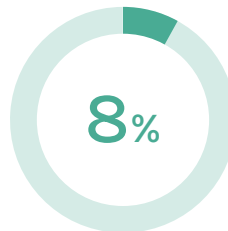
## Value for Healthcare Dollar



Fewer ER visits<sup>2</sup>



Office visits avoided by virtual care<sup>3</sup>



Cost savings<sup>4</sup>

Sources: 1) Experience and Engagement data from One Medical 2017-2018, 15 largest clients 2) CareFirst PCMH Ranking of Overall Performance Report, 2018; 3) Gerhart J, Piff A, Bartelt K, Barkley E. Most Primary Care Telehealth Visits Unlikely to Need In-Person Follow-Up Within 90 Days. Epic Research. <https://epicresearch.org/articles/most-primary-care-telehealth-visits-unlikely-to-need-in-person-follow-up>. February 24, 2023; 3) Cost Savings: Based on a 2018 study measuring medical cost savings (compared to an age, gender, geography matched control cohort), reduced time costs, and direct virtual replacement savings for ~2,000 of the client's engaged One Medical members. 3.5% medical costs savings with an additional 4.7% in savings when accounting for One Medical's claim-free virtual services (\$40 with comparable providers) and for time saved for employees from One Medical primary care visits (1 hour wait time, travel time) and avoided specialty & ER visits (3 hours for ER; 2 hours for specialty)) multiplied by an assumed fully loaded hourly rate of \$52. [https://www.myuhc.com/content/myuhc/Member/Assets/Pdfs/16-0271\\_JPMC\\_Virtual\\_Visit\\_FAQ\\_flyer\\_LowRes%2010.pdf](https://www.myuhc.com/content/myuhc/Member/Assets/Pdfs/16-0271_JPMC_Virtual_Visit_FAQ_flyer_LowRes%2010.pdf); American Journal of Managed Care, "Opportunity Costs of Ambulatory Medical Care in the United States", August 2015; 3CDC Quick Stats "Median Emergency Department (ED) Wait and Treatment Times, by Triage Level" (2010-2011).



# Awards & Recognitions

Named one of the **"Most Innovative Companies"** by Fast Company<sup>1</sup>

Recognized as #1 **"Most Consumer-Centric Companies"** in health by Forbes<sup>2</sup>

Certified as a **Great Place To Work** by the GPTW Institute for all 3 consecutive years<sup>3</sup>

Named to Digital Health 150: **"Digital Health Startups Redefining The Healthcare Industry"**<sup>4</sup>

Recognized by MedTech **Breakthrough Innovator Awards** for our Electronic Health Records<sup>5</sup>

Named **"A Most Disruptive" private health care company** in the US by AllianceBernstein<sup>6</sup>

Named by Fast Company's **World Changing Ideas Awards**

Recognized as one of **"top 8 companies building the future of medicine"** by Business Insider<sup>7</sup>

Recognized by NYC Health Department as **"the leading provider for HIV patient care."**<sup>8</sup>

Recognized as a **"Leader in Primary Care"** by Shortlister<sup>9</sup>



Source: 1) [www.cbinsights.com/research/report/digital-health-startups-redefining-healthcare-2022/](https://www.cbinsights.com/research/report/digital-health-startups-redefining-healthcare-2022/); 2) Source 2; 3) Source 3; 4) Source 4; 5) Source 5; 6) Source 6; 7) Source 7; 8) Source 8; 9) Source 9