



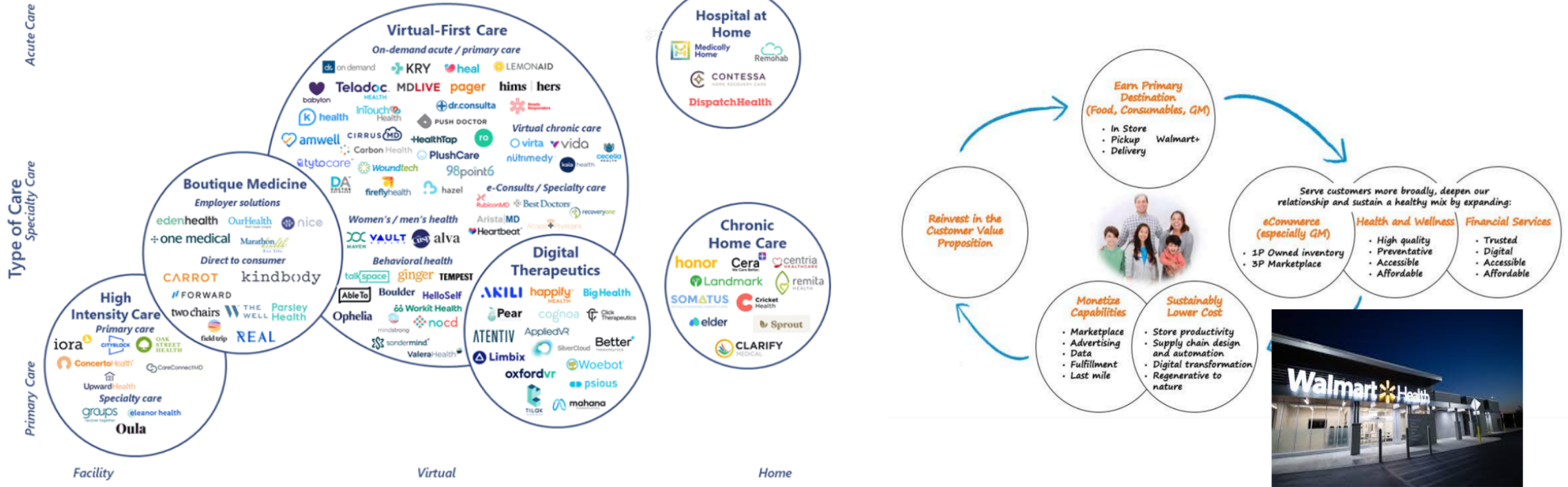
# Looking Around The Bend *Back to the future*

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Former Vice President Clinical Operations & Chief Clinical Executive Walmart Health, Physician  
Focused Payment Technical Advisory Committee of HHS (Advising CMS and CMMI) Committee Member



# The Ecosystem is busy...



# What is happening to the workforce?



75 Thousand Physicians left the workforce in 2022

That is approximately 7% of the workforce. 1 in 5 physicians say they will leave the workforce in the next two years.



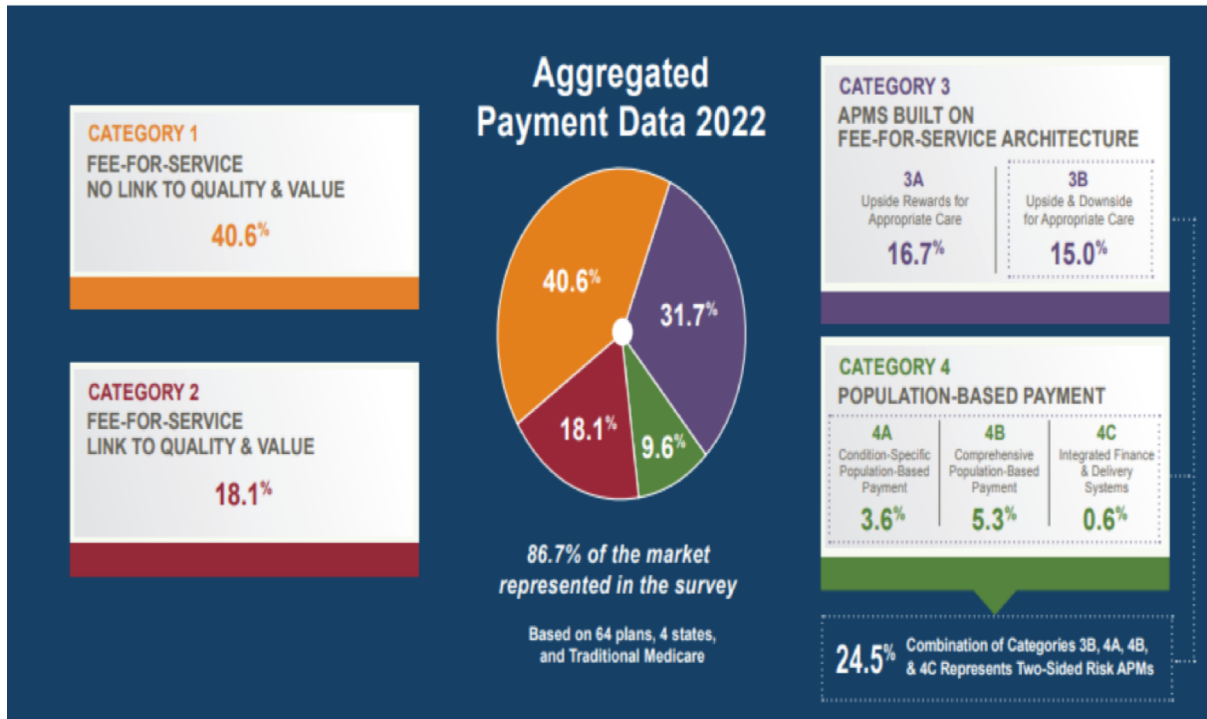
***Adding family physicians to a population improves health outcomes.*** Adding family physicians to a population yields more health benefits than adding any other physician group. For every additional 10 family physicians per 100,000 population, there are 15 fewer deaths, 40 fewer hospitalizations,<sup>13</sup> and an average increase in life expectancy of 52 days.<sup>14</sup>

<https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10112714/>

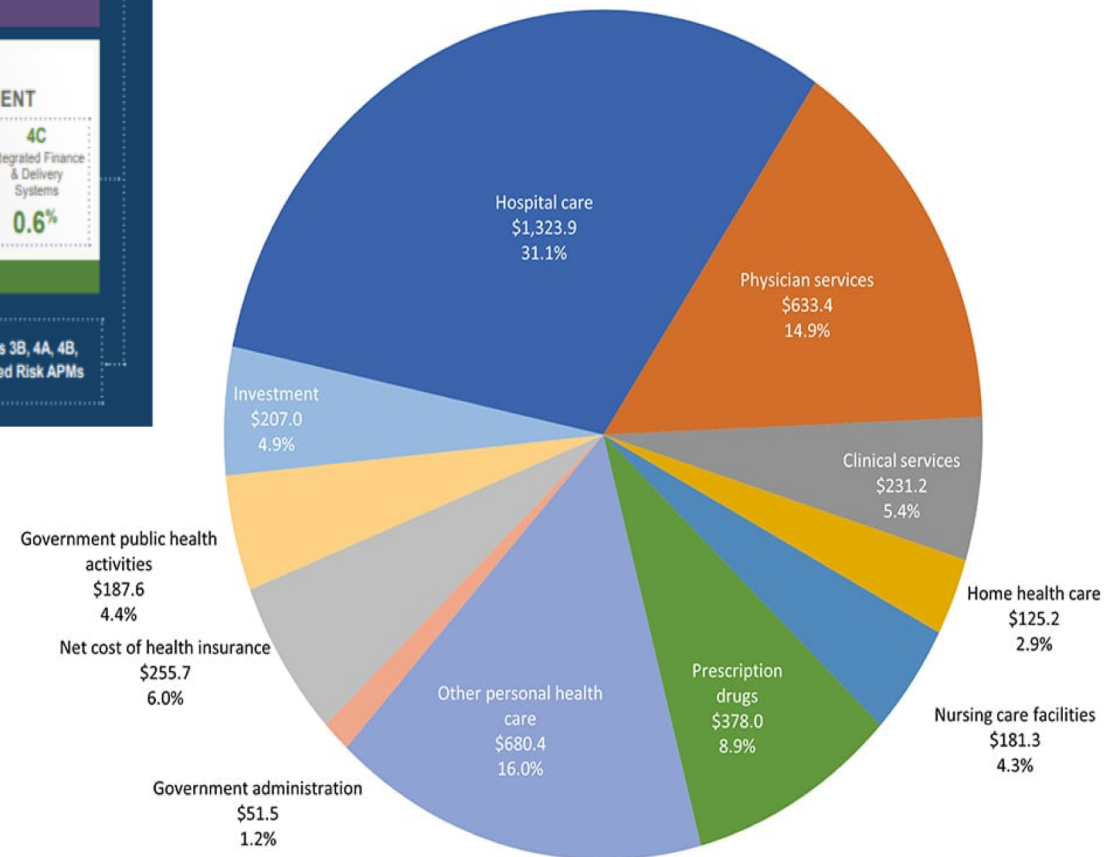


**VALUE BASED CARE IS HERE TO STAY**

Figure 1: Aggregated APM Payments in CY 2022



The U.S. spent \$4,255.1 billion on health care in 2021 where did it go?

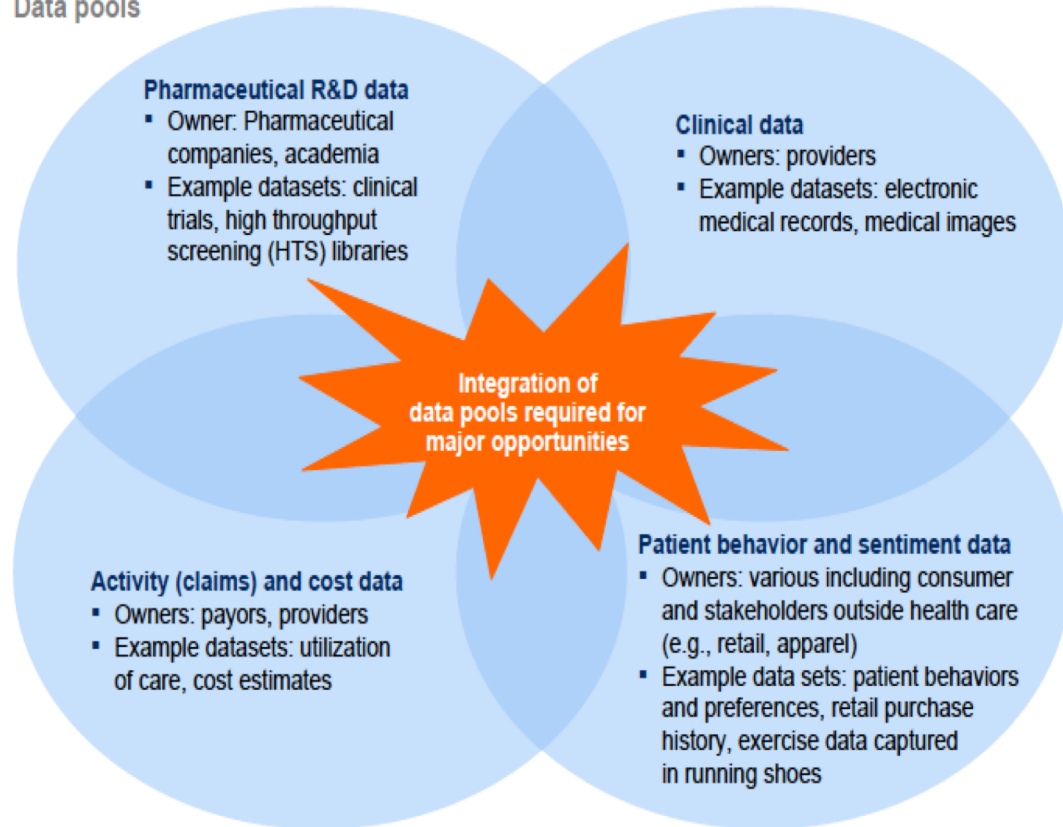


Center for Medicare and Medicaid Service:  
[National Health Expenditure Accounts:](#)  
[Methodology Paper, 2020 Definitions,](#)  
[Sources, and Methods](#)

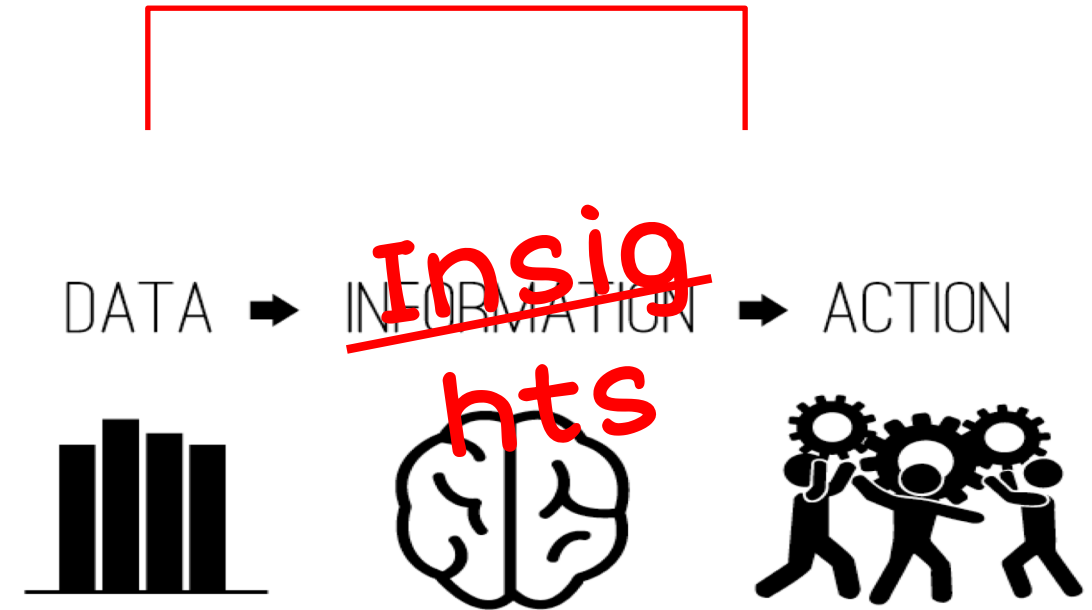
Follow the money....

## Four distinct big data pools exist in the US health care domain today with little overlap in ownership and low integration

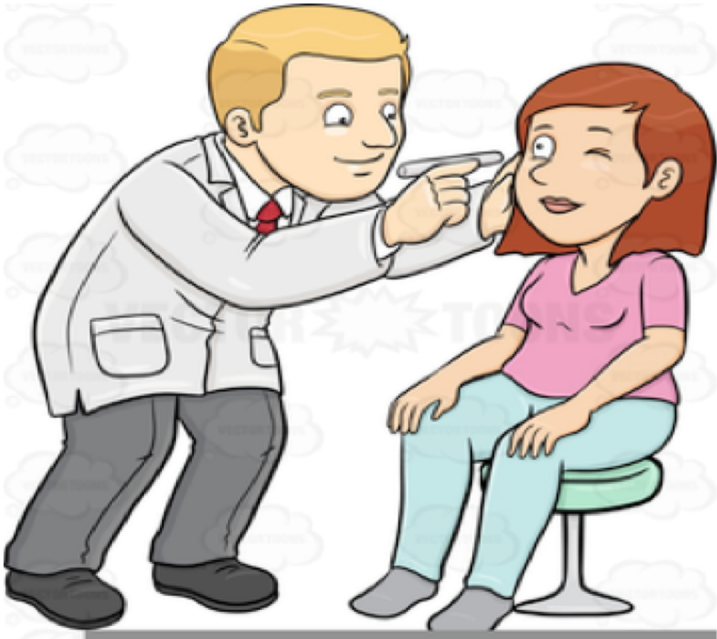
### Data pools



SOURCE: McKinsey Global Institute analysis



# Consumerism = Patient experience & Healthcare is Local!



# The Future is Here



## THE FUTURE OF COLLABORATIVE CARE

### HEALTHCARE INNOVATIONS

- EMPLOYER-FOCUSED POPULATION HEALTH
- DIAGNOSTICS, THERAPEUTICS, REMOTE MONITORING MEAN BETTER OUTCOMES
- TRANSCEND ON-SITE CARE + ASCEND PBM

### HEALTHCARE ON DEMAND

- DR. LINK
- ON SITE CLINICS
- NEAR SITE CLINICS
- HOUSE CALLS



### PERSONALIZED + CONNECTED HEALTH

- WEARABLE TECH INTEGRATION
- PRECISION MEDICINE



Oncology is expected to drive growth given usage across patient Journey in clinical settings.



# Questions?

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