

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Executive Committee

DATE: October 23, 2024

SUBJECT:
Approval of October 23, 2024 Agenda

ITEM #: 2024-039

Enclosure: Yes

Category: Approval of Agenda

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Under California Government Code Section 54950 the “Legislative Body” is required to post an agenda detailing each item of business to be discussed. The Authority posts the agenda in compliance with California Government Code Section 54954.2.

STATUS:

Unless items are added to the agenda according to Government Code Section 54954.2 (b) (1) (2) (3), the agenda is to be approved as posted.

RECOMMENDATIONS:

Subject to changes or corrections, the agenda is to be approved.

AGENDA

PUBLIC AGENCY COALITION ENTERPRISE (PACE)

EXECUTIVE COMMITTEE MEETING

October 25, 2024

2:00 pm

TEAMS MEETING: [HTTPS://TEAMS.MICROSOFT.COM/L/MEETUP-JOIN](https://teams.microsoft.com/l/meetup-join)

Meeting ID: 284 533 705 941

Passcode: YRVqBd

Call-in number to access audio via phone not computer:

Any document provided to a majority of the members of the Public Agency Coalition Enterprise (PACE) regarding any item on this agenda will be made available for public inspection at the meeting and at Keenan, 1111 Broadway, Suite 2000, Oakland, CA 94607 during normal business hours.

I. CALL TO ORDER

II. ROLL CALL

EXECUTIVE COMMITTEE MEMBERS:

REGIONAL GOVERNMENT SERVICES
SANGER, CITY OF
SUPERIOR COURT OF CA, MENDOCINO COUNTY
TRUCKEE DONNER RECREATION & PARK DISTRICT
VACANT

Christina Nygard, Non-Officer Member
Becky Padron, **Secretary/Treasurer**
Kim Turner, **Vice President**
David Faris, **President**
Melanie Correa, Non-Officer Member

MANAGERS:

KEENAN & ASSOCIATES

Peter McNamara
Christine Hough
Melissa King

OTHERS:

KEENAN & ASSOCIATES

Sam Mel-Chan
Laurie LoFranco
Mariah Caracoza
Robin Rager
Alexandria Van Brunt

ANTHEM

Gilbert Soto

RULA

Suchit Shah

EMPIRX

Samantha Tappe
Greg Lewis

III. PUBLIC COMMENTS

Comments from the general public will be received and limited to five minutes per person regarding items not on the agenda.

IV. APPROVAL OF AGENDA – October 23, 2024, Action
Presented by David Faris **2024-039**

V. APPROVAL OF MINUTES – August 21, 2024, Action
Presented by David Faris **2024-040**

The Executive Committee will review the minutes of the previous Executive Committee Meeting for any adjustments and adoption.

VI. CORRESPONDENCE Information
Presented by E. Peter McNamara **2024-041**

Correspondence will be presented and reviewed by the Executive Committee. No action may be taken in response; only referred for action on a subsequent agenda.

VII. FINANCIAL

2023 FINANCIAL AUDIT Action
Presented by Ben Leavitt **2024-042**

The Executive Committee will hear and discuss a presentation on the 2023 audit.

QUARTERLY FINANCIAL REPORT Information
Presented by Sam Mel-Chan **2024-043**

The Executive Committee will hear a report on the Quarterly Financial Review as of August 31, 2024, Q3 LAIF/CAMP Statements and the 2025 preliminary PACE Budget.

ANTHEM UPDATE Information
Presented by Gilbert Soto **2024-044**

The Executive Committee will hear a report on Anthem.

RULA Information
Presented by Suchit Shah **2024-045**

The Executive Committee will hear a report on Rula.

ANCILLARY UPDATES

Presented by Melissa King and EmpiRx Team

Information

2024-046

The Executive Committee will hear a report on LiveHealth Online and EmpiRx utilization.

WELLNESS UPDATES

Presented by Mariah Caracoza & Robin Rager

Information

2024-047

The Executive Committee will hear a report on the 2024 Wellness Program and the 2025 Personify Program Implementation timeline and preliminary member communication campaign.

VIII. ADMINISTRATION

PACE NEW MEMBER ACTIVITY

Presented by Christine Hough

Information

2024-048

PACE Management will review new marketing activity of the PACE JPA.

2025 PROPOSED MEETING CALENDAR

Presented by E. Peter McNamara

Action

2024-049

The Executive Committee will discuss the calendar for 2024 PACE Executive Committee and Full Board Meetings.

IX. INFORMATION

EXECUTIVE COMMITTEE COMMENTS

Information

Each Executive Committee member may report about various matters involving the Authority. There will be no Executive Committee discussion except to ask questions, and no action will be taken unless listed on a subsequent agenda.

MANAGER COMMENTS

Information

PACE Management will report to the Executive Committee about various matters involving the Authority. There will be no Executive Committee discussion except to ask questions, and no action will be taken unless listed on a subsequent agenda.

Symetra excess commission review

X. AGENDA ITEMS NEXT MEETING

Information

Executive Committee Members and others may suggest items for consideration at the next meeting scheduled for December 11, 2024 via Zoom.

XI. ADJOURNMENT

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

Approval of August 21, 2024 Minutes

ITEM #:

2024-040

Enclosure:

Yes

Category:

Approval of Minutes

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

As a matter of record and in accordance with the Brown Act, minutes of each meeting are kept and recorded.

STATUS:

Included in the agenda packet are minutes from the previous Executive Committee meeting, which have not yet been approved.

RECOMMENDATIONS:

Subject to changes or corrections, the minutes are to be approved and submitted.

MINUTES

PUBLIC AGENCY COALITION ENTERPRISE (PACE)

EXECUTIVE COMMITTEE MEETING

August 21, 2024

11:00 am

ZOOM MEETING: [HTTPS://ZOOM.US/J/92649103758](https://zoom.us/j/92649103758)

Meeting ID: 926 4910 3758

Call-in number to access audio via phone not computer:

Any document provided to a majority of the members of the Public Agency Coalition Enterprise (PACE) regarding any item on this agenda will be made available for public inspection at the meeting and at Keenan, 1111 Broadway, Suite 2000, Oakland, CA 94607 during normal business hours.

I. CALL TO ORDER

The meeting was called to order at 11:05am

II. ROLL CALL

EXECUTIVE COMMITTEE MEMBERS:

SANGER, CITY OF
SUPERIOR COURT OF CA, MENDOCINO COUNTY
TRUCKEE DONNER RECREATION & PARK DISTRICT
GUSTINE, CITY OF
SAN BERNARDINO COUNTY
EMPLOYEES' RETIREMENT ASSOCIATION

Becky Padron, **Secretary/Treasurer**
Kim Turner, **Vice President**
David Faris, **President**
Melanie Correa, **Member**
Stacey Barnier, **Member**

MANAGERS:

KEENAN & ASSOCIATES

E. Peter McNamara
Christine Hough
Melissa King
Mariana Torres Hernandez

OTHERS:

KEENAN & ASSOCIATES

Eugene Yu

III. PUBLIC COMMENTS

There were no public comments.

IV. APPROVAL OF AGENDA – August 21, 2024, Action
Presented by David Faris

Motion to approve the August 21, 2024, Agenda 1. Kim Turner 2. Melanie Correa **2024-033**

V. APPROVAL OF MINUTES – July 24, 2024, Action
Presented by David Faris **2024-034**

Motion to approve the July 24, 2024, Minutes 1. Kim Turner 2. David Faris

VI. CORRESPONDENCE Information and Action, if needed
Presented by E. Peter McNamara **2024-035**

There was no correspondence to review.

VII. FINANCIAL

2025 RENEWAL ACTION Action
Presented by E. Peter McNamara and Christine Hough **2024-036**

All PACE agencies renew on a calendar year cycle. Review and Discuss Rates.

Self-funded Anthem PPO

Claims have been running much higher than prior years. To support this, we have made the following recommendations for the 2025 renewal.

1. Keenan will be covering PACE’s Wellness Program expenses, removing the \$5 per employee per month from the premium.
2. Using up to \$1,000,000 from reserves to keep the renewal inline with initial figures shared during the July Executive Committee Meeting, keeping the renewal below 10%.
3. Use stop-loss reimbursements of \$223,000 to reduce rates further.

Kim Turner makes a motion to use up to \$1,000,000 of reserves to keep the renewal 9.5% or lower. seconded by -David Farris.

Fully insured Anthem HMO

Initial renewal came in a 18.88% based on claims through March 2024. We asked them to look at claims through May 2024, which then increased the renewal to 19.5%, they offered to make a business decision to come down to 13.5%. We have continued to negotiate these rates and they came down to 11.5% this morning. We would like to ask the Executive Committee to accept a renewal of 11.5% or lower, to allow for additional negotiation.

Motion to approve 1. Kim Turner 2. Melanie Correa

Fully insured Kaiser HMO

As our membership has grown, Kaiser has not been willing to have a blended renewal between the two regions. The Northern California increase was 11% and the Southern California increase -0.5%. We have asked them to blend this renewal. Keenan will be giving our members a combined renewal for the entire pool. We anticipate 4.71% based upon Keenan’s calculation. To be safe, we would like to approve up to 6% as the renewal, but we believe it will be 5% or less.

Motion to approve 1. Kim Turner 2. David Farris

VIII. ADMINISTRATION

Hello Heart - Review & Discussion

**Action
2024-037**

Presented by E. Peter McNamara & Melissa King

The Executive Committee reviewed and discussed the Hello Heart Program. Currently, we recommend not engaging with the HelloHeart benefit, it does not meet our members’ needs and cost is high.

Motion to approve 1. David Farris 2. Becky Pardon

WELLNESS - Review & Discussion

**Action
2024-038**

Presented by E. Peter McNamara & Melissa King

The Executive Committee will hear a report on the 2024 Wellness Program. The Executive Committee reviewed the 2025 Wellness Program recommendations and costs, and voted on new program implementation.

Motion to adopt the virgin pulse w/ \$200 rewards Total population health coaching with no spouses with Keenan covering the costs of the program for the first year.

Motion to approve 1. Kim Turner 2. Stacey Barnier

IX. INFORMATION

EXECUTIVE COMMITTEE COMMENTS

Information

There were no Executive Committee comments.

MANAGER COMMENTS

Information

There were no Manager comments.

X. AGENDA ITEMS NEXT MEETING

Information

Executive Committee Members and others may suggest items for consideration at the next meeting scheduled for October 23, 2025, via Teams.

XI. ADJOURNMENT

This meeting was adjourned at 11:51am.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Executive Committee

DATE: October 23, 2024

SUBJECT:
Correspondence

ITEM #: 2024-041

Enclosure: Yes

Category: Correspondence

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Communications received by, or sent on behalf of, PACE are presented to the Executive Committee. These communications are normally informational in content and no action is required except to acknowledge the communication.

STATUS:

The Executive Committee will review any correspondence received by or sent on behalf of PACE.

RECOMMENDATIONS:

If the Executive Committee decides further discussions or actions are required on any specific communication, they will direct it to be placed on a future agenda and/or have PACE Management research the issue further.

Mariana Torres Hernandez

From: Everett McNamara
Sent: Wednesday, October 16, 2024 11:56 AM
To: Mariana Torres Hernandez
Subject: FW: PACE Executive Committee / Board

Mariana

This email should be included in the Correspondence section of our meeting

[Click here](#) to book a meeting with me!

Keenan[®]



E Peter McNamara, MBA

Senior Vice President
CA License #0A94087
Municipalities - Accretive Stop Loss Solutions

o: 510-986-6761 ext: 8130 | c: 510-508-2959 | f: 510-986-0440
e: pmcnamara@keenand.com

From: Becky Padron <becky.padron@ci.sanger.ca.us>
Sent: Friday, September 20, 2024 9:43 AM
To: Everett McNamara <PMcNamara@Keenan.com>
Cc: Melissa King <mking@keenand.com>; Dawn Almanzor <dalmanzor@Keenan.com>
Subject: PACE Executive Committee / Board

Hello Peter,

I am reaching out to let you know that I am retiring from my position with the City of Sanger effective November 1, 2024. We are in the process of hiring human resources personnel who will represent Sanger on the PACE Board. I will let you know as soon as someone is assigned.

As to the Executive Committee, I am not sure how a replacement is determined. Let me know if I can be of any assistance.

Thank you.

Becky Padron, CMC
City Clerk/Deputy Personnel Officer
City of Sanger
1700 7th Street
Sanger, California 93657
(559) 876-6300 extension 1350
(559) 876-6319 fax
becky.padron@ci.sanger.ca.us

KAISER SOCAL RECEIVES STRIKE NOTICE FROM UNION: STRIKE BY MENTAL HEALTH WORKERS MAY START OCT. 21

To: Southern California Employers with Employees Covered by Kaiser Permanente Health Plans.

On October 10, Kaiser Permanente received a 10-Day Strike Notice from the National Union of Healthcare Workers (NUHC), stating that the union intends to start an open-ended work stoppage by mental health workers starting October 21 at various Kaiser facilities throughout Southern California if a collective bargaining agreement is not reached by that date.

This Alert summarizes what is happening and what employers can expect going forward.

What is Happening: Kaiser and the NUHC began bargaining back in July, and have been negotiating on wages and numerous other issues including more planning and preparation time for therapists. In early October, the union members voted to authorize a strike. The parties have two remaining bargaining sessions scheduled before the October 21 deadline.

The union represents about 2,400 mental health workers at Kaiser facilities throughout Los Angeles, San Diego, Bakersfield, Orange County and the Inland Empire. NUHC contends that Kaiser has refused to offer benefits that match those provided in an agreement reached last year with Northern California mental health workers.

Kaiser asserts that its latest offer “not only increases wages, which on average are already 18% above market, but also enhances the comprehensive benefits our mental health professionals enjoy plus provides therapists more non-patient time for planning and preparation.”

Despite the national shortage of therapists, Kaiser has grown its California licensed mental health clinician workforce by 22% in the last four years and has spent more than \$1 Billion since 2020 to expand its mental health capabilities in Southern California, including more therapists and physical resources, leading to shorter waiting times. Kaiser asserts it has also strengthened its network of external providers.

What Employers Need To Do: No action is required by plan sponsor employers under these circumstances. Keenan will provide additional updates when appropriate.



Performance Guarantees for Poway Unified School District

EmpiRx Health measures performance guarantees monthly and reports on them quarterly. Below are the results for 2023 based on performance guarantees set forth in your contract.

Service Description	Performance Guarantee	Results
		2023
Plan Design Setup	98% of plan specifications and formulary information will be set up and accurately loaded into the EmpiRx Health system by the sponsor implementation date.	100%
Member Communication Materials	98% of covered persons will receive ID cards and welcome kits within 5 business days of the sponsor effective date.	100%
Electronic Claims Processing Accuracy	98% or more of all point-of-service claims will be processed and paid with no errors.	99.97%
Electronic Claims Processing Turnaround Time	90% of all claims submitted by network pharmacies through the EmpiRx Health system will be received, processed, and messaged back to the pharmacy within 3 seconds.	100%
Eligibility Changes	98% of eligibility change and update files will be loaded accurately into the EmpiRx Health system by 5 PM EST each day; within 48 hours of receiving a clean file.	99.98%
First Call Resolution	95% of all covered persons' inquiries will be resolved on the first contact. Resolved means that the covered person did not call back within 48 hours of the initial call.	99.50%
Mail-order Pharmacy Prescription Dispensing Accuracy	99% of covered drugs mailed by the mail-order pharmacy to covered persons on an annual basis will be the correct drug, at the correct strength, and the correct dosage (excluding errors by the prescriber).	100%
Mail-order Pharmacy Service Turnaround Time (Clean Claims)	99% of covered drugs mailed by the mail-order pharmacy to covered persons on an annual basis shall be dispensed and mailed within 2 business days of receiving a clean claim, excluding specialty drug claims.	99.64%

Standard Report Delivery	98% of all reports due to the sponsor will be delivered within 2 business days of their due date.	100%
Average Speed of Answer	Covered person calls received during each calendar year will be answered on average within 30 seconds except for failure due to a third-party communications system.	:21
Abandonment Rate	Less than 4% of covered person calls, once a call has entered the queue.	.02%
Plan Design Changes	98% of all plan specifications and formulary changes will be made and accurately loaded into the EmpiRx Health system within 5 business days.	99%
EmpiRx System Availability	The EmpiRx Health system will be available 24 hours per day, 7 days per week (excluding scheduled system maintenance) 98% of each calendar year.	100%

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

2023 Financial Audit

ITEM #:

2024-042

Handout:

Yes

Category:

Financial

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

PACE is required to file independent financial audits each year.

STATUS:

The Executive Committee will hear a report on the 2023 financial audit.

RECOMMENDATIONS:

For review, discussion and action as necessary.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

Quarterly Report as of September 30, 2024 and the 2025
PACE Preliminary Budget

ITEM #:

2024-043

Enclosure:

Yes

Category:

Financial

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

SETECH provides financial reporting services for PACE.

STATUS:

The Executive Committee will hear a report on the Quarterly Financial Report as of September 30, 2024 and the 2025 Preliminary PACE Budget.

RECOMMENDATIONS:

For review, discussion and action as necessary.



FINANCIAL REPORT

FOR THE TWO MONTHS ENDED AUGUST 31, 2024

As mandated by Section 53646 of the California Government Code, Public Agency Coalition Enterprise (PACE) is able to meet its pool's expenditure requirements for the next six months. PACE does not hold six months of cash flow in reserve. However, monthly member contributions are adequate to meet the monthly cash flow requirements.

Officer

PACE pools the claims experience of all member districts in all health and welfare pools. Operating as a blind pool, individual district claims experience is not available.

Prepared by:



Innovative Solutions. Enduring Principles.

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Public Agency Coalition Enterprise

PACE

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Distribution and Use of Report

This financial management information report (Report) prepared by Service Enhancement Technologies (SETECH), a Division of Keenan & Associates, is intended solely for internal use by the Authority's Officers, Board Members, Advisory Committee Members, and for internal decision making purposes only in regards to the Authority's insurance program.

SETECH makes no representations or warranties regarding the use of this Report for any other purpose other than for the Authority's insurance program. The official version of the Report is finalized only upon approval by the Authority's Board of Directors and/or Advisory Committee in accordance with the Authority's Agreement and Bylaws following presentation by SETECH or Keenan & Associates. We understand that members may wish to provide a copy of this Report to auditors and regulatory authorities on the conditions that:

- A) The official approved Report is used,
- B) The entire Report be distributed rather than any excerpts,
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SETECH may utilize actuarial projections as an integral component of this Report, as provided by the Authority's actuary and in the case of some Benefit Groups, by a staff member of the Keenan & Associates Technical Department. We may also rely upon financial data provided by the Authority's Treasurer, Accountant or County Office of Education. We have not audited this data and are not responsible for its accuracy. With any financial analysis, the accuracy and relevance of the conclusions as well as the reasonableness of the recommendations depend upon the accuracy and relevance of the underlying data. Financial information provided in this Report is subject to an annual independent financial audit.

SETECH strives to maintain the strictest confidentiality of any information for our clients. The pages of this Report indicate that the information contained in the Report is for "Client Confidential Use Only." This indicates that SETECH will only disclose information contained in these Reports to our intended clients, their members or their contracted parties.

Public Agency Coalition Enterprise
PACE
Financial Report
As of And For the Two Months Ended 08/31/2024

	Cash Transactions			Balance Year To Date	(1) Final Budget 2024	% of Budget
	07/01/2024 - 08/31/2024	01/01/2024 - 06/30/2024	Accruals			
Unaudited, Total Net Position as of 12/31/2023:						
				Undesignated	8,103,094	
				Designated - Wellness Funds	8,700	
				Total Net Position	\$ 8,111,794	
Operating Revenue						
Member Contributions						
Kaiser	\$ 2,071,645	\$ 6,023,845	\$ --	\$ 8,095,490	\$ 13,562,831	59.69 %
Anthem - HMO	942,760	2,714,817	--	3,657,577	5,611,364	65.18
Anthem - Self Funded	4,455,902	13,315,758	(24)	17,771,636	28,681,453	61.96
EmpiRx Rebates	128,568	--	214,280	342,848	--	--
Stop Loss Reimbursement	246,074	345,737	--	591,811	--	--
Total Operating Revenues	7,844,949	22,400,157	214,256	30,459,362	47,855,648	63.65
Operating Expenditure						
Premium						
Kaiser	2,064,245	6,002,460	--	8,066,705	13,312,803	60.59
Anthem - HMO	910,631	2,592,022	--	3,502,653	5,507,919	63.59
Claims						
Anthem	5,135,255	9,265,182	1,276,886	15,677,323	19,468,700	80.53
EmpiRx	641,486	1,651,163	153,057	2,445,706	3,939,279	62.09
Administration	308,694	797,182	169,681	1,275,557	1,830,903	69.67
Wellness Program	7,886	17,006	90	24,982	113,355	22.04
Stop Loss	614,972	1,834,468	(30,749)	2,418,691	3,677,689	65.77
Professional Development	--	1,900	--	1,900	5,000	38.00
Total Operating Expenditures	9,683,169	22,161,383	1,568,965	33,413,517	47,855,648	69.82
Other:						
Change in Claim Liabilities	--	--	669,050	669,050	--	--
Total Other	--	--	669,050	669,050	--	--
Total Operating Expenditures	9,683,169	22,161,383	2,238,015	34,082,567	47,855,648	71.22
Net Income/(Loss) from Operations	(1,838,220)	238,774	(2,023,759)	(3,623,205)	--	--
Non Operating Revenue/(Expenditure)						
Late Fees	--	3,979	7,277	11,256	--	--
Investment Income	97,273	323,832	50	421,155	577,952	72.87
Total Non Operating Revs/Exps	97,273	327,811	7,327	432,411	577,952	74.82 %
Net Increase/(Decrease)	\$ (1,740,947)	\$ 566,585	\$ (2,016,432)	(3,190,794)		
				Undesignated	4,912,300	
				Designated - Wellness Funds	58,700	
				Unaudited, Total Net Position, 08/31/2024	\$ 4,971,000	

(1) Budget as approved at the May 29, 2024 Executive Committee & Full Board Meetings.

Public Agency Coalition Enterprise
PACE
Statement of Net Position
As of 12/31/2023 and 08/31/2024

	<u>Unaudited Balance 12/31/2023</u>	<u>Activity 01/01/2024 Through 08/31/2024</u>	<u>Unaudited Balance 08/31/2024</u>
ASSETS:			
Current Assets			
U.S. Bank Checking	\$ 1,294,975	\$ 153,127	\$ 1,448,102
Local Agency Investment Fund (L.A.I.F)	5,293	236	5,529
California Asset Management Program (C.A.M.P)	10,025,494	(1,421,774)	8,603,720
Subtotal Cash and Cash Equivalents	<u>11,325,762</u>	<u>(1,268,411)</u>	<u>10,057,351</u>
Interest Receivable	117	(67)	50
Member Contribution Receivable	127,934	(102,795)	25,139
Rebate/Reimbursement Receivable	784,364	(489,336)	295,028
Prepaid Expenses	-	10,603	10,603
Subtotal Current Assets	<u>912,415</u>	<u>(581,595)</u>	<u>330,820</u>
Total Assets	<u>12,238,177</u>	<u>(1,850,006)</u>	<u>10,388,171</u>
LIABILITIES:			
Current Liabilities			
Accounts Payable	891,666	748,103	1,639,769
Unearned Revenue	723,567	(126,365)	597,202
Subtotal	<u>1,615,233</u>	<u>621,738</u>	<u>2,236,971</u>
Claim Liabilities - Anthem	2,511,150	669,050	3,180,200 (1)
Subtotal	<u>2,511,150</u>	<u>669,050</u>	<u>3,180,200</u>
Total Liabilities	<u>4,126,383</u>	<u>1,290,788</u>	<u>5,417,171</u>
Net Position:			
Undesignated - Net Position	8,103,094	(3,165,812)	4,937,282
Designated - Wellness Funds	8,700	25,018	33,718
Total Net Position	<u>8,111,794</u>	<u>(3,140,794)</u>	<u>4,971,000</u>
Total Liabilities and Net Position	<u>\$ 12,238,177</u>	<u>\$ (1,850,006)</u>	<u>\$ 10,388,171</u>

(1) Claim Liabilities as of 08/31/2024.

Public Agency Coalition Enterprise

PACE

Summary of Cash Flow 2024

Actuals as of 08/31/2024 and Projected through 12/31/2024

	Actuals								As of 08/31/2024	Projected				Total As of 12/31/2024	(1) Final Budget
	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24		Sep-24	Oct-24	Nov-24	Dec-24		
Beginning Cash Balance As of 12/31/2023	\$ 11,325,762								\$ 11,325,762					\$ 11,325,762	
Monthly Cash Balance										\$ 10,057,351	\$ 10,744,441	\$ 10,423,602	\$ 10,529,380		
Inflow:															
Member Contributions															
Kaiser	\$ 963,432	\$ 949,328	\$ 971,009	\$ 1,074,085	\$ 1,037,896	\$ 1,028,095	\$ 1,034,832	\$ 1,036,813	\$ 8,095,490	\$ 1,366,835	\$ 1,366,835	\$ 1,366,835	\$ 1,366,836	\$ 13,562,831	\$ 13,562,831
Anthem - HMO	421,456	417,537	453,948	465,615	473,870	482,391	469,655	473,105	3,657,577	488,447	488,447	488,447	488,446	5,611,364	5,611,364
Anthem - Self Funded	2,204,321	2,193,402	2,127,981	2,359,421	2,242,645	2,187,988	2,157,480	2,298,422	17,771,660	2,727,448	2,727,448	2,727,448	2,727,449	28,681,453	28,681,453
EmpiRx Rebates	--	--	--	--	--	--	--	128,568	128,568	--	--	--	--	128,568	--
Stop Loss Reimbursement	--	--	--	202,055	44,048	99,634	126,434	119,640	591,811	679,361	75,492	--	--	1,346,664	--
Unearned Revenue - 2023	(723,567)	--	--	--	--	--	--	--	(723,567)	--	--	--	--	(723,567)	--
Unearned Revenue - 2024	680,865	(184,710)	615,133	(87,453)	200,327	(732,857)	330,461	(224,564)	597,202	(95,187)	(502,015)	--	--	--	--
Late Fee	--	--	--	--	3,979	--	--	--	3,979	--	--	--	--	3,979	--
Investment Income	52,064	55,148	57,860	52,900	55,651	50,209	51,515	45,757	421,104	39,212	39,212	39,212	39,212	577,952	577,952
Prepaid Expense	--	(26,509)	2,651	2,651	2,651	2,651	2,651	2,651	(10,603)	2,651	2,651	2,651	2,650	--	--
Interest Receivable	117	--	--	--	--	--	--	--	117	--	--	--	--	117	--
Accounts Receivable	589,366	53,888	--	4,845	--	1,567	265,561	--	915,227	--	--	--	--	915,227	--
Total Deposits and Credits	4,188,054	3,458,084	4,228,582	4,074,119	4,061,067	3,119,678	4,438,589	3,880,392	31,448,565	5,208,767	4,198,070	4,624,593	4,624,593	50,104,588	48,433,600
Outflow:															
Premium															
Kaiser	--	(960,017)	(945,908)	(1,006,699)	(2,065,401)	(1,024,435)	(1,031,117)	(1,033,128)	(8,066,705)	(1,311,525)	(1,311,525)	(1,311,524)	(1,311,524)	(13,312,803)	(13,312,803)
Anthem - HMO	(129,395)	(664,672)	(433,914)	(444,020)	(452,177)	(467,844)	(456,831)	(453,800)	(3,502,653)	(501,317)	(501,317)	(501,316)	(501,316)	(5,507,919)	(5,507,919)
Anthem - Claims	(1,120,315)	(1,273,714)	(1,817,130)	(2,107,497)	(1,612,560)	(1,333,966)	(2,002,874)	(3,132,381)	(14,400,437)	(1,800,055)	(1,800,055)	(1,800,055)	(1,800,055)	(21,600,657)	(19,468,700)
EmpiRx - Claims	(133,628)	(281,762)	(308,175)	(270,060)	(303,612)	(353,926)	(279,609)	(361,877)	(2,292,649)	(411,658)	(411,658)	(411,657)	(411,657)	(3,939,279)	(3,939,279)
Administration	(2,962)	(7,572)	(281,790)	(187,671)	(147,700)	(169,487)	(163,325)	(145,369)	(1,105,876)	(181,257)	(181,257)	(181,257)	(181,256)	(1,830,903)	(1,830,903)
Wellness Utilization	--	(6,402)	(2,651)	(2,651)	(2,651)	(2,651)	(4,875)	(3,011)	(24,892)	(22,116)	(22,116)	(22,116)	(22,115)	(113,355)	(113,355)
Stop Loss	(306,898)	--	(613,239)	(305,856)	(304,292)	(304,183)	(306,862)	(308,110)	(2,449,440)	(293,749)	(290,981)	(290,890)	(291,011)	(3,616,071)	(3,677,689)
Professional Development	--	(1,340)	--	(560)	--	--	--	--	(1,900)	--	--	--	(3,100)	(5,000)	(5,000)
Accounts Payable	(689,348)	(48,933)	(118,480)	--	(193)	(6,218)	(9,252)	--	(872,424)	--	--	--	--	(872,424)	--
Total Disbursements	(2,382,546)	(3,244,412)	(4,521,287)	(4,325,014)	(4,888,586)	(3,662,710)	(4,254,745)	(5,437,676)	(32,716,976)	(4,521,677)	(4,518,909)	(4,518,815)	(4,522,034)	(50,798,411)	\$ (47,855,648)
Ending Cash Balance	\$ 13,131,270	\$ 13,344,942	\$ 13,052,237	\$ 12,801,342	\$ 11,973,823	\$ 11,430,791	\$ 11,614,635	\$ 10,057,351	\$ 10,057,351	\$ 10,744,441	\$ 10,423,602	\$ 10,529,380	\$ 10,631,939	\$ 10,631,939	
Summary:															
Cash - U.S. Bank	\$ 1,376,029	\$ 1,378,650	\$ 1,830,165	\$ 1,209,040	\$ 1,701,849	\$ 1,398,254	\$ 1,501,894	\$ 1,448,102		\$ --	\$ --	\$ --	\$ --		
Local Agency Investment Fund	5,410	5,410	5,410	5,467	5,467	5,467	5,529	5,529		--	--	--	--		
C.A. Asset Management Fund	11,749,831	11,960,882	11,216,662	11,586,835	10,266,507	10,027,070	10,107,212	8,603,720		--	--	--	--		
Ending Cash Balance	\$ 13,131,270	\$ 13,344,942	\$ 13,052,237	\$ 12,801,342	\$ 11,973,823	\$ 11,430,791	\$ 11,614,635	\$ 10,057,351		\$ --	\$ --	\$ --	\$ --		

(1) Budget as approved at the May 30, 2024 Executive Committee & Full Board Meetings.

**Public Agency Coalitions Enterprise
PACE
Check Reimbursements and Wire Transfers
Payment Order Number 2024 - 03
For the Period from 07/01/2024 through 08/31/2024**

Ck Date	Check/WT #	Payee	Invoice #	Amount	Transaction Description
7/17/2024	WT071724A	Anthem Blue Cross	542290882106	642,125.46	Claims 06/20-26/24
7/17/2024	WT071724A	Anthem Blue Cross	542298348611	220,309.62	Claims 06/27-07/03/24
7/17/2024	WT071724A	Anthem Blue Cross	542291886387	424,404.39	Claims 07/04-10/24
7/17/2024	WT071724B	Anthem Blue Cross	0017683731H	456,830.73	HMO 07/24
7/17/2024	WT071724C	Anthem Blue Cross	0624	52,586.82	Admin 06/24
7/17/2024	WT071724D	EmpiRx Health	INV23686	4,709.16	Admin 06/24
7/17/2024	WT071724D	EmpiRx Health	INV23686-1	11,091.23	Cost Avoidance Fee 05/24
7/17/2024	WT071724D	EmpiRx Health	INV23469	168,082.71	Claims 06/24
7/17/2024	WT071724E	Keenan & Associates	0624	74,361.50	Mgmt Fees 06/24
7/17/2024	WT071724F	Symetra Life Insurance Company	0724	306,861.53	Stop Loss 07/24
7/18/2024	10576	Catilize Health ADM	PAC-20246A	350.00	Admin 06/24
7/18/2024	10576	Catilize Health ADM	PAC-202406-S	12,486.72	Savings Calculation 2nd Qtr 2024
7/18/2024	10577	Catilize Health CL	070824	2,116.94	Claims 07/08/24
7/18/2024	10578	Gallagher Benefit Services, Inc	0624	1,831.50	06/24
7/18/2024	10579	Keenan & Associates	307671	24.49	Walktober Prize Reimbursement
7/18/2024	10580	Snappy App, Inc.	FDA52807-	2,200.00	Wellness Program - 2024 Walktober Challenge
7/18/2024	10581	United States Treasury	PACE2024	9,254.28	30-1003027 - Form 720 2024
7/18/2024	10582	WellSteps	9034	150.00	Wellness Program 04/24
7/18/2024	10582	WellSteps	9116	150.00	Wellness Program 05/24
7/18/2024	10582	WellSteps	9209	60.00	Wellness Program 06/24
7/18/2024	10583	Winton, Ireland Strom & Green	0624	1,976.83	06/24
7/26/2024	WT072624A	Anthem Blue Cross	542298211803	421,524.21	Claims 07/11-17/24
7/26/2024	WT072624A	Anthem Blue Cross	542299190026	294,509.95	Claims 07/18-24/24
7/26/2024	WT072624B	EmpiRx Health	INV23888	111,525.82	Claims 07/24
7/26/2024	WT072624C	Kaiser - PACE	0724	1,031,117.02	07/24
7/30/2024	10584	Catilize Health CL	072224	1,454.78	Claims 07/22/24
			July	<u>4,252,095.69</u>	
8/5/2024	WT080524A	Anthem Blue Cross	542292458604	1,051,647.31	Claims 07/25-31/24
8/5/2024	WT080524B	Anthem Blue Cross	0017818411H	453,800.29	HMO 08/24
8/5/2024	WT080524C	EmpiRx Health	INV24168	201,418.57	Claims 07/24
8/5/2024	WT080524D	Keenan & Associates	310248	2,522.10	KPPC 07/24
8/6/2024	10585	Catilize Health ADM	PAC-20247A	350.00	Admin 07/24
8/19/2024	WT081924A	Anthem Blue Cross	542296535343	655,153.16	Claims 08/01-07/24
8/19/2024	WT081924A	Anthem Blue Cross	542291212676	714,546.80	Claims 08/08-14/24
8/19/2024	WT081924B	Anthem Blue Cross	0724	52,895.70	Admin 07/24
8/19/2024	WT081924C	EmpiRx Health	INV24323	2,895.28	Admin 07/24
8/19/2024	WT081924C	EmpiRx Health	INV24323-1	5,258.75	Cost Avoidance Fee 06/24
8/19/2024	WT081924D	Kaiser - PACE	0824	1,033,128.02	08/24
8/19/2024	WT081924E	Keenan & Associates	0724	74,091.76	Mgmt Fees 07/24
8/19/2024	WT081924F	Symetra Life Insurance Company	0824	308,110.11	Stop Loss 08/24
8/20/2024	10586	Catilize Health CL	080624	1,479.11	Claims 08/06/24
8/20/2024	10587	Gallagher Benefit Services, Inc	0724	1,850.00	07/24
8/20/2024	10588	Winton, Ireland Strom & Green	0724	1,820.93	07/24
8/28/2024	WT082824A	Anthem Blue Cross	542297998265	711,033.37	Claims 08/15-21/24
8/28/2024	WT082824B	EmpiRx Health	INV24437	160,457.94	Claims 08/24
8/28/2024	WT082824C	Keenan & Associates	311216	2,551.50	KPPC 08/24
8/29/2024	10589	Catilize Health CL	082024	14.05	Claims 08/20/24
			August	<u>5,435,024.75</u>	
			Report Total	<u><u>9,687,120.44</u></u>	



FINANCIAL REPORT
FOR THE TWO MONTHS ENDED
AUGUST 31, 2024

Presented by:
Sam Mel-Chan
October 23, 2024



8 Months - 66.67%

Page 1	08/31/2024 Actual	Final Budget	Variance	%
Operating Revenues	<u>\$ 30,459,362</u>	<u>\$ 47,855,648</u>	<u>\$ (17,396,286)</u>	<u>63.65 %</u>

Operating Expenditures	<u>\$ 34,082,567</u>	<u>\$ 47,855,648</u>	<u>\$ (13,773,081)</u>	<u>71.22 %</u>
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Non Operating Rev/(Exp)	\$ 432,411
Late Fees	11,256
Investment Income	421,155

Non Operating Rev/Exp	<u>\$ 432,411</u>	<u>\$ 577,952</u>	<u>\$ (145,541)</u>	<u>74.82 %</u>
------------------------------	-------------------	-------------------	---------------------	----------------

Revenues vs. Claims/Admin Paid	\$ (2,929,173)
Accounts Payable Activity	748,103
Unearned Revenue Activity	(126,365)
Wellness Program Activity	25,018
Late Fees	11,256
Investment Income	421,155

Page 2	<u>12/31/2023</u>	<u>Activity</u>	<u>08/31/2024</u>	<u>%</u>
Total Assets	\$ 12,238,177	\$ (1,850,006)	\$ 10,388,171	(15.12)

Accounts Payable - Prior	\$ (891,666)
Accounts Payable - Current	1,639,769
Unearned Revenue - Prior	(723,567)
Unearned Revenue - Current	597,202
Increase in Claim Liabilities	669,050

Page 2

	<u>12/31/2023</u>	<u>Activity</u>	<u>08/31/2024</u>	<u>%</u>
Total Liabilities	\$ 4,126,383	\$ 1,290,788	\$ 5,417,171	31.28

Revenues vs. Claims/Admin Paid	\$ (2,929,173)
Late Fees	11,256
Investment Income	421,155
Wellness Program Activity	25,018
Increase in Claim Liabilities	(669,050)

Page 2

	12/31/2023	Activity	08/31/2024	%
Undesignated - Net Position	8,103,094	(3,165,812)	4,937,282	(39.07)
Designated - Wellness Funds	8,700	25,018	33,718	287.56
Total Net Position	\$ 8,111,794	\$ (3,140,794)	\$ 4,971,000	(38.72)

Cash Flow Analysis	Actuals as of 08/31/2024	Projected as of 12/31/2024
Beginning Cash Balance	<u>\$ 11,325,762</u>	<u>\$ 11,325,762</u>
Member Contributions		
Kaiser	8,095,490	13,562,831
Anthem - HMO	3,657,577	5,611,364
Anthem - Self Funded	17,771,660	28,681,453
EmpiRx Rebates	128,568	128,568
Stop Loss Reimbursement	591,811	1,346,664
Unearned Revenue	(126,365)	(723,567)
Late Fee	3,979	3,979
Investment Income	421,104	577,952
Prepaid Expense	(10,603)	--
Interest Receivable	117	117
Accounts Receivable	<u>915,227</u>	<u>915,227</u>
Total Inflow	<u>\$ 31,448,565</u>	<u>\$ 50,104,588</u>
Premium		
Kaiser	(8,066,705)	(13,312,803)
Anthem - HMO	(3,502,653)	(5,507,919)
Anthem - Claims	(14,400,437)	(21,600,657)
EmpiRx - Claims	(2,292,649)	(3,939,279)
Administration	(1,105,876)	(1,830,903)
Wellness Utilization	(24,892)	(113,355)
Stop Loss	(2,449,440)	(3,616,071)
Professional Development	(1,900)	(5,000)
Accounts Payable	<u>(872,424)</u>	<u>(872,424)</u>
Total Outflow	<u>\$ (32,716,976)</u>	<u>\$ (50,798,411)</u>
Ending Cash Balance	<u>\$ 10,057,351</u>	<u>\$ 10,631,939</u>

Questions?

Thank you from your



Team



Account Statement

For the Month Ending **July 31, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
CAMP Pool					
Opening Balance					10,027,070.43
07/18/24	07/18/24	Purchase - Incoming Wires	1.00	1,211,000.00	11,238,070.43
07/29/24	07/29/24	Redemption - Outgoing Wires	1.00	(1,179,000.00)	10,059,070.43
07/31/24	08/01/24	Accrual Income Div Reinvestment - Distributions	1.00	48,141.33	10,107,211.76

Closing Balance **10,107,211.76**

	Month of July	Fiscal YTD July-July		
Opening Balance	10,027,070.43	10,027,070.43	Closing Balance	10,107,211.76
Purchases	1,259,141.33	1,259,141.33	Average Monthly Balance	10,461,429.83
Redemptions (Excl. Checks)	(1,179,000.00)	(1,179,000.00)	Monthly Distribution Yield	5.43%
Check Disbursements	0.00	0.00		
Closing Balance	10,107,211.76	10,107,211.76		
Cash Dividends and Income	48,141.33	48,141.33		



Account Statement

For the Month Ending **August 31, 2024**

Public Agency Coalition Enterprise - Public Agency Coalition Enterprise - 6192-001

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
CAMP Pool					
Opening Balance					10,107,211.76
08/06/24	08/06/24	Redemption - Outgoing Wires	1.00	(691,000.00)	9,416,211.76
08/19/24	08/19/24	Redemption - Outgoing Wires	1.00	(547,000.00)	8,869,211.76
08/29/24	08/29/24	Redemption - Outgoing Wires	1.00	(308,000.00)	8,561,211.76
08/30/24	09/03/24	Accrual Income Div Reinvestment - Distributions	1.00	42,508.67	8,603,720.43
Closing Balance					8,603,720.43

	Month of August	Fiscal YTD July-August	
Opening Balance	10,107,211.76	10,027,070.43	Closing Balance
Purchases	42,508.67	1,301,650.00	Average Monthly Balance
Redemptions (Excl. Checks)	(1,546,000.00)	(2,725,000.00)	Monthly Distribution Yield
Check Disbursements	0.00	0.00	5.41%
Closing Balance	8,603,720.43	8,603,720.43	
Cash Dividends and Income	42,508.67	90,650.00	

California State Treasurer *Fiona Ma, CPA*



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

August 05, 2024

[LAIF Home](#)
[PMIA Average Monthly Yields](#)

PUBLIC AGENCY COALITION ENTERPRISE
(PACE)
KEENAN & ASSOC/SETECH DEPT
P.O. BOX 4328
TORRANCE, CA 90510

[Tran Type Definitions](#)

Account Number: 40-19-075

July 2024 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
7/15/2024	7/12/2024	QRD	1755785	N/A	SYSTEM	61.69

Account Summary

Total Deposit:	61.69	Beginning Balance:	5,467.59
Total Withdrawal:	0.00	Ending Balance:	5,529.28

California State Treasurer *Fiona Ma, CPA*



Local Agency Investment Fund
P.O. Box 942809
Sacramento, CA 94209-0001
(916) 653-3001

September 06, 2024

[LAIF Home](#)
[PMIA Average Monthly Yields](#)

PUBLIC AGENCY COALITION ENTERPRISE
(PACE)
KEENAN & ASSOC/SETECH DEPT
P.O. BOX 4328
TORRANCE, CA 90510

[Tran Type Definitions](#)

Account Number: 40-19-075

August 2024 Statement

Account Summary

Total Deposit:	0.00	Beginning Balance:	5,529.28
Total Withdrawal:	0.00	Ending Balance:	5,529.28



**Preliminary Budget
2025**

	2024			2025	
	Adopted Budget	Unaudited Actuals as of 08/31/2024	Estimated Annualized Actuals	Preliminary Budget	
Operating Revenue					
Member Contributions					
Kaiser	\$ 13,562,831	\$ 8,095,490	\$ 12,143,235	\$ 12,693,324	(1)
Anthem - HMO	5,611,364	3,657,577	5,486,366	6,117,298	(1)
Anthem - Self Funded	28,681,453	17,771,636	26,657,454	28,448,503	(1)
EmpiRx Rebates	--	342,848	342,848	--	
Stop Loss Reimbursement	--	591,811	591,811	--	
Total Operating Revenues	47,855,648	30,459,362	45,221,714	47,259,124	
Operating Expenditure					
Premiums					
Kaiser	13,312,803	8,066,705	12,100,058	12,404,544	(1)
Anthem - HMO	5,507,919	3,502,653	5,253,980	5,978,126	(1)
Claims					
Anthem	19,468,700	15,677,323	23,515,985	18,510,914	(2)
EmpiRx	3,939,279	2,445,706	3,668,559	4,267,275	(2)
Administration	1,830,903	1,275,557	1,913,336	2,372,511	(3)
Wellness Program	113,355	24,982	37,473	40,000	(1)
Stop Loss	3,677,689	2,418,691	3,628,037	3,680,754	(4)
Professional Development	5,000	1,900	1,900	5,000	(5)
Total Expenditures	47,855,648	33,413,517	50,119,326	47,259,124	
Other					
Change in Claim Liabilities	--	669,050	669,050	--	
Total Other	--	669,050	669,050	--	
Total Operating Expenditures	47,855,648	34,082,567	50,788,376	47,259,124	
Income/(Loss) from Operations	--	(3,623,205)	(5,566,662)	--	
Non Operating Revenue & Expenditure					
Late Fees	--	11,256	11,256	--	
Investment Income	577,952	421,155	631,733	344,370	(6)
Total Non Operating Revenues & Expenditures	577,952	432,411	642,989	344,370	
Revenues in Excess of Expenditures	577,952	(3,190,794)	(4,923,673)	344,370	
Beginning Net Position	8,103,094	8,103,094	8,103,094	3,238,121	
Designated - Wellness Funds	8,700	58,700	58,700	68,700	(7)
Ending Net Position	\$ 8,689,746	\$ 4,971,000	\$ 3,238,121	\$ 3,651,191	

Notes to Budget

- (1) Based upon estimated enrollment and approved final rates.
- (2) Based upon estimated claims paid in the development of the approved final rates.
- (3) Based upon prior year actuals/estimates.
- (4) Based upon a final rate per employee per month.
- (5) Professional Development activity.
- (6) Estimated based on average cash balance.
- (7) Annual Wellness Program Funding from Anthem effective 2023.

\$ 8,603,720	Estimated Cash Balance
4.00%	CAMP Rate
<u>\$ 344,149</u>	Investment Income
\$ 5,529	Estimated Cash Balance
4.00%	LAIF Rate
<u>\$ 221</u>	Investment Income

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Executive Committee

DATE: October 23, 2024

SUBJECT:
Anthem Update

ITEM #: 2024-044

Enclosure: Yes

Category: Financial

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

PACE is in a standalone partnership with Anthem effective January 1, 2020.

STATUS:

The Executive Committee will hear and discuss a report from Anthem.

RECOMMENDATIONS:

For review, discussion and action as necessary.

Financial and Utilization Dashboard (Paid Claims)

Medical Membership Summary

Period	Subscribers	Members	Contract Size	Contract Size Commercial Benchmark	Member Trend
Current	1,372	2,855	2.1	2.0	0.3%
Prior	1,343	2,848	2.1	2.0	9.4%

Medical and Pharmacy Paid Amount Summary

	Current	Prior	Trend	Prior Trend
Medical				
Paid Amount	\$21,653,233	\$13,725,292		
Paid PMPM	\$632.03	\$401.66	57.4%	3.4%
Paid PEPM	\$1,315.51	\$851.97	54.4%	-1.2%
Pharmacy				
Paid Amount	\$333,165	\$244,343		
Paid PMPM	\$62.65	\$53.32	17.5%	-10.6%
Paid PEPM	\$136.43	\$122.23	11.6%	-14.9%
Total				
Paid Amount	\$21,986,398	\$13,969,635		
Paid PMPM	\$641.75	\$408.82	57.0%	2.8%
Paid PEPM	\$1,335.75	\$867.14	54.0%	-1.6%
Paid Amount In Network	\$20,836,380	\$13,191,758		
Percent Paid Amount In Network	96.2%	96.1%		
Discount Amount	\$35,521,485	\$23,215,366		

High Cost Claimants with Paid Amounts > \$100,000

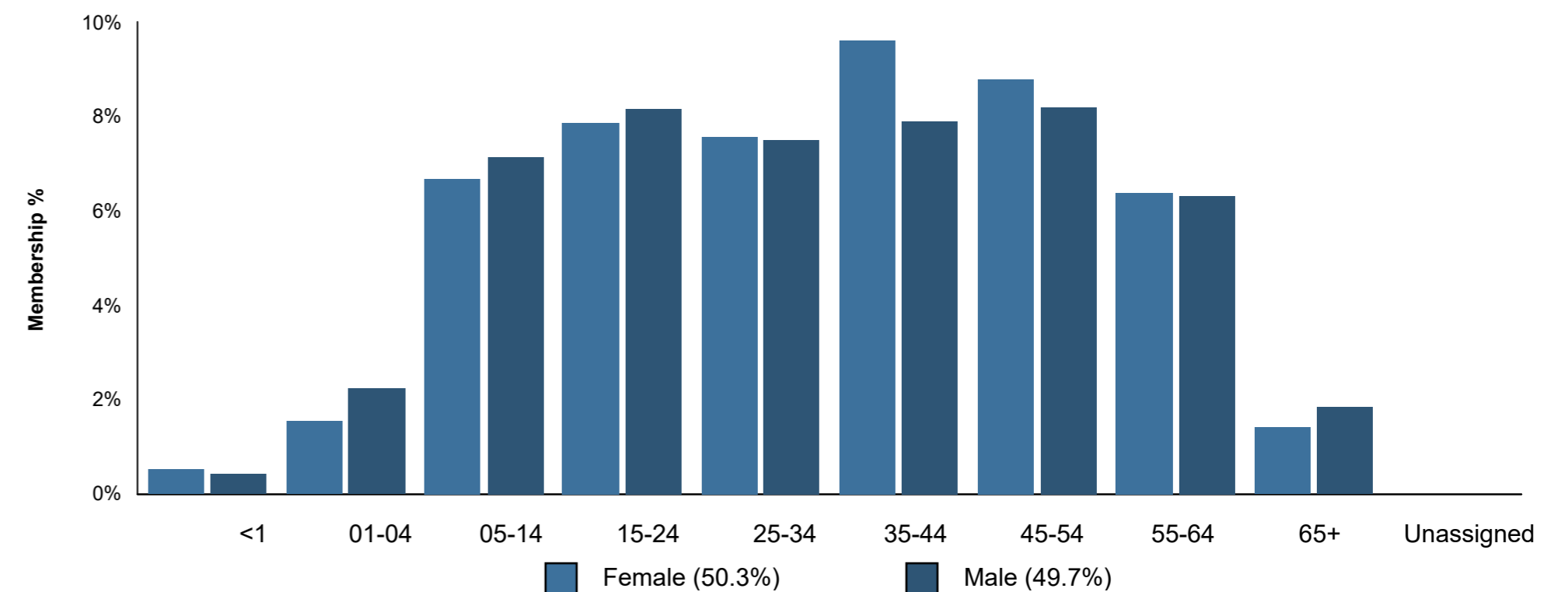
High Cost Claimant (HCC) Summary	Current	Prior	Trend	Commercial Benchmark	Percent Paid In Network
Total Paid Amount	\$21,986,398	\$13,969,635			96.3%
Total HCC Paid Amount Med	\$9,828,048	\$3,868,460			96.7%
Total HCC Paid Amount Rx	\$37,654	\$9,301			100.0%
HCC Paid Amount as % of Total Paid Amount	44.9%	27.8%	61.7%	33.2%	
Number of HCC Members > \$100K	35	20			
HCC Members as Percent of Total Members	1.2%	0.7%	74.5%	0.9%	

High Cost Claimant (HCC) Detail	Current	Prior	Trend	Commercial Benchmark
HCC PMPM - Total	\$287.97	\$113.48	153.8%	\$163.97
HCC PEPM - Total	\$599.37	\$240.71	149.0%	\$325.89
Non-HCC PMPM - Total	\$353.79	\$295.33	19.8%	\$329.30
Non-HCC PEPM - Total	\$736.37	\$626.44	17.5%	\$654.48
HCC PMPM - Medical	\$286.87	\$113.21	153.4%	\$151.11
HCC PEPM - Medical	\$597.09	\$240.13	148.7%	\$300.33
Non-HCC PMPM - Medical	\$345.16	\$288.46	19.7%	\$294.50
Non-HCC PEPM - Medical	\$718.42	\$611.85	17.4%	\$585.32
HCC PMPM - Pharmacy	\$7.08	\$2.03	248.9%	\$43.79
HCC PEPM - Pharmacy	\$15.42	\$4.65	231.4%	\$80.65
Non-HCC PMPM - Pharmacy	\$55.57	\$51.29	8.3%	\$118.47
Non-HCC PEPM - Pharmacy	\$121.01	\$117.58	2.9%	\$218.20

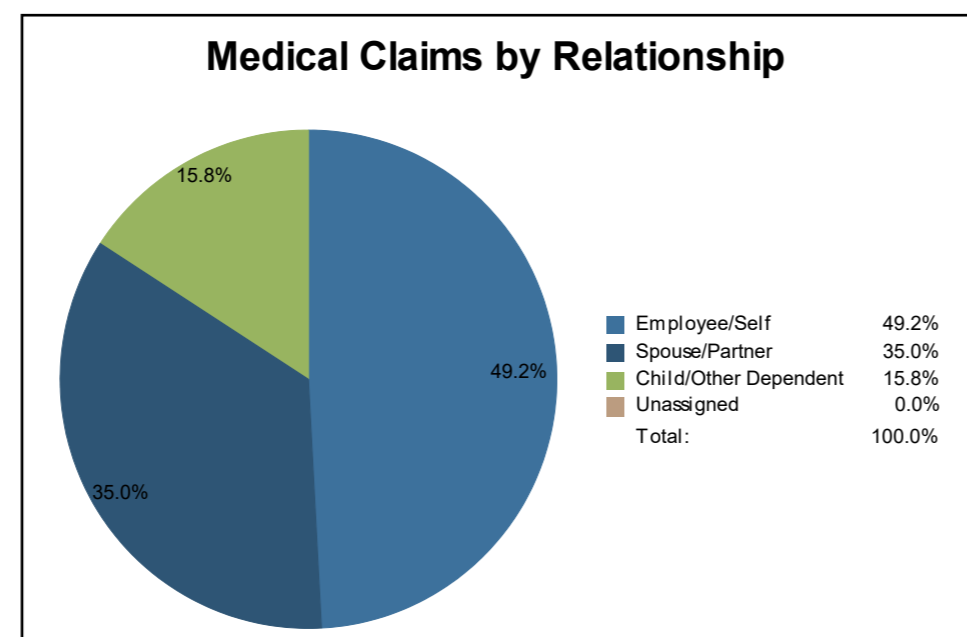
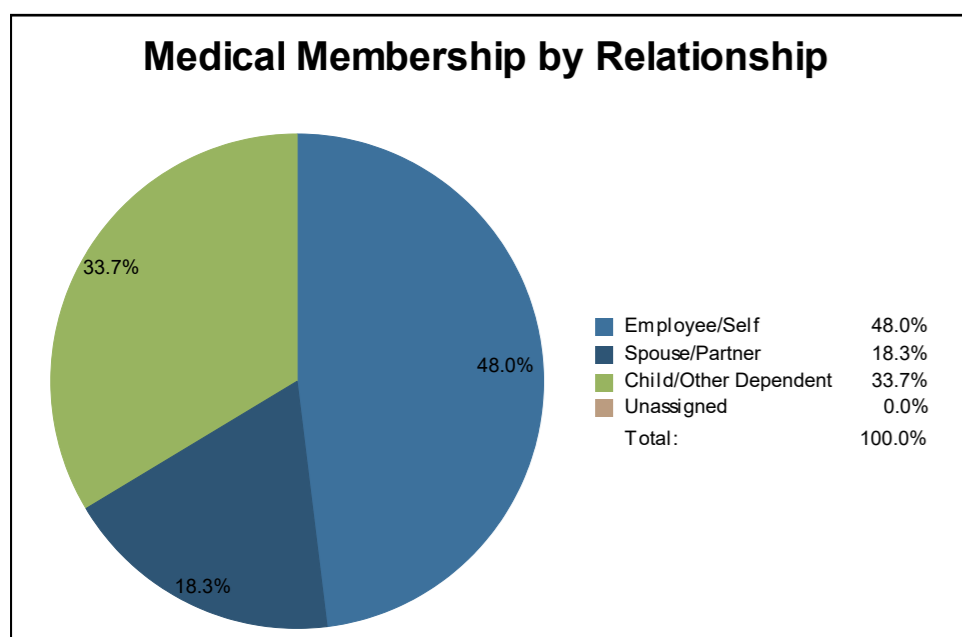
Note: High Cost Claimants are defined as those claimants with more than \$100,000 in paid amount during the reporting period. Benchmark total doesn't equal Medical and Pharmacy combined because not all clients have Anthem pharmacy.

Medical Membership Summary by Age Band and Gender

Average Age: Subscriber = 44, Member = 34



NOTE: Anthem Book of Business Average Age is 35



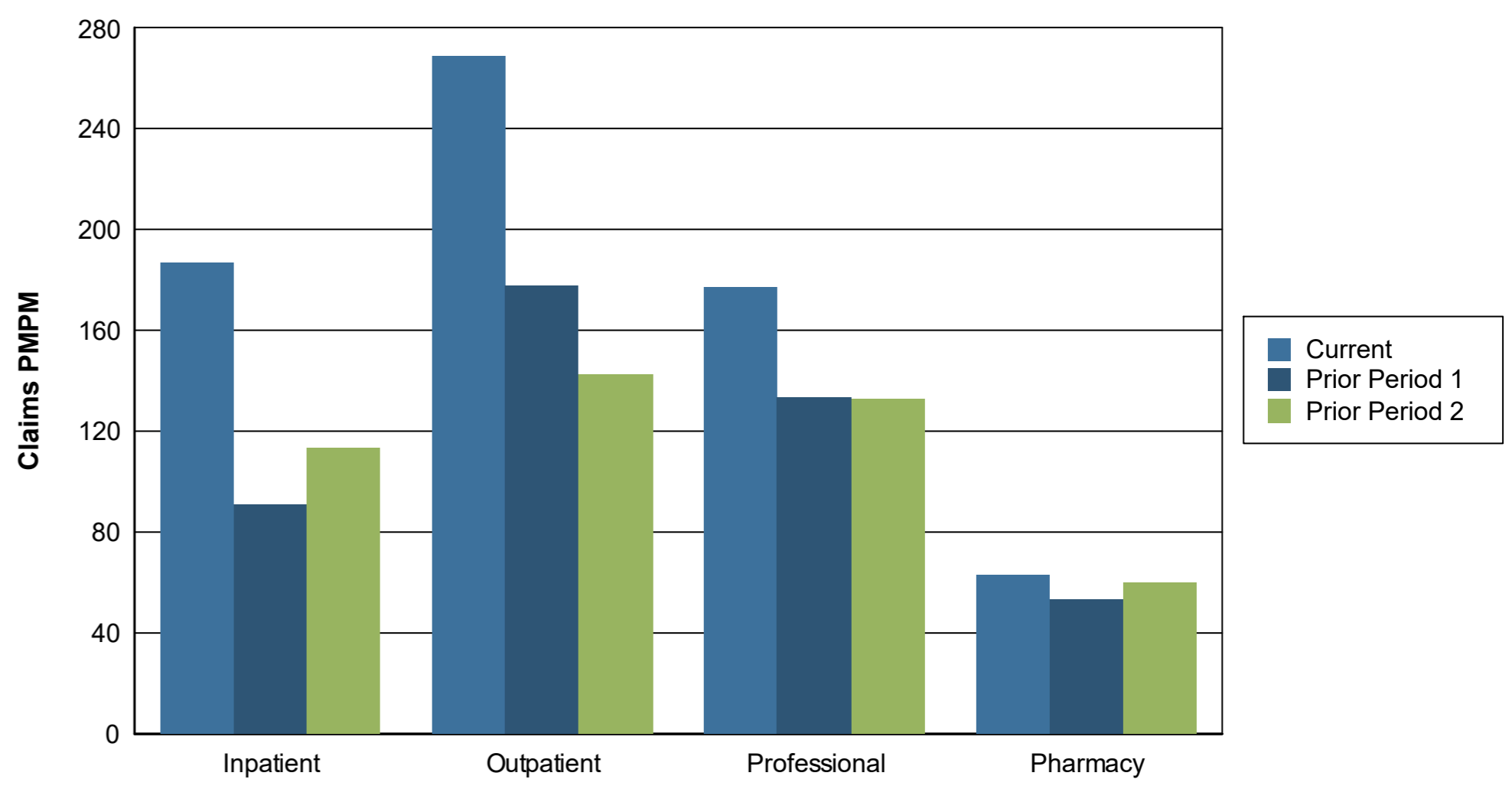


Financial and Utilization Dashboard (Paid Claims)

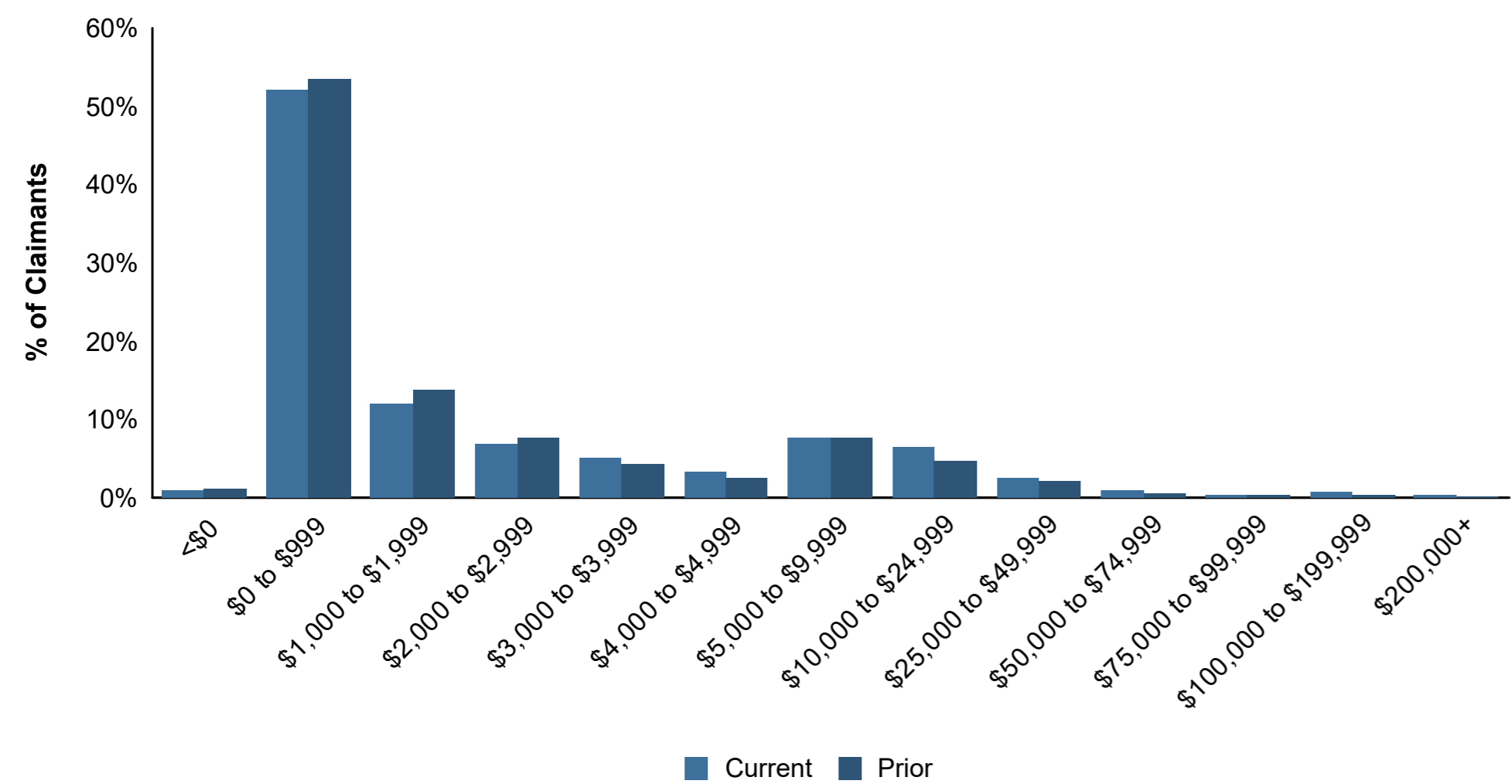
Utilization Breakdown

Metrics	Current Period	Prior Period 1	Prior Period 2	Trend Lines
Utilization				
IP Facility Acute Admissions per 1000	55.0	34.8	46.9	
IP Facility Acute Days per 1000	270.4	132.7	238.1	
IP Facility Acute Avg LOS	4.92	3.82	5.08	
OP Facility Visits per 1000	1,933.5	1,343.6	1,257.9	
Professional Services per 1000	19,838.5	18,331.3	18,247.0	
Paid Amount PMPM by Setting				
IP Facility Acute Admit	\$186.42	\$90.93	\$113.32	
OP Facility Visits	\$268.81	\$177.48	\$142.51	
Professional Service	\$176.80	\$133.26	\$132.78	

Paid Amount by Setting



Paid Claims Distribution



Pharmacy Highlights

Drug	Paid Amount	Scripts	Paid Per Script	Percent of Claims Paid
OZEMPIC	\$39,188	30	\$1,306	11.8%
ABIRATERONE ACETATE	\$31,789	9	\$3,532	9.5%
XIFAXAN	\$23,723	8	\$2,965	7.1%
JARDIANCE	\$20,655	23	\$898	6.2%
XOLAIR	\$13,599	6	\$2,267	4.1%
PAXLOVID	\$9,729	7	\$1,390	2.9%
FARXIGA	\$9,457	7	\$1,351	2.8%
MOUNJARO	\$9,246	*	*	2.8%
TRELEGY ELLIPTA	\$8,371	13	\$644	2.5%
BREO ELLIPTA	\$7,168	16	\$448	2.2%
Top Ten Subtotal	\$172,926	124	\$1,395	51.9%
All Other Drugs	\$160,239	2,922	\$55	48.1%
Total	\$333,165	3,046	\$109	100.0%

* This value not shown due to small numbers.
The data in any reports provided by Anthem may contain substance use disorder information subject to 42 CFR Part 2. 42 CFR Part 2 prohibits unauthorized disclosure of these records.

Note: Based on medical and pharmacy where applicable

In California Anthem Blue Cross is the trade name of Blue Cross of California, Inc. Also serving California: Anthem Blue Cross Life and Health Insurance Company. In 11 northeastern counties of New York Anthem Blue Cross is the trade name of Anthem HealthChoice Assurance, Inc., and Anthem HealthChoice HMO, Inc., and Anthem Blue Cross HP is the trade name of Anthem HP, LLC. Independent licensees of the Blue Cross Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc.

This confidential information should not be distributed without prior written consent and should only be used to review health care utilization.

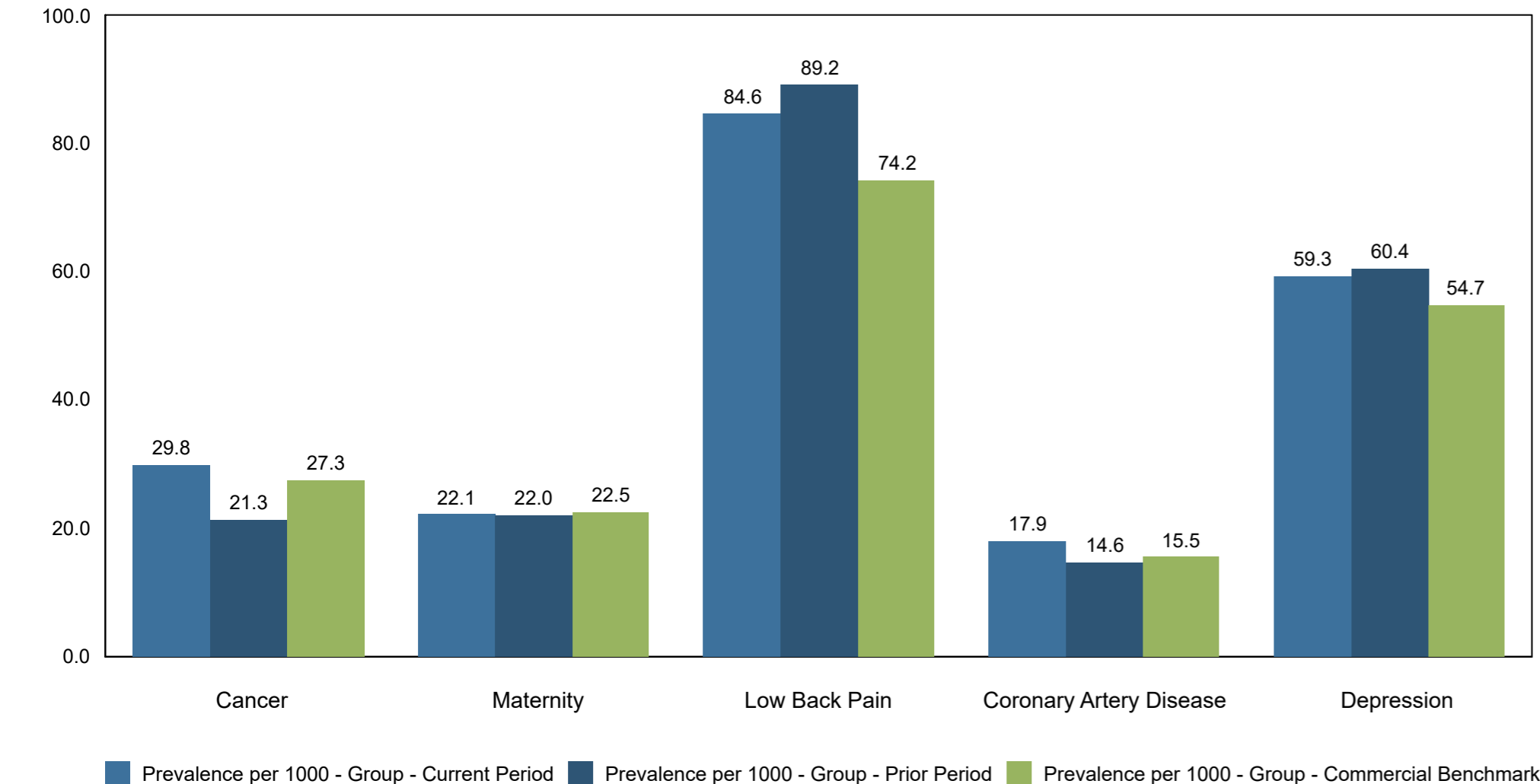
Disclaimer: Paid date is the date the claim was adjudicated in the claims system



Clinical Dashboard

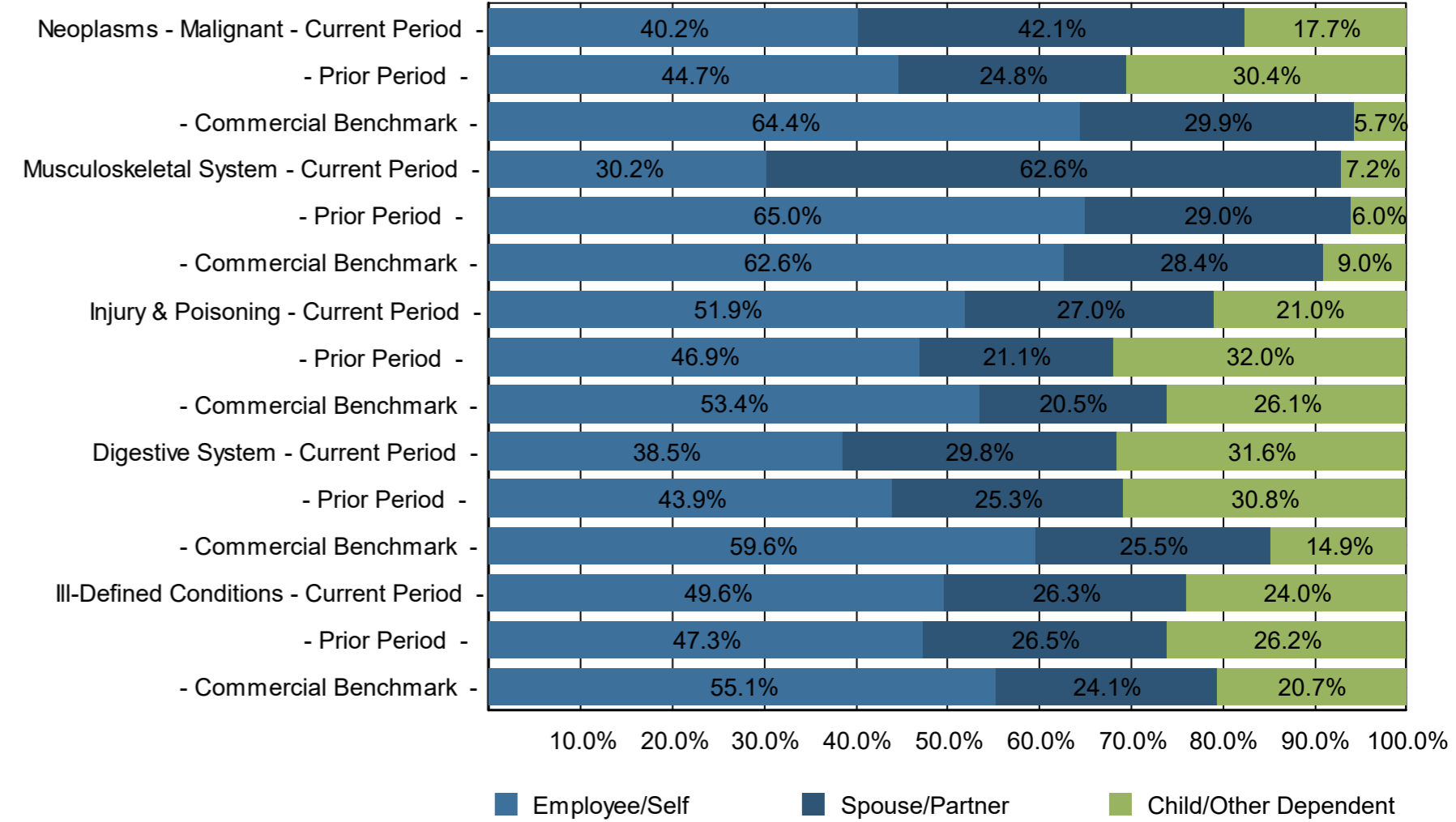
Top Five Target Program Conditions Compared to Benchmark (Based on Paid Amount)

Prevalence per 1000 for Target Program Conditions



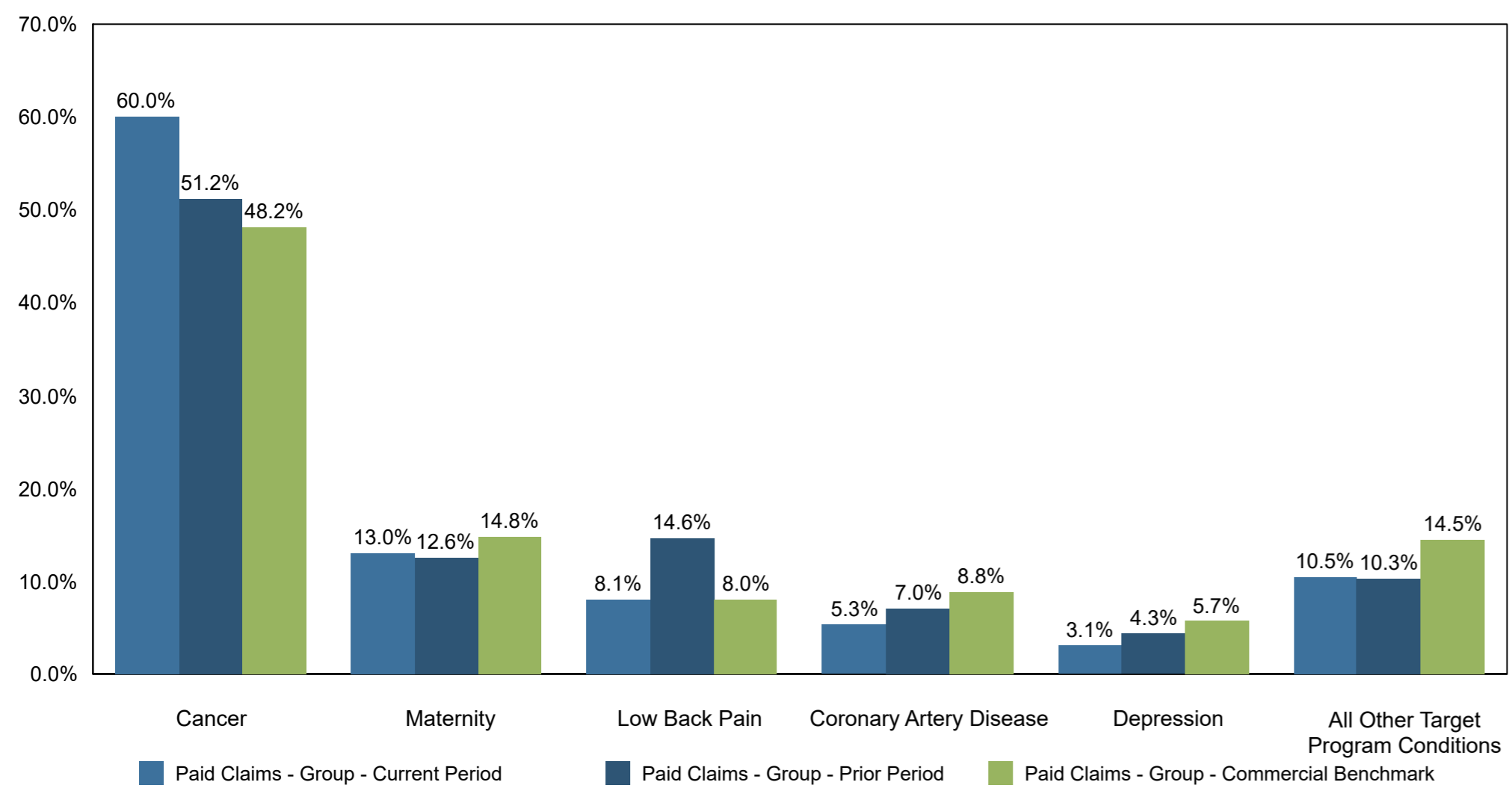
Top Five Health Conditions by Paid Amount

Percentage of Claims Paid by Relationship



Top Five Target Program Conditions Compared to Benchmark (Based on Paid Amount)

Percent of Paid Amount for Target Program Conditions



Health Risk Index

The Risk Index is based on Incurred and Paid Claims

	Current	Prior	Percent Change
Group	1.36	1.29	5.5%
Commercial Benchmark	1.00	1.00	0.0%
Variance to Commercial Benchmark	35.9%	28.8%	

The Health Risk Index is a diagnostic and age/sex adjusted projection of the population's likely level of risk for the period indicated. The Benchmark is presented for comparison. The comparison population reflects the healthcare experience of employees and dependents from a large national dataset. A score higher than 1.0 indicates a higher level of risk as compared to the national dataset.

In California Anthem Blue Cross is the trade name of Blue Cross of California, Inc. Also serving California: Anthem Blue Cross Life and Health Insurance Company. In 11 northeastern counties of New York Anthem Blue Cross is the trade name of Anthem HealthChoice Assurance, Inc., and Anthem HealthChoice HMO, Inc., and Anthem Blue Cross HP is the trade name of Anthem HP, LLC. Independent licensees of the Blue Cross Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc.

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**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

RULA Presentation

ITEM #:

2024-045

Enclosure:

Yes

Category:

Financial

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

RULA is a part of Anthem.

STATUS:

The Executive Committee will hear a report on RULA.

RECOMMENDATIONS:

For review, discussion, and action as necessary.



A healthcare provider group enabled by technology delivering reliable access to high quality mental health services

10,000+

Providers nationwide

100s of providers

added each month

5 years old+

Ages served

Rula makes it easy for members to find a therapist who meets their preferences, is in-network with their insurance, and has availability this week.



Rapid Availability

24/7 online scheduling means patients can schedule their first appointment in < 5 min

3 days

Average time to 1st offered appointment



Curated Matching

Members can select providers based on multiple dimensions (e.g., gender, language, ethnicity, specialty)

99%

Therapeutic Alliance based off > 450k potential permutations



Clinical Excellence

Clinical support system focused on ensuring therapists meet quality of care expectations

68%

clients complete treatment in less than 16 sessions



Measurable Outcomes

Weekly use of measurement based care to track progress and drive treatment planning

30-40%

improvement in PHQ9 and GAD7 scores after 90 days

Get started today at www.rula.com/AnthemCA

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Executive Committee

DATE: October 23, 2024

SUBJECT:
Ancillary Updates – LiveHealth Online and EmpiRx

ITEM #: 2024-046

Enclosure: Yes

Category: Financial

Prepared by: Keenan & Associates & EmpiRx

Requested by: Executive Committee

BACKGROUND:

PACE offers the following value-add services to members:

- LiveHealth Online Medical - provides access to telehealth doctor visits 24/7/365.
- EmpiRx Health - administers PACE's prescription drug plan for the self-funded EPO and PPO plans.

STATUS:

The Executive Committee will hear a report on the LiveHealth Online and EmpiRx utilization reports.

RECOMMENDATIONS:

For review, discussion and action as necessary.

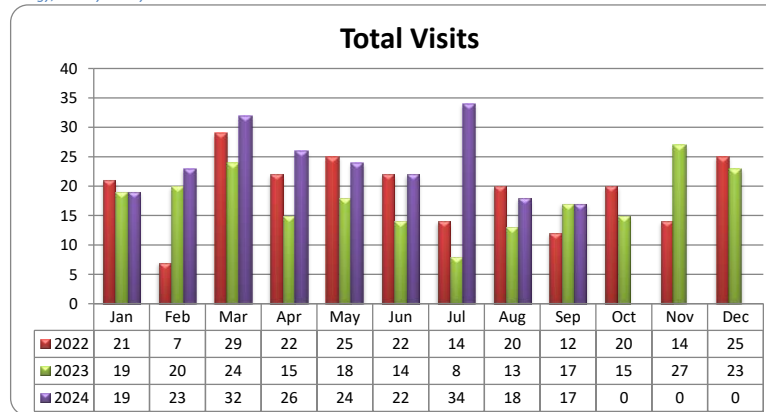
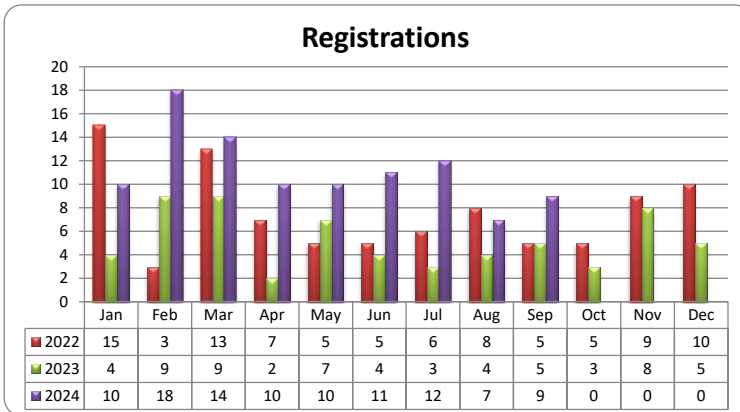
PACE
Registration & Utilization
1/1/13 thru 9/30/24
(282517)

Date Printed:10/3/24

Registrations		VISITS						UTILIZATION		
Year	Count	Medical	VPC	BH	Breastfeeding	Dermatology	Grand Total	Medical	BH	
2024	101	2024	167	21	27	0	0	215	0.40	0.06
2023	63	2023	165	0	42	0	6	213	0.35	0.09
2022	91	2022	194	0	32	1	0	227	0.48	0.08
all prior years	354	all prior years	258	0	42	0	0	300	0.64	0.11
Total 1/1/13 thru 9/30/24	609	Total 1/1/13 thru 9/30/24	784	21	143	1	6	955	0.49	0.09

	Medical	VPC	BH	Breastfeeding	Dermatology
Nbr of Users	338	15	14	1	9
Avg Wait time (min:sec)	7:44	2:14	5:10	2:39	0
Avg Visit Duration (min:sec)	5:22	9:48	43:23 ¹ 13:30 ²	1:39	N/A
Avg Rating of LHO (Scale 1-5, 5=best)	4.9 (n=233)	5.0 (n=11)	4.9 (n=26)	0.0 (n=0)	0.0 (n=0)
Avg Rating of Provider (Scale 1-5, 5=best)	4.9 (n=236)	5.0 (n=11)	5.0 (n=27)	0.0 (n=0)	0.0 (n=0)

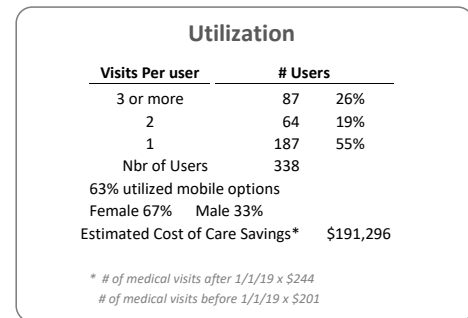
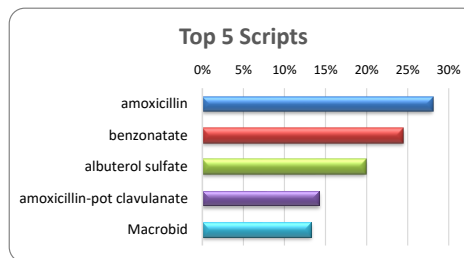
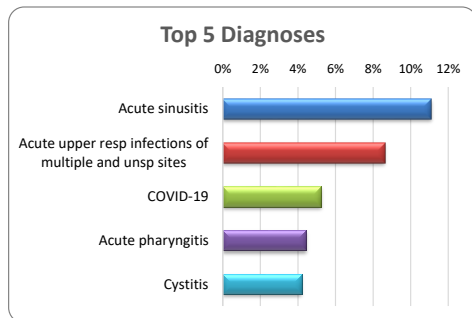
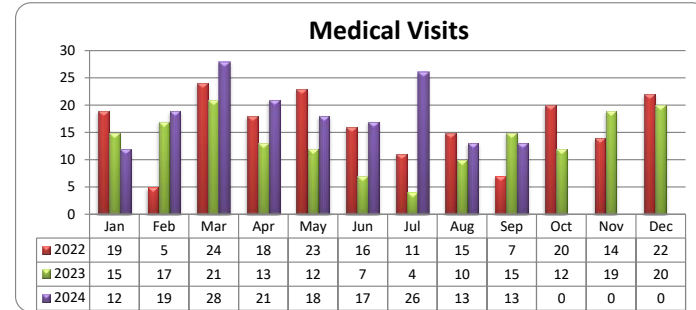
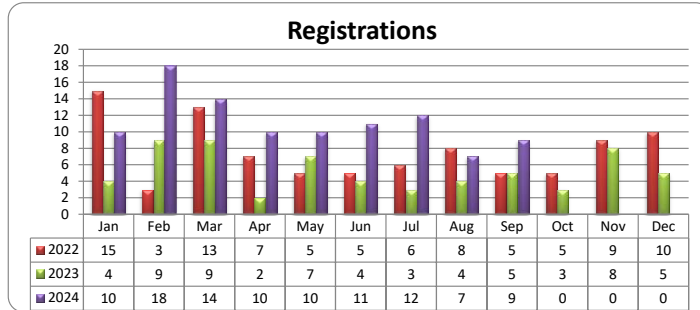
1 = Psychology, 2 = Psychiatry



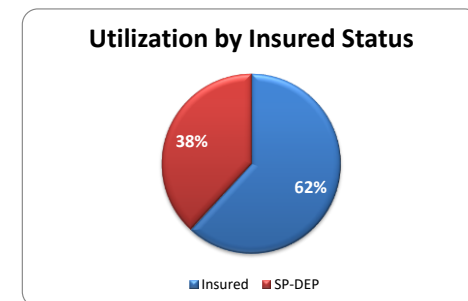
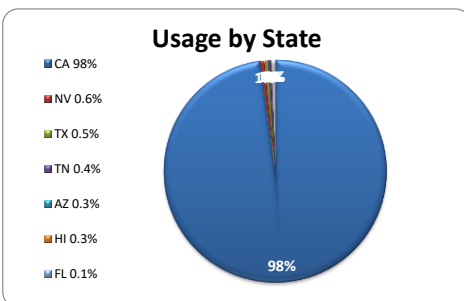
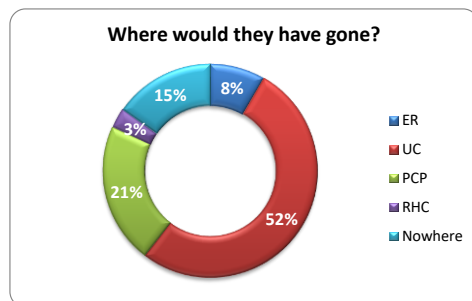
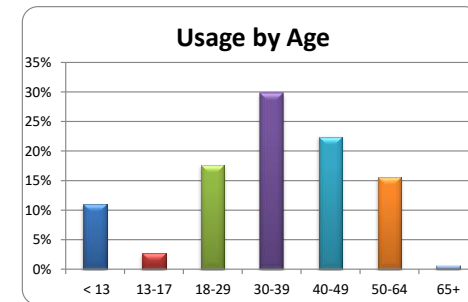
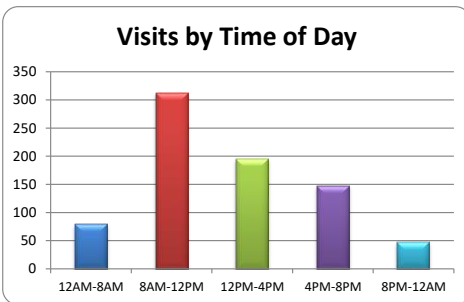
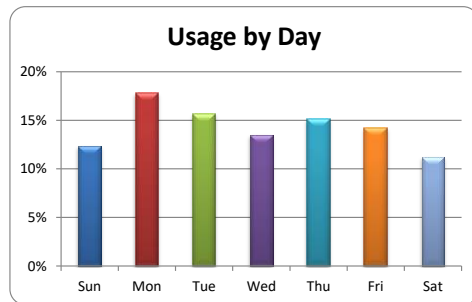
Note: Registrations and Total Visits charts show only the most recent 3 years

MEDICAL ACTIVITY

Note: Registrations and Medical Visits charts show only the most recent 3 years

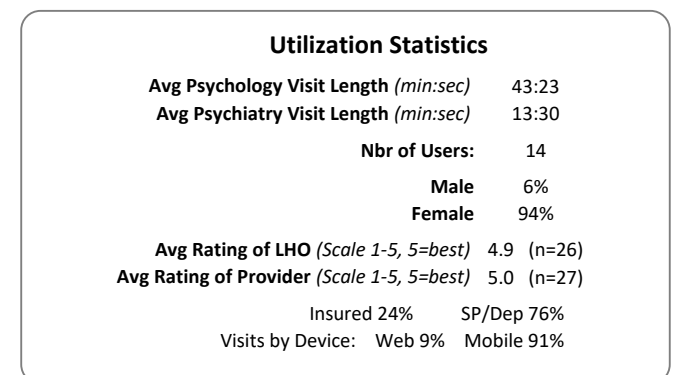
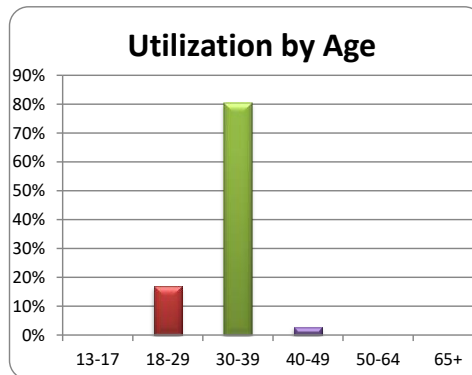
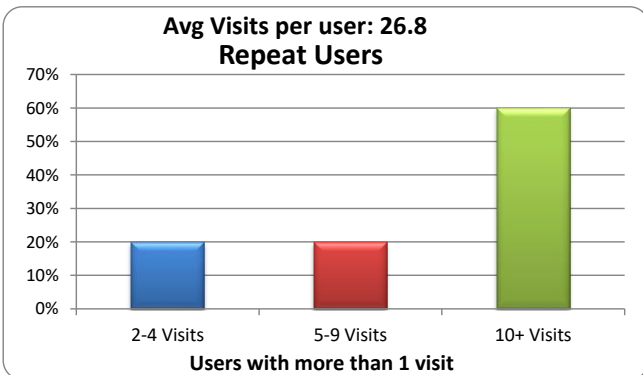
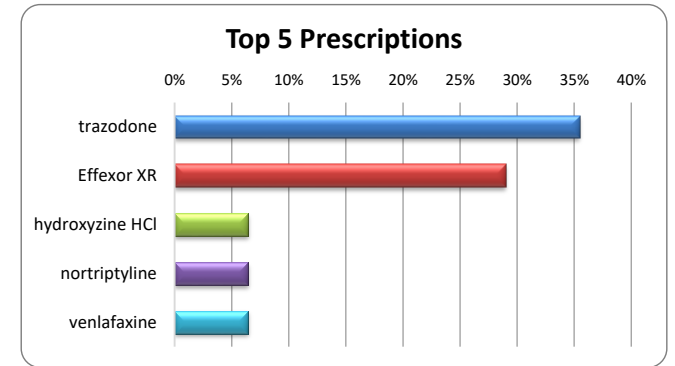
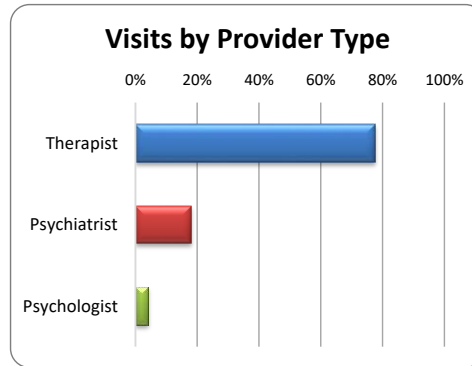
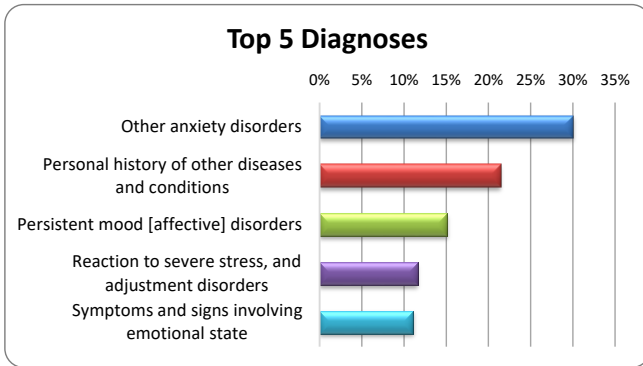
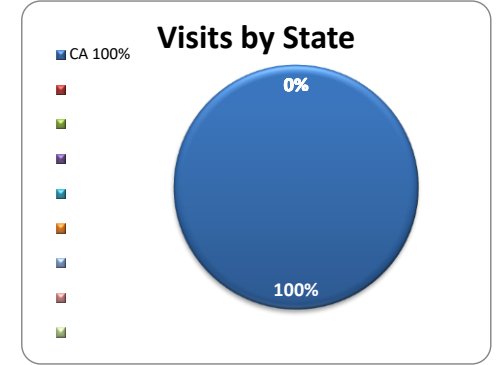
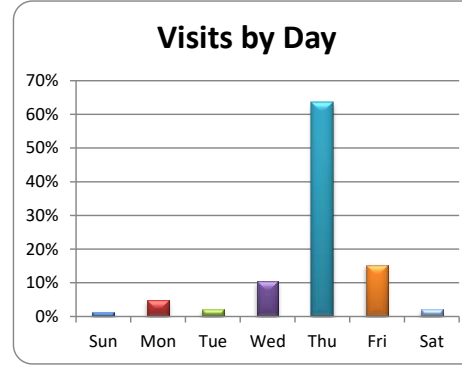
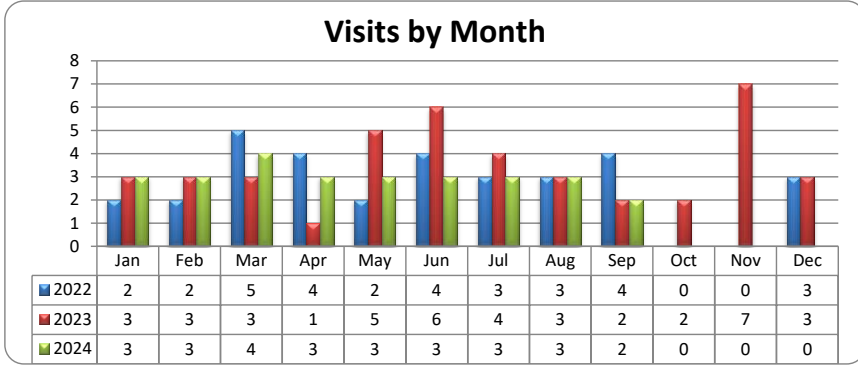


- 74% of visits resulted in a prescription
- 31% of visits with antibiotic prescriptions
- 20% of visits received multiple prescriptions



BEHAVIORAL HEALTH ACTIVITY

Note: Visits by Month chart shows only the most recent 3 years





EmpiRx Health

Monthly Reporting Package

PACE

January 2024 - September 2024

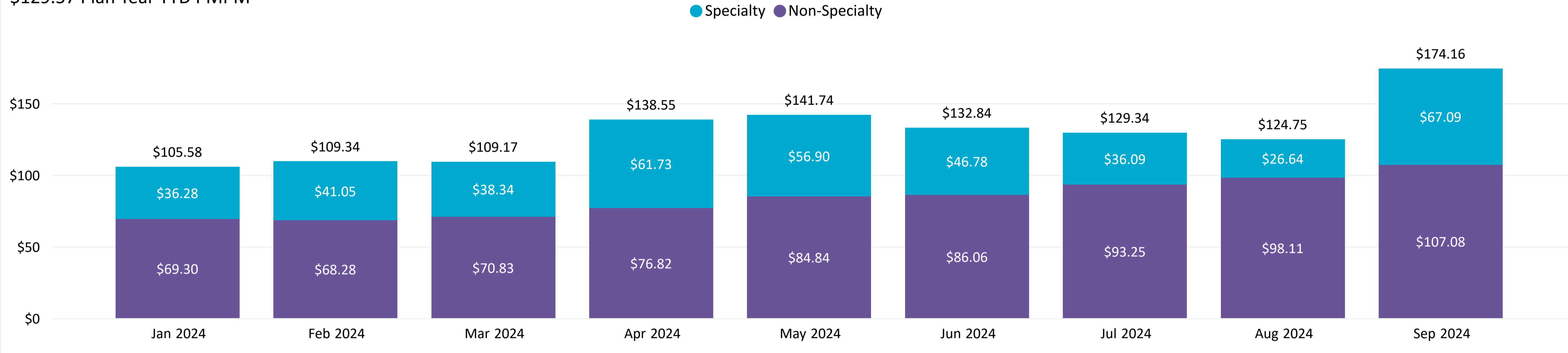
THIS REPORT REPRESENTS THE FIGURES AT THE TIME THE REPORT WAS GENERATED AND IS SUBJECT TO CHANGE.

Plan Paid

January 2024 - September 2024

Plan Paid Per Member Per Month (PMPM)

\$129.57 Plan Year YTD PMPM



Plan Paid by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Total YTD
Plan Paid	\$255,388	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$425,655	\$2,816,926
Specialty Plan Paid	\$87,758	\$98,240	\$91,719	\$147,959	\$136,727	\$112,232	\$87,868	\$65,512	\$163,960	\$991,976
Non-Specialty Plan Paid	\$167,630	\$163,400	\$169,420	\$184,148	\$203,868	\$206,462	\$227,070	\$241,257	\$261,695	\$1,824,950
Retail Plan Paid	\$154,156	\$156,781	\$165,522	\$180,392	\$207,764	\$200,244	\$233,629	\$237,682	\$246,925	\$1,783,095
Mail Plan Paid	\$101,233	\$104,859	\$95,617	\$151,715	\$132,831	\$118,450	\$81,309	\$69,086	\$178,730	\$1,033,831

Specialty Utilization

January 2024 - September 2024

1.1%

of Total Claims

35.2%

of Plan Paid YTD

46

Unique Utilizers YTD

Specialty Metrics by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Total or Average YTD
Specialty as % of Total Claims	1.0%	1.1%	1.3%	1.3%	1.4%	1.2%	0.9%	0.7%	1.1%	1.1%
Total Claims	2,451	2,204	2,196	2,365	2,477	2,245	2,393	2,361	2,403	21,095
Specialty Claims	25	24	29	31	34	26	22	17	27	235
Specialty as % of Total Plan Paid	34.4%	37.5%	35.1%	44.6%	40.1%	35.2%	27.9%	21.4%	38.5%	35.2%
Total Plan Paid	\$255,388	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$425,655	\$2,816,926
Specialty Plan Paid	\$87,758	\$98,240	\$91,719	\$147,959	\$136,727	\$112,232	\$87,868	\$65,512	\$163,960	\$991,976
Total Utilizers	826	788	768	796	808	795	788	801	812	798
Specialty Utilizers	24	24	24	27	28	23	19	17	24	23

Specialty Cost Containment Metrics

January 2024 - September 2024

Specialty Cost Containment powered by Payer Matrix

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Total YTD
Alternate Funding	\$110,653	\$116,177	\$40,869	\$147,377	\$44,693	\$33,406	\$70,653	\$43,971	\$607,799
SCC Claims	13	10	9	15	4	5	9	8	73
Plan Savings	\$88,522	\$92,942	\$32,696	\$117,902	\$35,754	\$26,725	\$56,522	\$35,177	\$486,240
SCC Utilizers	12	9	9	11	4	5	7	8	26

Notes:

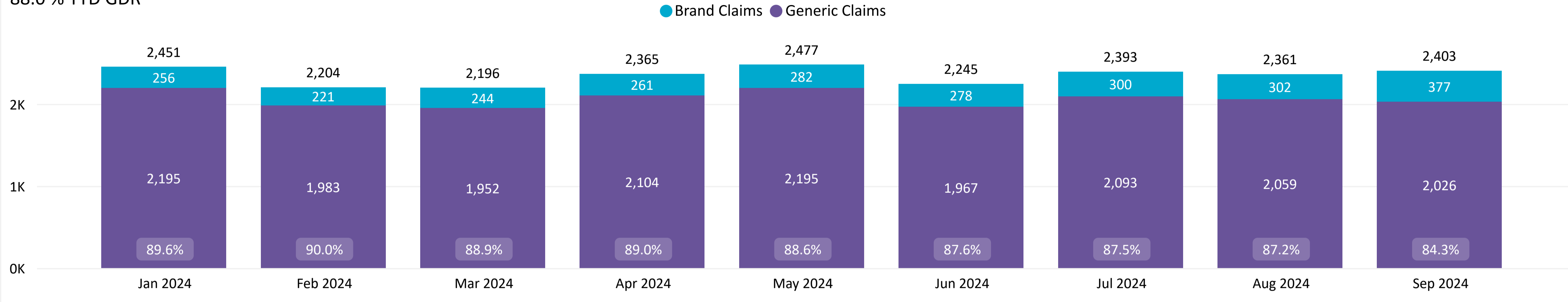
1. Patient Assistance Programs (PAPs) dramatically reduce specialty spend using manufacturer-driven funding mechanisms
2. Figures above represent data at the time that the report was generated and are subject to change
3. Prior month data may not be visible due to reporting lag times

Utilization by Drug Type

January 2024 - September 2024

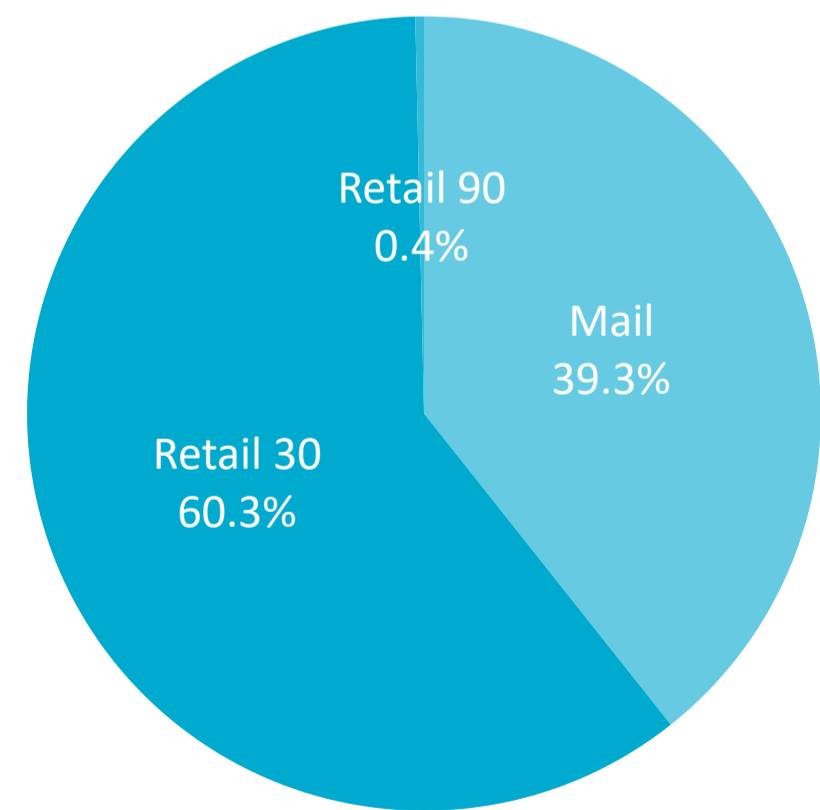
Brand and Generic Dispensing Rate (GDR) by Month

88.0 % YTD GDR



Brand Plan Paid by Channel

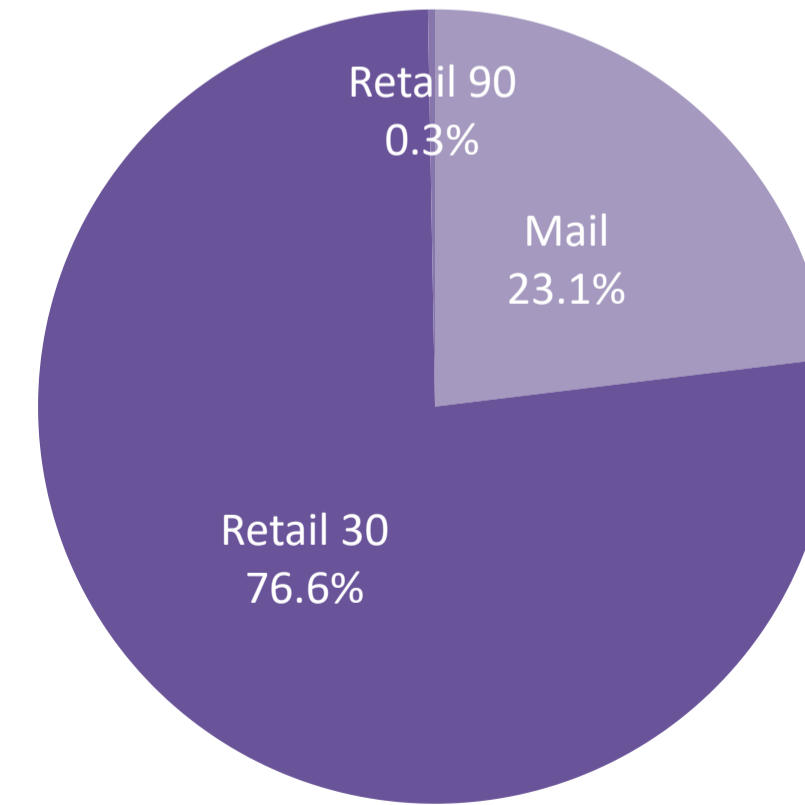
\$2,362,641 Brand Plan Paid YTD



● Mail ● Retail 30 ● Retail 90

Generic Plan Paid by Channel

\$454,285 Generic Plan Paid YTD



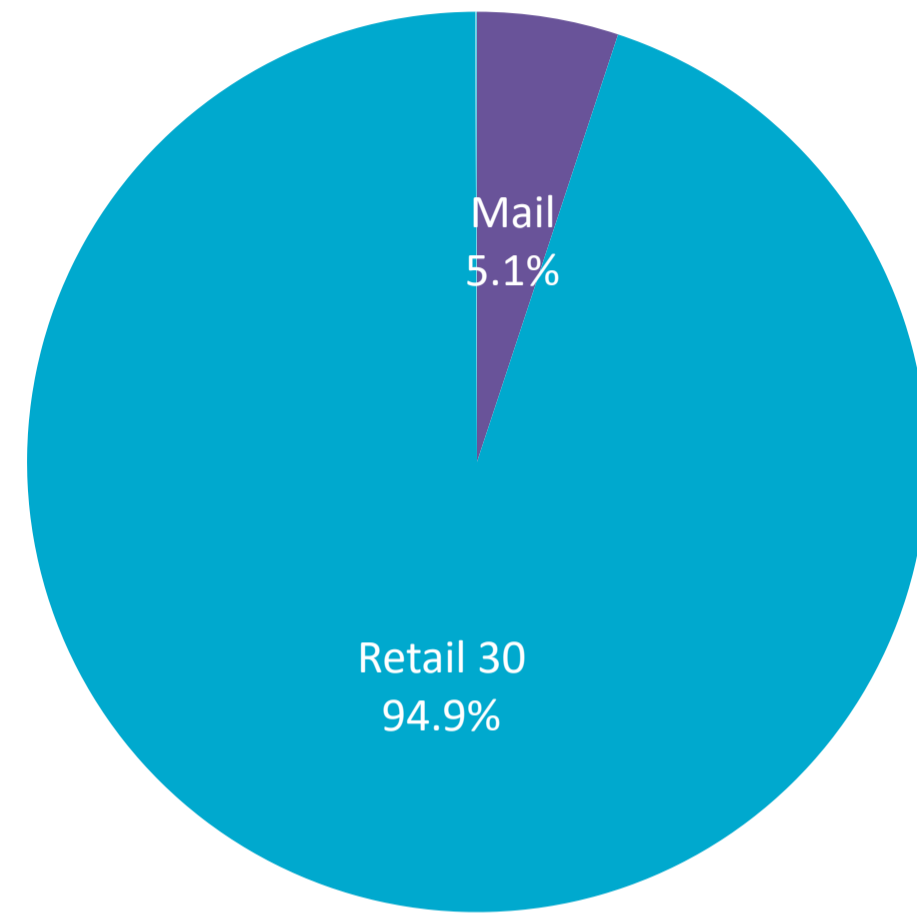
● Mail ● Retail 30 ● Retail 90

Utilization by Channel

January 2024 - September 2024

All Claims by Channel

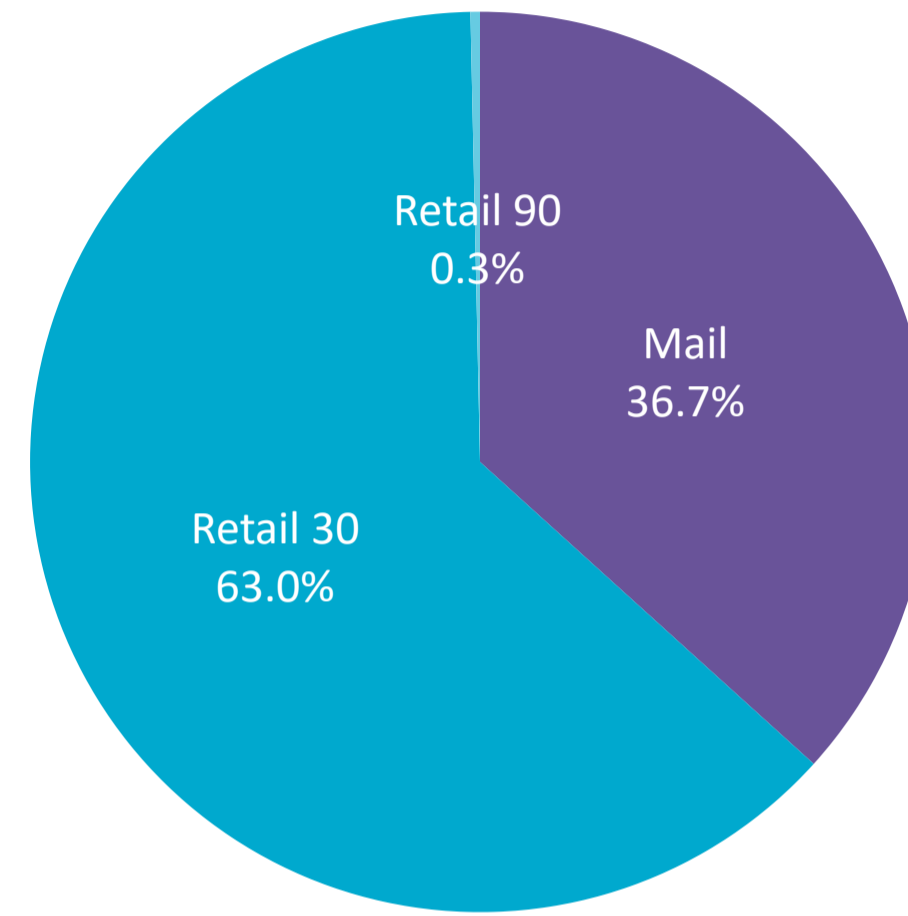
21,095 Total Claims YTD



● Mail ● Retail 30 ● Retail 90

Plan Paid by Channel

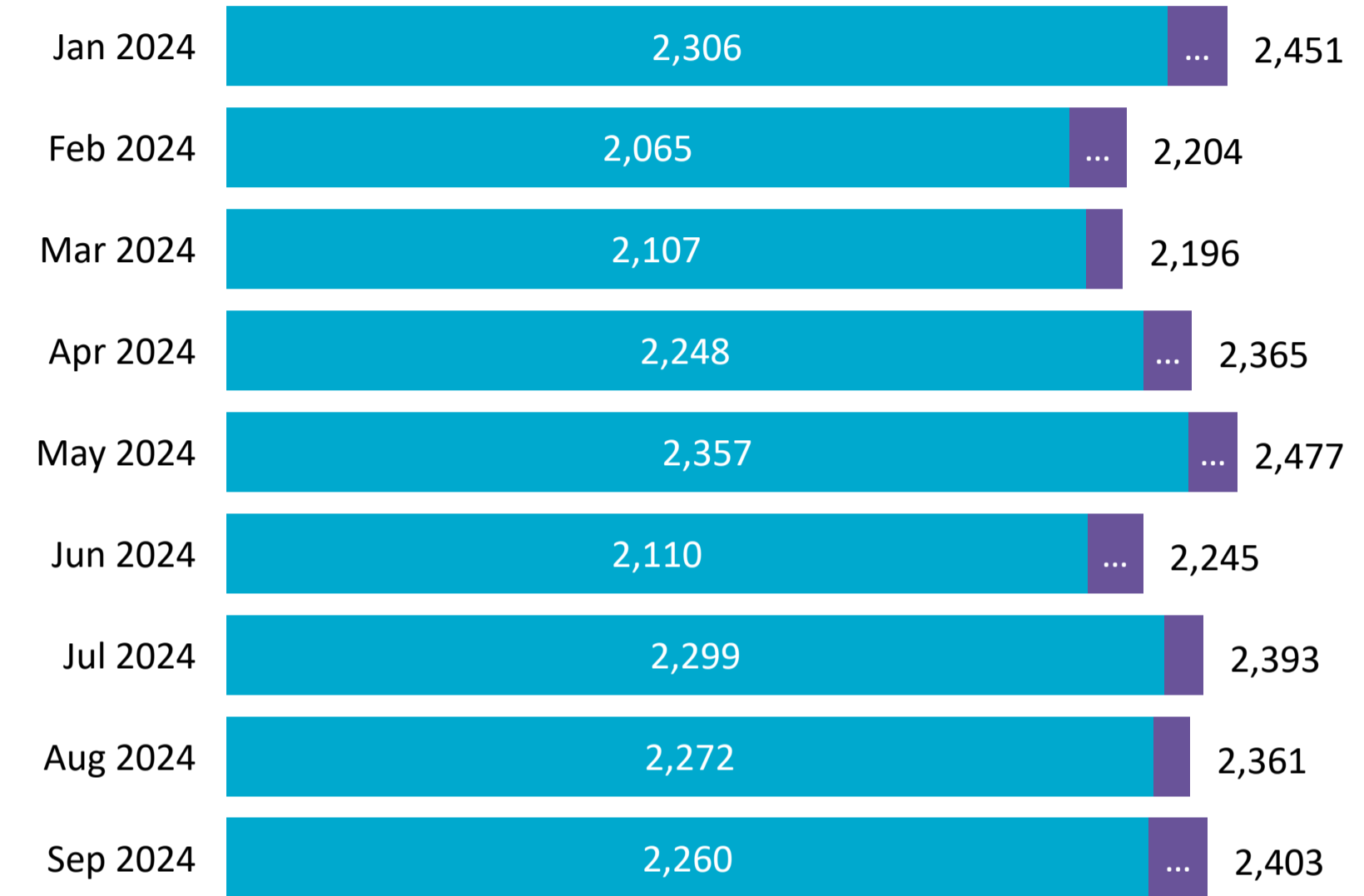
\$2,816,926 Total Plan Paid YTD



● Mail ● Retail 30 ● Retail 90

Retail and Mail Claims by Month

5.1 % Mail Order Penetration Rate



● Retail ● Mail

Plan Paid by Channel by Month

	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024	Sep 2024	Total YTD
Retail 30 Plan Paid	\$151,396	\$156,598	\$165,188	\$177,633	\$207,581	\$200,093	\$230,687	\$237,499	\$246,849	\$1,773,523
Retail 90 Plan Paid	\$2,759	\$183	\$335	\$2,759	\$183	\$152	\$2,943	\$183	\$76	\$9,573
Mail Plan Paid	\$101,233	\$104,859	\$95,617	\$151,715	\$132,831	\$118,450	\$81,309	\$69,086	\$178,730	\$1,033,831
Total Plan Paid	\$255,388	\$261,640	\$261,139	\$332,107	\$340,595	\$318,695	\$314,938	\$306,768	\$425,655	\$2,816,926

Members and Utilizers

January 2024 - September 2024

2,416

Average Monthly Members

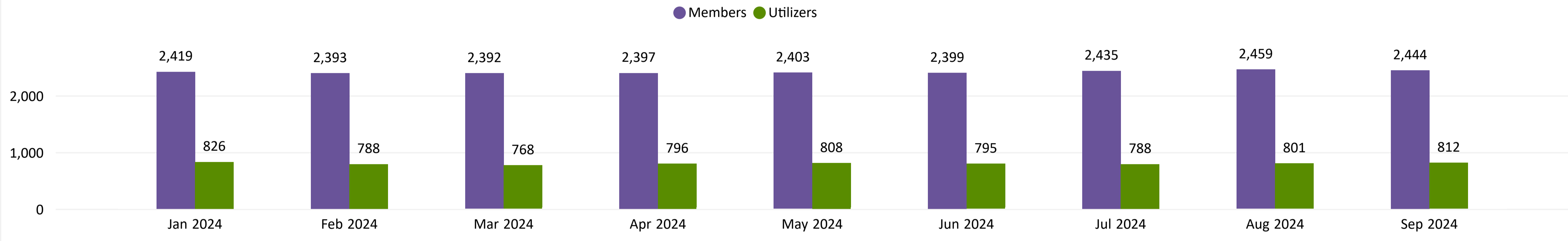
1,519

Unique Utilizers YTD

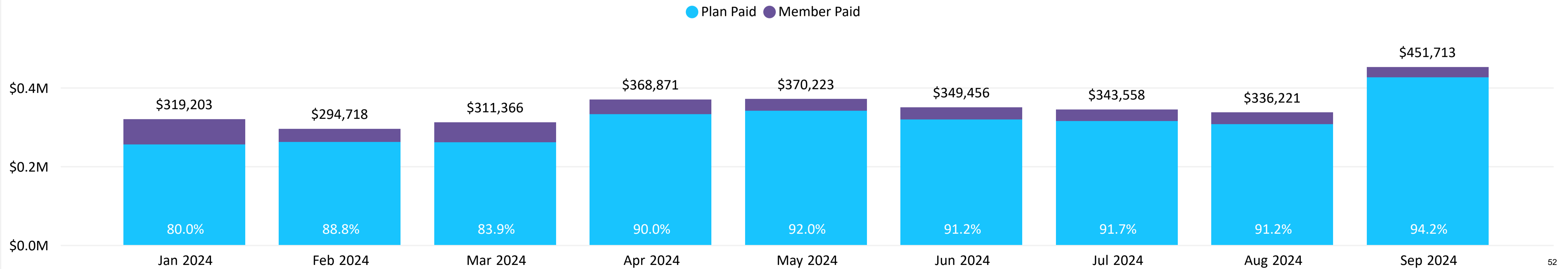
10.4%

Member Cost Share YTD

Members and Utilizers by Month



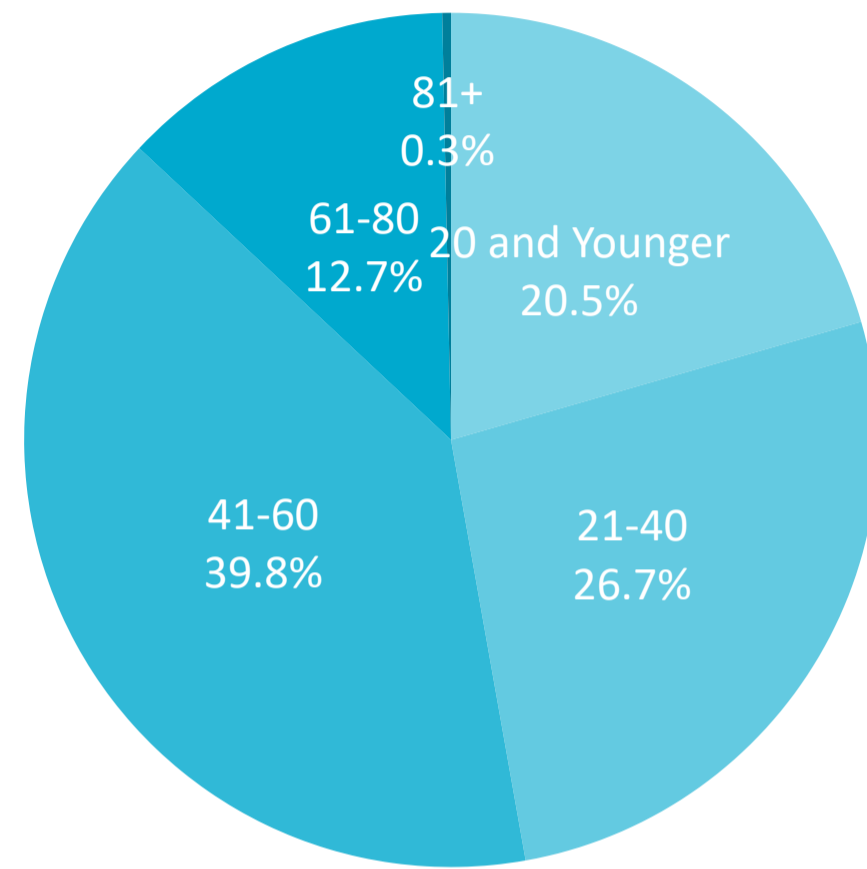
Plan Paid and Member Paid by Month



Demographics

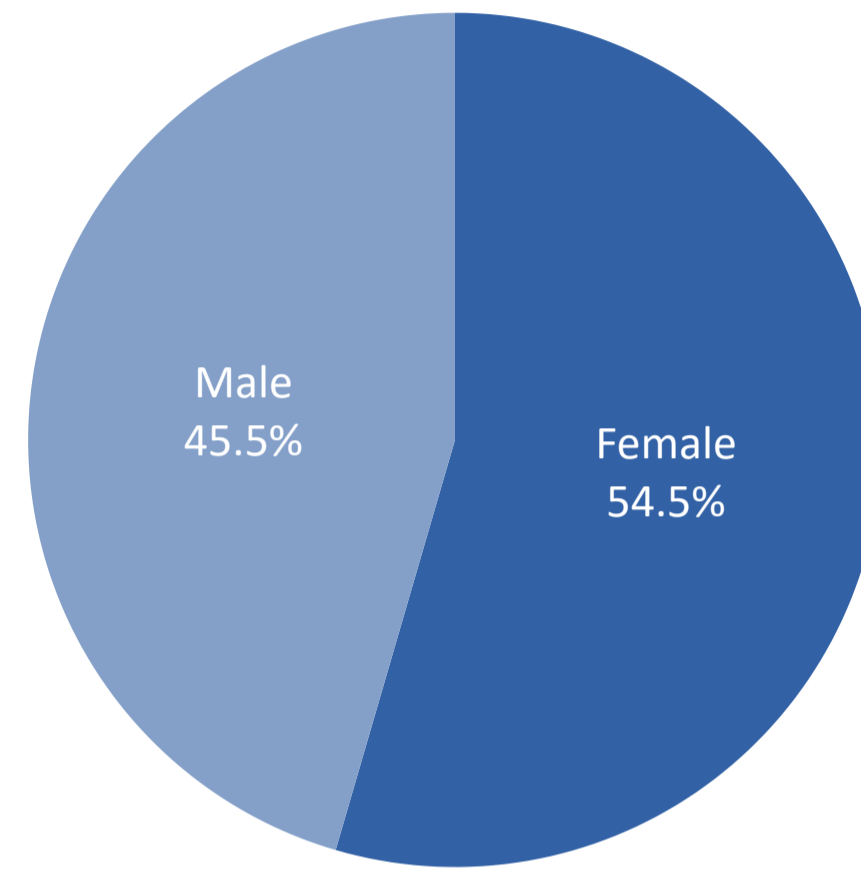
January 2024 - September 2024

All Utilizers by Age Group



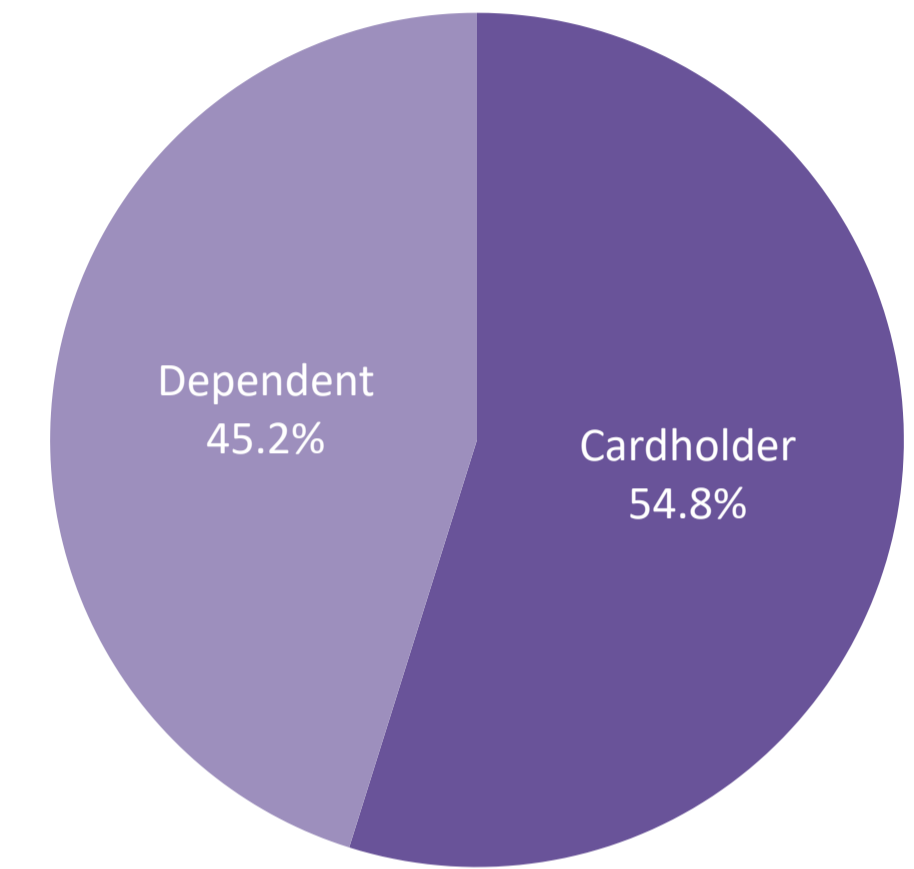
● 20 and Younger ● 21-40 ● 41-60 ● 61-80 ● 81+

All Utilizers by Gender



● Female ● Male

All Utilizers by Member Type



● Cardholder ● Dependent

Specialty and Non-Specialty Utilizers by Age Group

Age Group	Non-Specialty Utilizers	Specialty Utilizers
20 and Younger	312	3
21-40	404	9
41-60	602	27
61-80	193	6
81+	5	1
Total	1,516	46

Specialty and Non-Specialty Utilizers by Gender

Gender	Non-Specialty Utilizers	Specialty Utilizers
Female	826	23
Male	690	23
Total	1,516	46

Specialty and Non-Specialty Utilizers by Member Type

Member Type	Non-Specialty Utilizers	Specialty Utilizers
Cardholder	832	32
Dependent	684	14
Total	1,516	46

Top Members by Plan Paid

January 2024 - September 2024

Top 20 Members by Plan Paid YTD

Member Rank	Top Utilized Drug Name	Top Drug Brand / Generic	Top Drug Specialty / Non-Specialty	Top Drug Claim Count	Top Drug Plan Paid	All Other Claim Count	All Other Plan Paid	Total Plan Paid	Total Plan Paid as % of Total YTD
1	TREMFYA	Brand	Specialty	5	\$69,336	7	\$8,977	\$78,313	2.8%
2	MAYZENT	Brand	Specialty	8	\$67,578	4	\$619	\$68,197	2.4%
3	SKYRIZI PEN	Brand	Specialty	3	\$63,359	18	\$2,133	\$65,492	2.3%
4	SKYRIZI PEN	Brand	Specialty	3	\$62,602	3	\$38	\$62,640	2.2%
5	HUMIRA PEN	Brand	Specialty	6	\$40,636	3	\$14,065	\$54,700	1.9%
6	KESIMPTA	Brand	Specialty	8	\$53,260	4	\$226	\$53,486	1.9%
7	SKYRIZI PEN	Brand	Specialty	2	\$41,475	6	\$9,358	\$50,833	1.8%
8	RINVOQ	Brand	Specialty	4	\$47,803	7	\$1,662	\$49,466	1.8%
9	ENBREL SURECLICK	Brand	Specialty	8	\$46,971	10	\$441	\$47,411	1.7%
10	TALTZ	Brand	Specialty	7	\$44,293	0	\$0	\$44,293	1.6%
11	SKYRIZI PEN	Brand	Specialty	2	\$42,071	2	\$732	\$42,803	1.5%
12	CIMZIA	Brand	Specialty	5	\$25,950	9	\$16,347	\$42,297	1.5%
13	HUMIRA PEN	Brand	Specialty	4	\$27,146	11	\$13,288	\$40,434	1.4%
14	BENLYSTA	Brand	Specialty	8	\$35,497	4	\$115	\$35,612	1.3%
15	RINVOQ	Brand	Specialty	3	\$18,998	15	\$14,185	\$33,183	1.2%
16	RINVOQ	Brand	Specialty	5	\$31,355	10	\$419	\$31,773	1.1%
17	LEDIPASVIR/SOFOSBUVIR	Generic	Specialty	1	\$11,658	15	\$19,378	\$31,036	1.1%
18	COSENTYX SENSOREADY PEN	Brand	Specialty	4	\$23,650	12	\$6,676	\$30,326	1.1%
19	RINVOQ	Brand	Specialty	4	\$25,176	17	\$1,835	\$27,012	1.0%
20	ABIRATERONE ACETATE	Generic	Specialty	8	\$22,802	10	\$592	\$23,394	0.8%

Top Rx by Plan Paid

September 2024

Top 20 Rx by Plan Paid Prior Month

Rank	Drug Name	Drug Class	Brand / Generic	Specialty / Non-Specialty	Claim Count	Plan Paid	Member Paid	Total Paid Per Claim	Total Paid
1	WEGOVY	Anti-Obesity Agents	Brand	Non-Specialty	48	\$60,640	\$2,345	\$1,312	\$62,985
2	SKYRIZI PEN	Antipsoriatics	Brand	Specialty	2	\$42,828	\$0	\$21,414	\$42,828
3	SKYRIZI	Inflammatory Bowel Agents	Brand	Specialty	1	\$21,186	\$0	\$21,186	\$21,186
4	ZEPBOUND	Anti-Obesity Agents	Brand	Non-Specialty	19	\$18,801	\$890	\$1,036	\$19,691
5	TREMFYA	Antipsoriatics	Brand	Specialty	1	\$13,834	\$150	\$13,984	\$13,984
6	HUMIRA (2 PEN)	Anti-TNF-alpha - Monoclonal Antibodies	Brand	Specialty	2	\$13,656	\$0	\$6,828	\$13,656
7	PAXLOVID (300/100)	Antiviral Combinations	Brand	Non-Specialty	9	\$12,594	\$235	\$1,425	\$12,829
8	LEDIPASVIR-SOFOSBUVIR	Hepatitis Agents	Generic	Specialty	1	\$11,520	\$0	\$11,520	\$11,520
9	CIMZIA (2 SYRINGE)	Inflammatory Bowel Agents	Brand	Specialty	2	\$11,436	\$150	\$5,793	\$11,586
10	MOUNJARO	Incretin Mimetic Agents	Brand	Non-Specialty	11	\$11,252	\$290	\$1,049	\$11,542
11	OZEMPIC (2 MG/DOSE)	Incretin Mimetic Agents	Brand	Non-Specialty	11	\$10,177	\$280	\$951	\$10,457
12	ELIQUIS	Direct Factor Xa Inhibitors	Brand	Non-Specialty	15	\$9,035	\$295	\$622	\$9,330
13	KESIMPTA	Multiple Sclerosis Agents	Brand	Specialty	1	\$8,655	\$150	\$8,805	\$8,805
14	JARDIANCE	Sodium-Glucose Co-Transporter 2 (SGLT2) Inhibitors	Brand	Non-Specialty	12	\$7,957	\$315	\$689	\$8,272
15	MAYZENT	Multiple Sclerosis Agents	Brand	Specialty	1	\$7,018	\$3,008	\$10,026	\$10,026
16	TALTZ	Antipsoriatics	Brand	Specialty	1	\$6,971	\$0	\$6,971	\$6,971
17	NURTEC	Calcitonin Gene-Related Peptide (CGRP) Receptor Antag	Brand	Non-Specialty	5	\$6,441	\$85	\$1,305	\$6,526
18	RINVOQ	Antirheumatic - Enzyme Inhibitors	Brand	Specialty	1	\$6,333	\$0	\$6,333	\$6,333
19	DESCOVY	Antiretrovirals	Brand	Specialty	3	\$5,685	\$444	\$2,043	\$6,129
20	XIFAXAN	Anti-infective Agents - Misc.	Brand	Non-Specialty	3	\$5,207	\$30	\$1,746	\$5,237

Top Rx by Claim Count

September 2024

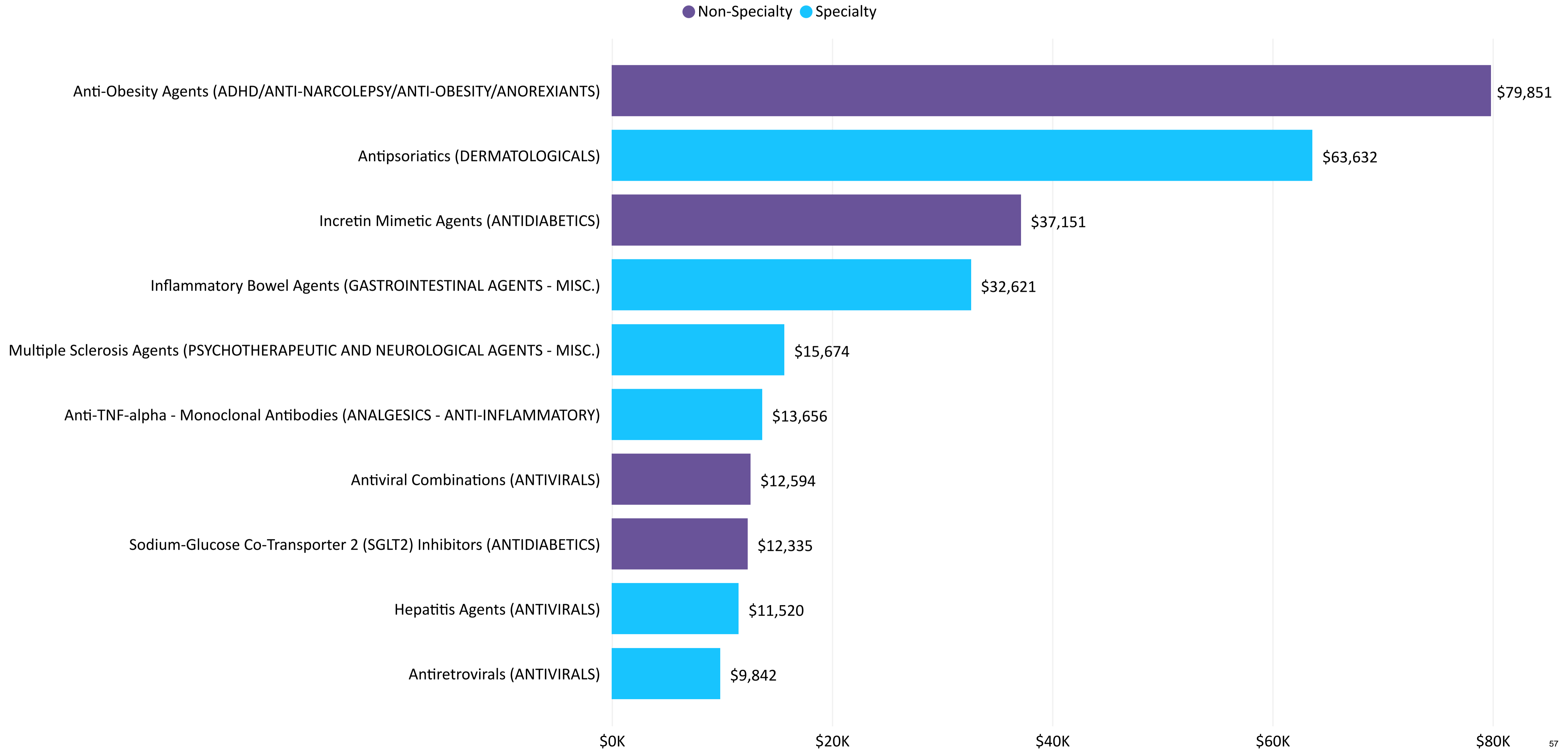
Top 20 Rx by Claim Count Prior Month

Rank	Drug Name	Drug Class	Brand / Generic	Specialty / Non-Specialty	Claim Count	Plan Paid	Member Paid	Total Paid Per Claim	Total Paid
1	LEVOTHYROXINE SODIUM	Thyroid Hormones	Generic	Non-Specialty	81	\$403	\$708	\$14	\$1,112
2	ATORVASTATIN CALCIUM	HMG CoA Reductase Inhibitors	Generic	Non-Specialty	80	\$460	\$31	\$6	\$491
3	LISINOPRIL	ACE Inhibitors	Generic	Non-Specialty	70	\$74	\$312	\$6	\$386
4	LOSARTAN POTASSIUM	Angiotensin II Receptor Antagonists	Generic	Non-Specialty	60	\$39	\$322	\$6	\$361
5	AMLODIPINE BESYLATE	Calcium Channel Blockers	Generic	Non-Specialty	57	\$5	\$109	\$2	\$114
6	WEGOVY	Anti-Obesity Agents	Brand	Non-Specialty	48	\$60,640	\$2,345	\$1,312	\$62,985
7	ROSUVASTATIN CALCIUM	HMG CoA Reductase Inhibitors	Generic	Non-Specialty	44	\$402	\$0	\$9	\$402
8	OMEPRAZOLE	Proton Pump Inhibitors	Generic	Non-Specialty	42	\$29	\$176	\$5	\$205
9	METFORMIN HCL	Biguanides	Generic	Non-Specialty	40	\$24	\$165	\$5	\$189
10	ESCITALOPRAM OXALATE	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	35	\$29	\$115	\$4	\$143
11	ALBUTEROL SULFATE HFA	Sympathomimetics	Generic	Non-Specialty	31	\$1,211	\$306	\$49	\$1,517
12	BUPROPION HCL ER (XL)	Antidepressants - Misc.	Generic	Non-Specialty	31	\$1,238	\$260	\$48	\$1,498
13	SERTRALINE HCL	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	31	\$8	\$117	\$4	\$125
14	MONTELUKAST SODIUM	Leukotriene Modulators	Generic	Non-Specialty	28	\$182	\$215	\$14	\$398
15	METOPROLOL SUCCINATE ER	Beta Blockers Cardio-Selective	Generic	Non-Specialty	28	\$207	\$270	\$17	\$477
16	IBUPROFEN	Nonsteroidal Anti-inflammatory Agents (NSAIDs)	Generic	Non-Specialty	26	\$5	\$135	\$5	\$140
17	FLUOXETINE HCL	Selective Serotonin Reuptake Inhibitors (SSRIs)	Generic	Non-Specialty	25	\$144	\$121	\$11	\$265
18	HYDROCHLOROTHIAZIDE	Thiazides and Thiazide-Like Diuretics	Generic	Non-Specialty	24	\$15	\$63	\$3	\$77
19	ESTRADIOL	Estrogens	Generic	Non-Specialty	21	\$631	\$196	\$39	\$827
20	HYDROCODONE-ACETAMINOPHEN	Opioid Combinations	Generic	Non-Specialty	20	\$587	\$111	\$35	\$697

Top Therapeutic Classes

September 2024

Top 10 Therapeutic Classes by Plan Paid Prior Month



**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

Wellness Updates

ITEM #:

2024-047

Enclosure:

Yes

Category:

Financial

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

In partnership with the PACE health plans, KeenanWell Health Management consultants help agencies in the PACE JPA design and implement programs that create, support, and maintain wellness cultures specifically tailored to each organization's unique needs, and provide coordination and alignment of wellness components to assure program integrity. Participation in Wellness (Health Management) is a condition of membership in PACE.

STATUS:

The Executive Committee will hear and discuss a report on the 2024 Health Management program and 2025 Wellness Program Recommendations.

RECOMMENDATIONS:

For review, discussion and action as necessary.

Wellness Update

PACE Executive Committee Meeting 10/23/24

- **2024 PACE Wellness Program – February 1 – November 15, 2024**
 - Participation Updates:
 - 3,775 total PACE Members currently on eligibility file.
 - **191 participants (5%) registered for the 2024 PACE Wellness Program so far.**
 - Status:
 - Employees – 178
 - Spouses – 13
 - Carriers:
 - Anthem – 149
 - Kaiser – 33
 - Default – 9 (need to add carrier information)
 - Rewards Update:
 - 98 participants have reached rewards status already!
 - Bronze (\$50 reward) – 600-899 points – 22 participants
 - Silver (\$100 reward) – 900-1,199 points – 22 participants
 - Gold (\$125 reward) – 1,200-1,699 points – 32 participants
 - Platinum (\$175 reward) – 1,700+ points – 22 participants
 - 28 of the 34 agencies (82%) have PACE members participating in the program.
 - See page 5 for breakdown by agency.

For reference: Wellness Program Participation 2020-2024

Year	Number on Eligibility File	Registered (% eligible)	Earned Rewards (% registered; % eligible)
2024 so far	3,775	191 (5%)	98 (51%; 3%)
2023	2,795	182 (7%)	56 (30%; 2%)
2022	2,629	188 (7%)	55 (29%; 2%)
2021	1,884	198 (11%)	59 (30%; 3%)
2020	1,514	152 (10%)	108 (71%; 7%)*

* In 2020, we had 152 registered and 108 earned rewards (points were transferred over from MCSIG's program and the biometric screening was not a required activity in 2020).

- **Follow-Up - Third Campaign: Stress Free – See attached Campaign Report.**
 - Dates: August 5, 2024 – September 15, 2024 (6 weeks)
 - Description: This campaign focuses on simple strategies that participants can apply right away to help move them towards a more “stress free” life.
 - **95 participants (60%) of the 159 registered at the time engaged in the program (completed at least 1 week of activities).**
 - **81 participants (85%) of the 95 engaged completed the behavior change campaign and earned the required behavior change campaign point.**
 - See attached Program Summary Report from WellSteps:
 - 100% of those who completed the evaluation said they learned something new, and 98% participants also changed one health behavior.
 - Testimonials:
 - “I loved the reminder that random acts of kindness really lift your spirits, makes you feel accomplished and happy.”
 - “The campaign reminded me to think of myself, at times we get wrapped into life and it’s easy to forget oneself.”

- **Fourth and FINAL Campaign: Walktober Challenge – going on now!**
 - Dates: October 1-31, 2024
 - Last day to log activity: Tuesday, November 5
 - Registration closed on October 11.
 - Participation:
 - 204 total registrants (183 employees, 21 household members)
 - 149 registrants are using the Walktober App.
 - 28 official teams of 4-5 members.
 - 180 have logged activity so far; 24 have not logged activity.
 - Goal is to walk 6,000 steps or more per day to earn points (or fall leaves).
 - This will be the last campaign for participants to earn their required behavior change point.
 - Will have prize drawings for teams and individuals.

- **Follow-Up: Wellness Advisory Committee Meeting on Wednesday, October 16, 2024:**
 - Representatives from **11** agencies attended.

- **Personify Health Wellness Program (formally Virgin Pulse) – Launches January 1, 2025**
 - Personify Health Wellness Program Introduction
 - Communications
 - PACE 2025 Personify Health Enrollment Teaser Flyer > **Attached**
 - PACE 2025 Personify Health Enrollment Program Guide Flyer > **Pending**

- **Next Wellness Advisory Committee Meeting on Wednesday, December 4, 2024 – 3-4pm PT.**



2024 PACE Wellness Program Registration Numbers (as of 10/16/2024)		
Location	Carrier	Count
3050-HASLO	ANTHEM	8
CARMEL AREA WASTEWATER DISTRICT	ANTHEM	2
CARMEL AREA WASTEWATER DISTRICT	default	1
City of Avenal	ANTHEM	1
CITY OF CLAREMONT	ANTHEM	1
CITY OF CLAREMONT	KAISER	4
CITY OF CORCORAN	ANTHEM	2
CITY OF DESERT HOT SPRINGS	ANTHEM	12
CITY OF DOS PALOS	ANTHEM	1
CITY OF FOWLER	ANTHEM	7
City of Gustine	ANTHEM	4
CITY OF LEMOORE	ANTHEM	3
City of Lemoore	KAISER	1
CITY OF LINDSAY	ANTHEM	6
CITY OF LIVINGSTON	ANTHEM	6
CITY OF NEWMAN	ANTHEM	4
City of Newman	KAISER	2
CITY OF SANGER	ANTHEM	6
CITY OF SANGER	KAISER	3
CITY OF UPLAND	ANTHEM	11
COMPASS CHARTER SCHOOLS	ANTHEM	1
Compass Charter Schools	default	4
EL DORADO SUPERIOR COURTS	ANTHEM	5
EL DORADO SUPERIOR COURTS	KAISER	3
HASLO	ANTHEM	5
HUMBOLDT BAY FIRE	ANTHEM	5
MODOC COUNTY	ANTHEM	3
REDWOOD COAST ENERGY AUTHORITY	ANTHEM	7
REGIONAL GOVERNMENT SERVICES	ANTHEM	4
REGIONAL GOVERNMENT SERVICES	default	4
Regional Government Services	KAISER	7
SAN BERNARDINO COUNTY EMPLOYEES RETIREMENT ASSOCIA	ANTHEM	12
SAN BERNARDINO COUNTY EMPLOYEES RETIREMENT ASSOCIA	KAISER	3
SUPERIOR COURT OF CALIFORNIA - COUNTY OF KINGS	ANTHEM	1
SUPERIOR COURT OF CALIFORNIA COUNTY OF KINGS	ANTHEM	8
SUPERIOR COURT OF CALIFORNIA SUTTER COUNTY	ANTHEM	11
SUPERIOR COURT OF CALIFORNIA SUTTER COUNTY	KAISER	8
Superior Court of Mendocino County	ANTHEM	2
TOWN OF DANVILLE	KAISER	1
TRUCKEE DONNER REC AND PARK DISTRICT	ANTHEM	12
TOTAL		191

**NEW Wellness
Program Launching
January 2025!**



Exciting News Regarding the 2025 PACE Wellness Program!

PACE is pleased to announce that the 2025 Wellness Program is getting an upgrade! Beginning in January, the Wellness Program will move to **a new vendor – Personify Health**. The Personify Health wellness program can help you achieve your health goals with a fun and engaging experience that delivers powerful resources right to your fingertips. And, you will be able to invite up to 10 friends and family members to join you in the program!

WATCH FOR MORE DETAILS COMING SOON!

We will be sending more information on the new Personify Health program soon, including portal log-in instructions and the requirements for earning 2025 wellness rewards.

Who's eligible: All employees and early retirees enrolled in PACE medical plans are eligible to participate in the Personify Health wellness program and can invite up to 10 friends and family to join them, but only employees and early retirees are eligible to earn \$50 quarterly rewards, \$200 annually.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:

Executive Committee

DATE:

October 23, 2024

SUBJECT:

PACE New Member Activity

ITEM #:

2024-048

Enclosure:

No

Category:

Administration

Prepared by:

Keenan & Associates

Requested by:

Executive Committee

BACKGROUND:

New agencies can join PACE any time during the year.

STATUS:

PACE Management will update the Executive Committee on the current marketing activity and any potential PACE JPA member agencies.

RECOMMENDATIONS:

For review, discussion and action as necessary.

**PUBLIC AGENCY COALITION ENTERPRISE
JOINT POWERS AUTHORITY**

PRESENTED TO:
Executive Committee

DATE: October 23, 2024

SUBJECT:
2025 Proposed Meeting Calendar

ITEM #: 2024-049

Enclosure: Yes

Category: Administration

Prepared by: Keenan & Associates

Requested by: Executive Committee

BACKGROUND:

Each year meeting dates and location are proposed for the Executive Committee and Full Board.

STATUS:

The Executive Committee will discuss the calendar for 2024 PACE Executive Board and Full Board Meetings.

RECOMMENDATIONS:

For review, discussion and action as necessary.

 PACE EC

 PACE FB

 PACE EC and FB renewal meetings on the same day

JANUARY							FEBRUARY							MARCH							APRIL						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4	26	27	28	29	30	31	1	23	24	25	26	27	28	1	30	31	1	2	3	4	5
5	6	7	8	9	10	11	2	3	4	5	6	7	8	2	3	4	5	6	7	8	6	7	8	9	10	11	12
12	13	14	15	16	17	18	9	10	11	12	13	14	15	9	10	11	12	13	14	15	13	14	15	16	17	18	19
19	20	21	22	23	24	25	16	17	18	19	20	21	22	16	17	18	19	20	21	22	20	21	22	23	24	25	26
26	27	28	29	30	31	1	23	24	25	26	27	28	1	23	24	25	26	27	28	29	27	28	29	30	1	2	3
2	3	4	5	6	7	8	2	3	4	5	6	7	8	30	31	1	2	3	4	5	4	5	6	7	8	9	10

MAY							JUNE							JULY							AUGUST						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	1	2	3	1	2	3	4	5	6	7	29	30	1	2	3	4	5	27	28	29	30	31	1	2
4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9
11	12	13	14	15	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16
18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23
25	26	27	28	29	30	31	29	30	1	2	3	4	5	27	28	29	30	31	1	2	24	25	26	27	28	29	30
1	2	3	4	5	6	7	6	7	8	9	10	11	12	3	4	5	6	7	8	9	31	1	2	3	4	5	6

SEPTEMBER							OCTOBER							NOVEMBER							DECEMBER						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
31	1	2	3	4	5	6	28	29	30	1	2	3	4	26	27	28	29	30	31	1	30	1	2	3	4	5	6
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13
14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27
28	29	30	1	2	3	4	26	27	28	29	30	31	1	23	24	25	26	27	28	29	28	29	30	31	1	2	3
5	6	7	8	9	10	11	2	3	4	5	6	7	8	30	1	2	3	4	5	6	4	5	6	7	8	9	10