

CUSTOMER EXPERIENCE & MARKETING COMMITTEE

Wednesday, June 4th, 2025
50 Water Street, 7th Floor Board Room
New York, N.Y. 10004

AGENDA

Call To Order	Vallencia Lloyd
Old Business	
Adoption of Minutes March 26 th , 2025	Vallencia Lloyd
New Business	
Project Edge	Tomasz Kawka
Retention	Tabitha Garcia
Provider Network Operations Update	Lila Benayoun
Salesforce Marketing Cloud Recertification & Onboarding Pilot Results	Laura Santella Saccone
Adjournment	Vallencia Lloyd

**Minutes
of
March 26th, 2025
Customer Experience & Marketing
Committee Meeting**

MetroPlus Health Plan, Inc.

Customer Experience & Marketing Committee Meeting

Wednesday, March 26th, 2025

Customer Experience & Marketing Committee Meeting

The meeting of the Customer Experience & Marketing Committee of MetroPlus Health Plan, Inc. (hereafter “MetroPlus or the Plan”) was held in the 7th Floor Boardroom at 50 Water Street, New York, NY 10004 on the 26th day of March 2025 at 10:30 A.M.

The following Finance Committee Members were present via video conference or in-person:

Sally Hernandez-Piñero

Vallencia Lloyd

Dr. Talya Schwartz

Mark Power

Vallencia Lloyd, Chair of the Customer Experience & Marketing Committee, called the meeting to order at 10:31 A.M.

Vallencia Lloyd chaired the meeting and Angela Minerva kept the minutes, thereof.

ADOPTION OF THE MINUTES

The minutes of the Customer Experience & Marketing Committee held on December 11th, 2024, were presented to the Committee. On a motion by Vallencia Lloyd and duly seconded, the Committee adopted the minutes.

NEW BUSINESS

PROJECT EDGE

Vallencia Lloyd asked that we begin with Project Edge. Tomasz Kawka, Vice President of Business Transformation began by presenting Project Edge Status, Project Edge Wave 1 Watch Items, Where We Are, January 2027 Medicare/QHP Transition Timeline, Critical Component of Project Edge – Integration with 47 Third Party and Vendor Contract & Contingency Spend.

Committee Members asked questions regarding the cost, platforms and plan for the future as it relates to the outsourcing of Medicare and QHP.

Ganesh Ramratan, Chief Information officer, Dr. Talya Schwartz, President & CEO and Tomasz Kawka responded.

RETENTION

Vallencia Lloyd asked Tabitha Garcia, Senior Director of Customer Success to discuss Member Retention. Tabitha Garcia presented the Recertification Update, Impact of the HRA

Auto-Extension Phase Out, Recertification Strategy & Announcements, Top Voluntary Disenrollment Codes for 2024, Top Involuntary Disenrollment Codes for 2024, Disenrollment Text Message Survey Results, Traditional CSX Disenrollment Outreaches Saved in 2024 and 2024 MetroPlus Overall Retention.

Committee Members asked questions regarding retention efforts, transition to Salesforce Marketing Cloud, providers responsibility to recertification efforts and voluntary and involuntary disenrollment.

Lila Benayoun, Chief Operating Officer, Dr. Talya Schwartz and Tabitha Garcia responded.

MEMBERSHIP & MARKETSHARE

Vallencia Lloyd asked that we move on to discuss Membership & Market Share. Steven Mitchell, Vice President of Sales presented the 12-Month Membership Performance by lines of business.

Committee Members asked questions regarding Broker Activity and QHP membership.

Steven Mitchell and Dr. Talya Schwartz responded.

PROVIDER DATA MANAGEMENT

Vallencia Lloyd asked that we move on to discuss Provider Data Management. Jeffrey Wojtasik, Vice President of Health Analytics presented the Program Overview and Providers Added to the Network in 2024.

Committee Members asked questions regarding providers that were added to our network and high utilizing providers.

Dr. Talya Schwartz, Jeffrey Wojtasik and Brindha Sridhar, Vice President of Customer Experience and Strategy responded.

PROVIDER ACTIVATION INITIATIVE

Vallencia Lloyd asked that we move on to discuss the Provider Activation Initiative. Brindha Sridhar, Vice President of Customer Experience Strategy and Laura Saccone-Santella, Chief Brand & marketing Officer presented the Program Overview, results as of March 18th, 2025, Contact Related Follow-Ups and Provider Survey Update.

Committee Members and Dr. Schwartz made comments regarding the results of the Provider Outreach Initiative.

2024 ANNUAL PROVIDER SATISFACTION SURVEY RESULTS

Vallencia Lloyd asked that we move on to discuss the 2024 Annual Provider Satisfaction Survey Results. Lila Benayoun, Chief Operation Officer presented the Methodology, Composite Summary Rate Scores, Key Findings, Loyalty Analysis, Summary Rate Scores and Competitive Comparison.

Committee Members asked questions and made comments regarding Rate Scores and Competitive Campaigns.

Lilar Benayoun responded.

MARKETING CAMPAIGN

Vallencia Lloyd asked that we move on to discuss MetroPlusHealth's 2025 Spring Campaign. Kenrick Louie, Deputy Chief Marketing & Brand Officer presented The Year of the Phone Call, 2024 In Review, Why We Need to Modulate, What Drives Calls and Distinction, Headline and Payoff – the New Campaign Messaging, RTBS Ranked With Averages and finally, the Spring Campaign.

Committee Members asked a question regarding the Spring Campaign and scheduling appointments with H+H providers/facilities.

Laura Saccone-Santella responded.

CALL CENTER

Vallencia Lloyd asked that we move on to discuss the Call Center. Lila Benayoun, Chief Operating Officer presented Member Call Volume Trends, Abandonment Rate for Member Calls, Provider Call Volume Trends, Abandonment Rate for Provider Calls and NPS Call Center Trends. In the interest of time, we asked Committee Members to review the Complaints presentation and circle back with any questions.

IT UPDATE ON DIVESTITURE & DATA CENTER

Vallencia Lloyd asked that we move on to discuss the IT Update on Divestiture & Data Center. Ganesh Ramratan presented the Background, Projects Overview, Network Separation/Segmentation, Primary Data Center Move, Secondary Data Center Move and Virtual Infrastructure Migration.

Dr. Schwartz briefly discussed and updated the Committee on the Single Statewide Fiscal Intermediary (FI) initiative.

There being no further business, Vallencia Lloyd adjourned the meeting at 12:18 P.M.

New Business

MetroPlusHealth

Customer Experience & Marketing Committee



Wednesday, June 4th, 2025

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Project Edge

Tomasz Kawka

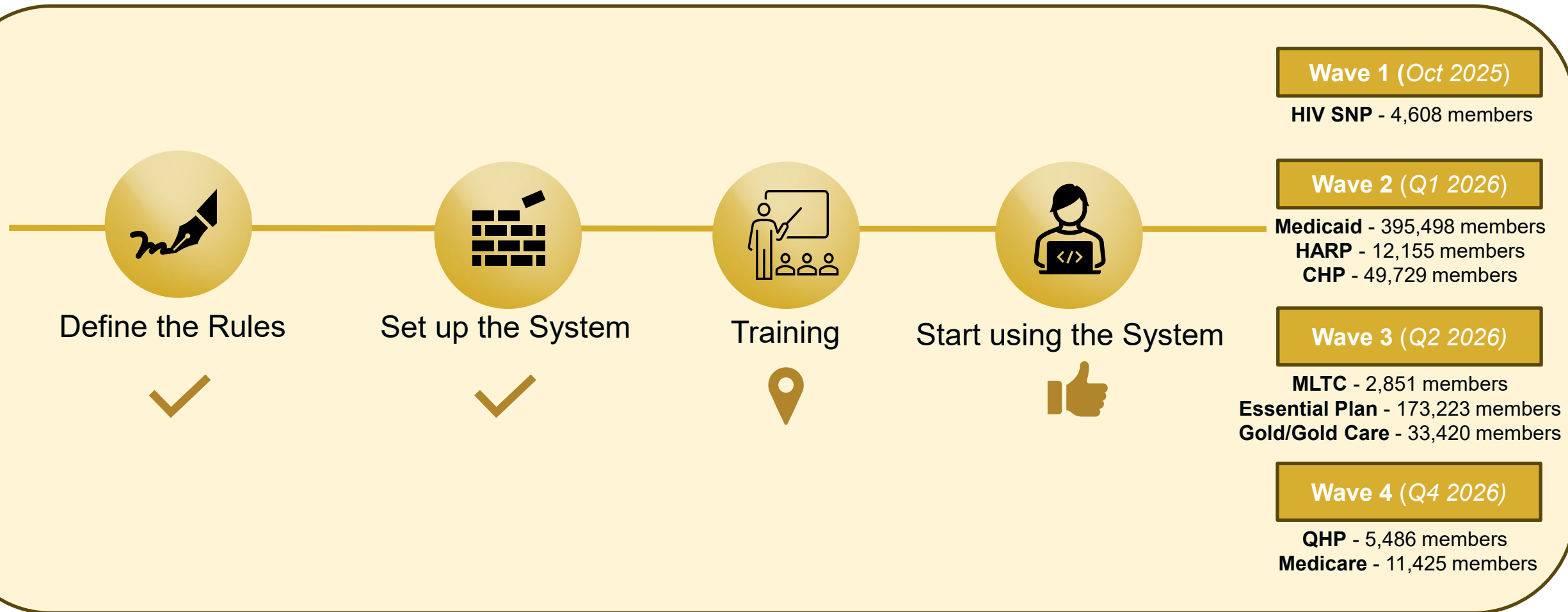
Vice President of Business Transformation

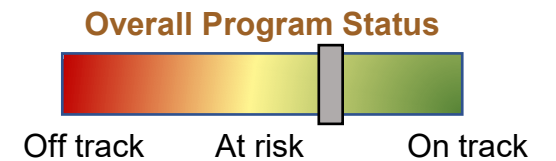
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PROJECT EDGE | WHERE WE ARE





PROJECT EDGE | STATUS

Key Accomplishments:

Wave 1 (PIC HIV SNP)

- All design completed.
- All product enhancements, configurations and integrations completed.
- Established multiple environments to fulfill needs for development, testing, training.
- Completed unit testing, configuration validation, and 2 out of 3 rounds of systems integration testing.
- Established delivery schedule with 3rd party vendors, began testing with partners.
- Finalized training plan and curriculum. Began train the trainer sessions.
- Assessment of impacted P&Ps completed, began updating and/or developing new P&Ps.

Wave 2 (Medicaid, HARP, CHP)

- Initiated design under an accelerated timeline and approach focused on incremental deliverables.

Awareness:

Wave 1 (PIC HIV-SNP)

- Go-live scheduled for 10/6/2025.
- End-to-end testing and business validation starts in June.
- User Acceptance testing starting in August.
- Training will begin early August.

Wave 2 (Medicaid, HARP, CHP)

- Target implementation is Q1 2026.
- No net new product gaps identified (yet).

Wave 3 (MLTC, Gold/GoldCare, EP)

- Target implementation Q2 2026.

Wave 4 (QHP, Medicare)

- Completed due diligence and partner selection.
- Implementation targeted for Q4 2026.

PROJECT EDGE | WATCH ITEMS

Key Risks

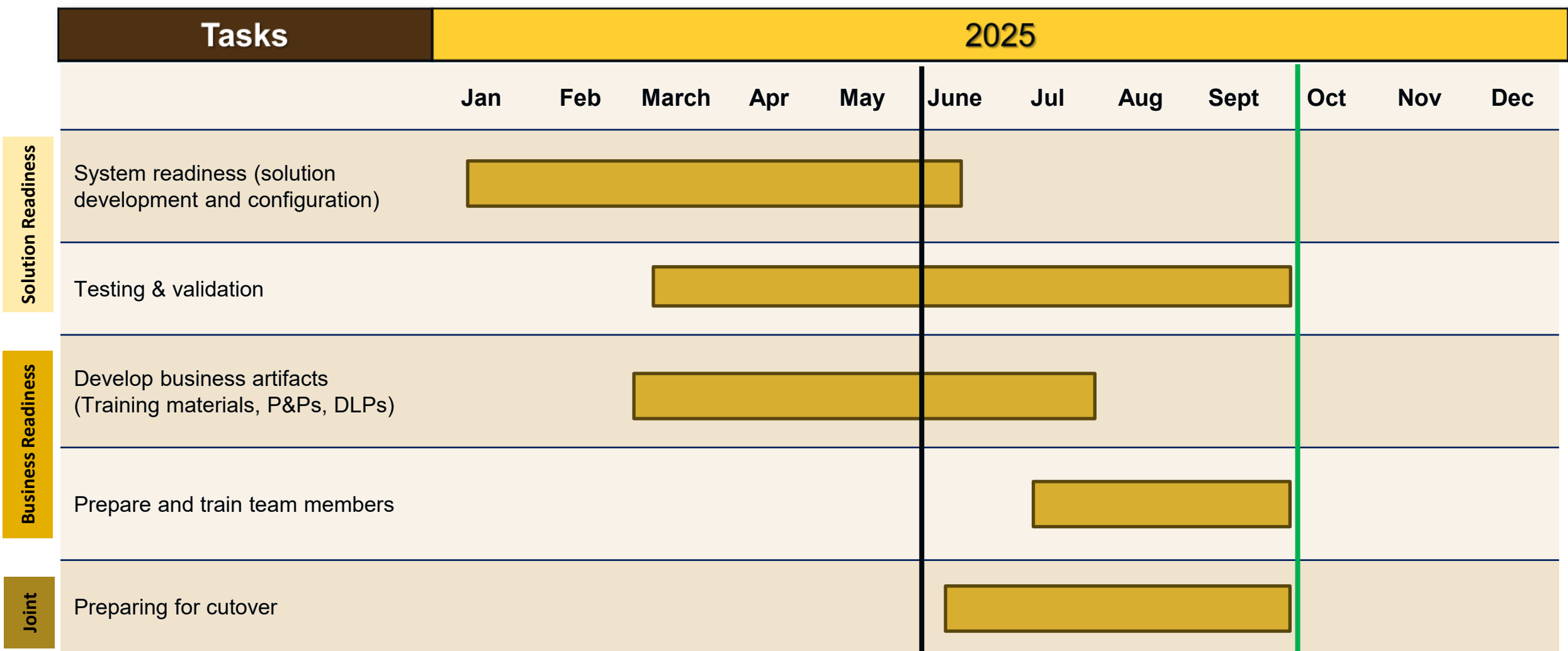
- MPH will be first client to leverage several new HRP product enhancements, leading to higher risk of defects. MPH is mitigating the risk with extensive business validation and testing.
- MPH is operating under a fixed timeline to complete the migration and is concluding a longstanding TPA relationship. The schedule compression leaves little room for error and may result in MPH having to accept a partial solution.

Key Issues

- Capacity of MPH and HE teams to maintain high velocity needed to execute on multiple waves in parallel and meet current program timelines. MPH is mitigating the issue by limiting initiatives and new commitments.
- We identified HealthEdge product gaps during previous program phases resulting in a cascading delay to the program. While MPH expedited discovery and we do not expect further gaps, additional deficiencies could impact program timelines.



PROJECT EDGE | FOCUS ON WAVE 1 READINESS



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Today

Wave 1
Go-live

Retention

Tabitha Garcia

Senior Director of Customer Success

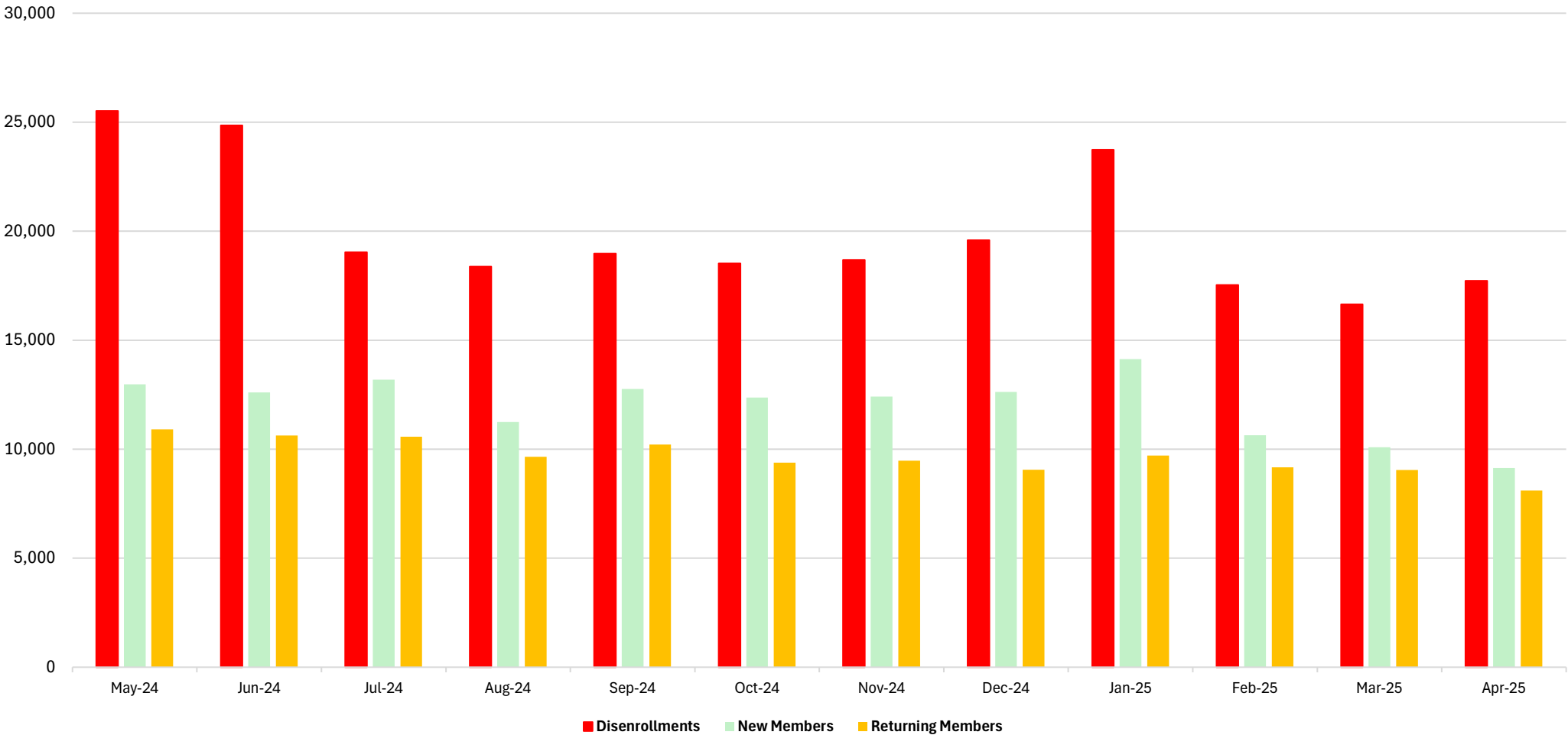
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MEMBERSHIP BREAKDOWN | LAST 12-MONTHS

Disenrollments, New Members, and Returning Members



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**Data pulled on 5/5/2025.*

Provider Network Operations Update

Lila Benayoun
Chief Operating Officer

Wednesday, June 4th, 2025



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PROVIDER DIRECTORY ACCURACY IMPROVEMENTS

Several initiatives were implemented to increase data accuracy of our Provider Directory.

Better Doctor's Partnership

- Campaign launched July '24, educating providers to submit quarterly rosters, and/or attest to demographics, to Better Doctor's for data validation.
- Providers participating in P4P program are incentivized for participating.
- MPH began receiving data validation discrepancies in October 2024.

Monthly Secret Shopper

- Medical, BH and Specialists randomly selected from the provider directory and an attempt is made to make an appointment, confirm demographics and panel status.
- Any discrepancies identified are validated and outreach made to provider.



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PROVIDER DIRECTORY ACCURACY IMPROVEMENTS | CONTINUED

Access and Availability P4P Incentive – 2025

- All providers in MetroPlus P4P with 200+ members (as of February 2025) are eligible.
- Deficient providers and/or groups will undergo specialized training
 - Providers earn additional PMPM for achieving a 75% pass rate targeted at Non-Urgent Sick, Emergency and Urgent appointment availability.

Note: *We continue to perform existing quarterly A+A surveys to network, inclusive of BH and educate deficient providers.*



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Salesforce Marketing Cloud

Recertification PILOT Results + Scale Up Recommendations

Laura Santella Saccone
Chief Marketing & Brand Officer

Wednesday, June 4th, 2025



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RECERTIFICATION PILOT EXECUTIVE SUMMARY

Goal

- Improve recertification rates via frequent and early communication.

Methodology

- EP & Medicaid members due to recertify in March received communication (SMS, Email) Dec 31 - March 31 including post recertification (ending in June).

The PILOT

Control: 30,579 members (EP & Medicaid) - **mPulse (5 touches; 6 weeks).**

Pilot: 3,174 members (EP & Medicaid) - **SFMC enhanced (14 touches; 5 months).**

Findings

- PILOT has statistically significant higher recertification rates compared to the control group.
- Pilot has slightly higher portal registrations.
- Low unsubscribes.

Recommendation

- Reduce touchpoints to 9 and maintain improved benefits of automation and improved recertification rate.

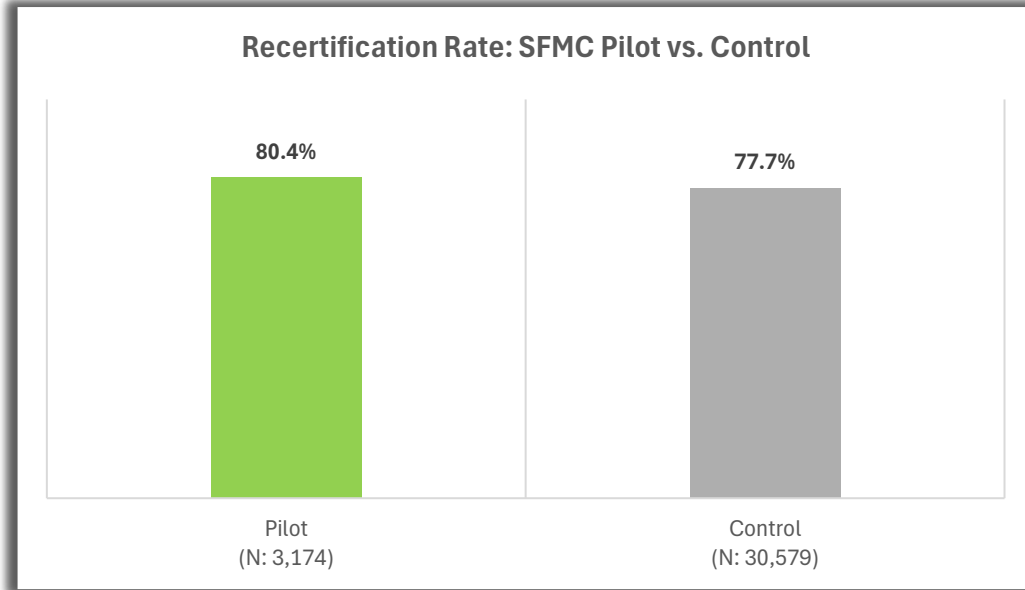
KPIs

- Retention Rate
- Portal Registrations
- Member Satisfaction



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RECERTIFICATION RESULTS



KPIs

Retention Rate

Pilot cohort statistically significant higher recertification rate compared to control group.

- Pilot 80.4% vs. Control 77.7%
 - **EP:** Pilot 75.98%, Control 73.97
 - **MCAD:** Pilot 84.59%, Control 81.44%

Portal Registration

- Pilot 1.4% vs. Control 1.0%

Member Satisfaction

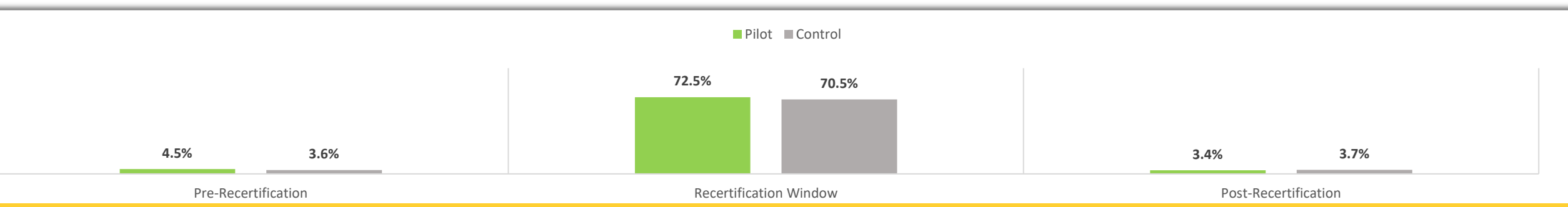
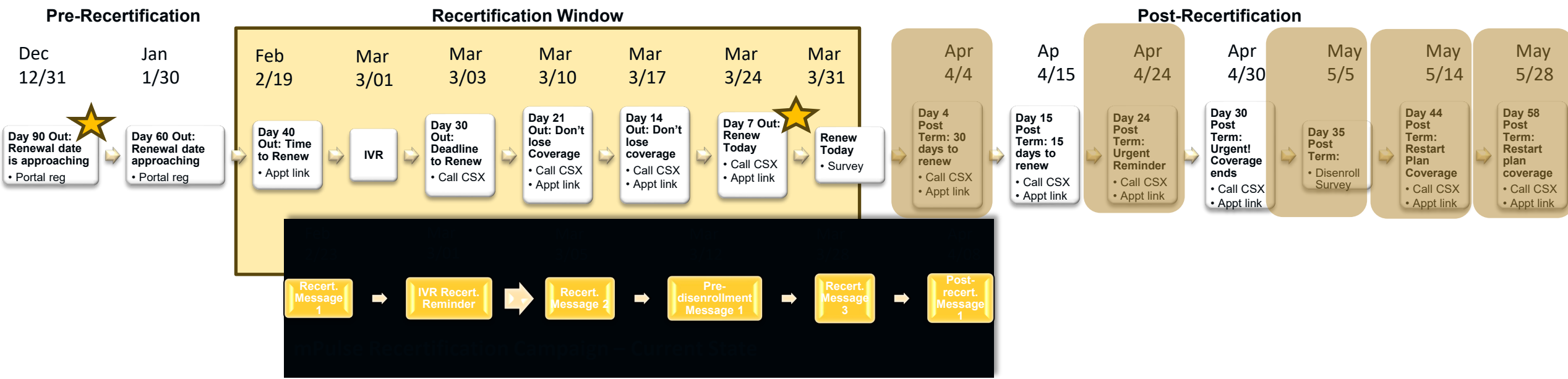
- Responses received from only 6 members so too small to calculate.

- N-size represents number of members due for recertification 3/31.
- Pilot excludes those who received recertification journey via mPulse.



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RECERTIFICATION | PILOT AND CONTROL JOURNEY



RECERTIFICATION SCALE UP PLAN

MEDICAID AND EP

- VOLUME PER MONTH
Medicaid: 26.3k
EP: 11.6k
- **TIMING:** Launch Aug 1

MEDICAID LIKE (HIV/SNP, HARP) AND CHP

- VOLUME PER MONTH
PIC: 83
CHP: 2.3k
- **TIMING:** Launch Aug 1

HRA

- VOLUME PER MONTH
HRA: 1.6k
- **TIMING:** Launch Aug 1



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Salesforce Marketing Cloud

Onboarding PILOT Results + Scale Up Recommendations



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ONBOARDING PILOT EXECUTIVE SUMMARY

Goal

- Improve new member retention in the first 90 days of enrollment via frequent and early communication.

Methodology

- New Medicaid members received communications from Dec 3 - Mar 3.

The PILOT:

3,338 Medicaid members randomly selected, and sample stratified based age, gender, & county.

- **Control:** 1,628 members – **mPulse (6 touches; 90 days).**
- **PILOT:** 1,711 members – **SFMC enhanced (14 touches; 90 days).**

Findings:

- Pilot has higher retention vs. Control.
- Pilot call volume ~2% lower than Control; Low unsubscribes.
- Pilot has higher PCP visits vs. Control.
- No significant impact to portal registration.

Recommendation:

- Reduce pilot touchpoints from 15 to 10 over 90 days.

KPIs

- Retention Rate
- Member Calls
- PCP Visits
- Portal Registrations
- Member Satisfaction



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ON-BOARDING | SCALE UP PLAN

MEDICAID

- VOLUME PER MONTH
Medicaid: 4.6k
EP: 3.7k
- **TIMING:** Launch August 1st

MEDICAID LIKE AND CHP

- VOLUME PER MONTH
PIC: 110
CHP: 1.2k
- **TIMING:** Launch August 1st

MEDICARE/MLTC

- VOLUME PER MONTH
MA: 90
GOLD: 500-850
- **TIMING:** Launch August 1st



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