

**CVS**  
**CAREMARK**

## Retail Clinic Leadership & Integration “Sweet Spots”

Andy Sussman, M.D.  
President, MinuteClinic

2011  
**analyst**  
day

## MinuteClinic Overview

- National Shortage Of Primary Care
- Accessible, Affordable, High Quality Care
- Expanding Sites And Clinical Scope
- Caremark Client Collaboration
- Health System Affiliations



# Primary Care Shortage And Rising Demand

## Painful Fall?

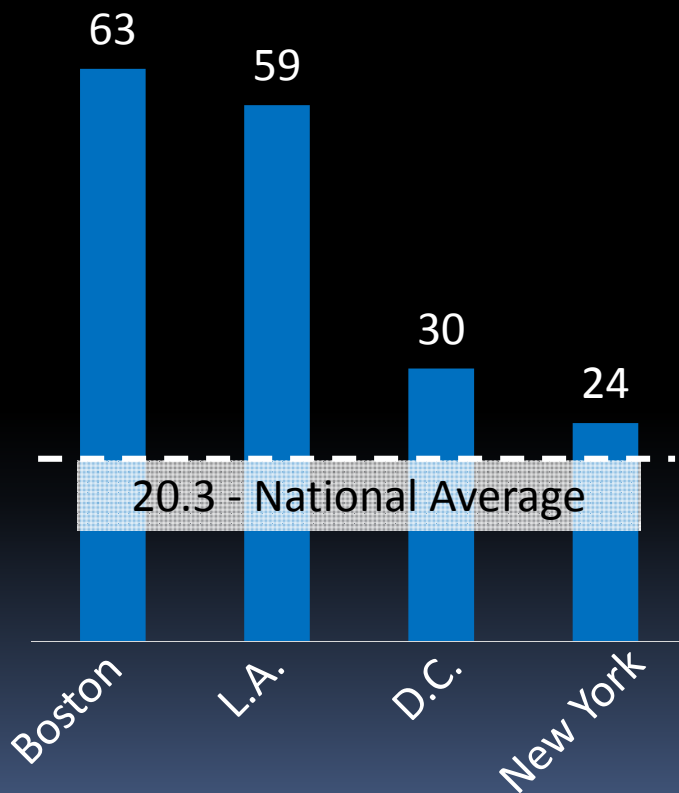
The Percentage Of US Medical School Graduates Choosing Residency Spots In Family Medicine Has Declined **54%** Since 1997



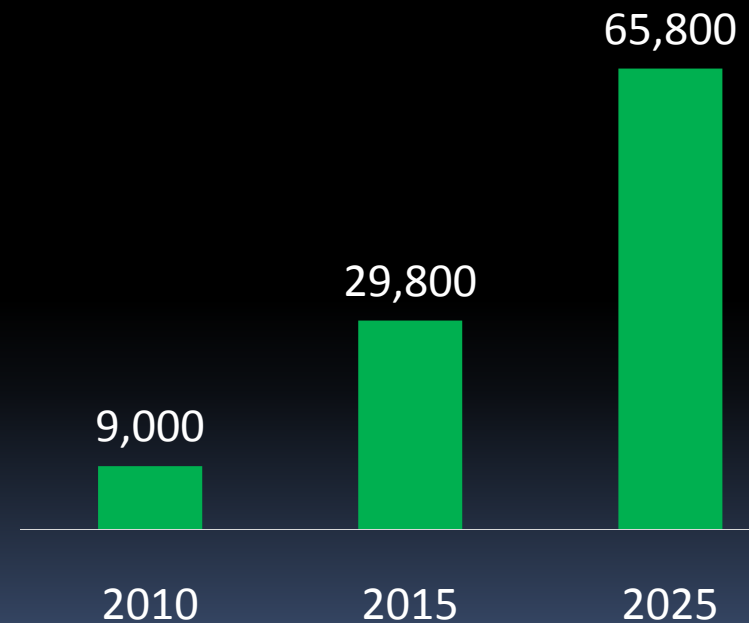
- Expect Shortage Of 45,000 Primary Care Physicians (PCP) By 2020
- PCPs Going To Concierge Practice And Retiring
- Increased PCP Supply Years Away
- 30% Obesity; 50% By 2030
- 75 Million People With Diabetes In 10 Years
- “Silver Tsunami”
- Health Care Reform Expected To Add 32 Million Newly-covered Patients In 2014

# Primary Care Shortage Worsening

## Average Days To Appointment For Family Practice

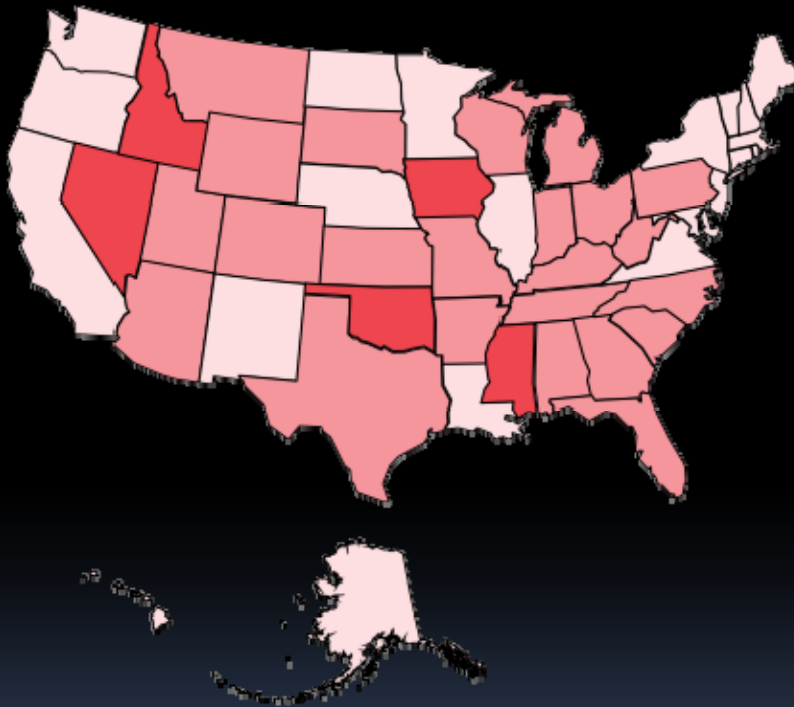


## Projected PCP Shortage

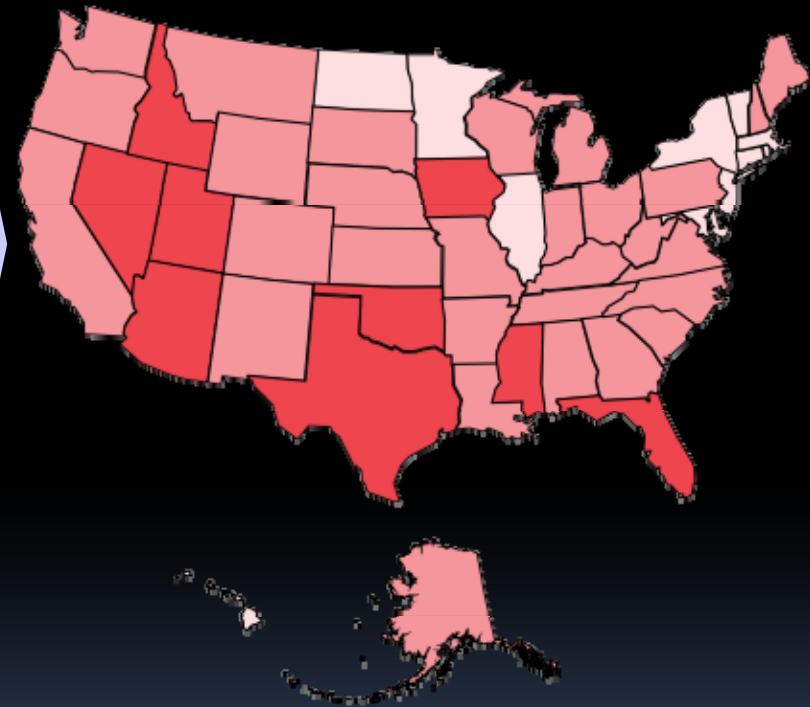


# Primary Care Shortage May Become Severe In Many States By 2016

PCP Demand: 2011



PCP Demand: 2016



Number of annual  
visits per PCP



>2000



1500-2000



<1500

# MinuteClinic: 2011 Overview

- Largest Retail Clinic Provider
- Health Care/Retail Leadership
- 11 Million Visits Since Inception
- Walk-in Care, 7 Days Per Week, Evenings/Holidays
- Evidence-based Guidelines
- 80% Third Party Coverage
- 50% Report No Physician

## Our services:

### Get better

|                       |           |
|-----------------------|-----------|
| ■ Minor illness exam  | \$79-\$89 |
| ■ Minor injury exam   | \$79-\$89 |
| ■ Skin condition exam | \$79-\$89 |

### Stay healthy

|                               |               |
|-------------------------------|---------------|
| ■ Wellness & physical exams   | \$27-\$69     |
| ■ Health condition monitoring | \$59-\$89     |
| ■ Vaccinations                | \$29.95-\$147 |

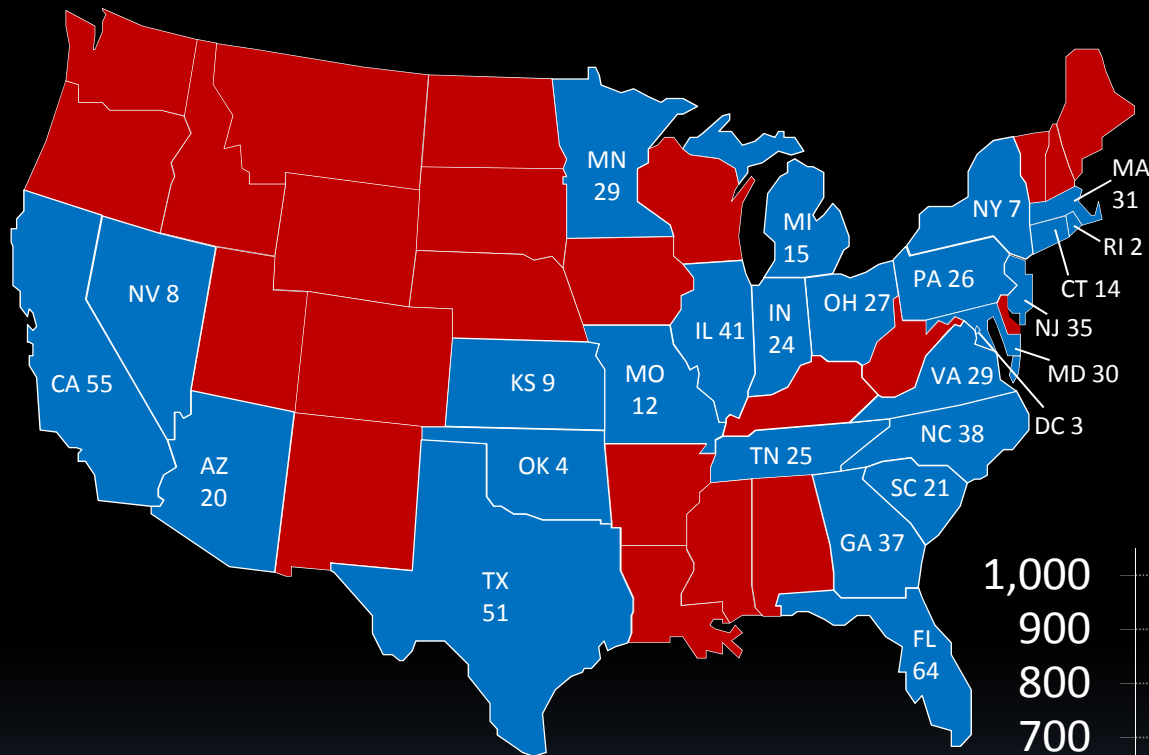
\* Lab tests, additional services and visit complexity may result in additional charges. Pricing subject to change.



Sign in at the kiosk.

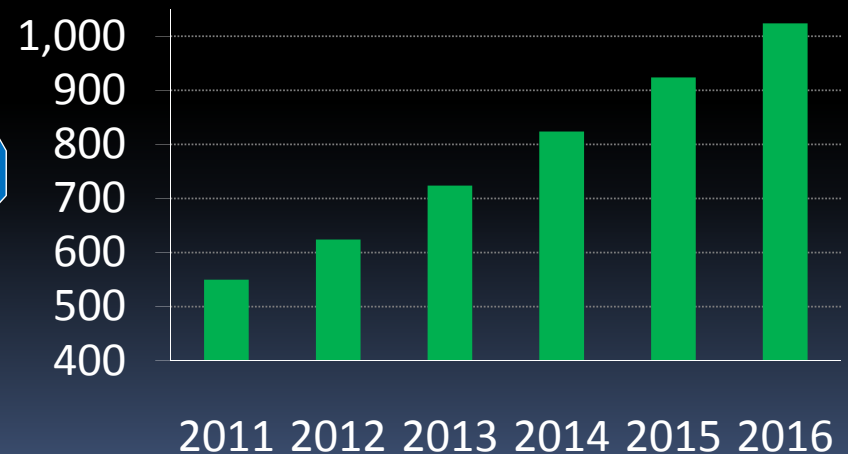


## More Than 650 Clinics In 25 States



100 New Clinics Opened In 2011

Full-time MinuteClinics



# Excellent Quality And Patient Satisfaction

MinuteClinic Is Fully  
Accredited By The  
Joint Commission



Overall Satisfaction Rating: **94%**  
Overall Practitioner Rating: 95%  
Felt "Listened To And Respected": 96%

MinuteClinic Net Promoter Score: **80%**

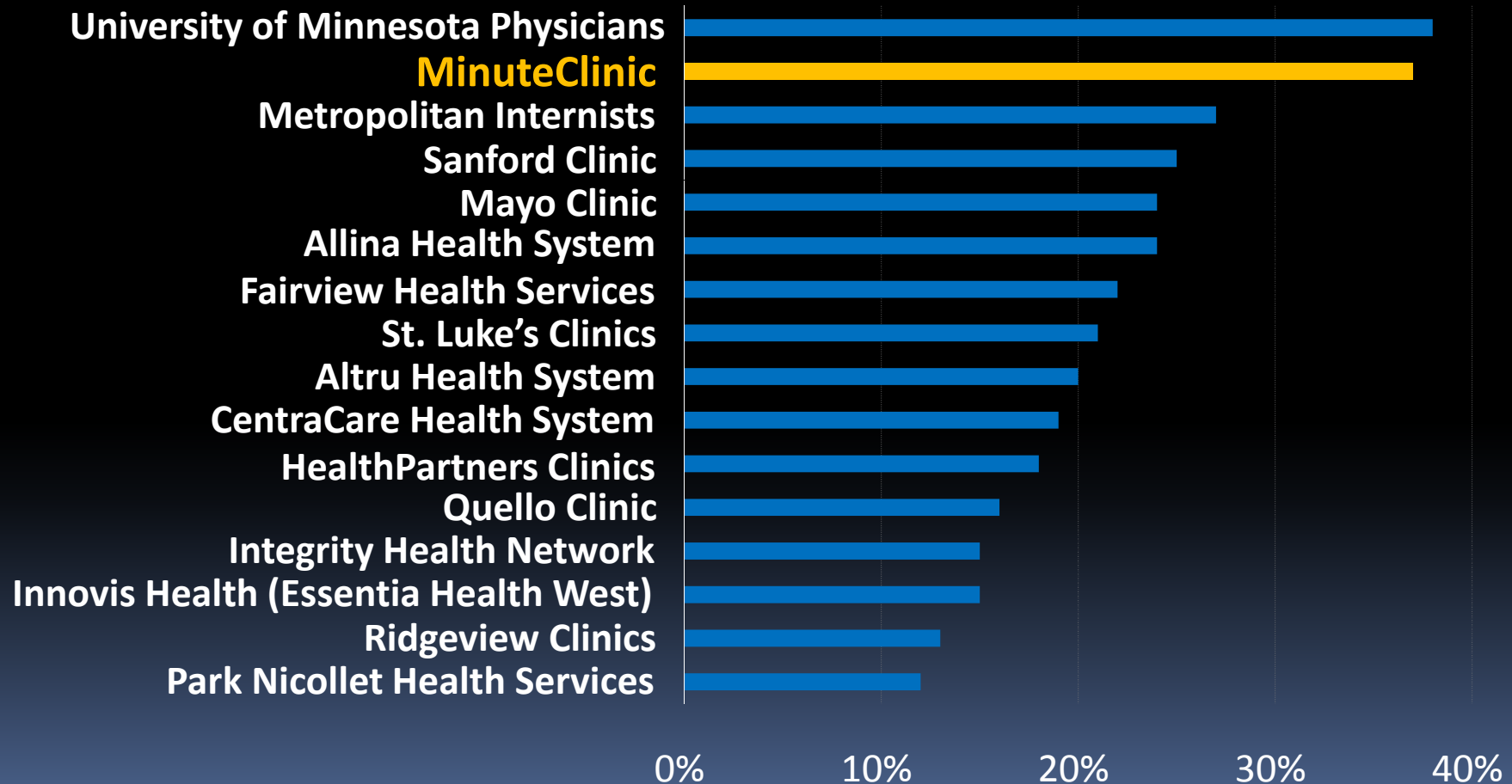


| Sample Scores       |            |
|---------------------|------------|
| USAA (Financial)    | 87%        |
| Trader Joe's        | 82%        |
| <b>MinuteClinic</b> | <b>80%</b> |
| Apple               | 72%        |
| Amazon.com          | 70%        |
| Physician Offices   | 69%        |
| Urgent Care         | 68%        |

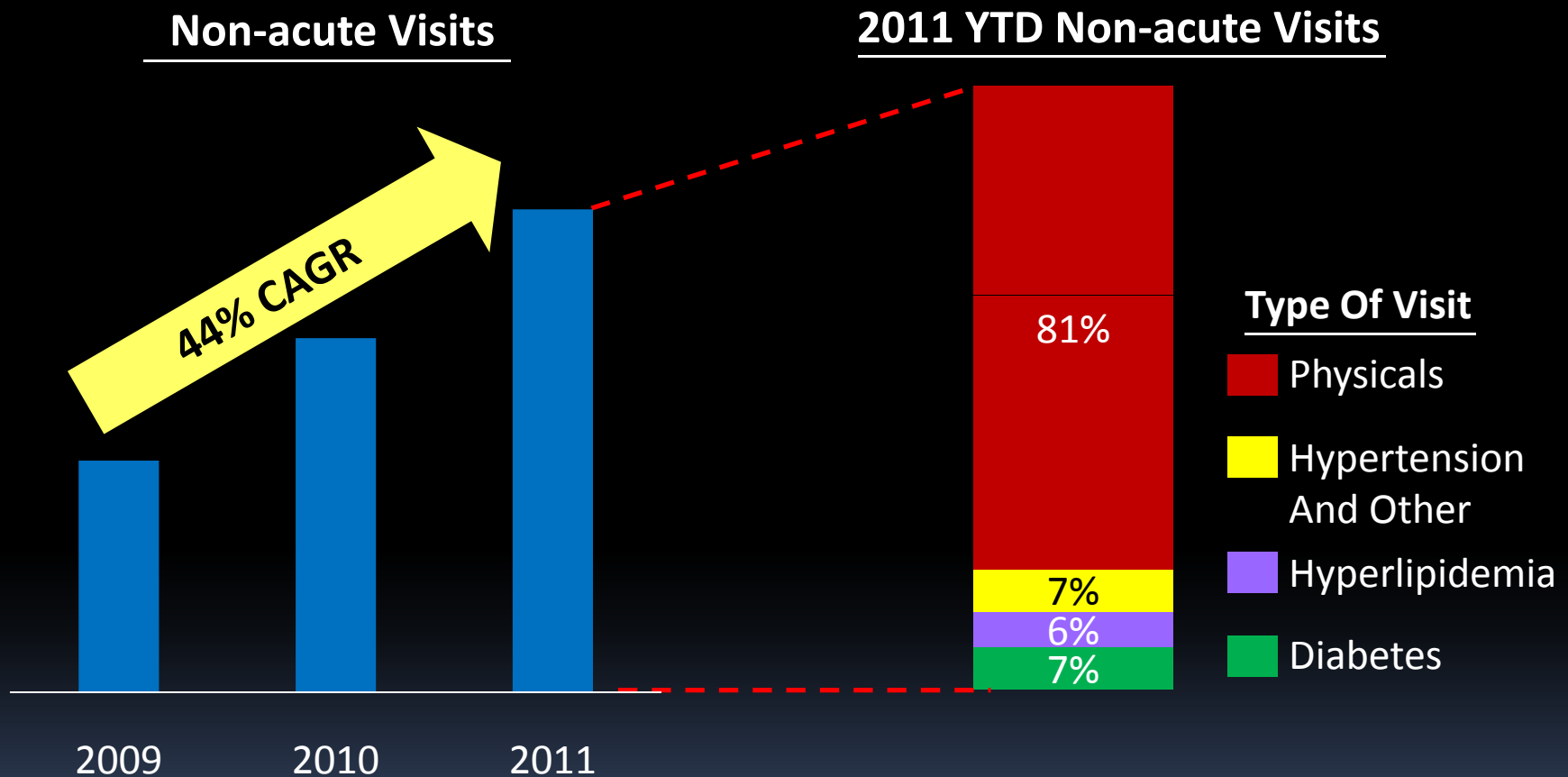


# MinuteClinic Clinical Quality: HEDIS Measure

## Avoidance Of Antibiotic Treatment In Adults With Acute Bronchitis (2010)

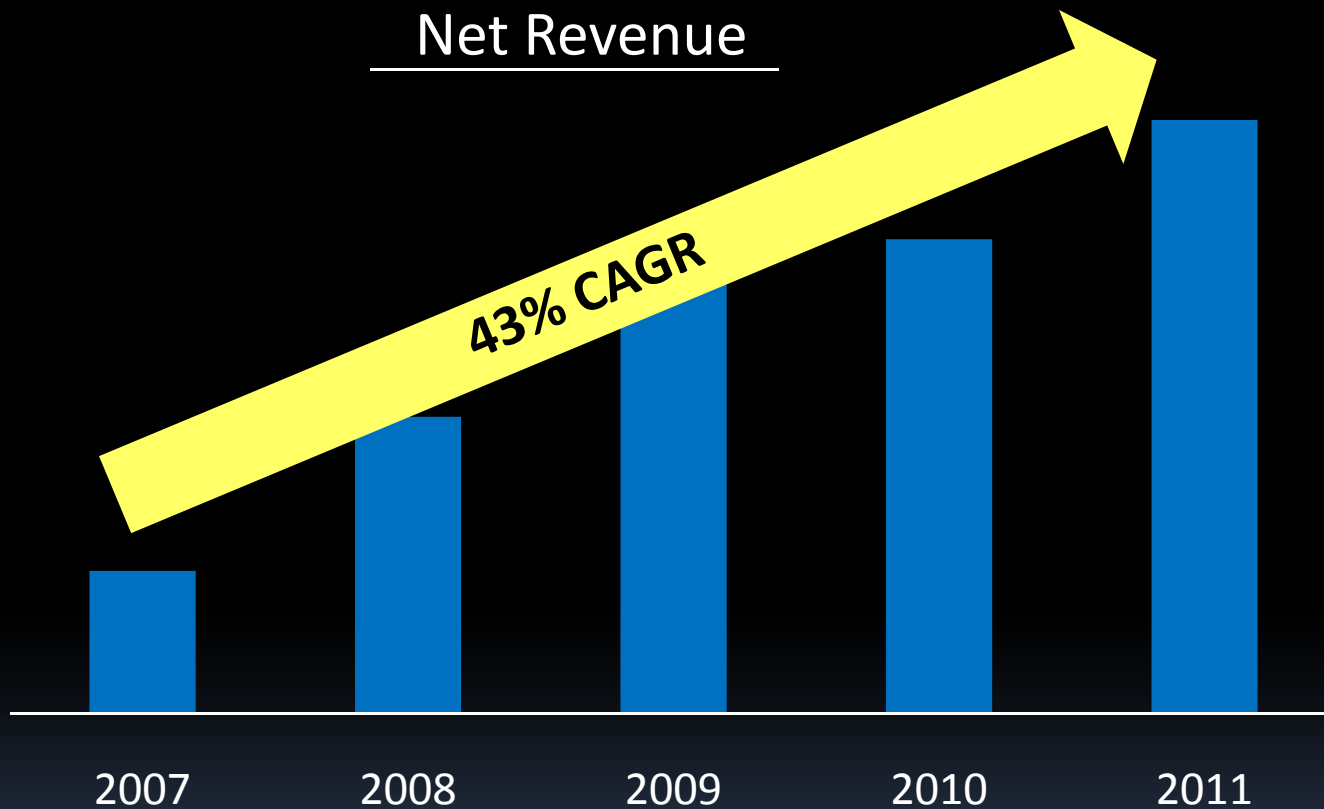


# MinuteClinic Non-acute Visits: Fastest Growing Segment



By 2015, Non-acute Care Including Visits And Non-flu Vaccines Could Account For **25%** Of All MinuteClinic Visits

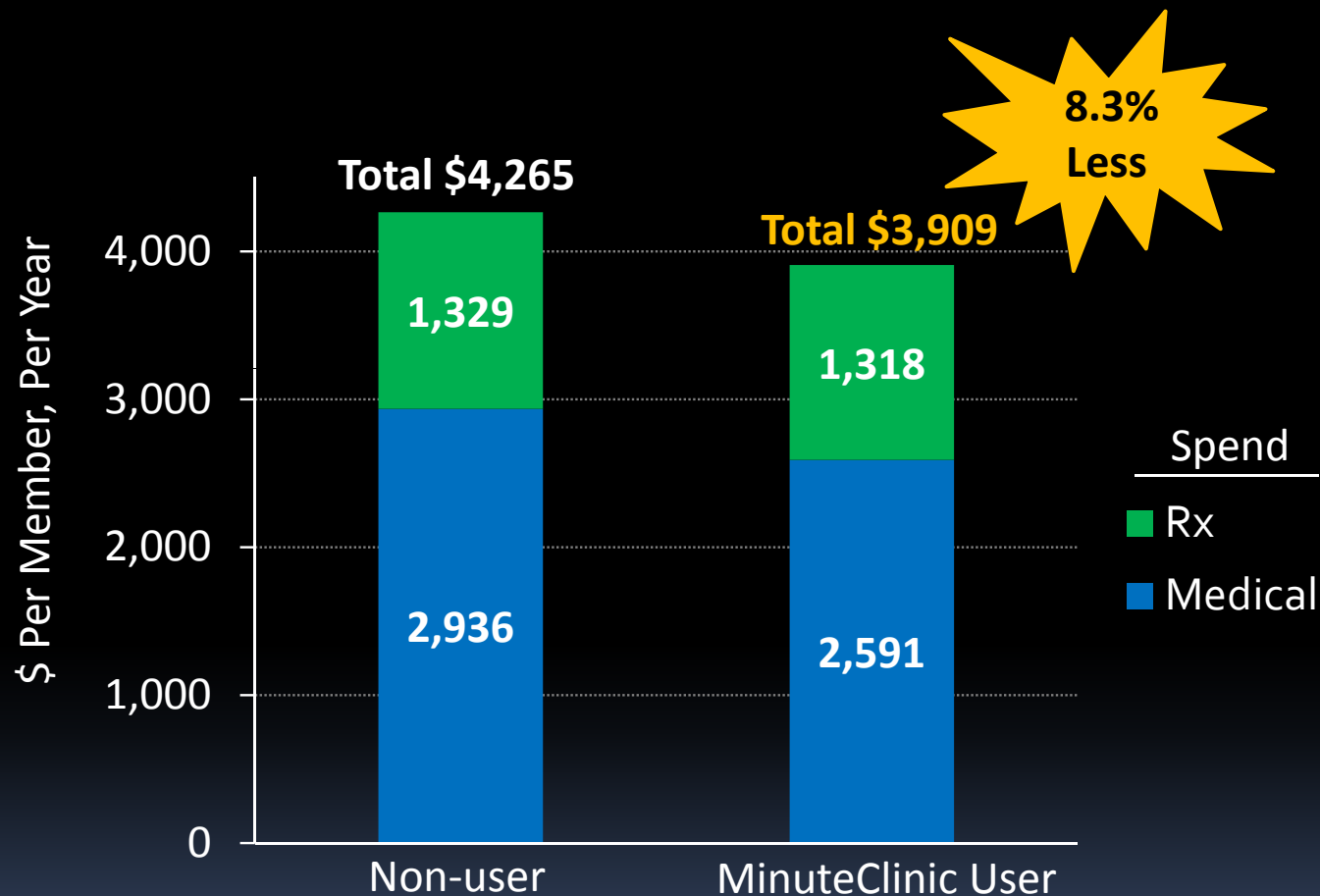
## MinuteClinic Visit Revenue Continues To Grow



**MinuteClinic Break-even By End Of 2011 On Enterprise Basis**

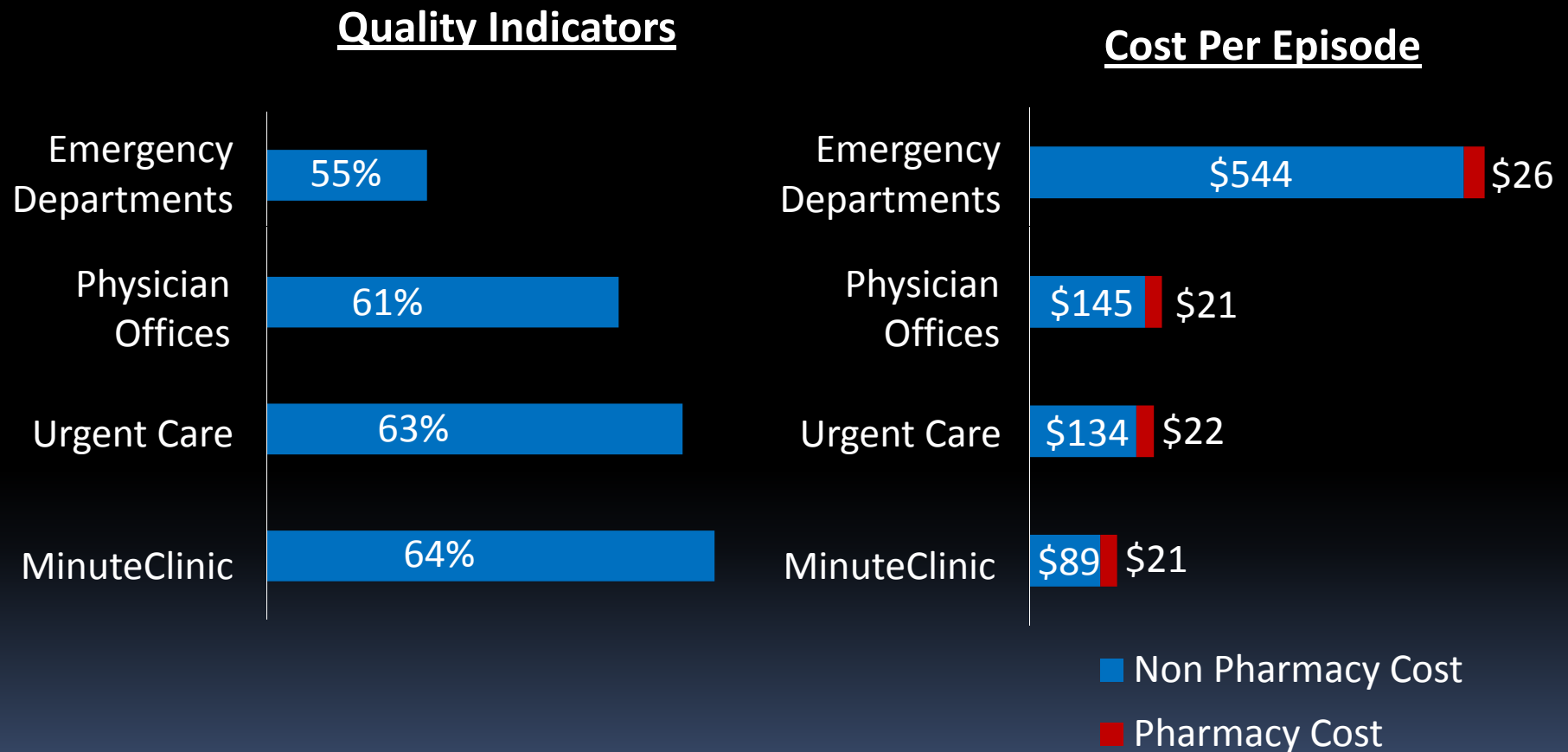
# Utilizer Spend 2010:

## MinuteClinic Versus Non-MinuteClinic



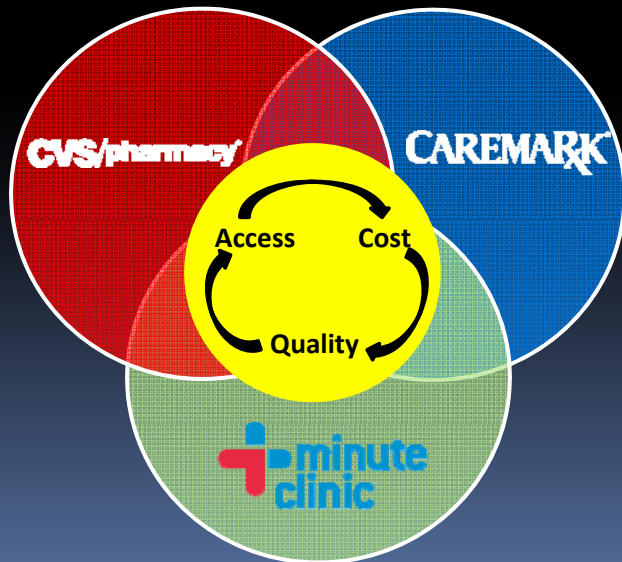
**Lower Total Health Care Costs Per Person Who Used MinuteClinic**

# Comparing Cost And Quality Of Treating Common Illnesses Across Medical Settings



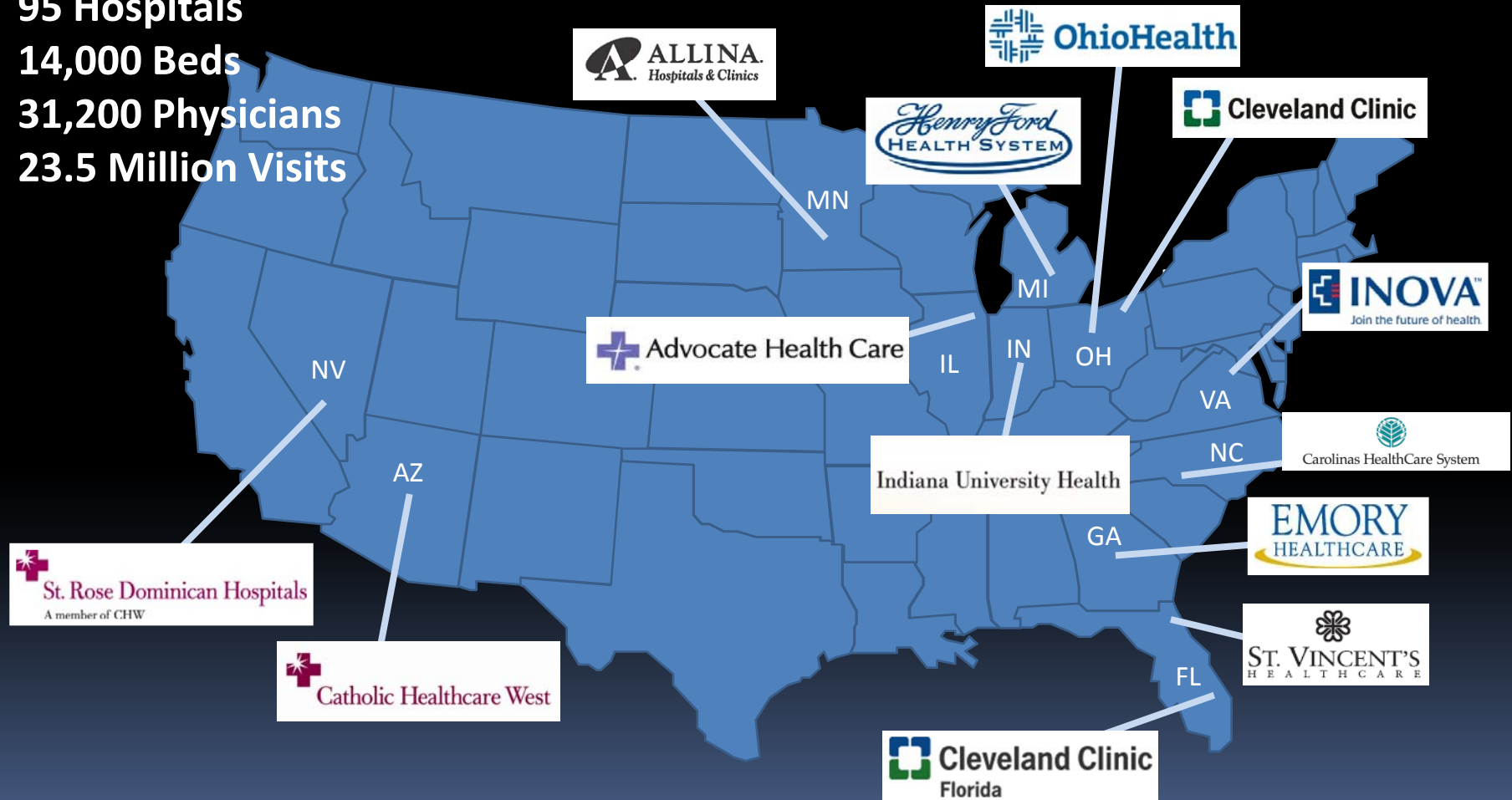
# Caremark Member Care At MinuteClinic

- Opportunity: Acute And Chronic Care For Caremark Members
- Caremark Offering Clients Opportunity To Change Their Benefit Structure To Substantially Reduce Co-pay At MinuteClinic To Lower Overall Health Care Costs
- Flu Vaccination Programs At MinuteClinic
- Biometric Screening Programs For Clients
- Wellness Programs For Clients
- On Site Clinics At Corporate Locations



# MinuteClinic Strategic Affiliations: Major Health Systems

95 Hospitals  
14,000 Beds  
31,200 Physicians  
23.5 Million Visits



## Health System Affiliations

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- Joint Clinical And Pharmacy Care Programs
- Health System Physician Directors For MinuteClinic
- Chronic Disease Programs
- Integrate Electronic Medical Records
- Participate In Future Accountable Care Organizations



# Integration Of Electronic Medical Records With Affiliated Health Systems

|      |            |                  |                     |                       |        |                |
|------|------------|------------------|---------------------|-----------------------|--------|----------------|
| Read | 09/25/2010 | Labtest, Labfour | Retail Clinic Visit | Provider, External... | Closed | CCF Department |
|------|------------|------------------|---------------------|-----------------------|--------|----------------|

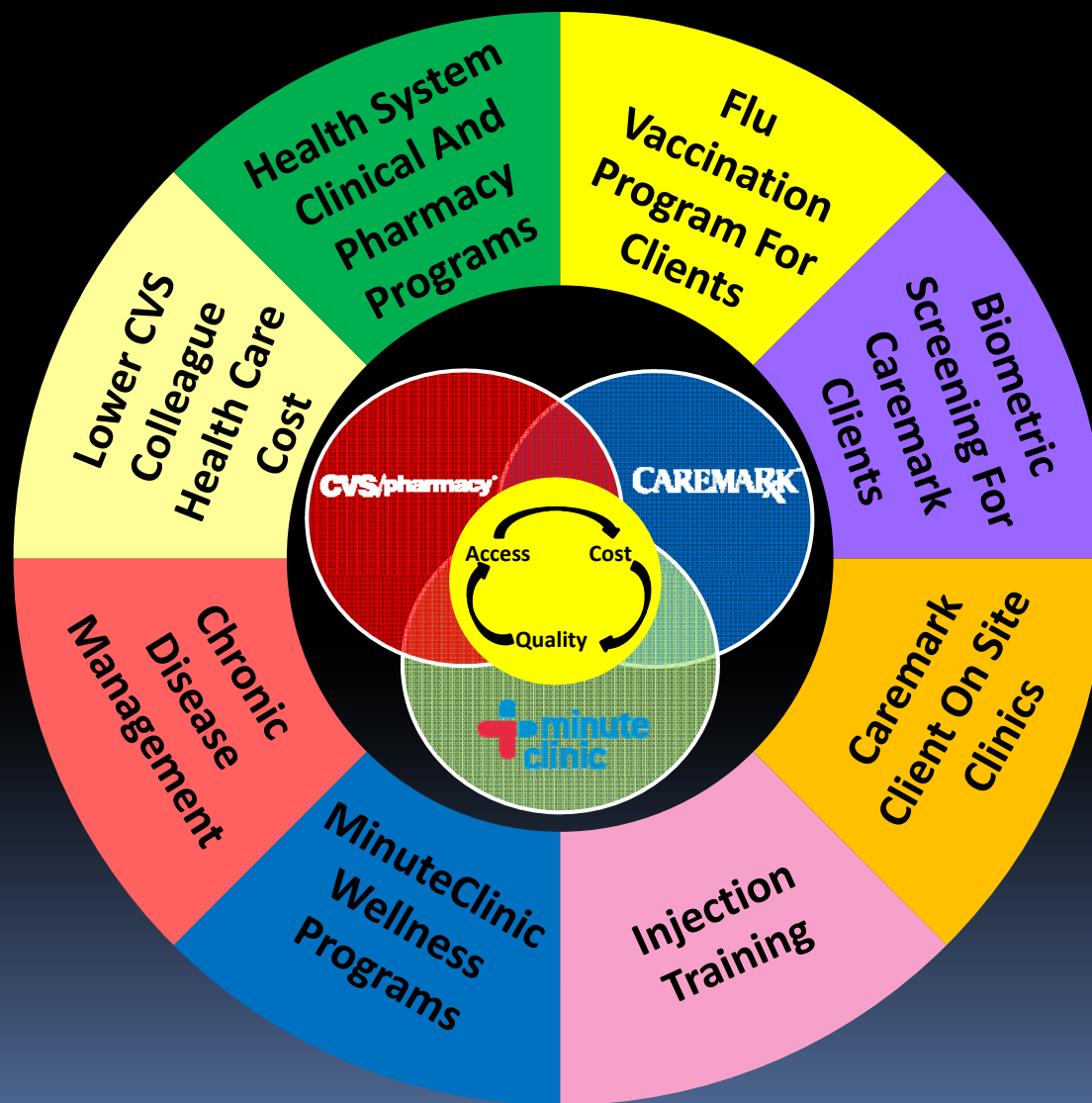
|                             |                   |                            |             |
|-----------------------------|-------------------|----------------------------|-------------|
| 09/25/10 - Labtest, Labfour |                   | More Data                  |             |
| <b>Retail Clinic Visit</b>  |                   | Labfour Labtest (MR# 5600) |             |
| <b>Contact Information</b>  |                   |                            |             |
| Date & Time                 | Provider          | Department                 | Encounter # |
| 9/25/2010 4:07 PM           | External Provider | Cleveland Clinic Dept      |             |
| <b>Patient Info</b>         |                   |                            |             |
| Patient Name                | Sex               | DOB                        |             |
| Labtest, Labfour (56000046) | Male              | 01/01/1980                 |             |

Scanned Documents

[View Retail Clinic Visit - CVS Strongsville 09/25/2010](#)

Allergies as of 09/25/2010

# MinuteClinic's Enterprise Role



## Reinventing Pharmacy For Better Shareholder Value

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- Expanding To Over 1,000 Full-time Clinics By 2016
- Robust Volume And Revenue Growth
- Lowering Health Care Costs
- Opportunity With Caremark Clients To Provide Cost-effective, Coordinated Care
- Major Health System Affiliations And Future ACO Role