




UGM 2022



5th Annual User Group Meeting

 **Pendry Hotel, San Diego**

 **October 19-21, 2022**

PROGRAM BOOKLET



Personal



EHR
Integration



Data
Aggregator



Quality



Applied Research Works, Inc.

COZEVA®



Bridge



Risk



NLP



Care



Analytics





Dave Meyer
Chief Customer Officer



Yin Ling Leung
Chair and Board Member



Khanh Nguyen
Chief Executive Officer



Shaibal Roy
Chair and Board Member



Nikki Asao
Chief Revenue Officer



Amitava Maulik
Chief Information Officer



Rupinder Singh
Chief Technology Officer



Madhurima Dhar
VP, Product Development



Pankaj Agarwal
VP, Engineering

Thank you from all of us.

We would like to take a moment to formally express our gratitude to each and every one of our clients and industry partners. We are deeply honored that you trust us with your business and grateful that we have the opportunity to transform healthcare together.

This past year has been an exciting one for us from key product enhancements and leadership changes to welcoming new members to the Cozeva ecosystem.

Cozeva's new leadership team brings over 40 years of collective industry experience.

We welcome the following organizations to the **Cozeva community**:



includes Brand New Day and Central Health Plan



MSO of Seaview IPA and Santa Barbara Select IPA



Expanded to AZ, IN, NM, NY, OH, OR, and WA



Thank you for your strong partnership and collaboration with us. We are committed to expanding our ecosystem with scalable, innovative solutions to support your journey towards higher quality and more equitable health outcomes.

Keynote Speakers



Lauren Taylor, MDiv, MPH, PhD

Assistant Professor,
NYU Grossman School of Medicine

Lauren A Taylor, studies governance and management of health improvement efforts within the United States and abroad. She was a consultant for the Global Fund and Bill and Melinda Gates Foundation and has since written on the institutionalization of global health, how to reform the World Health Organization, the responsibilities of health systems to address social determinants of health and the problem of dirty hands for health policymakers. In 2013, she co-authored *The American Health Care Paradox* with Elizabeth Bradley.

For several years, Lauren co-taught Global Health Ethics at Harvard Medical School with Sadath Sayeed. In addition to her teaching at Wagner, she also teaches Professional Responsibility at NYU Stern.

She holds a Masters in Public Health from Yale, a Masters in Divinity from Harvard, and PhD from Harvard Business School. Lauren is an Assistant Professor in the Department of Population Health at NYU Grossman School of Medicine.

Topic : **Building and Sustaining Trust in Health Care**

Time : Day 2 | 09:00 AM - 09:45 AM



Fred Camacho, PhD, MS

VP of Product Management,
National Committee for Quality Assurance (NCQA)

Fred is VP, Product responsible for NCQA's product portfolio. He has a well-rounded track record in healthcare including payers, providers, consumer engagement, clinical and SDOH solutions, population health and health information technology.

Fred was most recently at Humana where he was an Associate VP in Clinical Product Management with responsibility for various member-facing solutions and led the clinical product portfolio management, platform integration, and clinical experience design teams. Previously, he was VP, Consumer Engagement at Medecision where he led product management and prior to that, he was VP, Product at Vizient where he led the healthcare supply chain analytics team.

He worked 10 years at UnitedHealthcare and OptumHealth in various roles focused on product management, consumer engagement and transparency, decision support tools and member portals. He received a PhD Engineering and MS Applied Math from Brown University and an MS Civil Engineering from Carnegie Mellon University.

Topic : **Advancing Health Equity and Digitizing Quality**

Time : Day 1 | 01:15 PM - 02:00 PM



Jonathan Mates, MD

Medical Director of Manifold

Jonathan Mates, MD, is a radiologist, informaticist, and physician leader, with decades of experience in healthcare technology and leadership.

He has been a leader in imaging operations and informatics, serving as Chief of Radiology, Associate Physician-in-Chief, and Regional Director of Radiology Informatics at Kaiser Permanente in Northern California. He has also been responsible for diverse areas outside of radiology, such as quality and coding and outpatient clinic operations.

Dr. Mates has most recently moved into the field of artificial intelligence in healthcare, working as the Medical Director at Viz.ai, one of the early healthcare AI “unicorn” startups, and now as Medical Director at Manifold, a company dedicated to improving life science research with custom AI and machine learning solutions.

Having worked extensively in both clinical operations and healthcare software, he provides an insider’s perspective to both sides of the problem of effectively using clinical data.

Topic : **The Case for AI in Healthcare: “AI won't take your job, but it won't save it, either”**

Time : Day 3 | 09:00 AM - 09:45 AM

Topic focused Presenters

Topic : **SDoH Strategies in Current & Emerging Programs**

Time : Day 2 | 02:00 PM - 02:45 PM



John Gorman

Government Health Program Expert and SDOH Investor

Founder and Chairman of Nightingale Partners, the first Opportunity Zone fund to invest in social determinants of health interventions with health insurers, local government, and provider organizations.



Ana Handshuh

Principal at CAT5 Strategies

A government programs executive with expertise in creating and implementing corporate programs for the healthcare industry.

Topic : **Clinical Panel: State, Health System, and Provider Perspectives on the Intersection between Health Equity, Quality, and Trust**

Time : Day 2 | 09:45 AM - 10:30 AM



Bihu Sandhir, MD

Chief Quality Officer, AltaMed

Physician Executive with more than 25 years of health care experience. She brings a proven track record in leading medical teams in care transformation toward Value-Based Care and Population Health.



Rina Shah, MD

Regional Medical Director, Board Member, Hill Physicians Medical Group

Pediatrician for over 20 years, with experience in private practice, concierge, and HMO settings. Rina is passionate about social determinants of health and closing health care disparities.



Margareta Brandt, MPH

Quality Improvement Unit Manager, Covered California

11 years of experience in health care leading the development and implementation of quality improvement, health equity, and delivery system reform strategic initiatives.

Topic : **Thought Leadership on Revenue Policy & Enforcement - What is Coming and Why Everyone Should Care?**

Time : Day 2 | 02:45 PM - 03:30 PM



Jason Christ, JD

Member of the Firm, Epstein Becker Green

One of the first and few attorneys focused on risk adjustment in Medicare Advantage (MA) plans, Jason has transformed how clients organize, monitor, and ultimately defend their programs.

Agenda

Conference Day 1 | Wednesday, October 19, 2022

11:00 AM - 1:00 PM Conference Registration Open

01:00 PM - 01:15 PM

Opening Remarks

Applied Research Works

Khanh Nguyen, PharmD, Chief Executive Officer

Yin Ling Leung, MA, Chair and Board Member

01:15 PM - 02:00 PM

Day 1 Keynote Address

Advancing Health Equity and Digitizing Quality

Fred Camacho, PhD, MS, VP of Product Management, National Committee for Quality Assurance (NCQA)

02:00 PM - 02:35 PM

Client Showcase: **COZEVA Reporting – Real-Life Population Health Strategies**

Hill Physicians Medical Group

Annie Hou, PharmD, Director of Clinical Quality

02:35 PM - 02:50 PM

Break

02:50 PM - 03:10 PM

Client Showcase: **COZEVA AWV – Properly Align Revenues with Disease Burden and Improve Chronic Condition Management**

Southern California Physicians Managed Care Services

Tristin Rausche, Network Management Director

Jeffery Courtney, Certified Coder

Ophelia Aguirre, Performance Improvement Manager

03:10 PM - 03:55 PM

COZEVA Analytics Showcase

Applied Research Works

Dwayne Duenas, Director of User Engagement

03:55 PM - 04:10 PM

Closing Remarks

06:00 PM - 10:00 PM

Networking Reception

Oxford Social Club

07:30 AM - 08:50 AM

Breakfast
Lionfish Restaurant

09:00 AM - 09:45 AM

Day 2 Keynote Address

Building and Sustaining Trust in Health Care

Lauren Taylor, MDiv, MPH, PhD Assistant Professor, NYU Grossman School of Medicine

09:45 AM - 10:30 AM

Clinical Panel: State, Health System, and Provider Perspectives on the Intersection between Health Equity, Quality, and Trust

Bihu Sandhir, MD, Chief Quality Officer, AltaMed
Rina Shah, MD, Regional Medical Director, Hill Physicians Medical Group
Margareta Brandt, MPH, Quality Improvement Unit Manager, Covered California

10:30 AM - 10:45 AM

Break

10:45 AM - 11:45 AM

Health Plan Client Showcase: **COZEVA Bridge – How to Leverage COZEVA as an Innovation Partner to Drive Provider Performance**

Health Net

Steven Myers, Senior Manager, Provider Engagement Strategy, Provider Performance and Analytics
Indu George, Program Manager III

11:45 AM - 12:00 AM

Cozeva Feature Highlight: **Operationalizing Health Equity**

Applied Research Works

Rupinder Singh, Chief Technology Officer

12:00 PM - 01:30 PM

Lunch
Lionfish Restaurant

01:30 PM - 02:15 PM

SDoH Strategies in Current and Emerging Programs

John Gorman, Government Health Program Expert and SDOH Investor
Ana Handshuh, Principal at CAT5 Strategies

02:15 PM - 02:45 PM

Thought Leadership on Revenue Policy and Enforcement - What is Coming and Why Everyone Should Care?

Jason Christ, JD, Member of the Firm, Epstein Becker Green
Dave Meyer, Chief Customer Officer, Applied Research Works

02:45 PM - 02:55 PM

Break

02:55 AM - 03:40 PM

Client Showcase: **COZEVA Risk – Gaining Trust and Changing Clinician Behavior to Better Manage High Risk Members**

Hill Physicians Medical Group

Britt Moroles, Director Government Programs
Jon Hill, Manager, Government Programs and Coding

03:40 PM - 03:50 PM

Break

03:50 PM - 04:45 PM

Breakout Sessions

A. Quality

Siddhartha Sinha, Senior Manager of Clinical & Data Services

B. Risk and NLP

Nikki Asao, Chief Revenue Officer
Dave Meyer, Chief Customer Officer
Madhurima Dhar, VP Product Development
Nathan Cook, Population Health Manager

C. Data Governance

Claire Turner, Executive Director BI and Informatics, Epic
Amitava Maulik, Chief Information Officer

04:45 PM - 05:00 PM

Closing Remarks

06:30 PM - 08:30 PM

Strolling Dinner
Provisional Restaurant

07:30 AM - 08:50 AM	Breakfast Lionfish Restaurant
09:00 AM - 09:45 AM	Day 3 Keynote Address The Case for AI in Healthcare: “AI won't take your job, but it won't save it, either” Dr. Jonathan Mates, MD, Medical Director of Manifold
09:45 AM - 10:15 AM	Client Showcase: Provider Adoption – Effective Provider Engagement Strategies Optum Lina de La Rosa, MHA, Senior Director, Quality Improvement Heather Duker, Director, Quality Initiatives Glad Jarnilla, Sr. Project Manager, Quality Improvement
10:15 AM - 10:30 AM	Cozeva Feature Highlight: COZEVA Browser Extension – Plugin to COZEVA from any Web-based EHR system Applied Research Works Caitlin Jordan, Lead Customer Success Manager
10:30 AM - 10:45 AM	Snack Break
10:45 AM - 11:30 AM	Client Showcase: COZEVA EHR Integration and NLP – Improving Performance through Automation and Integration Providence St Joseph Health Mayra Martinez, MPA, Manager Quality Improvement Helen Hoang, Sr. Quality Improvement Specialists, Special Programs Ashley Truong, MHA, Manager Quality Improvement Vanessa Chaverst, Manager Quality Improvement Micaela Mendoza, Sr. Quality Improvement Specialist
11:30 AM - 12:15 PM	COZEVA Product Roadmap – Recap and Looking Ahead Applied Research Works Rupinder Singh, Chief Technology Officer Kelli Glynn, Director of Product and Partner Strategy
12:15 PM - 12:25 PM	Closing Remarks: Building the COZEVA Ecosystem Together Khanh Nguyen, PharmD, Chief Executive Officer, Applied Research Works
12:15 PM - 12:40 PM	Awards Ceremony

Overview and details about the

Pendry Hotel, San Diego

In the heart of the Historic Gaslamp Quarter, Pendry San Diego strikes a balance between modern and traditional, providing seasoned travelers with a home away from home set within a stunning environment.



Wifi details

📶 Cozeva

Password: ugm2022

Event Venue details

Main Event

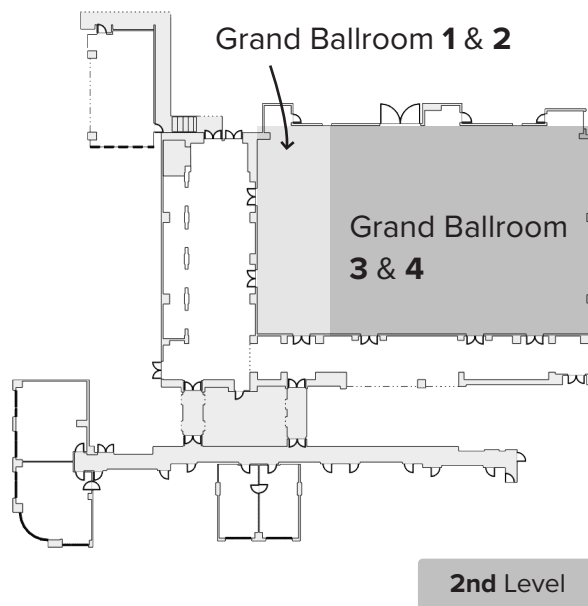
2nd Level

Grand Ballroom 3 & 4

Breakout Session

2nd Level

Grand Ballroom 1 & 2

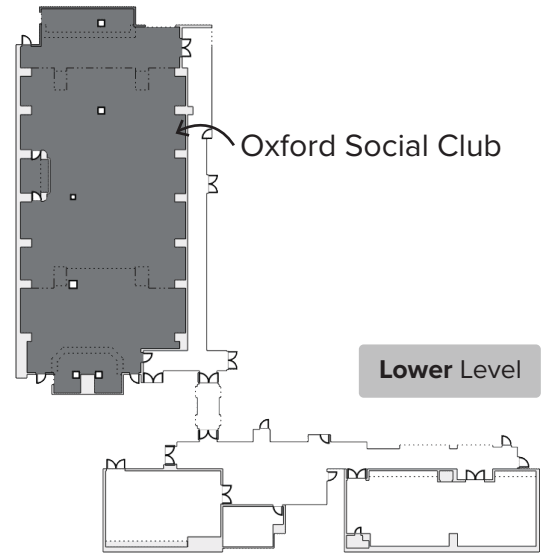


Networking Reception - Day 1

Lower Level
Oxford Social Club



Decked out with luxe furnishings, plush couches and eclectic street art, Oxford Social Club is a new approach to an elevated nightlife experience.

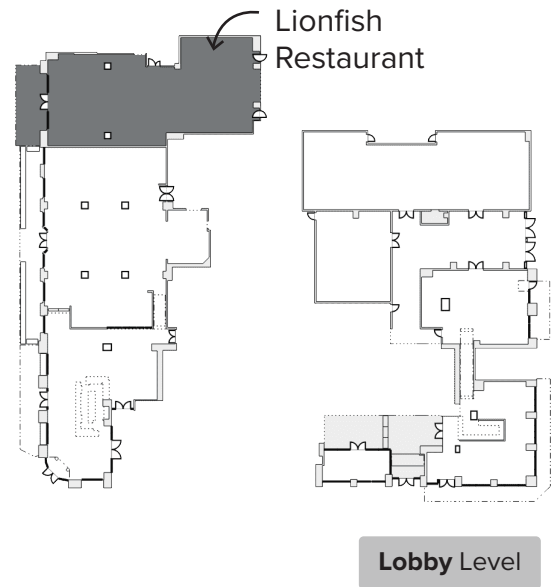


Breakfast - Day 1 & 2 Lunch - Day 2

Lobby Level
Lionfish Restaurant

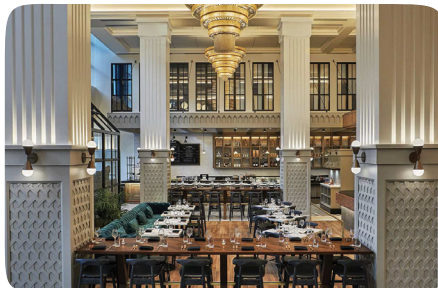


Signature restaurant driven by seasonal, local ingredients, the menu features inventive fresh-catch along with prime meats.

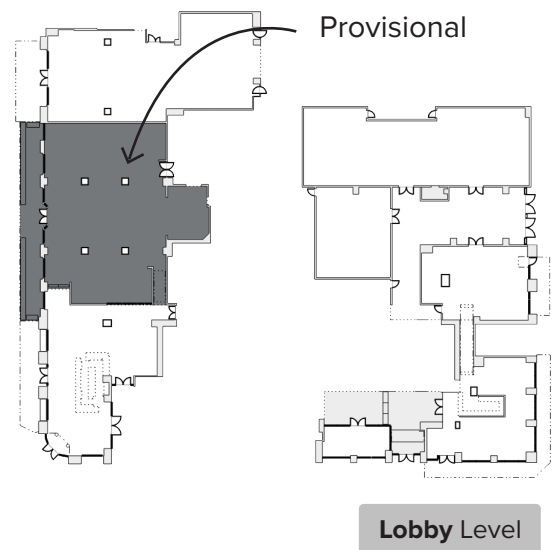


Dinner - Day 2

Lobby Level
Provisional



A restaurant-marketplace hybrid featuring seasonal fare and gourmet takeaway options, designed in partnership with Los Angeles' famed Alchemy Works retail concept. A communal dining space features an espresso bar and a retail space set within a greenhouse.



Tech and Innovations

Towards Tracking Health Equity

■ Analytics

Analytics team is continuing to enhance health equity reporting in Cozeva to help users track health disparities and overcome SDoH obstacles. This year started with the introduction of **County-level SVI geomaps** (Q2 '22) and **Member Engagement Model** (Q3 '22) and will end with new **Health Equity Workbook & REL Imputation & Filters** (Q4 '22). A **Care Advisor Alert model** (Q1 '23) is being prototyped and is expected to be released next year. Pilots with nThrive and Experian are also underway to improve SDoH visibility.

Data Extraction

■ Analytics

Analytics team introduced **zero-wait bulk downloads** (Q1 '22) & **unlimited PCP segmented metric-level summaries** (Q1 '22) earlier this year and plans to support **xlsx downloads** (Q4 '22) and **4-10x faster extract downloads** (Q4 '22) before the end of 2022 with support for **Smart filtering** (Q1 '23) shortly thereafter.

Broadening Reach of Analytics

■ Analytics

To support more roles and workflows in Analytics, the team will be adding **support for practice delegates** this year (Q4 '22) and will begin embedding **deeplinks to Analytics** from Cozeva Registries in early 2023.

Patient Care Reminders

■ Care Coordination

Contact Tracking last year to track member outreach, added support to

Care Coordination team, which released ingest member outreach data via **inbound feeds from external systems** (Q2 '22). Enhanced **measure tagging** is planned for later this year (Q4 '22) and tighter integration with **Patient Care Reminders** (PCR) soon thereafter (Q1 '23), to track and support different modes of outreach such as SMS, email, letter, IVR.

Smart Forms and Screeners

■ Care Coordination

New notifications, sections, screeners, forms, print options, and edit capabilities were added to the Annual Wellness Visit (AWV) and Cozeva Care modules this year. Several of the enhancements were necessary to drive DCE workflows. To scale creation of customer forms & screeners, the Care Coordination team is planning to release **easy form & screener creation tool** in Q1 of 2023.

GIC Actionability and Engagement

■ Care Coordination

Point-of-Care (POC) view, patient-level incentives, instantaneous gap in care (GIC) status updates are all planned to be supported in the Cozeva Patient Dashboard in Q3 of 2022. To improve coordination across multidisciplinary teams, **quarter-specific highlights** and **POC actions** will be added to Patient dashboard in Q4 '22 as well.

Bridging Members & Gaps

■ Bridge

The core bridge routines, which support Member Matching and Gap Comparison, were recently enhanced (Q3 '22) to support HP-to-HP bridge and PO-to-PO

(beyond HP-PO) bridge pending authorization from client. The enhanced routines also reduced recompute time by over 2x and are planned to drive **Bridge Dashboard Member Match & Gap Comparison** views in Q3 '22.

Consolidated Data & User

■ Bridge

While bridge of UI-entered supp data has been supported for over 2 years, bridge of **suspect HCC and coded Dx** from PO-to-HP went live recently (Q3 '22). **ADT** (Q3 '22) is on track to be bridged next followed by **Contact Tracking, REL, SOGI, contact information, lab, claim, Rx, Med Supp, and EHR** (Q4 '22).

User unification is currently also underway. Linked accounts was enhanced to support SSO this year and drive approvals through UI. Linked accounts will be enhanced further to automatically link users and unify their registries ('23).

EHR Data Retrievals

■ EHR Integration

Incremental data retrievals with 24/7 load and compute were added for 5 EHRs (Allscripts, Cerner, Epic, eCW, NextGen) this year. Bulk Data Retrievals are expected to be supported for AthenaHealth, Cerner, Epic, Allscripts, and NextGen before the end of 2022.

Embedded Cozeva App & Extension

■ EHR Integration

The Cozeva extension was deployed recently (Q3 '22). It has rulesets to support DrChrono and AthenaHealth. Rulesets for Allscripts TW22, eCW v11, Office Ally 24/7, and various other web-based EHRs with

support for notifications and multiple users will be added in Q4 '22. Support for thin clients (Epic, Cerner, etc.) is also currently under development through a desktop version of the extension, which is planned to be released in early 2023.

Supporting Traditional HEDIS Chart Chase

■ HEDIS DAV, Hybrid & Submissions

The HEDIS Hybrid team is developing a new HEDIS Hybrid module, which is available on stage under App tray. Custom filtering rules, email & fax form creation, support for inbound/outbound fax, practice list entry & updates, and project reporting are pending.

Data Governance

■ HEDIS DAV, Hybrid & Submissions

The DAV team will be cataloging the quality and completeness of all data sources throughout the year, which will significantly streamline Cozeva's annual DAV certification. The new data catalog and review UI is expected to be released later this year.

Configuration of Quality Engine

■ Quality Engine

Self-Help tools for Quality are on track to be released later this year. These tools will allow users to enable/disable pencil icons by measure, set the default quarter, update measure selection annually, and enable/disable continuous enrollment.

Improvements to RAF and Suspect models

■ Risk Score & Revenue

Risk suspect model rules were updated this year with new Clinical suspect rules planned to be deployed in Q4 '22. Improvements are also underway to

leverage MMR (RAFT & OREC), MOR, CCLF-8 and 837 files directly for beneficiary details and enhance reporting of HCC and Risk Revenue.

Getting Closer to Automated NLP Reviews

■ NLP

The NLP team deployed a **chart layout parser** this year, which has reduced the false positives and negatives in suggested HCC codes and fetched patient (name, dob, gender), provider (signature), and encounter (DOS, start/end page) details. Coming later this year are enhancements to the **auto-abstraction & autofill capabilities** (beyond HCC code) and a model to **score User and NLP output** so charts that don't require manual overread can be separated from the rest that can be processed in bulk.

Performance Improvements

■ RAS & Scalability

Several enhancements to API, validation, load, compute engine, and content management system (Drupal 7 to 9 migration) were deployed this year to improve the performance of Cozeva. The number of slow queries were reduced by over 80k, which **improved page load times**. Data validation and load code was optimized resulting in **3x improvement in performance**. API was updated to **support 4x the original volume**. Registry computation **increased by 10x (10K/s from 1K/s)**. System recovery time was **reduced from 16 hours to 4 hours**. API, load and compute engine are planned to be further optimized to support 5x current volume in 2023.

Fully Automating Validations & Load

■ Data Adapters, Automation, & Self-Help

The team deployed a **Self Help Validation Tool** (Q3' 22) and improved handling of

large files (splitting) and detection of anomalies using **file-level checksums and thresholds** (record/member stats). Multiversion support for self-help validations, advanced file and acknowledgment tracking, and self resolving load processes are pending.

New Data Sources

■ Data Adapters, Automation, & Self-Help

A pilot with OfficeAlly clearinghouse is underway to retrieve their 837 claims (pre/post adjudication) with minimal latency. We will be using site-encrypted irreversible hash to link members between OfficeAly and Cozeva, which will be first application of establishing feed with data partner without sharing any PII.

Support for new feeds and assets (REL+SOGI) also pending and will be available before the end of the year.

Cozeva Ecosystem

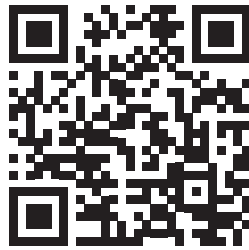
A visual representation of everything associated within the Cozeva Environment

Rotate 90 degrees to view properly



* Partnership conversation initiated or in-progress with COZEVA. Product names, logos, brands, trademarks and registered trademarks are property of their respective owners. Use of these names, trademarks and brands does not imply endorsement at this time.

How did you like UGM 2022?



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