Health iPASS
A SPHERE COMPANY

Partnership Program Overview
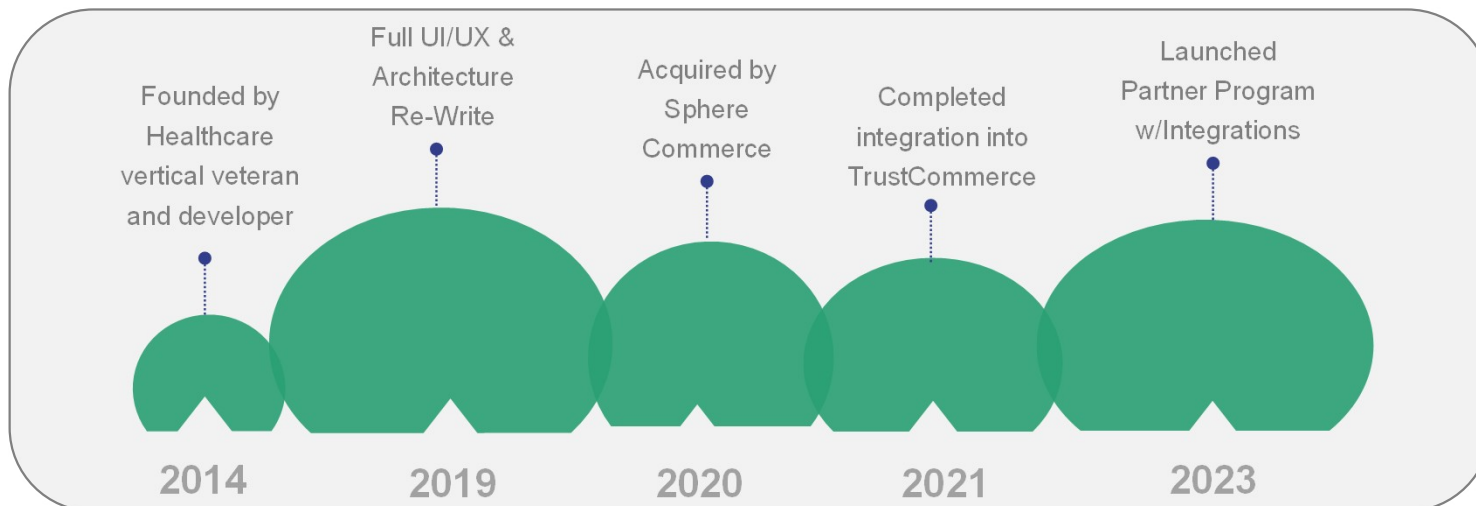
Health iPASS Overview

Who

Private Equity backed and wholly owned by Sphere Commerce

What

Patient engagement solution for healthcare providers, focused on streamlining the patient revenue cycle by offering tools that enhance transparency and efficiency in the billing and payment process. The Health iPASS platform includes features like patient check-in, payment estimation, and post-visit billing, all designed to improve the financial experience for both patients and providers. The goal of Health iPASS is to reduce the administrative burden on healthcare providers and increase patient payment collections by offering clear, upfront cost information and easy payment options.

When

- **2014** — Founded by Healthcare vertical veteran and developer
- **2019** — Full UI/UX & Architecture Re-Write
- **2020** — Acquired by Sphere Commerce
- **2021** — Completed integration into TrustCommerce
- **2023** — Launched Partner Program w/Integrations

Leadership Team —

'Our executive leadership is comprised of respected, dynamic veterans who have over 150 years of combined experience in Financial Technology, Payments, and Healthcare'

| **Curtis Bauer** Chief Executive Officer	**Rick Follett** VP Sales & Marketing	**Sylvia Xistris** VP Product & Implementations	**Christine Marag** VP Client Success	**Devin Stewart** VP IT	**Kalyan Boppe** VP, IT Operations
An accomplished leader in the financial technology space, with expertise in embedded payments, ISV Integrations, and high-growth partnerships. Curtis has held senior leadership roles at TSYS, TransFirst Holdings, Inc and Fifth Third Bank. He began his career with a startup Acquiring ISO organization that ultimately grew & sold to 5/3 Bank to become the core platform for their acquiring business.	Rick is responsible for managing both direct and partnership sales, including integrated healthcare vertical SAAS companies and our Marketing strategies. Previously, he managed inside sales teams for 10+ years located in Nashville, Omaha, Phoenix, and Oklahoma City for Global Payments. He also spent two years at TrustCommerce building out their partner channel.	Sylvia leads Product Management, including Product Strategy & Client Implementations, driving the Product Roadmap and Integration Solutions. Sylvia is SAAS Healthcare expert with over 10 years of experience in leadership roles with patient engagement software companies, including Artera Health. Sylvia holds a masters in Public Health.	Christine is a seasoned leader with over three decades of experience in Client Relationship Management and corresponding business development. Christine leads our Client Success and Client Support organizations. Christine joined Health iPASS in 2022 after a thirty-year tenure at Greenway Health.	With over 30 years of technology leadership experience, Devin is responsible for all aspects of product development and platform technology. Devin has an extensive background with both start-up and large corporations, which included the development and operation of high-performance systems for companies such as McDonalds and The Nielson Company.	Kalyan oversees technical operations and product delivery cultivating a culture of collaboration and continuous improvement. Kalyan has over 20 years managing offshore SAAS development teams. Kalyan has held leadership roles with CVM Solutions, now Supplier.io and Solix Technologies.

Better Together

Sphere

Parent Company of Health iPASS & TrustCommerce, combining two best in class SAAS platforms to provide a Robust Health Vertical Solution.

Health iPASS
A SPHERE COMPANY

Comprehensive Patient Engagement Platform.
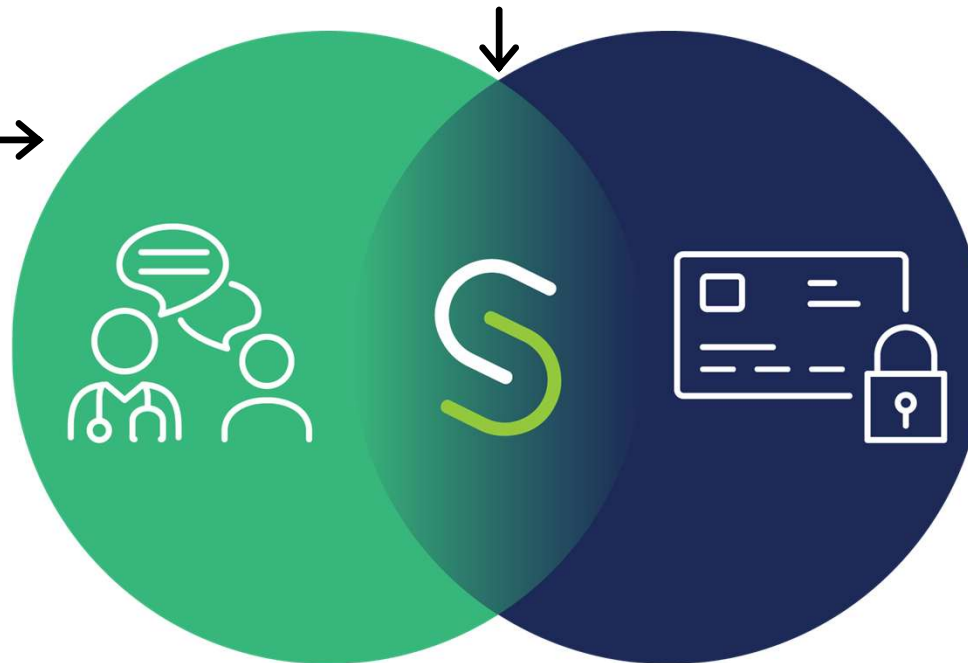
TrustCommerce®
A Sphere Company

Health Vertical Payment Processing Platform.

Vertically Integrated Omni Channel Patient Engagement / Patient Payments

Health iPASS Solution

Enhances provider revenue collection and improves efficiency through industry leading end-to-end Patient Engagement digital tools.

The easiest way for patients to pay

Streamline patient intake and patient payments pre-, during- and post-visit with pre-arrival check-in, eligibility, cost estimates and electronic statements.

Before Health iPASS

Patient yield

50-70%

with Health iPASS

Patient yield

90-95%

Key PM/EMR Integrations

- athenahealth
- nextgen healthcare
- eClinicalWorks *"Improving Healthcare Together"*
- MODERNIZING MEDICINE
- MEDITECH
- Cerner
- Epic
- Greenway Health
- veradigm
- med evolve
- Nextech
- eMDs
- exscribe

Product Summary

1 **Pre-arrival**
- Appointment reminders
- Collect prior balance, co-pay, smart deposits
- Express check-in at any device, any time

2 **Check-in**
- Balance, copay
- Static / smart deposits (estimates)
- Card-on-file
- Eligibility
- Configurable Healthcare intake forms with Practice Management posting
- Virtual waiting room

3 **Check-out**
- Visit estimate / remaining estimate
- Collect deposit on estimate

4 **Post-visit Billing**
- eStatements (autodebit)
- eBills
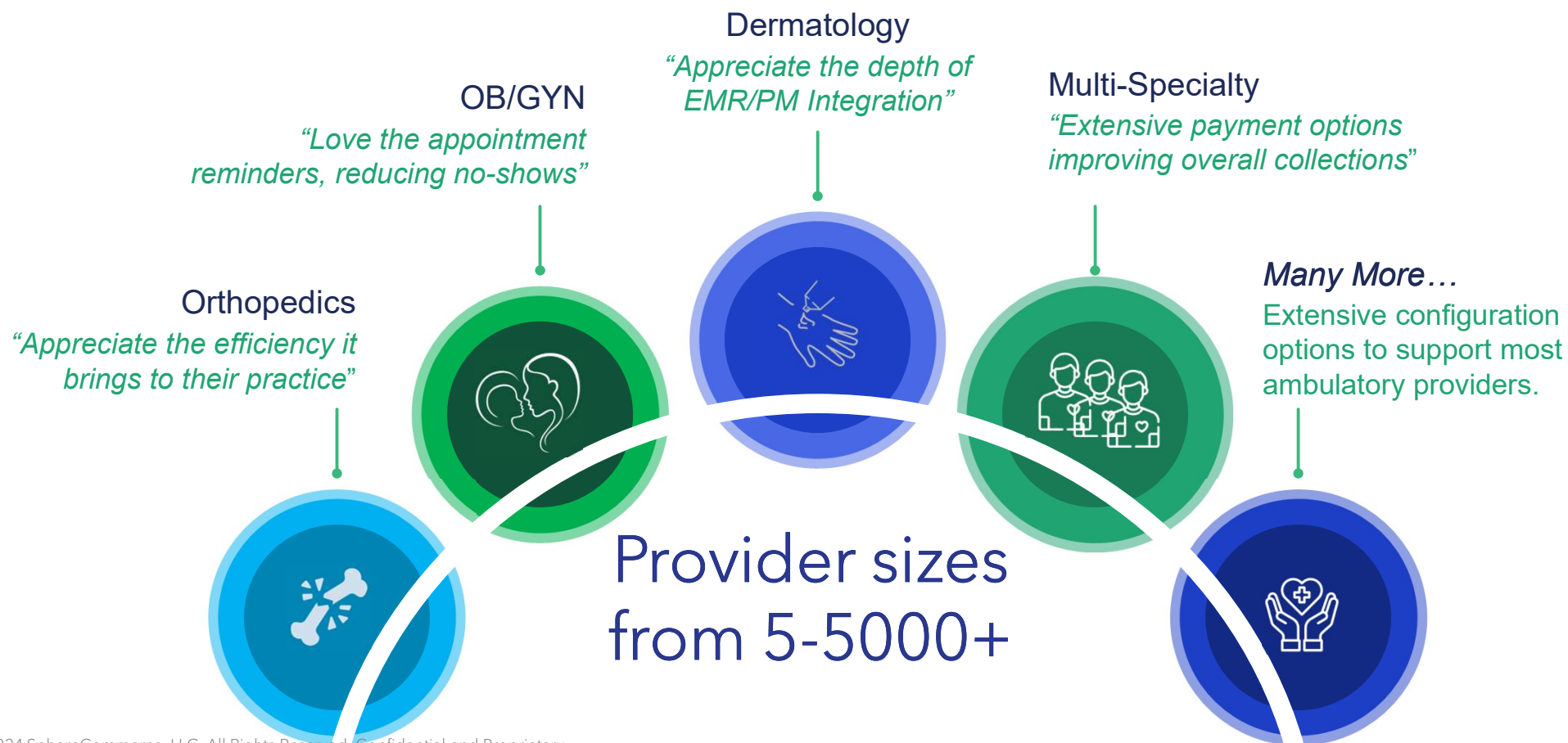- Consolidated eBills for all patient A/R
- Paper Statements

5 **One-time Payments / Portals**
- Any payment not tied to an appt. (surgery deposits, etc.)
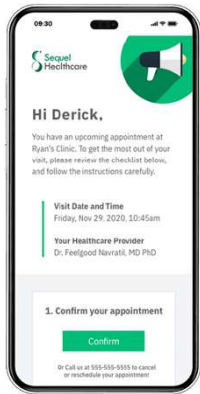- Online Bill Pay Portal

Who We Serve

**Top Health iPASS client verticals** – *Highly configurable for most Ambulatory providers*

Dermatology
"Appreciate the depth of EMR/PM Integration"

OB/GYN
"Love the appointment reminders, reducing no-shows"

Multi-Specialty
"Extensive payment options improving overall collections"

Orthopedics
"Appreciate the efficiency it brings to their practice"

Many More…
Extensive configuration options to support most ambulatory providers.

Provider sizes from 5-5000+

Product Overview

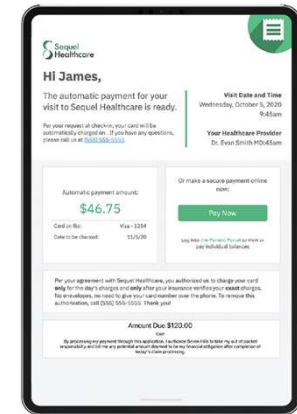**Pre-Visit**

- Appointment Reminders
- Digital Intake & Check In
- Configurable Forms, Payments, Eligibility, Demographics
- Smart Deposits, Cost Estimator
- Bulk Messaging & Campaigns
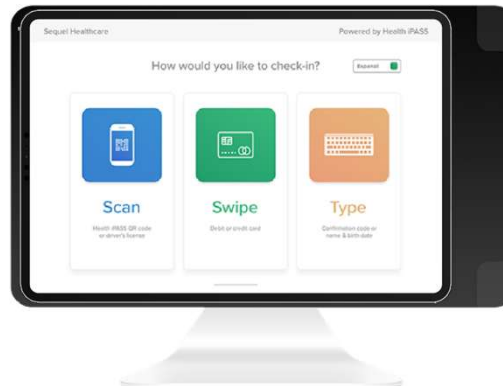
Point-of-Service

- Contactless Check-In
- Kiosk Check-In
- One Time Payments
- Cost Estimator
- Real Time Eligibility
- Reporting & Analytics Dashboard

Post-Visit
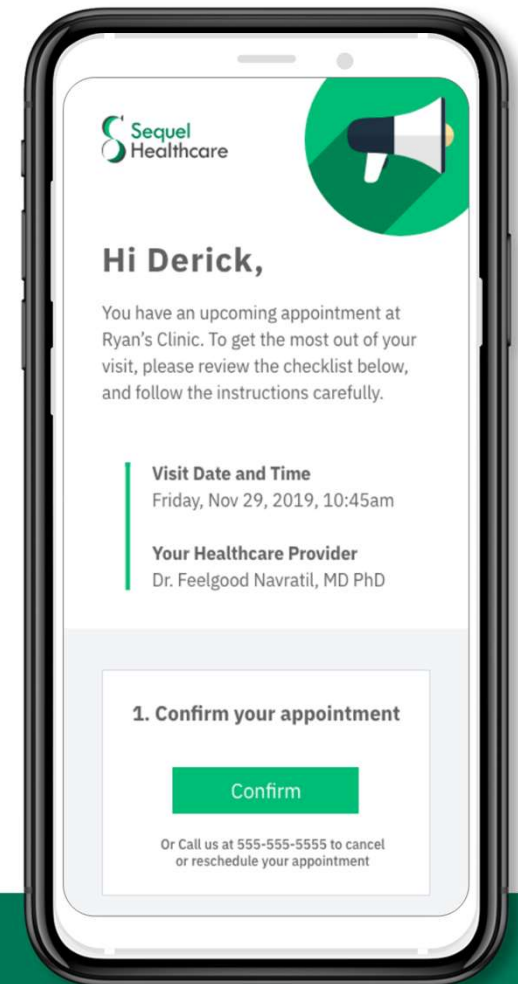
- Text to Pay / Email to Pay
- E-Bills with Configurable Dunning
- Online Bill Pay Portal
- Paper Statement Suppression
- Billing Management & Automations
- Post Visit Surveys & Marketing

Pre-Visit Workflows

Modular/Configurable Intake Flow

Login **Demographics** **Insurance** **Forms** **Payments**

Digital Intake

Features

- Unique authenticated secured link requires **no login**
- **Real Time Balance checks via API** reduce payment discrepancies and claim denials
- **Configurable rules engine** can customize verbiage and target patient AR
- **Real Time Automated Payment Posting** back to PM/EMR
- Provides patients with a convenient and secure way to pay

Value Prop

- **85% average text to pay enrollment across all clients**
- 32% of HealthiPASS patients pay their bill in less than five minutes when received via secure text
- **93% collection rates when a Card on File is captured**
- Providers are paid 1-3 months sooner than via traditional routes.
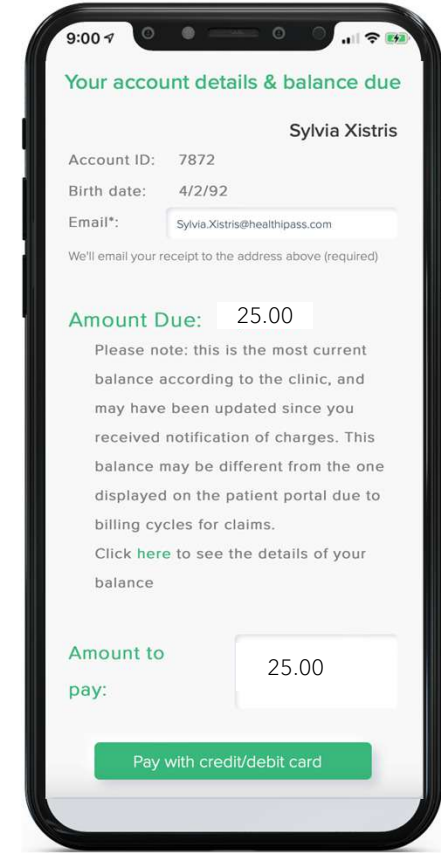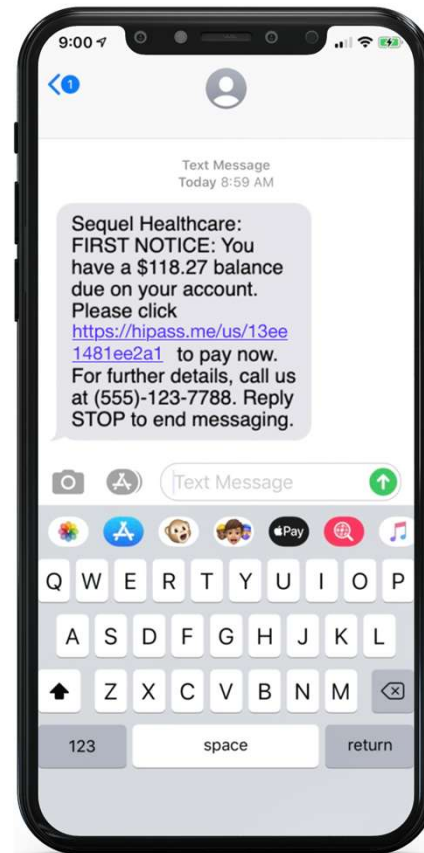
Digital Intake with automated forms

Features

Replace manual data entry with **automation**, **reduce** in clinic **wait times**, and provide a **connected** patient experience.

- No Login Required.
- **Branded schemes for your clinic.**
- **Powerful Rules Based Cadence** driven off Appt Type, Payor Type, Location, Provider, and more.
- **Native Forms Builder** allows for quick build time and customization.
- **Forms Support** for Consents, Clinical, or any Customizable form.
- **Automatically push via API** or HL7 to PM/EMR system in real time.
- **Discrete writeback** of data where Natively Integrated.
- **Partner API end points** available to white label all use cases.
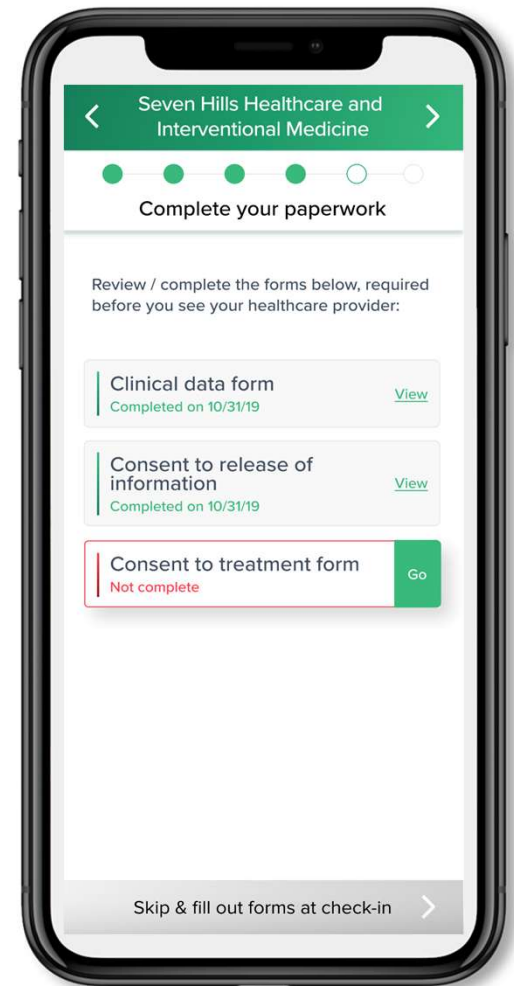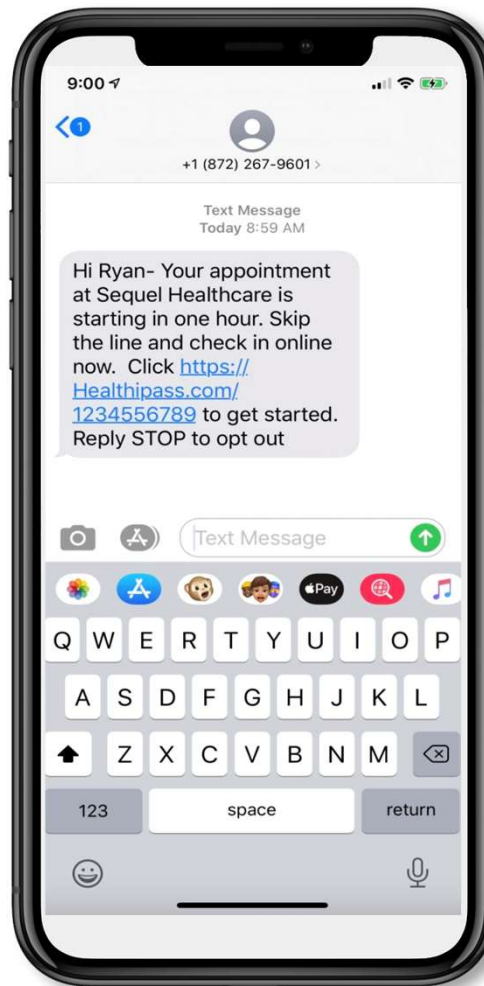
Health iPASS Dashboard

For Clinic / Provider Users

- **Real time check in dashboard** with I Frame Embed or SSO support optional.

- **Native Forms Builder** for quick build time and customization.

- Powerful **Analytics Reporting** to quantify adoption and performance.

- **Admin / Super User training** & access for quick configuration

In Clinic Users can:

- Collect Payments

- Check Eligibility in Real Time

- Push In Clinic Reminders
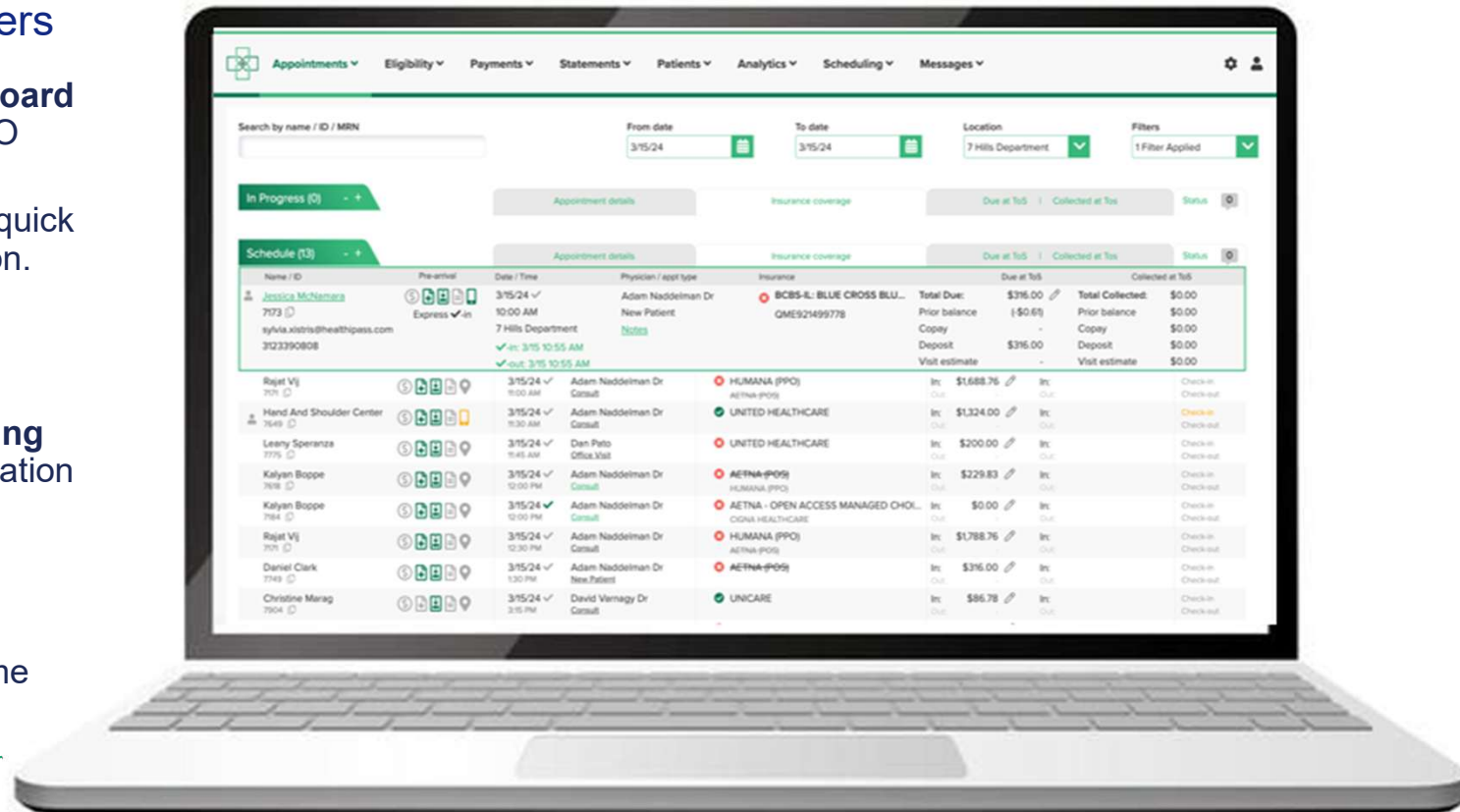
Post-Visit Workflows
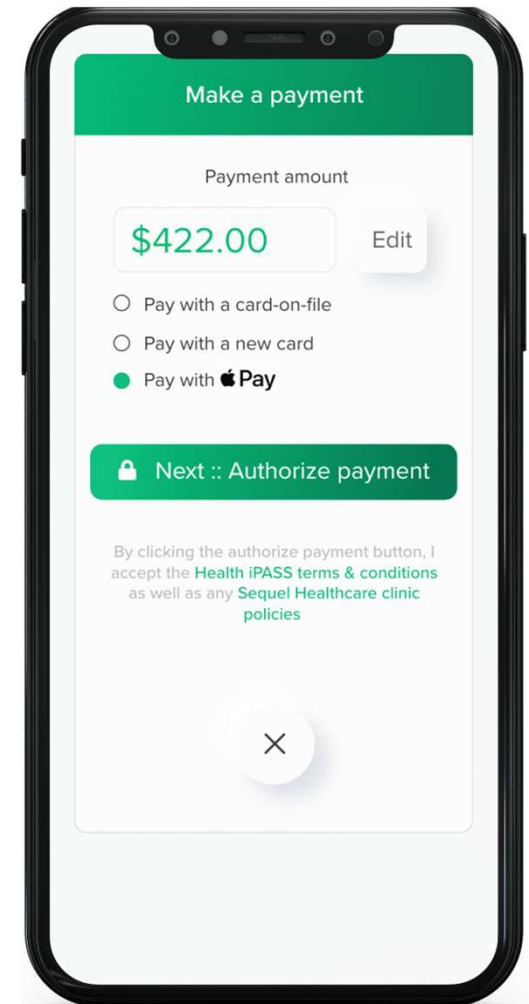
Text to Pay

Features

- Unique authenticated secured link requires **no login.**
- **Real time balance checks via API** reduce payment discrepancies and claim denials.
- **Configurable rules engine** can customize verbiage and target patient AR.
- **Real Time Automated Payment Posting** back to PM/EMR

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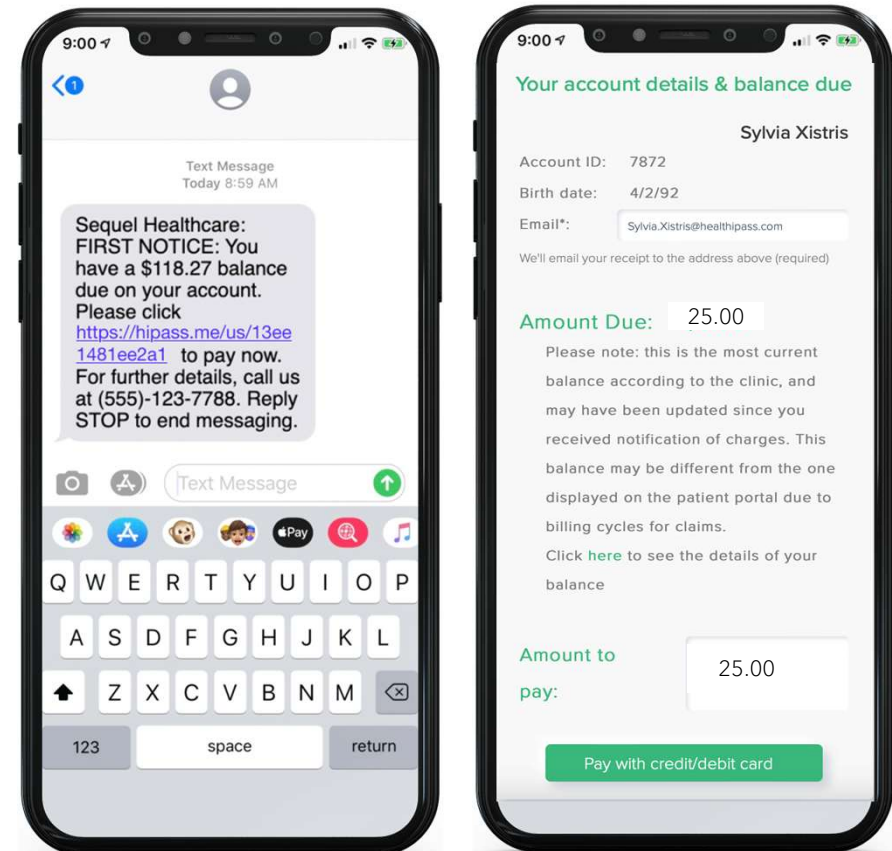
Automated Bill Pay Workflows

Includes Text/email to Pay, Online Bill Portal, Billing Reminders, Paper Statements and Suppression.

1 **Statement File Generated by PM/EMR**

- Statement file automation integration with EMR
- API or Pushed/Dropped via SFTP

2 **Bill Consolidation & Message Transmission**

- Bills consolidated into one easy to understand statement
- Bills sent out via text/email to patients preferred contact method
- Configurable rules-based message cadence

3 **Patient pays bill**

- Payment processed through merchant processor
- Payment pushed to EMR
- Co-Pay posted to visit
- Deposit posted to account
- Prior balance posted to visit/encounter

4 **Patient doesn't pay bill**

- If billing cadence expires with no payment, patient is dropped to optional paper statement

5 **Statement Consolidation**

- All open balances not collected via eBill cadence are dropped to Customer's paper statement vendor on configurable cadence

6 **Analytics & Report Monitoring**

- Bi-weekly call with Client Success Manager to analyze metrics
- Ongoing reporting tools for PSR & Staff

Deep Native PM/EMR Integrations

Appointment Data	Demographic Data	Payments Data	Forms Data
✓ Get Appointments (Load Appts) ✓ Appt ID ✓ Appt Info ✓ Check In	✓ Get Demographics ✓ Get Insurance Info ✓ Writeback Demographics ✓ Writeback Insurance Details & Images ✓ Writeback Patient Photo	✓ Get Patient Unpaid Charges ✓ Post Prior Balance to Visit ✓ Post Co-Pay to Visit ✓ Post Deposit to Account	✓ Post Discretely* (integration dependent) ✓ Post via PDF ✓ Document Batches (if applicable) ✓ Document Categories (if applicable)

Fields Included:
 	
✓ Appt Status (Confirm Appt)
✓ Provider
✓ Location
✓ Patient Insurance
✓ Patient Charges & Balance
✓ Guarantor Information (if applicable)
	Fields Included:
	
	✓ Patient Name
	✓ Patient DOB
	✓ Patient Address
	✓ Phone Numbers: mobile, home
	✓ Email Address
	✓ Primary Insurance
	✓ Secondary Insurance
	✓ Insurnace details & images
	✓ Gender
	✓ Marital Status
	✓ Race & Ethnicity
	✓ Primary Language
		Fields included:
		
		✓ Copay
		✓ Deposit
		✓ Balance
		✓ Transaction Info (Amount, type, ID, date, time, location)
		✓ Encounter Number
		✓ Applied payments to charges
		✓ Encounter Credits
		✓ Payment Batch
		✓ Card Type
		✓ Billing Name
		✓ Payment Method
		✓ Payment Source
		✓ Posting Status
			Forms supported:
			
			✓ Consent/Agreement Forms
			✓ Clinical scales & risk assessments: PHQ-2/9, MCHAT, BCRA, etc.
			✓ Signature Forms
			✓ Clinical Reports
			✓ Additional Data not included in discrete data fields (customized) (in applicable)
			✓ Clinical Forms
			  ✓ Past Medical Hx
			  ✓ Past Surgical Conditions
			  ✓ Allergies & reactions
			  ✓ Family Medical Hx
			  ✓ Social Hx
			  ✓ Review of Systems
			  ✓ Chief Complaint / Problem
			  ✓ Additional complaints / Problems
			  ✓ PHQ-2/9

Why Health iPASS?

✓ **Ambulatory** Market Fit

✓ API based **Native Integrations** across 7 core EMR/PM Systems

✓ Powerful **Rules Based Engines** across Pre & Post Visit workflows

✓ Highly **Standardized Forms** with **Configurable** Customization and Partner Self Service Tools

✓ **Bi-directional Partner Integrations**

✓ **Quick partner onboarding** with Integration Playbook & Solution Design

✓ Developer Portal with full suite of open **Restful Services APIs**

✓ **HiP Marketplace** integrations with Trust Commerce, EMRs, and Patient Engagement Platforms

✓ Robust **Payment Acceptance** Capabilities:

Patient Mobile Check-in & Post Visit Payments

Tablet Check-in & Payments

Countertop & Phone Payments

Kiosk Check-in & Payments

Core PM/EMR Support Matrix

		Core PM/EMRs Supported																
		Epic		**Athena One**		**Athena Practice/ Centricity**		**NextGen**		**Nextech**		**Nextech Practice Plus**		**Veradigm Allscripts**		**Greenway Intergy**		**Greenway PrimeSuite**	
Integration Type	API Native	Community Connect		X				X		X		X		X		X		X	
	API Bridge					X													
	HL7	X																	
	Other																		
	Marketplace Partner	X		X		X		X		X		X		X		X		X	

		Epic		**Athena One**		**Athena Practice/ Centricity**		**NextGen**		**Nextech**		**Nextech Practice Plus**		**Veradigm Allscripts**		**Greenway Intergy**		**Greenway PrimeSuite**	
		Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback
Demographics		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Insurance Eligibility		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Cost Estimator		X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Intake Standard Forms		X	PDF	X	PDF	X	`	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF
Intake Clinical Forms		X	PDF	X	Discrete	X	PDF	X	Discrete	X	PDF	X	PDF	X	PDF	X	PDF	X	Discrete
Pre-Screeners (Encounter Docs)		X	PDF	X	Discrete	X	PDF	X	Discrete	X	PDF	X	PDF	X	PDF	X	PDF	X	Discrete
Appt Reminders		X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Post-Visit Surveys		X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF
Patient Portal		X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Pre Visit Payments		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Card on File		X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Counter Top Payments		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Payment Portal		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Advanced eBilling		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Payment Plans		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Text/Email to Pay		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Online Bill Pay		X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Scheduling		Q2 '25	Discrete	Q2 '25	Discrete	X	Queue	Q2 '25	Discrete	Q2 '25	Discrete	X	Queue	Q2 '25	Discrete	Q2 '25	Discrete	Q2 '25	Discrete
2 Way Chat		X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-

Row group labels (left margin): Products Supported · Express Check In · RCM Complete · Advanced eBilling · +

Other PM/EMR Support Matrix

Other PM/EMRs Supported

	eClinical Works (on prem)		eClinical Works (cloud)		MEDITECH		Cerner		Exscribe PM		eMDS		MedEvolve		ModMed		TBD
Integration Type																	
API Native					TBD Q4 '25		TBD 2026								Q1 '25		
API Bridge	X		Q2 '25						X		X		X				
HL7			X		Q1 '25		X										
Other																	
Marketplace Partner															X		

	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback	Supported	Writeback
Demographics	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Insurance Eligibility	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-	X	Discrete	X	-
Cost Estimator	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Intake Standard Forms	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF
Intake Clinical Forms	X	PDF	X	PDF	X	PDF	X	PDF	X	Discrete	X	PDF	X	PDF	X	PDF
Pre- Screeners	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF
Appt Reminders	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Post-Visit Surveys	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF	X	PDF
Advanced eBilling	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Patient Portal	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Pre Visit Payments	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Card on File	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-
Counter top Payments	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Payment Portal	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Advanced eBilling	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete
Payment Plans	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Text/Email to Pay	X	-	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Online Bill Pay	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	Discrete	X	-
Scheduling	Q2 '25	Discrete	Q2 '25	Discrete	Q2 '25	Discrete	Q2 '25	Discrete	X	Queue	X	Queue	X	Queue	Q2 '25	Discrete
2 way Chat	X	-	X	-	X	-	X	-	X	-	X	-	X	-	X	-

Row group labels: Products Supported — Express Check In — Advanced eBilling — RCM Complete — +

Why <u>Partner</u> with Health iPASS?

Revenue
Generate incremental recurring revenue from Health iPASS SAAS subscription fees **and** payments volume.

Product
Expand your Product offering decreasing client churn.

Functionality
Enhance your native SAAS product by adding Health iPASS features and functionality via a direct integration. *If applicable*

Access
Obtain access to most major EMR/PM platforms for product and payment enablement.

Partnership Options

Let us sell on your behalf
Referral Partner

Non-Integrated
- HiP Brand or White Label

Integrated
- HiP Brand or White Label

You sell new HIP products/services
Reseller Partner

Non-Integrated
- HiP Brand or White Label

Integrated
- HiP Brand or White Label

Integration Options

	White Label	Integration Methods	Implementations	Client Billing & Support	PM Writeback
Post Visit Billing	👍	API or Flat File	Partner or HIP	Partner or HIP	✓
Forms	👍	Flat file	HIP	Partner or HIP	✓
E-Check-in	👍	API	Partner or HIP	Partner or HIP	✓
Payments	👎	API	HIP	HIP	✓
Text/email Communications	👍	API	Partner or HIP	Partner or HIP	✗
Eligibility/ Cost Estimator	👍	API	Partner or HIP	Partner or HIP	✓
Patient Portal	👍	API	Partner or HIP	Partner or HIP	✓
eStatements	👍	API	Partner or HIP	Partner or HIP	✓

Developer Portal & Integration Support

Use Cases

Primary White Label Use Cases
- Dashboard (APIs or Embed)
- Intake workflows including forms
- Payment Workflows including billing
- Custom Use Cases

Now:
- Appt Info, Create Appt, Appt Search
- Intake URL
- Billing URL
- Forms URL

Coming Soon:
- Payments URL

Roadmap:
- Subscription Model (vs polling method)

RESTful APIs

Appointments
- Get an Appointment <GET>
- Get multiple Appointments <POST>
- Get Appointments via search <GET>
- Create an appointment <POST>
- Request appointment load <POST>

Bills
- Create bill for encounters <POST>

Documents
- Get a document <GET>

Integration Support

Integration Kick-Off
- Kick-off meeting with HiP Developer and applicable partner development team to discuss integration approach and answer any questions.

Ongoing Support
- Recurring meetings with partner & HiP Developer support rep

Jit bit Ticketing System
- Submit ticket requests and receive developer level support

Example Partnership Revenue Potential

Chart values by Year: Year 1: $129,600 · Year 2: $259,200 · Year 3: $388,800 · Year 4: $518,400 · Year 5: $648,000
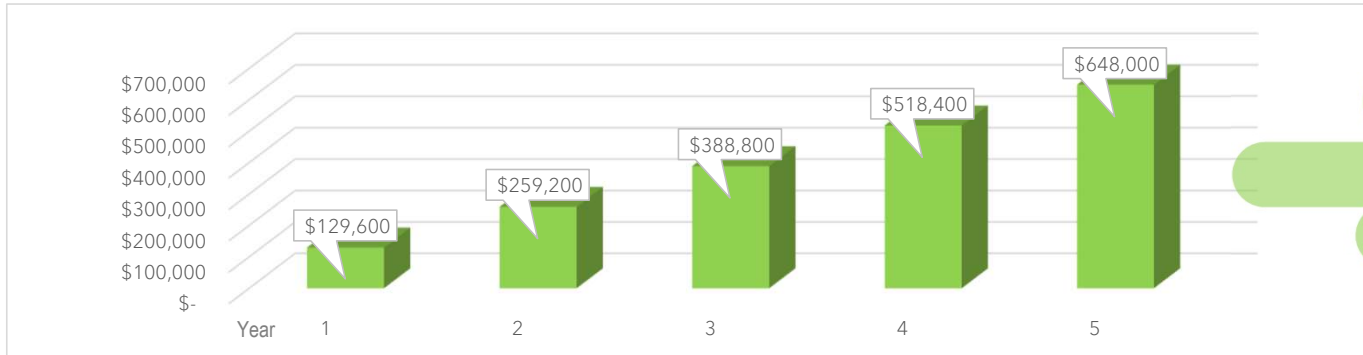
1 Client per Month
$2M over 5 Years

1 Client Assumptions

SAAS Assumptions
- $150 per provider
- 1 Client per month
- 50 providers per client
- 10% Revenue

Payment Assumptions
- $200k monthly volume
- $50 avg ticket
- Rate 0.75%
- 10% revenue share

	Single Client Profile	Year 1	Year 2	Year 3	Year 4	Year 5
Assumptions						
Clients Per Month	1	12	24	36	48	60
Locations	10	120	240	360	480	600
Provider per location	5	5	5	5	5	5
Total Provider	50	600	1,200	1,800	2,400	3,000
Average ticket / Payment Volume	$ 200,000	$ 28,800,000	$ 57,600,000	$ 86,400,000	$ 115,200,000	$ 144,000,000
Payment Interchange Markup	0.75%	0.75%	0.75%	0.75%	0.75%	0.75%
Revenue						
SaaS Partner Revenue	$ 750	$ 108,000	$ 216,000	$ 324,000	$ 432,000	$ 540,000
Payment Processing Revenue	$ 150	$ 21,600	$ 43,200	$ 64,800	$ 86,400	$ 108,000
Total Partner Revenue Potential	$ 900	$ 129,600	$ 259,200	$ 388,800	$ 518,400	$ 648,000

All calculations and information generated in this profit model are estimates only and are further dependent upon the accuracy and completeness of any assumptions. Health iPASS does not assume any responsibility for the accuracy or completeness of any information, calculations, formulas or other items contained herein.

Partnership Benefits Summary

1 — **Best in Class**
Refer or Resell the best Patient Engagement Solution *(period)*.

2 — **SAAS Revenue**
Unlock incremental high-margin recurring SAAS Revenue.

3 — **Payments Revenue**
Benefit from lucrative payment processing.

4 — **Reduce Client Churn**
Reduce client attrition by offering necessary patient engagement solutions before the competition does.

5 — **Sales Expertise**
Utilize Health iPASS' industry leading sales team or allow us to train your team.

6 — **Reduce time to Market**
Reduce time to market by leveraging a robust suite of PM/EMR integrations.

7 — **API Integration**
Easy API integration, with developer portal and developer support.

8 — **White Label**
Expand **YOUR** product offering to high value Health vertical clients.

9 — **Bank Agnostic**
Leverage a bank agnostic Patient Engagement solution; most are now owned by large banks.

10 — **Innovative & Nimble**
75% of our product roadmap is from feedback from partners and clients.

Security is Priority #1

Health iPASS with Sphere (our parent company) security and privacy are our top priorities. From our technical infrastructure, to Product development, to hiring and training, our DNA is protecting patient and cardholder data. We are transforming patient engagement with smart, simple and secure solutions that work within existing core business systems to optimize workflow, save time and reduce costs. Combining security software, a payments gateway and merchant software services, we are leading the evolution in integrated patient engagement and payment solutions by making it easier to securely connect and interact with patients.

HiTrust Certified

Card Brand PCI Compliant

EMV Certified

PCI Validated Point to Point Encryption

Tokenization

Partnership Next Steps

Decide on Partnership Model

(1)

- Referral or Reseller
- Integrated or non-integrated
- White label or HIP Label

Discuss Client Support approach

(2)

- Front-line
- Escalations
- Tech Support
- Billing

Discuss potential new business forecast

(3)

- Base portfolio and/or net new
- Est. Clients per Month
- Typical client profile

Execute Partnership Agreement

(4)

- HIP Reseller or Referral
- Sphere Referral

Solidify Integration Strategy *(if applicable)*

(5)

- Products to be integrated
- Data to be shared

Solidify GTM/Sales Strategy

(6)

- Lead Routing
- Pricing
- Products
- Sales Pitch

Finalize Process Flows

(7)

- Onboarding
- Implementation
- Ongoing Support
- Issue escalation

Complete Integration & Platform Configuration *(if applicable)*

(8)

- Who will connect to PM
- What information will be shared
- Who will handle SMS

End to End Testing

(9)

- Lead routing
- Client Setup
- Information Sharing
- Product testing

Launch ☺

(10)

Thank you!

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VP Client Success/Client Support – Christine Marag – christine.marag@healthipass.com

Integrated Partner Case Study

Overview

Who is Artera
Summary of who they are, the market they serve, and their product offering.

Solution
Overview of how Artera leveraged Health iPASS white label APIs to expand their core product.

Problem
Overview of challenges Artera was facing prior to integrating into Health iPASS

Results & Timeline
Impact to client churn and revenue

"Partnering with Health iPASS allowed us to quickly expand our product offering, increasing client stickiness while driving impactful incremental revenue" – Guillaume de Zwirek CEO Artera

Who We Are

artera

Artera's mission is to improve patient communications and customer service in healthcare.

Artera is a digital health company that helps healthcare providers communicate with patients through a variety of channels. Artera's platform integrates with a healthcare organization's tech stack, EHRs, and third-party vendors to unify digital communications into a patient's preferred channel. These channels include text messaging, email, IVR, and webchat, and are available in more than 109 languages.

Artera's Marketplace connects patients with more than 50 digital health vendors across categories such as scheduling, intake, patient education, and billing. Artera also has a Message API (MAPI) that allows third-party systems to send messages directly to patients.

More than 700 healthcare systems and federal agencies use Artera to facilitate about 2.2 billion messages each year, reaching over 100 million patients

Problem

Although Artera is a leading healthcare vertical message provider, they found they were losing clients to full Patient Engagement Solution providers who could provider similar messaging functionality along with additional tools, such as electronic check-in, electronic forms, patient collections, and electronic statements.

Solution

Artera integrated with Health iPASS' full set of APIs, allowing Artera to white label and offer additional Patient Engagement products, such as electronic intake, billing and payments acceptance to base clients and net new clients.

Results

As a result of Artera's new full Patient Engagement solution, Artera was not only able to **decrease Client churn by 30%,** but was also able to generate significant incremental revenue through the new product offering, increasing overall margins by **more than 20%.**

TIMELINE

Began discussions with Health iPASS

Dec 2023

Executed Reseller Agreement with Health iPASS

Jan 2024

Started the Integration into Health iPASS APIs

Mar 2024

Implemented first client on new Artera branded Patient Engagement Solution

June 2024