

proactive **md**

Lafayette School Corp

2025 Annual Business Review



Executive Summary

for Lafayette School Corp

2025 Annual Report

Engagement

Employee Engagement

51%

QoQ 0.24% YoY 1.83%



Overall Engagement

42%

QoQ -0.39% YoY 2.24%



Chronic Condition Engagement

Diabetes Engagement

64%

QoQ 0.75% YoY -5.05%



Hyperlipidemia Eng

71%

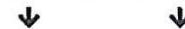
QoQ 1.87% YoY 0.19%



Hypertension Eng

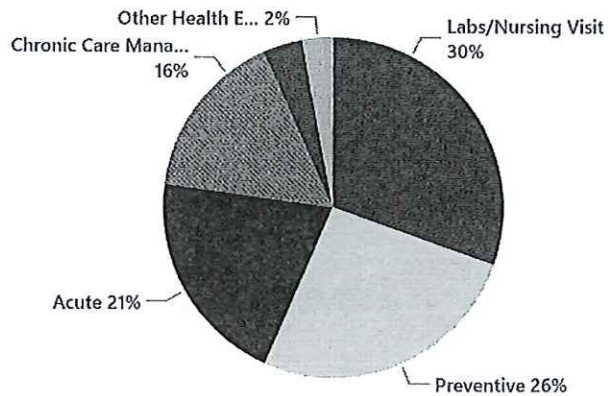
64%

QoQ -0.28% YoY -2.08%



Utilization & Clinic Care

Services by Category



Services

7353

Visits

2247

3.27

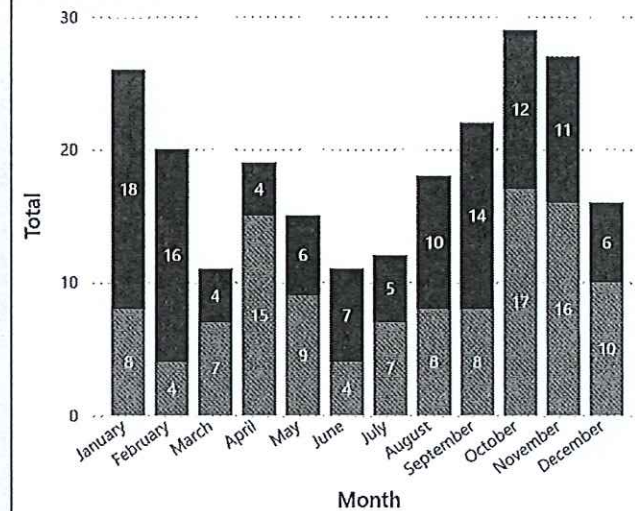
Services Per Visit

82

No Shows

New Patients

Year ● 2024 ● 2025



Executive Summary

for Lafayette School Corp

2025 Annual Report

Referrals		Labs & Meds	
266 Specialty Referrals	Referral Rate 11.84% QoQ YoY -2.40% ↓ -0.20% ↓	5,069 Total Labs Drawn	5,539 Total Meds Dispensed

Patient Satisfaction																										
85 Net Promoter Score	637 Total Responses	Total Responses by NPS <table border="1"> <caption>Total Responses by NPS</caption> <thead> <tr> <th>Net Promoter Score</th> <th>Responses</th> </tr> </thead> <tbody> <tr><td>0</td><td>0</td></tr> <tr><td>1</td><td>0</td></tr> <tr><td>2</td><td>0</td></tr> <tr><td>3</td><td>0</td></tr> <tr><td>4</td><td>0</td></tr> <tr><td>5</td><td>0</td></tr> <tr><td>6</td><td>0</td></tr> <tr><td>7</td><td>19</td></tr> <tr><td>8</td><td>42</td></tr> <tr><td>9</td><td>66</td></tr> <tr><td>10</td><td>492</td></tr> </tbody> </table>	Net Promoter Score	Responses	0	0	1	0	2	0	3	0	4	0	5	0	6	0	7	19	8	42	9	66	10	492
Net Promoter Score	Responses																									
0	0																									
1	0																									
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9	66																									
10	492																									

Return on Investment																				
ROI 1.20 QoQ YoY -0.01 ↓ -0.05 ↓	\$202.2K Net Savings	ROI by Quarter <table border="1"> <caption>ROI by Quarter</caption> <thead> <tr> <th>Quarter</th> <th>ROI</th> </tr> </thead> <tbody> <tr><td>1</td><td>1.25</td></tr> <tr><td>2</td><td>1.19</td></tr> <tr><td>3</td><td>1.12</td></tr> <tr><td>4</td><td>1.20</td></tr> <tr><td>5</td><td>1.20</td></tr> <tr><td>6</td><td>1.18</td></tr> <tr><td>7</td><td>1.16</td></tr> <tr><td>8</td><td>1.15</td></tr> </tbody> </table>	Quarter	ROI	1	1.25	2	1.19	3	1.12	4	1.20	5	1.20	6	1.18	7	1.16	8	1.15
Quarter	ROI																			
1	1.25																			
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6	1.18																			
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8	1.15																			

Glossary of Terms

Engagement: An engaged member is one who has had one or more visits with a Proactive MD provider (Physician or NP) in the previous 12 months.

Chronic Condition Engagement: Chronic conditions are diagnosed based on documentation within the PMD medical record or by diagnosis codes identified in the claims data

New Patient: An individual who has attended a visit with Proactive MD for the first time, regardless of visit type

Services: includes any of the numerous CPT and/or ICD codes that are indicative of any service or procedure being performed during a patient encounter, typically to achieve a specific objective that will manage or improve a member's health

Services Per Visit: Average number of services provided during a visit in the Health Center
 • Formula: Number of Services / Number of Kept Appointments

YoY Comparison: Comparative metric to prior calendar year (Q4 2024 to Q4 2025 comparison)

QoQ Comparison: Comparative metric to prior calendar quarter (Q3 to Q4 comparison)

Referral Rate: Average number of referrals provided during a visit in the Health Center
 • Formula: Number of Referrals / Number of Kept Appointments

ROI: Return on Investment

• Formula: (Service Savings + Chronic Condition Savings) / Program Costs

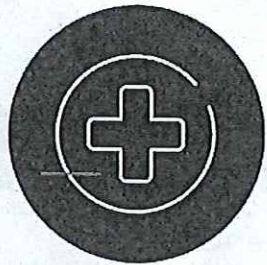
Net Promoter Score: reflects members' responses to a single key question: How likely would you be to recommend the Proactive MD Health Center to a friend or colleague?

Score Breakdown:

- Promoter = Scores of 9-10
- Passive = Scores of 7-8
- Detractor = Scores below 7

Formula: (Promoter - Detractor) / Total Responses

3



Engagement & Utilization

Engagement & Utilization

for Lafayette School Corp



686

Unique Patients

51%

Employee Engagement

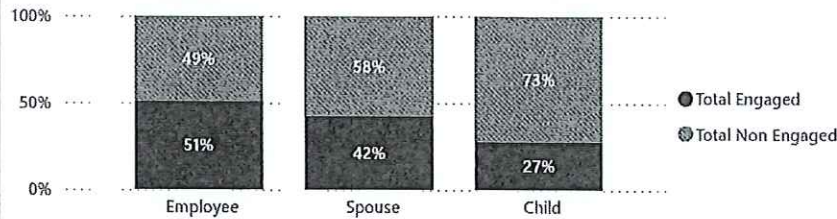
113

New Patients

Member Engagement

for Lafayette School Corp

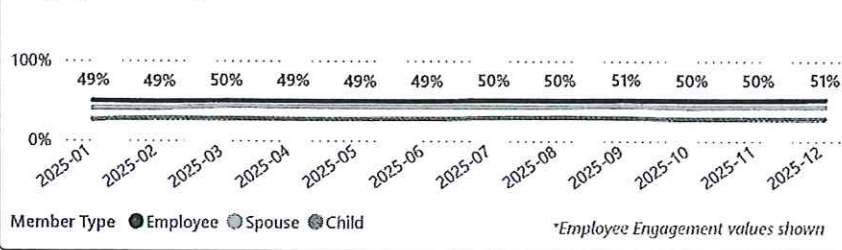
Current Engagement by Member Type



Current Engagement Counts

Member Type	Total Engaged	Total Non Engaged	Total Enrollment
Employee	420	404	824
Spouse	96	130	226
Child	138	367	505
Total	654	901	1,555

Engagement by Month



New Patient Count

Month	Total
January	18
February	16
March	4
April	4
May	6
June	7
July	5
August	10
September	14
October	12
November	11
December	6
Total	113

About This Measure

An engaged member is one who has had one or more visits with a Proactive MD provider (Physician or NP) in the previous 12 months. Engagement lies at the heart of our Advanced Primary Care model; once a member is engaged, we can deliver high-quality primary care, assist the member with coordination of their Care Beyond the Walls™, and improve their health trajectory.

A high level of engagement allows our care team to help prevent, diagnose, or treat the types of conditions that can result in absenteeism and decreased productivity (like diabetes or heart disease). Our team also works with patients to ensure they receive critical preventive care to catch potentially life-threatening conditions early.

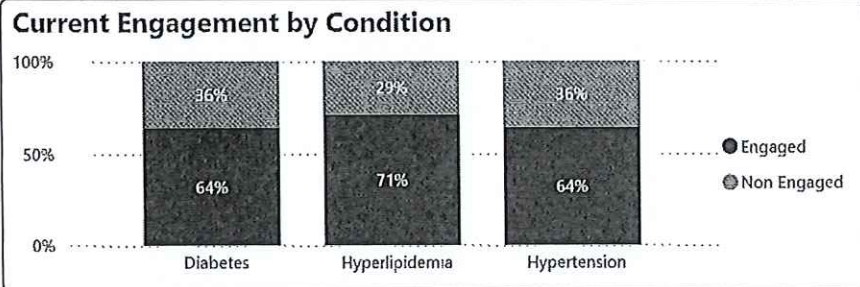
What are the numbers telling us?

The industry average for onsite clinics is 30 - 40% of employees engaged. As a note, we are calculating engagement at an individual member level for currently active members using the latest eligibility files. This method of calculation is more precise for capturing engagement.

6

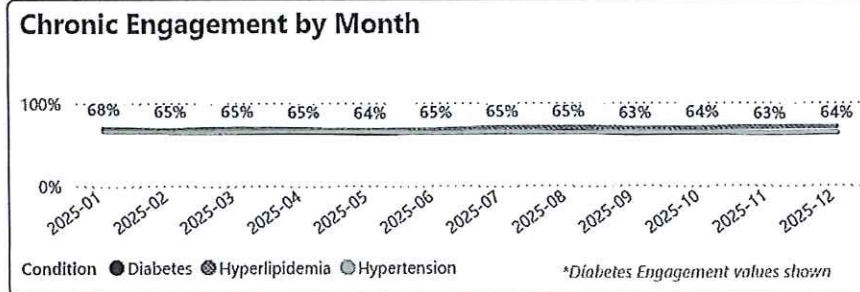
Chronic Condition Engagement

for Lafayette School Corp



Current Chronic Engagement Counts

Condition	Engaged	Non Engaged	Total
Diabetes	63	36	99
Hyperlipidemia	161	66	227
Hypertension	132	74	206
Total	356	176	532



About This Measure

This measure shows what percentage of employees in each chronic disease risk category are engaged with the Health Center.

Patients with chronic conditions today are the high-cost claimants of tomorrow. More importantly, they are also at the highest risk for life-threatening complications like heart attacks and strokes. By actively engaging these patients, we are able to help them manage their conditions to improve their health and prevent future complications.

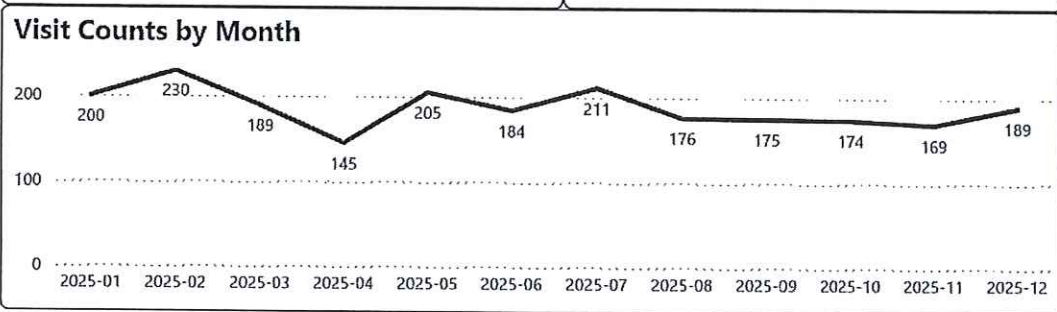
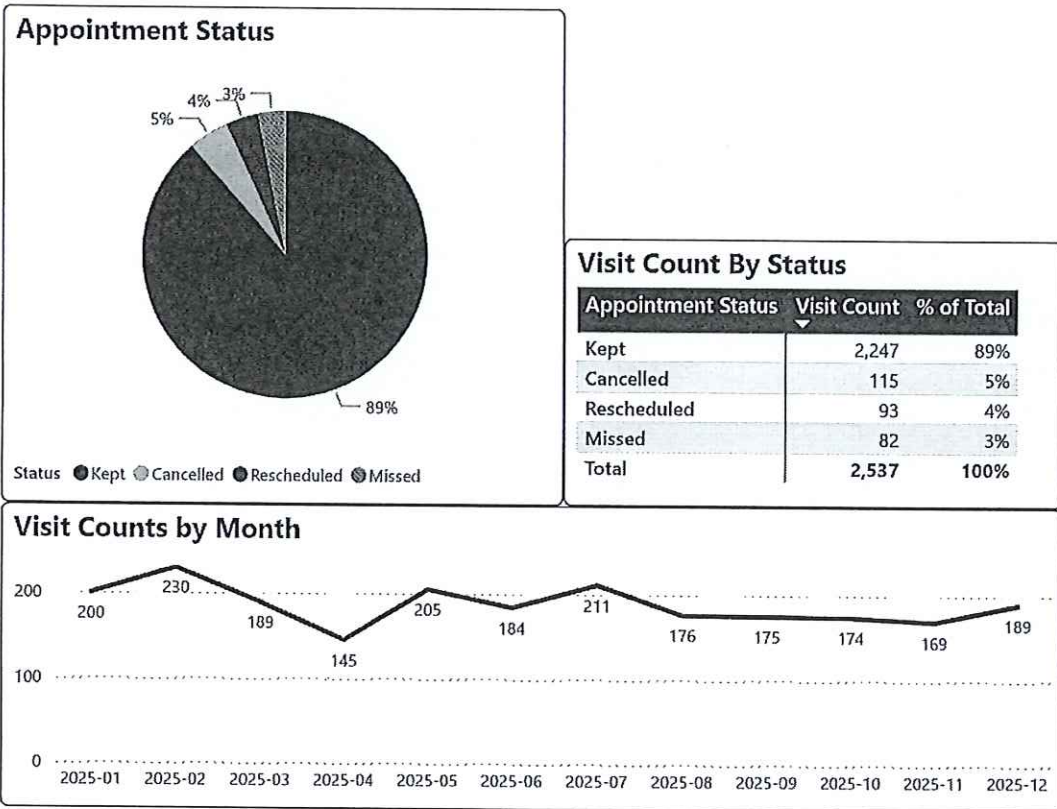
What are the numbers telling us?

We have engaged on average 67% of employees with hypertension (high blood pressure), hyperlipidemia (high cholesterol), and/or diabetes.

*Members with multiple chronic conditions will be counted in multiple buckets (once per chronic condition)

Visit Count & Status

for Lafayette School Corp



About This Measure

The chart shows the percentage of appointments that were kept, those that were canceled before the time of the appointment, and those that were missed when the patient did not show up to their appointment.

We monitor show rates closely to help us schedule our clinic efficiently and ensure access and availability of appointments to all patients seeking care. When we see high rates of missed or cancelled appointments, we look for opportunities to adjust scheduling practices to ensure appointments can be scheduled at convenient times for patients and will be utilized.

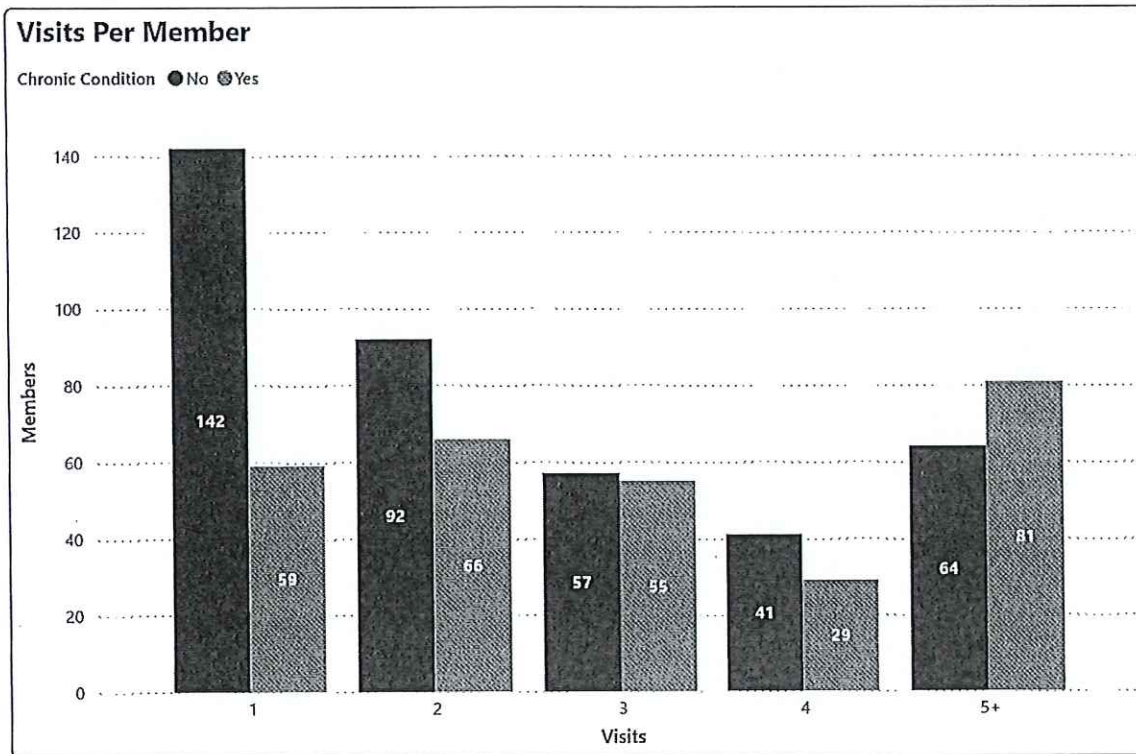
What are the numbers telling us?

The national average kept appointment rate is 80% among primary care practices. A higher kept appointment rate suggests that the Health Center's hours of operation are convenient for members.

8

Visits Per Member

for Lafayette School Corp



About This Measure

This measure evaluates how many times a member enters the Health Center to receive one or more services during the previous quarter. It is a good measure to identify members' Health Center utilization patterns. Having beyond 1 visit can indicate the success of comprehensive primary care as many high-risk patients' care plans require multiple provider visits to effectively manage chronic conditions.



Visit Heat Map

for Lafayette School Corp

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7 AM	60	91	78	55	67
8 AM	73	83	75	56	53
9 AM	60	68	68	46	58
10 AM	69	46	48	33	46
11 AM	41	40	36	29	43
12 PM	4	5	1		5
1 PM	38	23		30	29
2 PM	53	34	50	43	38
3 PM	72	47	39	48	42
4 PM	64	41	13	38	24
5 PM	15	18		11	
	549	496	408	389	405

About This Measure

This chart shows the number of visits over the past quarter by day of the week and time. We monitor trends in clinic utilization to help us manage our scheduling practices to minimize wait times and increase access for patients at the times that work best for their needs.

What are the numbers telling us?

Patient appointments are well-balanced across hours and days of operation. Our care teams have also provided a number of before or after-hours services to patients with urgent concerns or questions.

Health Center Hours:

MON: 7:00am-6:00pm

TUE: 7:00am-6:00pm

WED: 7:00am-5:00pm

THU: 7:00am-6:00pm

FRI: 7:00am-5:00pm

	Monday 7:00am-6:00pm	Tuesday 7:00am-6:00pm	Wednesday 7:00am-5:00pm	Thursday 7:00am-6:00pm	Friday 7:00am-5:00pm
Dr. Juliana Gaeta, Site Leader	8:00-5:00 12:00 Lunch	OFF	7:00-4:00 12:00 Lunch	9:00-6:00 12:00 Lunch	8:00-5:00 12:00 Lunch
Christina Martinez, FNP	7:00-4:00 1:00 Lunch	7:00-6:00 1:00 Lunch	7:00-4:00 12:00 Lunch	OFF	7:00-4:00 1:00 Lunch
Kerri Dexter, FNP	8:00-6:00 12:30 Lunch	8:00-5:00 12:30 Lunch	8:00-5:00 12:00 Lunch	7:00-5:00 12:30 Lunch	OFF



Clinical Care

Clinical Care

for Lafayette School Corp

"I have many patients tell me they chose to establish with our clinic because one of their peers told them how great it is. I have also had patients specifically ask to see me because one of their peers told them to request me because I listen, I take time with them, and I make them feel valued, appreciated, or well cared for."

"Several patients have thanked me for listening to them. That's the biggest thing that comes to my mind, is the many, many people who have said "my provider from (insert name here at some other facility)" never listened, or they made me feel like they just wanted to prescribe me drugs and get out, but you actually listened to me."

7,353

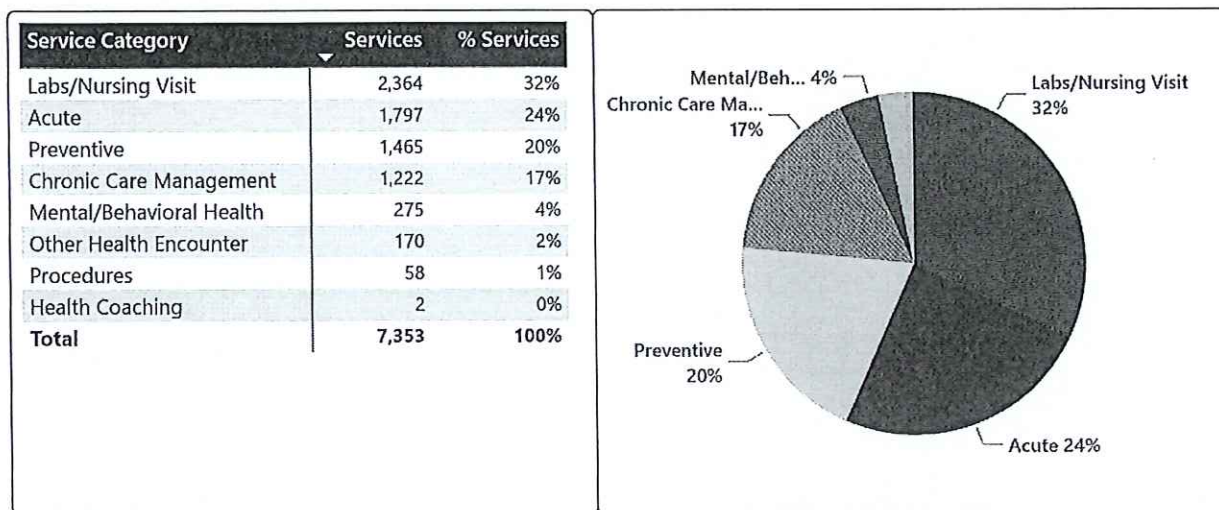
Services Provided

3.27

Services Per Visit

Health Center Services

for Lafayette School Corp



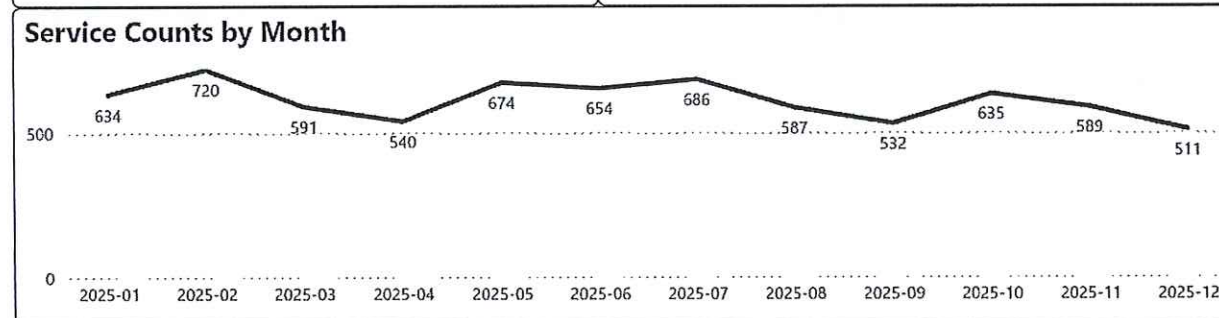
About This Measure

A service is an encounter with a member of the Proactive MD care team intended to achieve a specific objective that will manage or improve that member's health, whether it's diagnosing and treating a sinus infection, providing diabetes management coaching, or administering a flu shot.

If services received are distributed across service types, the Health Center is successfully acting as the member population's medical home and is able to improve their overall health.

What are the numbers telling us?

By actively engaging with patients, we are able to help them manage their conditions to improve their health and prevent future complications.



Outbound Referrals

for Lafayette School Corp

About This Measure

These measures show the number of referrals to a specialist by specialty.

Under Proactive MD's broad scope primary care model, our providers meet as many of each member's medical needs as they can within the Health Center, providing clinically excellent care that is more convenient for the member.

What are the numbers telling us?

The national average referral rate is 15-20%. Specialty referrals are for visits associated with conditions or complications of conditions falling outside the scope of a primary care provider.

**Excludes referrals for colon cancer and breast cancer screening*

266

Specialty Referrals

11.84%

Specialty Referral Rate

239

Provider Orders

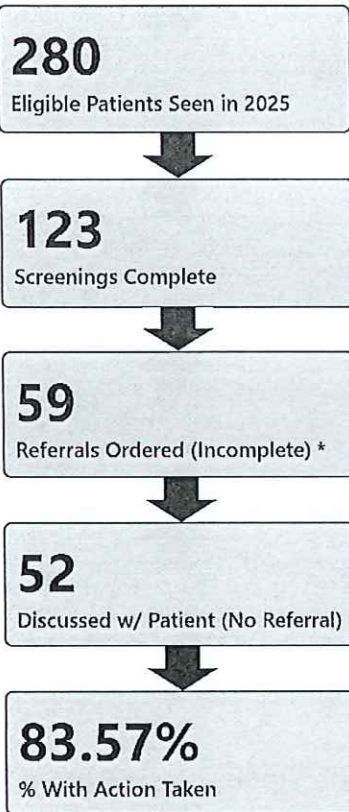
Top Specialties	Referral Count
Dermatologist	23
Physical Therapist	22
Orthopedic Surgeon	20
Gastroenterologist	19
Cardiologist	16
Urologist	16
General Surgeon	12
Podiatrist	11
Allergist	9
Ent Surgery	9
Pulmonologist	8
Neurologist	7
Orthopedic Spine Surgeon	7
Otolaryngologist	6
Hand Surgeon	5
Audiologist	4
Endocrinology	4
Gynecologist	4
Hematologist/Oncologist	4
Pain Management	4
Sleep Medicine	4

Top Provider Orders	Referral Count
X-Ray	85
Ultrasound	65
CT	39
MRI	39
Sleep Study	9
Nuclear Medicine	2

14

Colon Cancer Screening

for Lafayette School Corp



Total Referrals Ordered in 2025

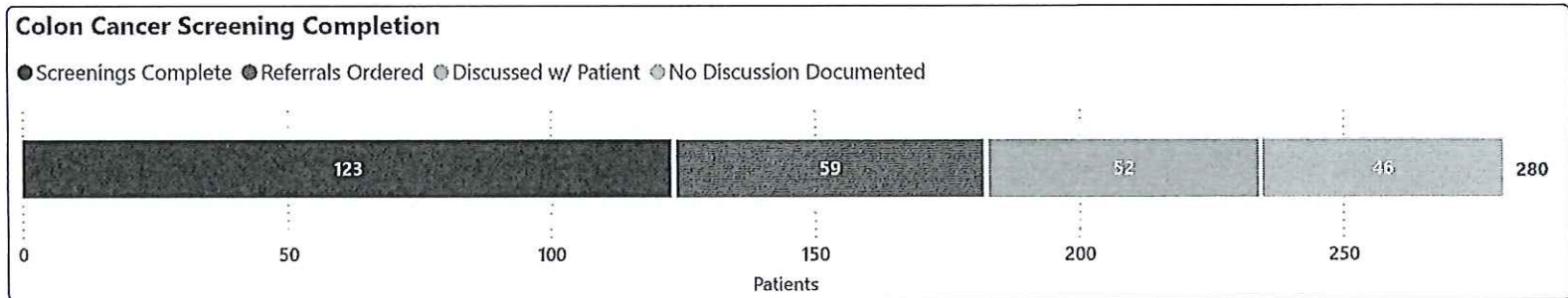
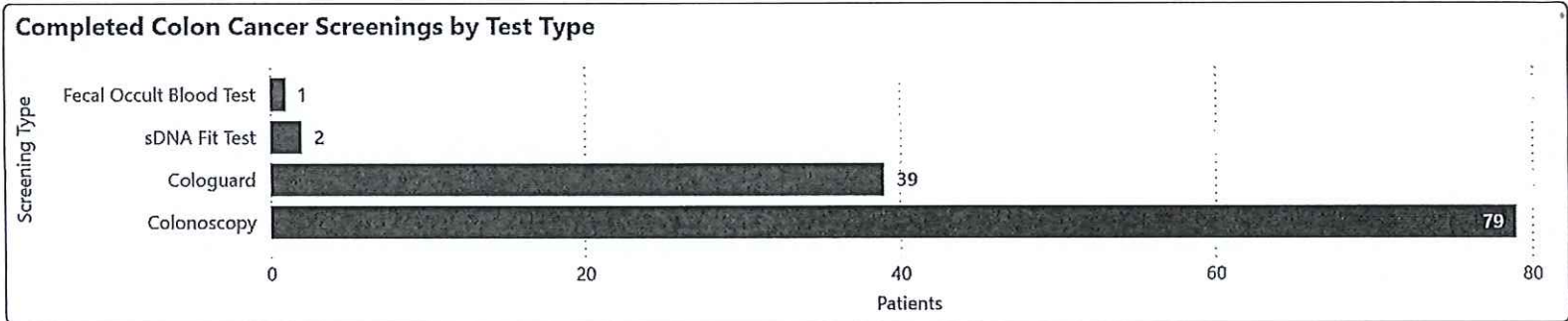
Screening type	Q1	Q2	Q3	Q4	Total
Colofit		1			1
Cologuard	14	16	22	27	79
Colonoscopy	24	28	24	42	118
Total	38	45	46	69	198

About This Measure

Preventive cancer screening is important in helping detect cancer at an early stage, before symptoms appear. When cancer is found early, it may be easier to treat or cure.

At Proactive MD, we follow HEDIS guidelines for colon cancer screening, established by the National Committee for Quality Assurance (NCQA), which suggests that men and women between 45 and 74 years of age receive one of the following colon cancer screening options:

- Colonoscopy every 10 years, or
- sDNA FIT Test or Cologuard every 3 years, or
- CT Colonography or Flexible Sigmoidoscopy every 5 years, or
- Fecal Occult Blood Test every 1 year

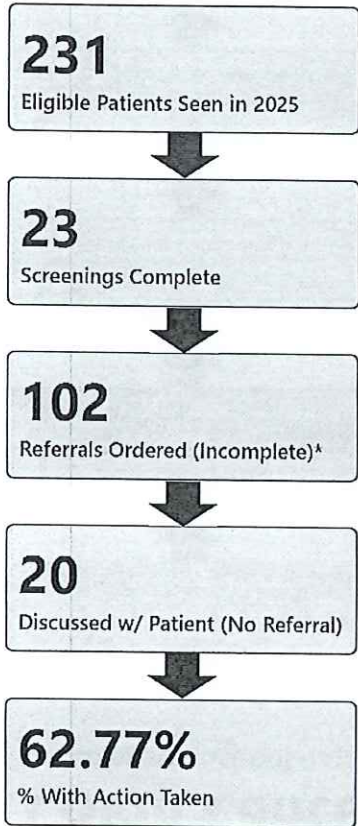


*12 months look back

15

Breast Cancer Screening

for Lafayette School Corp



Total Referrals Ordered in 2025

Screening Type	Q1	Q2	Q3	Q4	Total
Mammogram	23	36	52	53	164

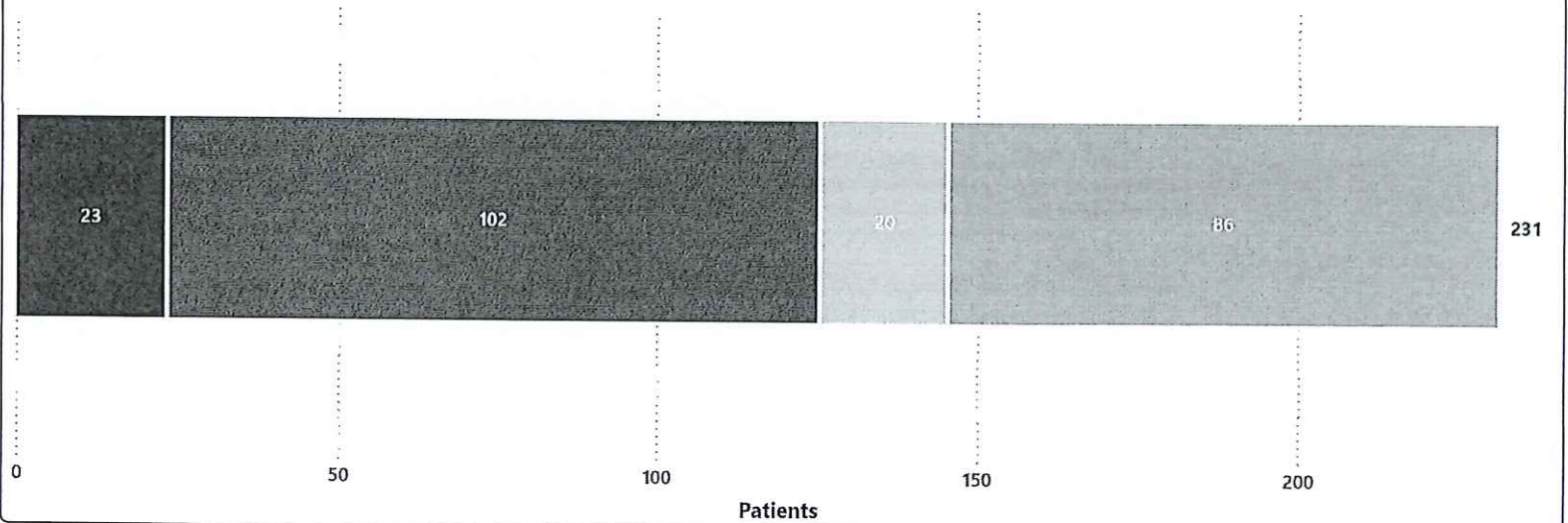
About This Measure

Preventive cancer screening is important in helping detect cancer at an early stage, before symptoms appear. When cancer is found early, it may be easier to treat or cure.

At Proactive MD, we follow HEDIS guidelines for breast cancer screening, established by the National Committee for Quality Assurance (NCQA), which suggests that women between 40 and 74 years of age should receive a mammogram to screen for breast cancer every 27 months.

Breast Cancer Screening Completion

● Screening Complete ● Referral Ordered ● Discussed w/ Patient ● No Discussion Documented



*12 months look back

16

Health Center Survey Responses

for Lafayette School Corp

Net Promoter Score (Rolling 12 Months)

Promoter	Passive	Detractor	Total NPS Responses	Total NPS Score
512	54	15	581	86

Annual

Net Promoter Score

85

Total Responses: **637** Completion Rate: **35.57%**

NPS Scores By Month

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2024	86	93	83	100	100	50	100	100	100	100	92	67
2025	76	89	94	91	89	87	82	80	88	79	89	71

About This Measure

The Net Promoter Score, or NPS, reflects members' responses to a single key question: how likely is it that you would recommend the Proactive MD Health Center to a friend or colleague? The score represents the percentage of respondents who are "Promoters" (answered with a 9 or 10) minus the percentage of respondents who are "Detractors" (any answer below 7). NPS is a widely used measure of customer satisfaction, not just within healthcare, but across a diverse spectrum of industries.

While many businesses are satisfied with scores above 40, Proactive MD sets a high goal standard of 80. In addition to the NPS survey, our service delivery and care teams continuously seek and respond to patient feedback and concerns in an effort to provide a positive primary care experience that is unmatched in the community.

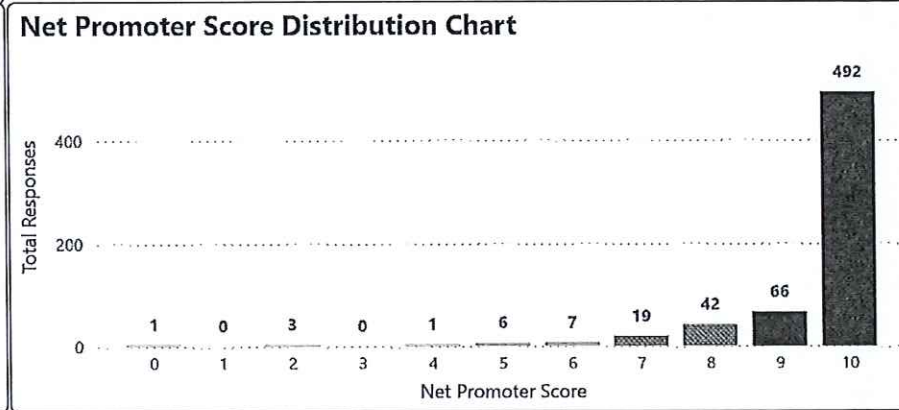
What are the numbers telling us?

The national average NPS score for primary care providers is around 80 and the average for healthcare in general is around 40.

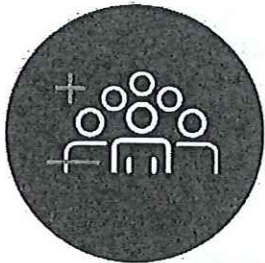
Response Detail

4.67 Appointment Availability	4.72 Wait Time	4.89 Privacy
4.84 Provider Explanations	4.87 Provider Attention	4.77 Care Coordination
4.89 Staff Friendliness	4.91 Facility	98% Return for Care

*Average response score rated from 1-Poor to 5-Great



17



Population Health

Population Health

for Lafayette School Corp

“Makynzie was incredible! She got me on the first try, she educated me on everything I asked! She was professional and friendly, what a great RN! Her communication was phenomenal!”

“Dr. Gaeta is outstanding and should be commended for excellent patient interactions, creative thinking, and compassionate listening. The nurses were also outstanding.”

“Christina, my nurse practitioner, was super helpful and informative. I've had the same mood and digestive issues for several years and they had always been brushed off as hormonal issues. Christina listened to me and addressed my problems, I feel like I had the most productive doctor's office visit I've ever had with her.”

48

Members with Reduced
Diabetes Risk Level

41

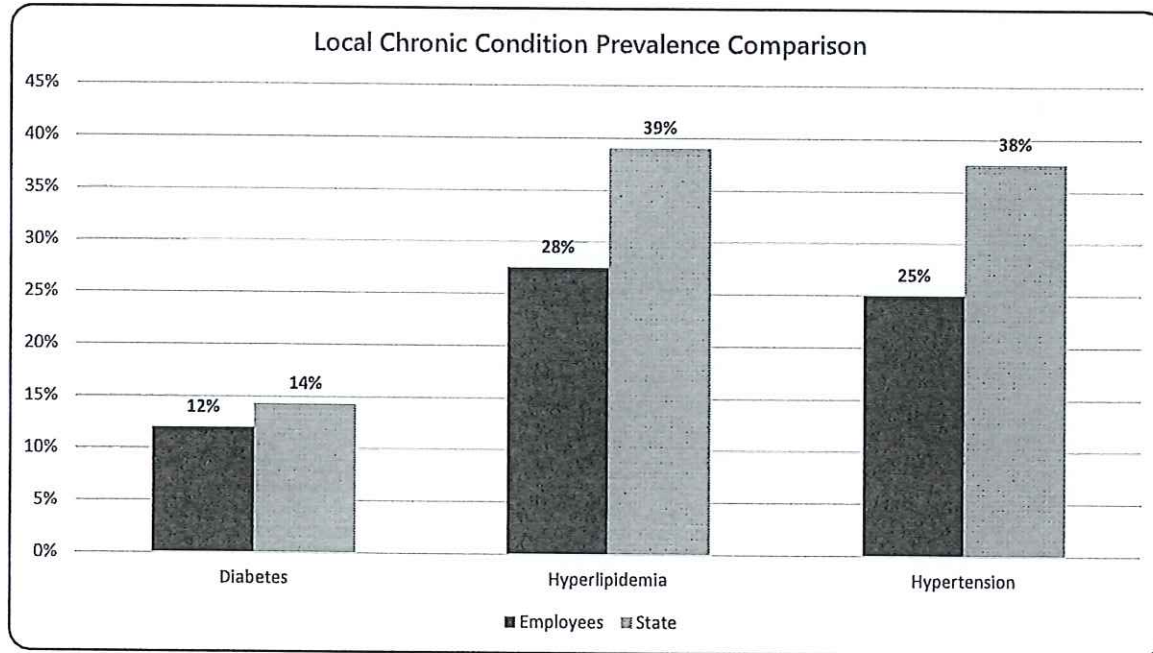
Members with Reduced
Hyperlipidemia Risk Level

106

Members with Reduced
Hypertension Risk Level

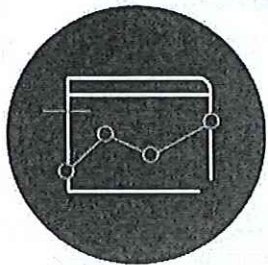
Chronic Condition Prevalence Ranking

for Lafayette School Corp



America's Health Rankings by United Healthcare Foundation: <https://www.americashealthrankings.org/explore/measures>

20



Return on Investment

Return on Investment

for Lafayette School Corp

“From Colleen's friendly voice on the other end of the phone line when you need to schedule or organize something, she is always on point and so kind about it. She is simply wonderful. I am also thankful for Dr. Gaeta and my family is also thankful for the nurse practitioner that they see. Dr. Gaeta has been patient kind actually listened and so far has given very effective evaluation and treatment plan advice that we both agree on. As a patient it is likely I would follow Dr. Gaeta along with my family wherever she were to go. Truly thankful for the medical staff there.”

“I am experiencing trauma from my ex-wife's condition, Christina has been very helpful. I really feel like she cares about her clients. The whole staff has been responsive, friendly and helpful.”

\$202,178

Net savings

1.20

ROI

Health Center Service Savings

for Lafayette School Corp

Category	Services	Savings
Labs/Nursing Visit	2,364	\$19,578
Acute	1,797	\$307,586
Preventive	1,465	\$93,419
Chronic Care Management	1,222	\$209,165
Mental/Behavioral Health	275	\$47,089
Other Health Encounter	170	\$20,848
Procedures	58	\$6,779
Health Coaching	2	\$105
Total	7,353	\$704,569

Category	Services	Savings
Labs	5,069	\$61,044
Meds	5,539	\$86,262
Total	10,608	\$147,306

Total Services	Total Savings
17,961	\$851,876

About This Measure

This measure shows the value of the services performed in the Health Center to the average fair market value (FMV) for that service in the community, totaled by service category. The FMV calculation PMD uses is 1.55 times the Medicare service value for services and pass-thru cost for Meds & Labs.

The Proactive MD Health Center is not only a more cost-effective option than typical community providers; it is also the highest quality care available. Our Advanced Primary Care model also links patients to important preventive care and chronic condition management, saving money in both the short and long term.

What are the numbers telling us?

Diverting care to the Health Center saved the plan an estimated \$851,876.

Chronic Condition Engagement Savings

for Lafayette School Corp

Condition	Non Engaged Cost	Engaged Cost	Savings per Member	Engaged Members	Annual Savings
Diabetes	\$24,804	\$20,225	\$2,440	63	\$153,690
Hypertension	\$19,975	\$16,384	\$1,480	90	\$133,218
Hyperlipidemia	\$16,729	\$13,664	\$1,516	66	\$100,032

Total Savings
\$386,940

About This Measure

We compared the average annual medical cost of employees diagnosed with a chronic condition who were engaged with the Health Center against those who were not engaged to show the estimated savings from Proactive MD's management of chronic illness.

Members with chronic disease managed within the Health Center end up requiring less downstream care for complications of their disease, such as ER visits or specialty care. This measure demonstrates the return on investment of improving members' health.

*Members fall into a single DX for savings calculations. Engaged is determined by a minimum of 1 provider visit in last 12 months.

*The savings dollar amounts are determined by PMD's book of business claims data for the previous rolling 12 months.

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Net Savings & ROI

for Lafayette School Corp

\$851,876

Service Savings

+ \$386,940

Chronic Condition Savings

- \$1,036,638

Program Costs

About This Measure

This measure shows the estimated return on investment from the Health Center.

It can be difficult to demonstrate the value of operating an employer-sponsored primary care center, but when translated into dollars, the savings generated not only by diverting care, but by avoiding downstream costs by improving the health of the member population, show the incredible value of the Proactive MD model.

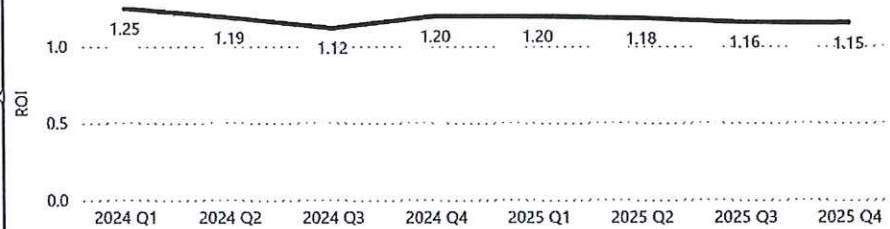
\$202,178

Net Savings

1.20

ROI

ROI by Quarter



25

HIGHLIGHTS

Proactive Rx Program Overview

Program Launched	02/02/2026
Est Annual Rx Savings	\$1,298,630
Annual Proactive Rx cost	\$46,650
Identified Patients	71
Identified Medication Claims	90

Q1 Results

Within less than two months of the program launch, the following savings and utilization rates have been achieved.

With continued outreach to increase program utilization and savings, these numbers are expected to significantly increase for the next quarter.

\$164,236.91
annualized savings

12.6% of savings
recognized

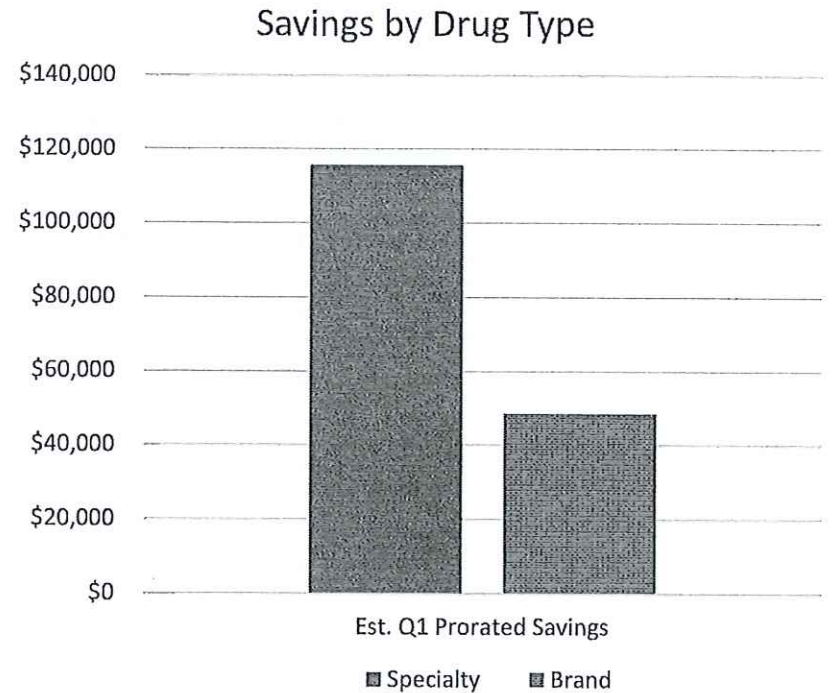
9 patients enrolled

12.7% of eligible
patients enrolled

BRAND VS SPECIALTY

Medication Breakdown

	Specialty	Brand
Identified	12	78
Enrolled	2	12
Declined	0	1
Unreached	10	65



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Forward Focus

- Proactive Rx Kicked off February 2, 2026
- Utilization and phone monitoring
 - Phone log is sent to me each month to monitor call volume.
 - Same day acute appointment tracker.
 - Scheduling efficiencies.
- Phreesia Phone Assistance Discussion
- Fully Staffed Health Center
- Onsite health center promotion
 - Dr. Gaeta and Makynzie would like to do another round of onsite presentations.
- Mailers were sent out January 2026



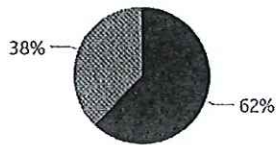
Appendix

Engagement Demographics

for Lafayette School Corp

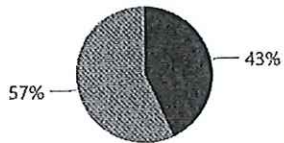
Engaged by Gender

● Female ● Male



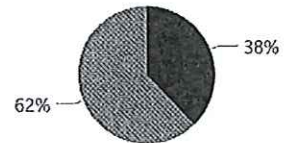
Female Engagement

● Engaged ● Non Engaged

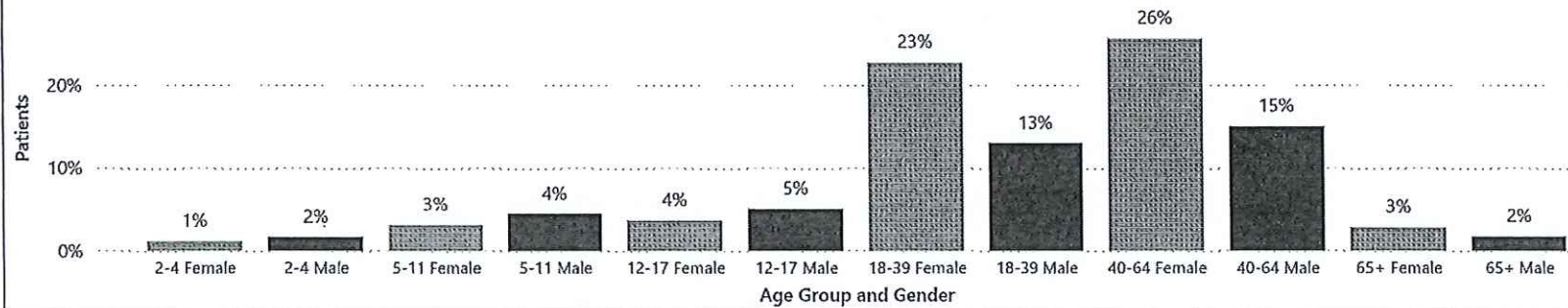


Male Engagement

● Engaged ● Non Engaged

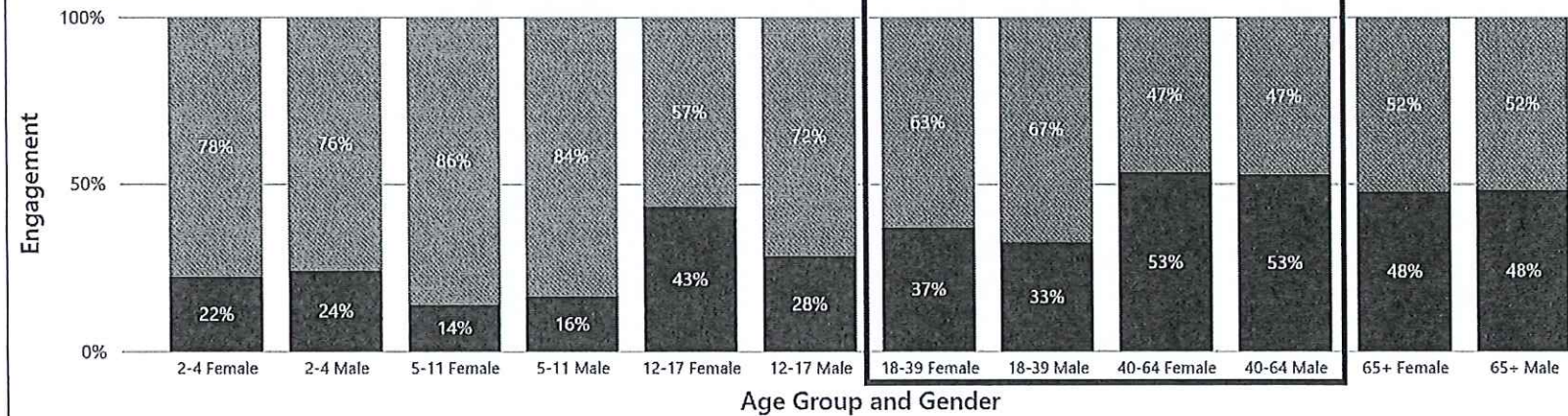


Patient Distribution by Age Group and Gender - % of Total Eligible Population



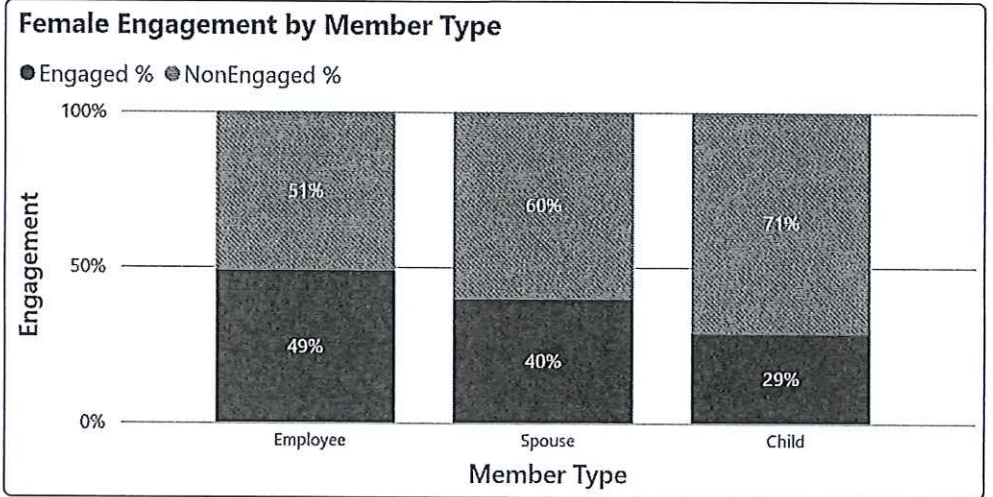
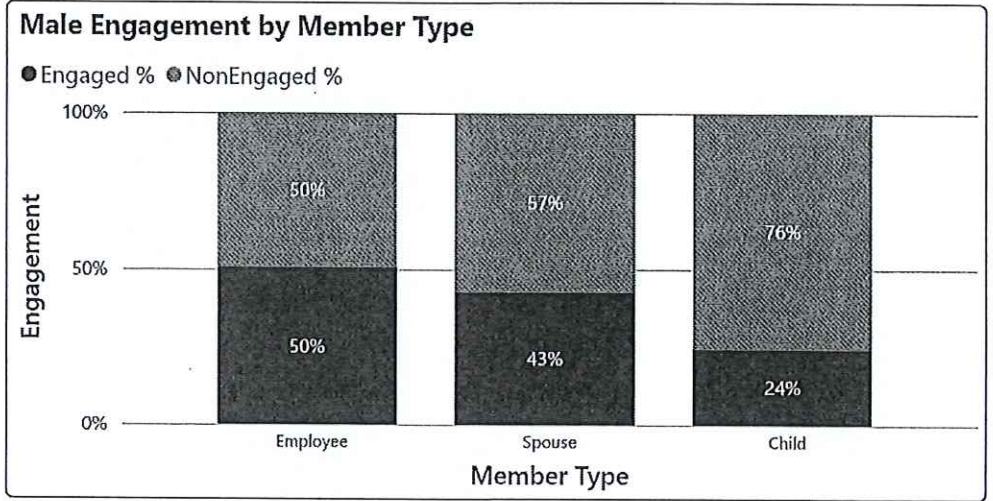
Engagement by Age Group and Gender

● Engaged ● Non Engaged



Engagement Demographics

for Lafayette School Corp



No Show & Cancellation Heat Maps

for Lafayette School Corp

About This Measure

Patient no-shows are long-standing issues affecting resource utilization and posing risks to the quality of healthcare services. Factors such as patient behavior, patients' financial situation, environmental factors, and scheduling policy can impact no-show rates.

What are the numbers telling us?

High no-show rates can result in longer wait times for appointments and higher urgent care and emergency room visits. By monitoring trends in patient no-shows, Health Centers can identify barriers within the care continuum and provide opportunities to increase patient adherence.

No Show Heat Map

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7 AM	4	9	3	3	4
8 AM	4	3	3	3	3
9 AM		2		2	1
10 AM	1	1	2		2
11 AM	1	1		1	1
1 PM		1			1
2 PM	3	1		3	
3 PM	1	3	2	5	2
4 PM	3		1		1
5 PM	1				
	18	21	11	17	15

Cancellation Heat Map

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7 AM	1	6	1	4	3
8 AM	4	6	2	2	1
9 AM	5	3	2		1
10 AM	4	5	1	1	1
11 AM	3	3		1	1
1 PM	3	1	2	1	1
2 PM	5	2	4	1	
3 PM	7	3	2	6	
4 PM	4	1	3	1	4
5 PM		2		1	
	36	32	17	18	12

Visit Heat Map - Nurse/Provider Visit Breakdown

for Lafayette School Corp

Provider Visits

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7 AM	22	36	27	19	35
8 AM	60	38	48	36	39
9 AM	51	51	52	33	49
10 AM	56	32	44	28	40
11 AM	40	35	24	23	35
12 PM	4	5	1		5
1 PM	32	17		24	23
2 PM	50	28	46	39	38
3 PM	64	39	37	32	35
4 PM	53	35	10	31	19
5 PM	15	18		11	
	447	334	289	276	318

Nurse Visits

Time	Monday	Tuesday	Wednesday	Thursday	Friday
7 AM	38	55	51	36	32
8 AM	13	45	27	20	14
9 AM	9	17	16	13	9
10 AM	13	14	4	5	6
11 AM	1	5	12	6	8
1 PM	6	6		6	6
2 PM	3	6	4	4	
3 PM	8	8	2	16	7
4 PM	11	6	3	7	5
	102	162	119	113	87

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