

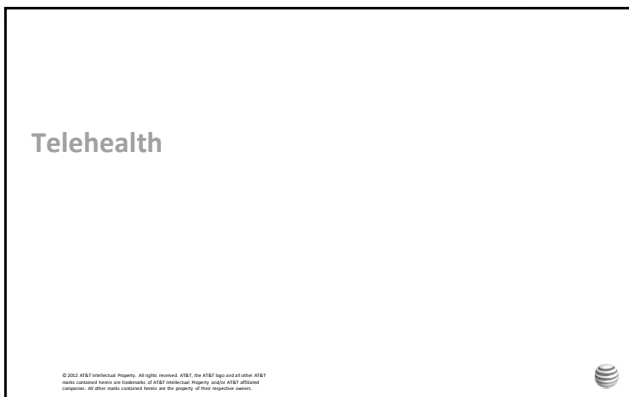


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Telehealth Reimbursement Trends

Growing State Adoption	Growing Reimbursement
<ul style="list-style-type: none"> 15 states now mandate private payors to reimburse for telemedicine; covers over 123 million Americans¹ Health plans cannot deny coverage on the basis that the care is provided through telemedicine Enhancement of state licensure to all doctors to practice interstate telehealth³ 5 States have pending legislation improving telehealth coverage¹ 	<ul style="list-style-type: none"> CMS currently reimburses telehealth for 20 professional-service categories, increasing annually 43 states allow varying Medicaid reimbursement for telehealth services - 2012³ More than 130 private payers reimburse for telehealth² Medicare offers a telehealth originating site facility fee (currently about \$20) Virginia Medicaid announced coverage and reimbursement for telehealth in schools - April 2012⁴ VA to eliminate copayments for in-home video telehealth - May, 2012⁵

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Three Generations of Telehealth

- First Generation: Ad-Hoc Telehealth**
 - Narrow focus, single use, and single stakeholder
 - AT&T Product: AT&T Virtual Care - Custom solution
- Second Generation: Rationalized Telehealth**
 - More efficient, programmatic, and profitable
 - Standardized and scalable
 - AT&T Products: AT&T Virtual Care - Managed and Custom - solutions
- Third Generation: Clinically-Integrated Telehealth**
 - Clinical integration and data exchange. Patient information, EHR, labs, and e-prescribe.
 - AT&T Products: AT&T Virtual Care - Managed and Custom - solution with AT&T Healthcare Community Online, AT&T Medical Imaging and Information Management

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Healthcare Challenges and Needs Met by AT&T Virtual Care

Healthcare Challenges	Needs	AT&T Virtual Care
<ul style="list-style-type: none"> New focus on pay-for-performance and accountable care Increasing shortage of doctors Rising patient loads due to aging population and healthcare reform Lack of access to care in rural and underserved urban cores Increasing specialization in medicine requires more patient touches 	<ul style="list-style-type: none"> Extend the reach of clinicians beyond metro clinics/hospitals Make specialty medical care available across a wider geographical area Accelerate critical medical interventions Reduce costs per unit of care 	<p>AT&T Virtual Care - Managed</p> <ul style="list-style-type: none"> Fully-managed, turn-key solution with fixed medical peripherals and clinical integration <p>AT&T Virtual Care - Custom</p> <ul style="list-style-type: none"> Custom solution; diverse array of endpoints; planning, design, installation, configuration, and management services. Lease and purchase options.

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AT&T Virtual Care

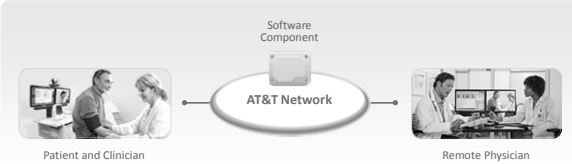
Introduction and Portfolio

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AT&T Virtual Care

AT&T delivers powerful telehealth solutions combining **network** resources, **video conferencing**, **medical devices**, and **clinical integration** to provide virtual visits between physicians and patients.




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AT&T Virtual Care Portfolio¹


AT&T Virtual Care – Managed

- Fully-managed service
- Medical devices (e.g. – blood pressure, pulse oximeter, otoscope, exam camera, dermoscope, etc.)
- Fixed, wheeled cart and desktop endpoints
- Single-view integration with EHR, HIE, RIS, and PACS
- Planning, design, and implementation included
- Used in mission-critical, high-volume applications where uptime and availability are paramount
- Optional dedicated network for high service quality and proactive monitoring
- Hosted (cloud) and on-site solutions
- Op-ex financial model eliminates capital outlay




AT&T Virtual Care - Custom

- Custom solution that can be financed or purchased
- Offers most managed telehealth components
- Diverse medical devices (e.g. – color Doppler, CT, etc.)
- Wheeled, desktop, smart phone, and tablet endpoints
- Specialized cameras
- Specialized application integration
- Consulting, design, implementation, management
- Integrate with existing telehealth and video systems
- Price/performance balance for specific uses
- Hosted and on-site options



1 All names, descriptions, features and functionality subject to change any time without notice.

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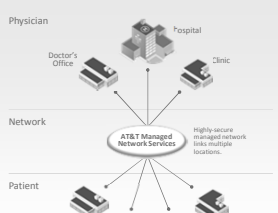
AT&T Virtual Care - Managed

Customer Requirements


- Turn-key, carrier-grade, and highly secure
- Managed service required – single point of accountability
- Integrate with existing EMR system
- Operational expense model – no capital outlay necessary
- AT&T responsible for operations and vendor management
- Monitoring, support, service desk included

Solution: AT&T Virtual Care - Managed

- Utilizes existing AT&T Managed Network Services – carrier-grade, scalable video network
- Cloud based solution; monthly recurring charge
- Medical devices and clinical software tested and certified by Cisco
- Managed telehealth application quickly integrates with customer's EHR for "one-screen" experience
- Offers a turn-key, secure, high-quality, user-friendly service
- Shifts installation, configuration, and management to AT&T to help hospitals focus on core business



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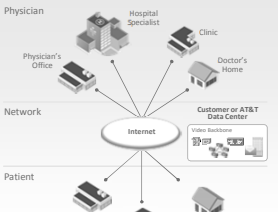
AT&T Virtual Care - Custom

Customer Needs


- Enable better tertiary and quaternary referrals
- Engage new physician practices with disparate networks
- Deliver care at distance to rural and underserved patients
- Integrate with existing networks and video systems
- Keep overhead low

Solution: AT&T Virtual Care - Custom

- Diverse video endpoint options
- Easy integration with standard video systems
- Integrates with existing networks in a highly secure way
- Incorporates smart phones and tablets
- Offers consulting, design, implementation services



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AT&T Virtual Care - Custom


Solution Component Examples

Patient + Medical Professional

Medical devices connected to example video endpoint




AT&T Network




Remote Specialist(s)


Room-based




Mobile Units



Desktop Units




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AT&T Virtual Care

Telehealth Use Cases

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Use Case

Optimize Scarce Clinical Resources

Problem

- Providers need to attract and retain increasing amounts of patients in large hub hospitals.
- Healthcare provider with costly, limited specialist resources
- Single specialist covering large geographic territory

Solution

- AT&T Virtual Care video pods connecting medical specialists to remote patient locations


Cause

- Scarcity of specialists
- Limited specialist funding
- Lack of medical specialists in rural areas

Benefit

- Greater utilization rates for high cost or scarce medical specialists
- Wider specialist availability
- Increase specialist penetration of remote patient populations

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Use Case

Teleradiology

Problem

- Healthcare reform and legislative changes designed to dramatically reduce CMS reimbursement for diagnostic imaging faces increased price pressures
- Adoption of EHR's and pay-for-performance models have impacted expectations for radiology – radiologists must be more effective and efficient

Solution

- Teleradiology solutions bring the radiologist immediately to wherever they're needed – whether it's an emergency room, operating room, or the doctors office


Cause

- In many areas it is not unusual for 1 radiologist or practice group to serve several different community hospitals or clinics
- In some cases, patients and care givers may wait days for even weeks to receive results from a radiologist
- Radiologist may need time to travel to review a study

Benefit

- Radiologists can provide fast and accurate analysis, interpretation and diagnosis
- It offers smaller community hospitals a competitive advantage, allowing them to perform exams in their local office – and send studies wherever the radiologist is located
- Patients no longer need to drive to the larger, urban hospitals for diagnostic imaging and exams

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Use Case

Tele-Stroke

Problem

- When you live in rural area, far from medical specialists, its hard to get high quality care right way (within the Golden Hour)
- Organizations are reviewing opportunities to incorporate a "new care" model to improve patient care, and reduce cost
- The current facilities are not equipped or able to handle demands placed on the healthcare system

Solution

- Tele-Stroke solutions bring the specialist immediately to wherever they're needed – whether it's a rural locations, an emergency room, operating room, or the doctors office


Cause

- Healthcare facilities were designed and build to support a more localized community
- Raising healthcare costs, while providing state-of-the-art healthcare services both to metro and rural communities
- 89M baby boomers are now entering retirement age

Benefit

- Specialist can provide fast and accurate analysis, interpretation and diagnosis within the "golden hour"
- It offers smaller community hospitals a competitive advantage, allowing them to perform exams in their local office
- Organizations are able to expand high quality care, improve patient outcomes, and reduce cost.

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Use Case

Workplace Clinics

Problem

- Lost days and diminished productivity due to sick employees cost companies millions of dollars every year.

Solution

- AT&T Virtual Care is healthcare when and where it's needed.
- Employees can see a provider when it's convenient for them.
- Providers can "visit" with patients from their own offices or remote clinics
- Services can be provided across time zones


Cause

- Today's nonstop 24/7 work pace, along with packed social lives, means people are busier than ever – and many do not visit the doctor for a wellness checkup or early intervention.

Benefit

- Telehealth enables employers to help their employees to stay healthy through face to face access to doctors in real time.
- Organizations are able to expand high quality care, improve patient outcomes, and reduce cost.
- Expands the reach of specialty care to all patients, including the rural area patient

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Use Case

Retail Pharmacy Services

Problem

- For many patients, picking up a prescription or speaking with a pharmacist in person is simply not an option.
- Patients may have trouble getting out of the house or difficulty finding transportation
- Patients in rural areas may not have a pharmacy conveniently located nearby.

Solution

- Telepharmacy gives pharmacies the tools to connect with patients who need support with medications, or cannot easily travel to a pharmacy in person
- Pharmacists can deliver personal, secure consulting and guidance even when patients are geographically distant
- Patients can get the information and encouragement they need to continue their treatments


Cause

- As the population ages and medication regimens become more complex, patient compliance with medications has become a major challenge.
- Studies show that more than 50% of patients fail to take their medications as prescribed

Benefit

- Enables retail pharmacies to expand their services to more patients while increasing efficiency and reducing the cost of care.
- It allows pharmacists to have more impact on higher medication adherence rates and accuracy among patients for better care outcomes

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Use Case

Correctional Facilities

Problem

- Inmate populations in the United States are growing, while resources to care for them continue to decline.
- The unique health and security issues involved with healthcare for correctional inmates make it costly.

Cause

- Due to poor lifestyle choices and limited access to healthcare prior to entering prison, many inmates have numerous medical issues.
- Mirroring demographic trends in the country, inmate populations are getting older.
- Remote locations often require transportation over long distances and security staff to take prisoners for treatment.

Solution

- Telehealth solutions enable remote consultations between physicians and inmates.
- A physician can see and interpret verbal and non-verbal communication to enhance their understanding of the patients condition.
- It is ideal for providing health education to prisoners in group settings or one-on-one.


Benefit

- It enables correctional facilities to transmit information instead of transporting inmates.
- Cash-strapped correctional facilities can deliver high-quality, cost-effective care to a population that needs it for treatment.

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AT&T ForHealthSM Solution Areas

Telehealth




Extending the reach of health care providers with remote access solutions.

RPM




Connecting and managing remote patient monitoring devices.

mHealth




Harnessing innovative mobile technologies to improve health.

Connected Care

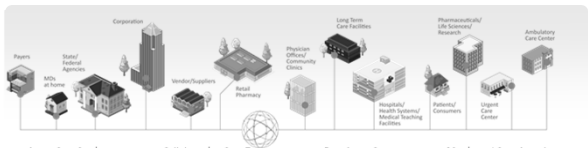


Connecting healthcare organizations and closing care gaps with health data exchange services.

Imaging in the Cloud




Enabling access to medical image data and related information virtually anywhere, anytime.



Acute Care Setting → Collaborative Care Team → Post-Acute Care → Monitored Care Anywhere

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Rethink Possible[®]



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