



imagine
PHARMACY
BENEFITS



Account Management and Client Services

Presented by:

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Agenda

Team Structure

What's New & Improved

Reporting

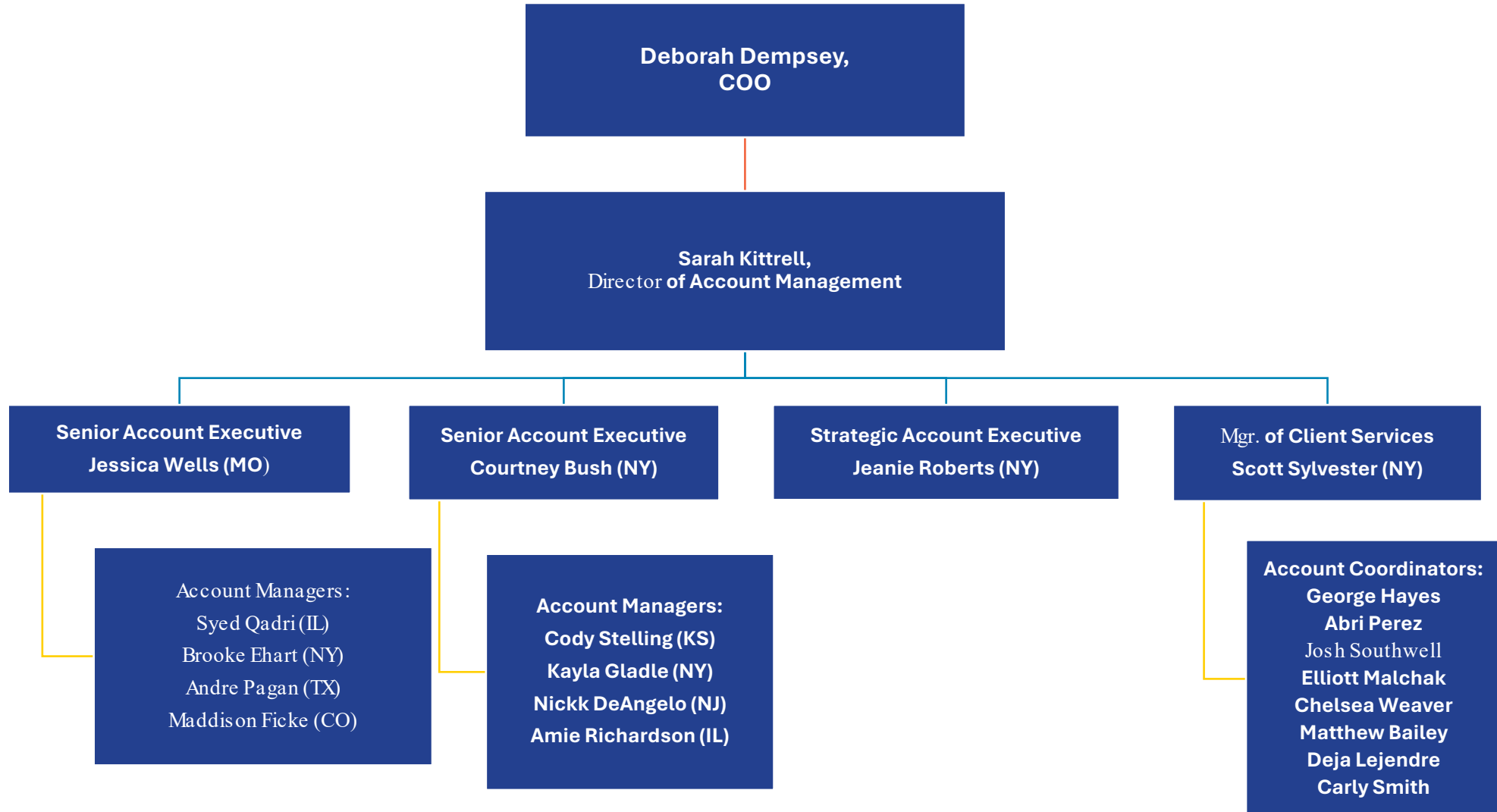
Member Portal

Renewal Process

Net Promoter Score Survey

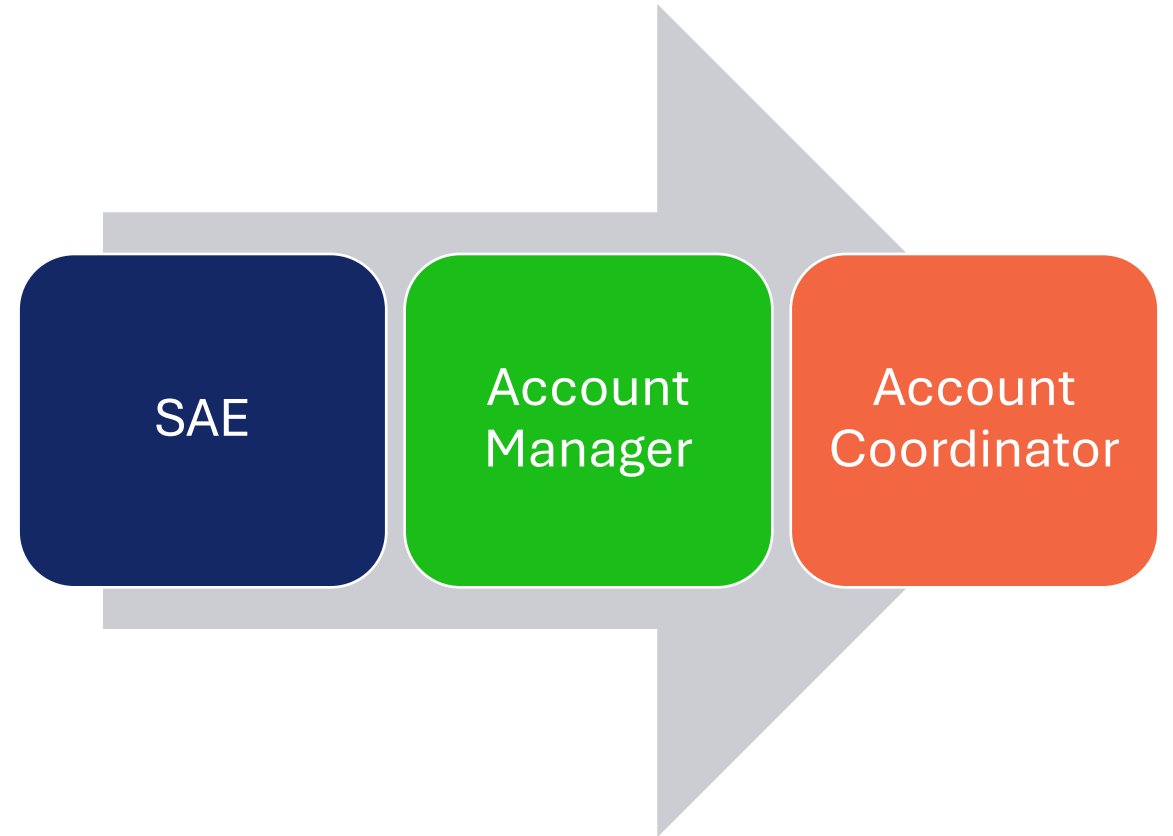


Account Management & Client Services Team Structure



Team Structure

- **POD Structure**
 - Team Support
 - Implementation Involvement
- **Contact Us**
 - Email Alias
 - Client Support In Box
 - SAE/AM Email/Call/Text
 - Client Support After Hours
- **Onsite Plan Reviews**
- **Onsite Open Enrollment/Benefit Fairs**
- **Call cadence – weekly, monthly, etc**



What's New & Improved

- Landing Pages – Customized
- Client Portal
- Plan Review Data – Refreshed
- Member Portal & Online Chat Feature



Landing Pages



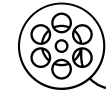
Helpful Flyers

- Formulary
- Online Resources
- Specialty Roadmap
- Mail Order Program –
Order Enrollment Form




“How to”

- Create an Account
- Enroll in Mail Order
- Auto-Refill
- Update Address



Helpful Videos

- Welcome to ProAct
- Mail Order Options
- At the Pharmacy
- Prior Authorization



At ProAct, we believe in building customers for life.

As our partner, we're proud to give you the tools and resources that you need to help make informed decisions.

Sign In

Industry Insights

Changes in healthcare can be non-stop and confusing. Let ProAct keep you up to date! Here, we offer important clinical news and regulatory compliance updates.

Industry News Updates

ProAct Announcements



Drug Trend Report

At ProAct, we are committed to supporting our plan sponsors by offering solutions that help lower plan spend without sacrificing patient care. Throughout our annual Drug Trend Report, we share both industry and ProAct-specific information that helps validate our successes in achieving our mission to create and promote lasting partnerships built on value, transparency, and evidence-based pharmacy benefit management solutions.

Download Report

ProAct Resources

Client Invoices & Reporting

- Client Invoices
- Automated Reports
- Ad Hoc Reports

PROACT ←

- Home
- Statements
- Reports
- Account Info
- Benefits

Support

SarahKittrell
sarahkittrell@proactrx.com

Welcome,

SarahKittrell

Industry News

Changes in healthcare can be non-stop and confusing. We'll keep you informed on important clinical news and regulatory compliance updates.

[See the latest](#) ↗

ProAct Announcements

Stay up to date with our latest partnerships, webinars, speaking engagements and more.

[See the latest](#) ↗

Resources

Access the latest ProAct reports and newsletters.

[2026 Drug Report](#) ↓

[Pipeline Report](#) ↓

[Consolidated Appropriations Act](#) ↓



[Biosimilar Strategy](#) ↓






[The ProAct Pulse Newsletter](#) ↓

[Need Help? Submit a support case](#)

Client Portal – Account Information




 


-  Home
-  Statements
-  Reports
-  **Account Info**
-  Benefits

Account Information

To update this information please submit a [support case](#)

Account

Account 1 

 **Account 1**
1,200 lives

Account Contact Info		
Account Address	Website	Main Phone
123 First St Brooklyn NY, 10000	account.com	123-456-7777

ProAct Contacts		
Account Manager	Account Coordinatoar	Account Executive
Jamie Smith	Jane Doe	Charles McKenzie

Client Portal - Benefits



PROACT ←

- Home
- Statements
- Reports
- Account Info
- Benefits

Benefits

Account

General Motors

Benefit

Basic Plan

Q Search

- Basic Plan ✓
- Family Plan
- Individual Plan

Copays	Channel	Brand	Non-Prefer
Retail	1-30	\$0	\$25 \$60
Retail	31-60	\$0	\$50 \$120
Retail	61-90	\$0	\$75 \$180
Specialty	30	30%	Brand 100% ProAct Plus
Mail Order	90	\$0	\$50 \$120
Alternate Funding Cap	30	\$60 No funding available	\$60 No funding available \$60 No funding available

General Info

Formulary	Prior Auth Limits	Step Therapy	Quantity Limits
Yes	No	Yes	ProAct Standard
DAW Differ	HDHP	HDP Expanded Preventative Medication	
ProAct Standard	No	No	

Client Portal – Support Cases



PROACT

- Home
- Statements
- Reports
- Account Info
- Benefits

Support

Support Cases

+ New Case

Search Status Type Clear All

Case Number	Title	Type	Created On	Status	
0123456789	General Inquiry	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Data Loss Issue	Type	12:00PM mm/dd/yyyy	Waiting for Details	>
0123456789	Technical Question	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Setup Assistance	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Slow App Performance	Type	12:00PM mm/dd/yyyy	Waiting for Details	>
0123456789	Feature Request	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Integration Error	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	App Crashing	Type	12:00PM mm/dd/yyyy	Waiting for Details	>
0123456789	Report a Bug	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Billing Inquiry	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Subscription Issue	Type	12:00PM mm/dd/yyyy	On Hold	>
0123456789	Payment Method Update	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Suspicious Activity	Type	12:00PM mm/dd/yyyy	Waiting for Details	>
0123456789	Locked Account	Type	12:00PM mm/dd/yyyy	In Progress	>
0123456789	Can't Access Account	Type	12:00PM mm/dd/yyyy	On Hold	>
0123456789	Profile Update Request	Type	12:00PM mm/dd/yyyy	In Progress	>

New Support Case

Case Number
1234567890

Title

Description
0/500 characters

Case Type

Priority

Files
You can upload a maximum of 5 files, each up to 90MB.

Upload

Submit Cancel

Case #1234567890

In Progress

Password reset link not working

Description
I clicked on the password reset link and keep getting the same error.

Case Type

Problem

Priority

High

Edit

Timeline

Representative Name
12:00pm mm/dd/yyyy
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Representative Name
12:00pm mm/dd/yyyy
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Add Note

Files

You can upload a maximum of 5 files, each up to 90MB.

Screenshot.png
5MB


Client Portal – User Profile




PROACT ←

- Home
- Statements
- Reports
- Account Info
- Benefits

Profile

 **Chris Robinson**
email@example.com Edit

First Name	Last Name	Nickname
Chris	Robinson	-
Mailing Address	Title	Business Phone
123 First St Brooklyn NY, 10000	HR Manager	123-456-7777

 **Account**
To make changes to your account access please submit a [support case](#)

[Account Name](#)

Plan Review Refresh

- Top Trend Drivers
- Top Utilizing Members
- Key Metrics Condensed
- Clinical & Cost Savings Opportunities
- Total Savings Summary



PROACT
PHARMACY BENEFIT MANAGEMENT

Plan Review Pharmacy Benefit Performance

Account: Client Name

Date Range: 00/00/0000 – 00/00/0000

 *re imagine*
**PHARMACY
BENEFITS**

PROACT

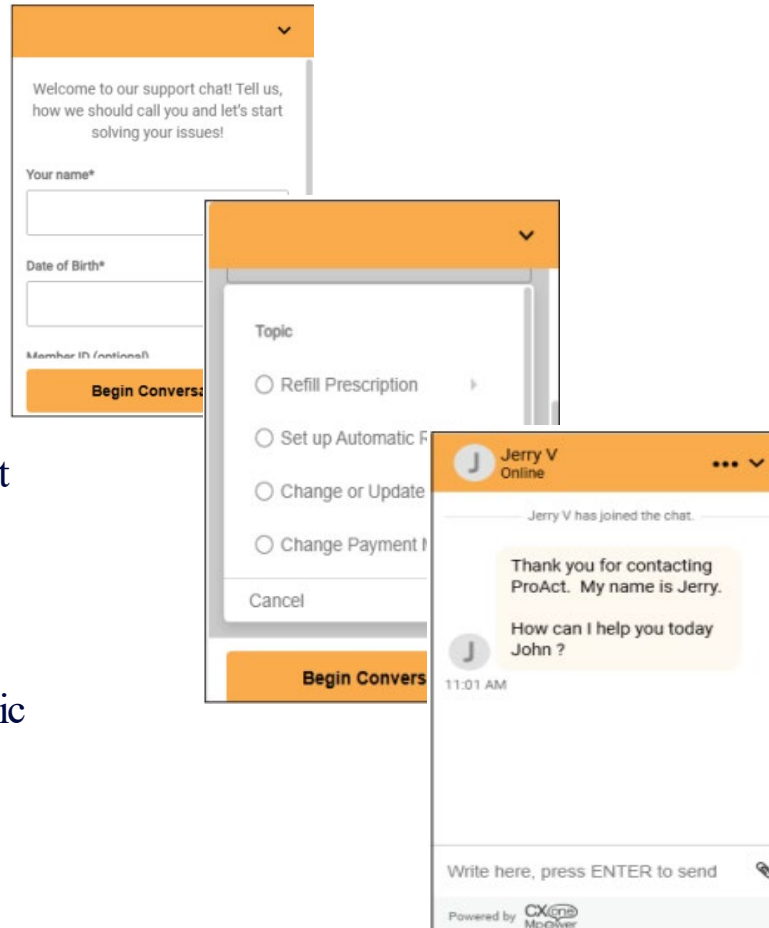
Clinical Program Recommendations

- Clinical Optimization Program
- MyMedMap Medication Therapy Management Program
- Mandatory/Preferred Mail
- Advantage Formulary
- ProActPLUS
- Omada Health Chronic Condition Management Program
- Counter Health Digital Member Engagement Platform
- Employer Group Waiver Plan (EGWP)
- Utilization Management
- Noble Health Services Copay Assistance Program



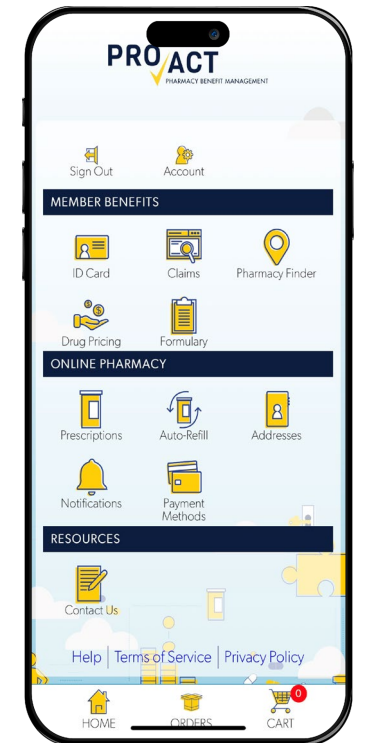
Member Online Chat

- Drug Coverage Questions
- Prior Authorization Status
- Order Status Updates
- Updating or changing payment methods
- Address Changes
- Prescription refills or automatic refill setup
- General Questions

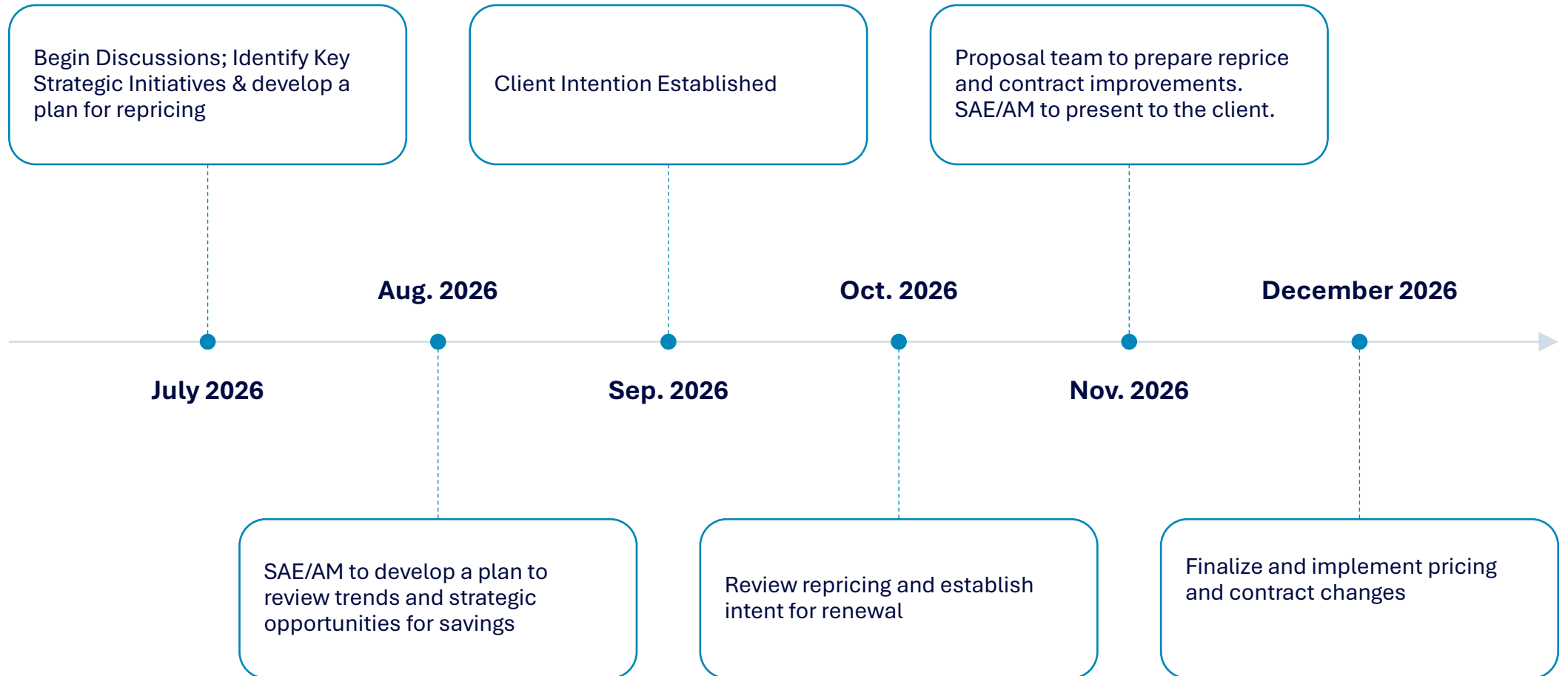


Member Portal

- Claims History
- Pharmacy Finder
- Mail Order Status
- Temporary ID Card Display
- Quick Dial



Renewal Process



Net Promoter Score Survey

We value your feedback!

- Service effectiveness
- Clarity and consistency of communication
- Responsiveness
- Breadth and quality of PBM solutions
- Reporting accuracy and usefulness

Your insights guide our continuous improvement. Please watch for the 2026 survey releasing this fall.



Account Management Mission Statement

“To maximize customer lifetime value through proactive service, act as a trusted advisor and help our clients achieve their strategic objectives.”

