Canary Health helps health plans, health care providers, employers, and others [e.g., recipients of Administration for Community Living (ACL) Chronic Disease Self-Management Education (CDSME) grants] improve the effectiveness and efficiency of their disease management/care management service for individuals with, or at risk for, a range of chronic diseases. This is accomplished by providing evidence-based digital therapeutic versions of proven, effective, in-person interventions.

**Better Choices, Better Health®** (BCBH®) is a 6-week, peer-to-peer lead, group-based digital intervention which helps adults with diabetes and other chronic conditions improve their lives, their relationships, their emotions, and their health and mental health outcomes. It is part of the [CDSME suite of programs](#) originally developed at Stanford University by Dr. Kate Lorig and her colleagues, and now managed by the Self-Management Resource Center. Self-management support approaches increase the participants’ self-efficacy – the confidence that a person can set and accomplish a specific goal.

1. **Who is the point person for grantees who wish to contact Canary Health?**

   Jonah Kaufman ([jkauffman@canaryhealth.com](mailto:jkauffman@canaryhealth.com)) is the point person for grantees contacting Canary Health. Neal Kaufman ([nkauffman@canaryhealth.com](mailto:nkauffman@canaryhealth.com)) should be copied on all messages.

   If you are applying for Administration for Community Living/Administration on Aging funding opportunities focused on implementing chronic disease self-management education programs, contact Canary Health during the application process to make sure the program is an appropriate fit for your organization and capacity, learn about the partnerships that will be needed to successfully deliver the program, and clarify program costs.

2. **What is the difference between participants that “sign-up”, “show-up”, and “complete” the program?**

   - **Sign-up**: Individuals who have signed up for the program, but have not yet attended a session. (See question #12 for a description of the sign-up process.)
   - **Show-up**: Individuals who attend at least one session demonstrated by actively participating in the session (e.g., take the lesson, complete action plan, post in the discussion center).
   - **Complete**: Individuals that have completed at least four of the six sessions (by the same criteria described for a participant that “shows-up”).

3. **Is there a set-up fee? (effective 1/1/2020)**

   Yes, the one-time set-up fee is $10,000 payable when Canary Health begins the project implementation.

4. **Is there an annual license fee? (effective 1/1/2020)**
Yes, the annual license fee is $10,000 payable when participant enrollment is ready and annually thereafter.

5. **How are contracts structured based on “sign-ups,” “show-ups,” and “completers” (defined in question #2)?**

We assume that all contracts will be for the length of the grant (e.g., 3 years) with the grantee retaining the option to cancel after one year if the program isn’t successful. We no longer have contracts based on sign-up. The preferred option is milestone-based, with a payment for show-up and a payment for completion. A fixed rate for show-up alone is possible, but only on a case-by-case basis.

6. **What is the cost for participants that “show-up” and “complete” the program (as defined in question #2)?**

This cost is finalized with each grantee depending on several factors including:

The routine per participant milestone-based payment is $175 at “show-up” and $175 at “completion”. Modification is possible depending on:

a. The total number of participants;

b. The chosen eligibility determination approach (e.g., done by grantee or Canary Health; integrated with healthcare provider or plan);

c. For more specific information, contact Neal Kaufman at nkaufman@canaryhealth.com.

7. **Is there a minimum number of milestones for an ACL grantee’s 3-year contract?**

Yes, the minimum number of milestones over the length of the contract is 750. The grantee retains the right to cancel the obligation if recruitment after a minimum of one year isn’t successful.

8. **Does Canary Health expect to be paid for participants who sign-up but don’t show-up?**

Canary Health does not require that it be paid for participants who sign-up but don’t show-up. However, a grantee should expect to spend between $30-$50 on outreach per participants who show-up. While there is no requirement that Canary Health be involved in outreach, we are very willing and able to help on a case-by-case basis, with our fees to be negotiated depending on the scope of work required.

9. **What are the options for payment terms?**

We view our relationship with a grantee as a long-term partnership where if the grantee is successful, we are successful. Our mutual goal is to create a scalable (significant number of
participants each year) and sustainable (paid for by non-grant funding) service. We make a considerable investment in each partnership and need to know that we will make a reasonable return on each investment. Guaranteeing payment over the life of the contract with the ability to carry-over any unused milestones/slots beyond the contract’s original termination date is our preferred method of payment. The exact amounts and timing of payments is decided on a case-by-case basis.

10. What are the criteria for BCBH® program completion in the National Council on Aging’s (NCOA) National Chronic Disease Self-Management Education (CDSME) Database?

The completer rate is the percentage of participants that “show-up” to the workshop that attend 4 out of 6 BCBH® sessions.

The completion rate can be thought of as the BCBH® dose. It is based on the original Stanford University trials of the BCBH® workshop, where those that attended at least 4 workshop sessions improved the most.

11. What outreach does Canary Health do to encourage participation and how can grantees be a part of that campaign?

Canary Health conducts digital and telephonic outreach to participants. This includes a campaign to remind those who “sign-up” to “show-up” to the first session. Those who “sign-up” can participate in a “session zero” designed and administered by Canary Health.

Selected workshop system emails to increase engagement in BCBH®:

- Welcome e-mail
- 3 days after selecting workshop: Prompt to complete self-test
- 5 days before workshop start: Reminder email
- 3 days before workshop: Text reminder
- 2 days before workshop start: Reminder email
- Did not show-up by Wednesday of the first week: Live agent call
- First and second week of workshop: Supplemental facilitator reminder, text nudges to active participants, days 3-7: Reminder to post, complete action plan

Note: If a prospective participant doesn’t show-up by the Wednesday of the second workshop week, they are removed from the workshop and offered the opportunity to pick another start date.

ACL grantees are free to conduct additional outreach to encourage participant engagement. This can be considered on a case-by-case basis with or without Canary Health involvement.

12. What is the process of signing people up? How does one enroll in BCBH®?
Participants learn about BCBH® from a variety of ways including email, printed materials, Interactive Voice Response (IVR) phone campaigns, and social media. All enrollment is completed online and is accessible by tablet, phone, or computer. After learning about BCBH®, participants visit an enrollment website branded to the host organization to complete basic eligibility criteria and select from a list of available workshops. Program enrollment is then confirmed by email.

13. How does each grantee check for eligibility for the program prior to allowing a person to sign-up for the program? If there are codes involved, how are they checked? Essentially, how are they registered?

Eligibility criteria can be customized for the specific host organization and is finalized prior to launching the program. This includes the opportunity to customize if grantees are partnering with health care providers, health plans, and employers. Organizations who are offering the program as part of grant funding from the ACL should specify the eligibility criteria they are requesting and how it will be determined as part of the contract negotiations.

Canary Health makes a distinction for eligibility between “Clinical” and “Billing”. For both types of eligibility, Canary Health recommends that ACL grantees look for the broadest possible eligibility criteria.

For clinical eligibility, we feel that any individual who learns about the program through outreach done by a grantee or a partner organization and feels their health would be improved by taking part in a BCBH workshop should be allowed to enroll. The only “requirement” that Canary Health analyzes from the enrollment form is that the participant is over the age of 18.

For billing eligibility, we again recommend the broadest possible criteria. For example, if your organization is a state department of health, anyone from that state should be able to enroll in the program.

The best way to control the process and ensure that enrollments come from the participant population is through proper targeting of individuals for outreach. This can be done in a variety of ways and is part of an implementation project and further support of outreach partner organizations. We can provide a variety of URL links to organizations to allow for tracking of the outreach source for each individual program participant.

Organizations who are offering the program as part of grant funding from the ACL should specify the eligibility criteria they are requesting and how it will be determined as part of the contract negotiations.

Examples of approaches include:

- Grantee determines eligibility criteria and only eligible individuals are able to enroll in BCBH. Eligibility criteria can be determined in a number of ways.
• Canary Health provides a series of unique codes to contracted organizations to provide to potential participants once they are determined eligible by the grantee/host organization. These codes allow Canary Health to track the source for the participants so reporting can be linked back to the host organization. A unique code is generated for each host site and individual, allowing Canary Health to track the source of each enrollment and the eligible individuals.

NOTE: The approaches below require agreement/contract between the partner organization and Canary Health and come with some cost.

• Canary Health is provided a list of eligible participants (by grantee or partner organization) who are pre-authorized to enroll in BCBH and determines each prospective participant’s active status on the list. The list is updated frequently (e.g., monthly) to be sure the individual is still an active health plan member.
• Canary Health asks an eligibility question on the enrollment form to only enroll participants who meet the pre-set requirements.
• For health care providers, health plans, and other large contractors, Canary Health creates a real-time approach to query the payor’s eligibility system to determine member eligibility.
• Each eligibility determination is customized for the specific host organization.

14. Trial participation and staff training sessions

Canary Health can provide support to help introduce and train staff to support BCBH. To this end we provide:
• Three (3) complimentary “trial” slots as part of a new implementation project. Note that these slots will be part of “real” BCBH workshops with participants who are looking to improve their health. It is expected that the trial participants are active members of the workshop and engage with fellow members of the group;
• One (1) complementary staff training webinar to provide information about the program, a program demonstration and Q&A; and
• Additional support can be provided on a case-by-case basis.

15. What is the average length of time between signing up for the program and beginning the workshop? What contact does Canary Health have with participants before and during sessions to keep them engaged?

All workshops begin on a Monday. Individuals are provided a choice to start a workshop beginning the first Monday from the date of enrollment (if space is available), or a future Monday, usually within a week or two. Individuals typically choose to start their workshop within three weeks. There may be an additional delay during the December holidays since it’s more challenging to fill workshops during that time. Typically, the longer an individual waits to attend, the less likely they are to follow through.
There is a self-test that is available after individuals have signed up for the program and before the workshop officially begins. Participants receive the results during Session one once the workshop begins. There are also videos and content available to browse. Reminder messages are sent to participants on a regular pre-determined schedule (for example: 5, 3 and 1 day prior to the beginning of the workshop). Messages are also continually sent throughout the workshop. (See question #11.)

16. What types of surveys does Canary Health conduct to determine participant satisfaction or other variables?

Canary Health conducts a participant satisfaction survey and the participant information survey required for ACL grants, before and after the workshop.

17. How often can grantees expect to get reports on BCBH® participation and how often is this information transmitted to NCOA for inclusion in the National CDSME Database? Who generates the reports?

Canary Health will provide quarterly data imports to NCOA’s National CDSME Database for all organizations funded by ACL grants to implement BCBH®, unless alternate arrangements have been made between grantees and Canary Health. This data can also be shared directly between Canary Health and the grantee, if requested.

Through the National CDSME Database, each grantee will have access to their organization’s data and aggregate level data for the BCBH® program.

Canary Health provides satisfaction data directly to contractors. Since a minimum number of surveys is required to give valid information, most grantees receive that information annually. This can be provided more frequently with appropriate volume. Contact Jonah Kaufman (jkaufman@canaryhealth.com) for more information.

18. What is the status of the BCBH®-Diabetes and Arthritis Self-Management Support Programs?

The previous digital versions (Diabetes and Arthritis) are not available and there are no current plans to launch a new version of BCBH®-Diabetes or Arthritis. Grantees will be informed if this changes.

19. Are there webinars, study results, or other ways to find out about Canary Health’s work with online programs?

- **Webinar: Do Digital Therapeutic Programs Work? Featuring Dr. Kate Lorig, Juliet Simone and Dr. Neal Kaufman**: This webinar features Dr. Kate Lorig and highlights the findings from studies of BCBH®. The webinar has a 30-minute presentation, 15 minutes Q&A, and 10-minute demonstration of BCBH®.
• A three-minute video of user experience from a live BCBH® demonstration at the Health 2.0 conference.
• A user story from Muriel who shares her BCBH® story and how it improved her life and health.
• A detailed bibliography for the digital BCBH® intervention is available on request.

20. Is there a demonstration that grantee staff or other interested individuals can view to gain a better understanding of the program?

• View a 3-minute demonstration of the program here.

• View a 10-minute demonstration of the program in the Webinar: Do Digital Therapeutic Programs Work? Featuring Dr. Kate Lorig, Juliet Simone and Dr. Neal Kaufman, starting at the 50-minute mark.

21. Are BCBH® programs available and reimbursable to members of:

   a. Medicare: No

   b. Medicaid: No

   c. Other health plans: A limited number

22. How is the security of participants’ information ensured?

   See Appendix A for the Canary Health privacy policy.
PRIVACY POLICY for Better Choices, Better Health® Web Site

IMPORTANT- PLEASE READ THIS PRIVACY POLICY CAREFULLY AS IT CONTAINS IMPORTANT INFORMATION REGARDING USE OF INFORMATION YOU DISCLOSE ON THIS WEB SITE.

Welcome to the Better Choices, Better Health® Online Web Site (the "Web Site") operated by ABK Ventures Inc. d/b/a Canary Health ("CANARY HEALTH", "we" or "us"). The Web Site contains the Better Choices, Better Health online self-management program, originally developed as the Chronic Disease Self-Management Program (© 2007-2012 The Board of Trustees of the Leland Stanford Junior University), a self-management course developed at Stanford University for individuals 18 years or older living with long-term conditions.

CANARY HEALTH created this Privacy Policy in support of our commitment to the user’s online privacy. This Privacy Policy discloses our information-gathering and disseminating practices for this Web Site. We urge you to read this Privacy Policy carefully. For an explanation of capitalized terms used in this Privacy Policy, please refer to the definitions at the end.

Privacy Policy

Protecting the privacy of the user’s information collected by the Web Site is critically important to CANARY HEALTH. We value and respect your trust and believe you have a right to know about how we collect and secure information we collect about you. We use commercially reasonable privacy and security protections to help keep your Personal Data private and confidential while using the Web Site.

This Privacy Policy applies to this Web Site only. The Web Site contains links to other web sites. Once you enter another web site (whether through a service or content link), be aware that CANARY HEALTH is not responsible for the privacy practices of such other web sites. We encourage you to look for and review the privacy statements of each and every web site that you visit through a link on CANARY HEALTH’s Web Site.

What Information is Collected and How Is It Used?

The Web Site may collect Personal Data from you through several means, including from information you provide in registering with the Web Site to participate in our sponsored programs and workshops, participating in a survey about your health, mood and activities, contributing to discussion boards with your facilitators, moderators and peer participants, as well as planning and tracking tools, and an electronic post office.

While CANARY HEALTH encourages participants to share personal experiences and opinions, it is entirely voluntary and you are not obligated to disclose details about your chronic condition. You are also allowed and encouraged to use an alias or “screen name” (fictitious name) to identify yourself on the Web Site, further protecting your privacy from your peer participants. Only those individuals responsible for managing, overseeing and administering the Web Site, and those to whom you have given consent will be able to view your actual name and contact information.

Except as provided in this Privacy Policy, CANARY HEALTH will not sell or share your Personal Data for marketing purposes without your consent.
CANARY HEALTH will maintain the privacy and confidentiality of your Personal Data as provided by applicable law. Personal Data will be maintained on CANARY HEALTH servers for the Program Period.

CANARY HEALTH may combine, in a non-identifiable format, the Personal Data you provide with information from other users to create aggregate data that may be disclosed to third parties and used by CANARY HEALTH for any lawful purpose. This aggregate data does not contain any personal identifiers that could be used to contact or identify you, such as name, address, or telephone number. This aggregate data may be maintained by CANARY HEALTH for the period of time deemed appropriate by CANARY HEALTH.

For persons participating through the Oregon Educators Benefit Board, Personal Data, which includes your name, birthdate, E-number, class cost, and whether or not you attended and/or completed a workshop will be shared with the Oregon Educators Benefit Board in an identifiable format, and will be transmitted over a secured electronic system. The Personal Data listed above is provided to verify workshop eligibility, enrollment and completion and for payment purposes.

For persons participating through the Public Employees’ Benefit Board (PEBB), limited Personal Data, which includes your name, birthdate, whether or not you completed a workshop will be shared with PEBB in an identifiable format, and will be transmitted over a secured electronic system. The Personal Data listed above is provided to verify workshop eligibility, enrollment and completion.

For persons participating through Government Employees Health Association (GEHA) or one of its subsidiaries, Personal Data, which includes your name, ethnicity, race, birthdate, gender, health conditions, zip code and whether or not you attended and/or completed a workshop will be shared with GEHA in an identifiable format, and will be transmitted over a secured electronic system. The Personal Data listed above is provided to verify workshop eligibility, enrollment and completion, coordinate services, and for reporting purposes. For persons participating in wellness programs who request confirmation that they have satisfied a wellness program activity, GEHA will share information with the sponsor of the wellness program, which may be the person’s employer or employer’s health benefits coordinator. Information provided will include health plan enrollment status, status of workshop completion, and workshop enrollment and completion dates. Information that will not be shared includes postings in the discussion center, goals and action plans, individual internet tools in the workshop and any other electronic communication within the workshop platform.

For individuals enrolled in the Better Choices Better Health Program (BCBH) via SmartHealth, your participation is funded by a grant to the Washington State Department of Social and Health Services (DSHS) from the Administration for Community Living (ACL), which is a division of the U.S. Department of Health and Human Services. To verify participation and perform program evaluation, Personal Data will be shared with ACL or its contractors, DSHS, and the Washington State Health Care Authority’s Public Employees Benefits (PEB) Program via a secured electronic system. The Personal Data shared may include your BCBH participant identification, your responses to the voluntary participant information survey, workshop participation, and discussion board participation.

For persons participating through Kaiser Permanente Southern California, Personal Data, which includes your name, birthdate, registration code, and whether or not you attended and/or completed a workshop will be shared with Kaiser Permanente Southern California in an identifiable format, and will be transmitted over a secured electronic system. The Personal Data listed above is provided to verify workshop eligibility, enrollment and completion.

For persons enrolled through New Mexico Health Connection ("NMHC"), personal data, which includes your name, ethnicity, race, birthdate, gender, health conditions, zip code and whether or not you attended and/or completed a workshop will be shared with NMHC in an identifiable format, and will be transmitted over a secured electronic system. The personal data listed above will be used to verify workshop enrollment, attendance, and completion. This information will be used by NMHC to analyze and assess information-seeking outcomes. Information that will not be shared includes
postings in the discussion center, goals and action plans, individual internet tools in the workshop and any other electronic communication within the workshop platform.

For individuals enrolled in the Better Choices Better Health Program (BCBH) via the New Mexico Retiree Health Care Authority landing page, [http://enroll-nmrhca.selfmanage.org](http://enroll-nmrhca.selfmanage.org), your participation is funded by a grant to the New Mexico Department Of Health (NMDOH) from the Administration for Community Living (ACL), which is a division of the U.S. Department of Health and Human Services. To verify participation and perform program evaluation, Personal Data will be shared with ACL or its contractors. The Personal Data shared may include your BCBH participant identification, your responses to the voluntary participant information survey, workshop participation, and discussion board participation.

You acknowledge that you have read and agree to the Privacy Policy by clicking on the checkbox and clicking “SUBMIT” tab at the end of this registration form. Checking the box and clicking “SUBMIT” on the registration form is sufficient as your signature and date and therefore an acceptance of the terms layout above.

**Disclosure of Personal Data**

Except as set forth in this Privacy Policy or as specifically agreed to by you, CANARY HEALTH will not disclose any Personal Data it gathers from you on the Web Site, provided that We may release Personal Data to third parties: (1) to comply with valid legal requirements such as a law, regulation, search warrant, subpoena or court order; (2) to certain contractors or partners for the purposes set forth below; (3) in special cases, such as in response to a physical threat to you or others, to protect personal safety or property or defend or assert legal rights or (4) in special cases, with your consent. In the event that we are legally compelled to disclose your Personal Data to a third party, we will attempt to notify you unless doing so would violate the law or court order. In addition, we may disclose Personal Data as described below.

**A. Disclosure to CANARY HEALTH Health Operations and Maintenance Contractors**

CANARY HEALTH operations and maintenance contractors sometimes have limited access to your Personal Data in the course of providing products or services to CANARY HEALTH. These contractors include vendors and suppliers that provide us with technology, services, and/or content related to operation and maintenance of the Web Site. Access to your Personal Data by these contractors is limited to the information reasonably necessary for the contractor to perform its function for CANARY HEALTH. We also contractually require that our operations and maintenance contractors 1) protect the privacy of Personal Data consistent with this Privacy Policy, and 2) not use or disclose Personal Data for any purpose other than providing CANARY HEALTH with products and services.

**B. Disclosure to Program Mentors, Facilitators and other Workshop Moderators**

Personal Data you share on this Web Site may be disclosed to workshop facilitators, mentors and other moderators in connection with the workshop in which you participate.

However, note that CANARY HEALTH and its workshop facilitators, mentors and other moderators assume no duty to identify or report any potential threats of imminent harm to your health or wellbeing or that of third parties based on information you or other users share on this Web Site.
Disclosure to Linked Sites

For your convenience there are links to other web sites operated by forms other than CANARY HEALTH ("Third Party Web Sites"). CANARY HEALTH does not disclose your Personal Data to these Third Party Web Sites without obtaining your consent. CANARY HEALTH does not endorse and is not responsible for the privacy practices of these sites.

Community Post Office, Blogs and other Public Forums

The Web Site features several community areas and other public forums where users with similar interests or medical conditions can share information and support one another or where users can post questions for comments. We also offer online discussions moderated by facilitators. Our communities are open to all workshop participants and should not be considered private.

Any information you share in any online community area or online discussion is by design open to workshop participants and is not private. You should think carefully before posting any Personal Data in any public forum.

Security for Personal Data and Non-Identifiable Information

Our Web Site and database servers are hosted in a secured physical and network environment in the United States. Reasonable efforts are made to secure web servers, networks, host operating systems and databases against unauthorized access. We use a variety of security measures to protect Personal Data when stored or transmitted by CANARY HEALTH, including Secure Socket Layer (SSL) Encryption. In order to take advantage of encryption, you must have an Internet browser that supports 128-bit Encryption. Despite CANARY HEALTH's efforts to protect your Personal Data, there is always some risk that an unauthorized third party may find a way around our security systems or that transmissions of your information over the Internet will be intercepted.

Please remember that no security measures are foolproof; and CANARY HEALTH cannot guarantee that information will be protected in all situations. We will make reasonable efforts to protect your Personal Data from unauthorized access.

Terms of Use

This Privacy Policy co-exists with our Terms of Use, and together both policies govern your use of this Web Site. By accessing, browsing or using the Web Site you acknowledge that you have read, understand and agree to this Privacy Policy and our Terms of Use. We encourage you to familiarize yourself with both this Privacy Policy and our Terms of Use. The Web Site Terms of Use may be found as a link on the page where this Privacy Policy is posted. If you do not agree with these terms (including any revisions to them), please do not use the Web Site.

Changes to This Privacy Policy

We may change this Privacy Policy at any time by posting revisions to our Web Site. Your use of this Web Site constitutes acceptance of the provisions of this Privacy Policy and your continued usage after such changes are posted constitutes acceptance of each revised Privacy Policy.
Privacy Policy for Children

This Web Site is not designed to attract or be used by children under the age of 13. We do not knowingly collect Personal Data from anyone under the age of 13 unless we first obtain permission from that child’s parent or legal guardian.

How to Contact Us

For more information about our privacy practices (including compliance with applicable law) contact us by email at privacy@canaryhealth.com or write to us at 11500 Olympic Blvd. Ste 455, Los Angeles CA 90064

DEFINITIONS

"Encryption" means the translation of data into a secret code. Encryption is the most effective way to achieve data security. To read an encrypted file, you must have access to a secret key or password that enables you to decrypt it.

“Firewall” means a system designed to prevent unauthorized access to or from a public or private network. Firewalls can be implemented in both hardware and software, or a combination of both. Firewalls are frequently used to prevent unauthorized Internet users from accessing private portions of public networks. All messages entering or leaving the network pass through the Firewall, which examines each message and blocks those that do not meet the specified security criteria.

“Personal Data” means information that is identifiable to a particular individual. Examples of Personal Data include your name, home address, telephone number, and email address. If other pieces of information are linked to Personal Data, they may also become Personal Data.

“Program Period” means at least 15 months after the conclusion of any workshop in which you participate utilizing the Web Site.

“Secure Sockets Layer” (SSL) means a security protocol for transmitting private information via the Internet. SSL works by using a private key to encrypt data that's transferred over the SSL connection. URLs that utilize an SSL connection start with https: instead of http.

“Cookie” means a data file that is stored on the hard drive of the computer you use to view a web site. Cookies are placed by that site or by a third party with a presence on the site and are accessible only by the party or site that placed the Cookie (i.e. a Cookie placed on your computer by CANARY HEALTH isn't accessed by any other site you visit but a Cookie placed on your computer by an advertiser may be accessed by any site on which that same advertiser has a presence). Cookies can contain pieces of Personal Data. Cookies are used to make the site easier to use. For example, if you check a box to ask that we store your user name on your computer so that you don't have to enter it each time you visit the site, it's stored in a Cookie on your computer.