

Summus Case Studies - Expert Opinion

Avoiding a High-Risk Surgery (Part I)

MEMBER CONCERN

After a routine scan identified a cyst on her pancreas, an member with a complex medical history was scheduled for a Whipple procedure—a major, life-altering surgery—just ten days later. Her family felt overwhelmed and anxious, urgently seeking clarity on whether this aggressive approach was the only option for what her local doctor called a pre-cancerous cyst.

SUMMUS RESPONSE

- Dr. Kristie Busch, Summus MD, spoke with the family immediately, recommending an **in-depth video Expert Consultation** with a surgical oncologist.
- The Summus team quickly helped the family **gather all medical records**.
- The family was then connected with **two leading surgical oncologists** for expert guidance.
- First, a consultation with **Dr. Peter Allen, Chief of Surgical Oncology at Duke University Medical Center**, who explained why the cyst **did not warrant such an invasive surgery** and that it would be best to pursue active surveillance instead. He helped the member understand that the **significant risks of the Whipple procedure** outweighed the likelihood of the cyst becoming cancerous.

CONSULTATIONS



KRISTIE BUSCH, DO

Emergency Medicine Physician
Weill Cornell Medical Center



PETER ALLEN, MD

Chief, Surgical Oncology
Duke University Medical Center

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SATISFACTION WITH
SUMMUS (0-10)

Yes

BETTER UNDERSTAND
HEALTH CONCERN



“

My family and I **could not be happier** with our experience.

Avoiding a High-Risk Surgery (Part II)

SUMMUS RESPONSE

- For added confidence, Summus arranged a second consultation with **Dr. Thomas E. Clancy, Director of Pancreatic Cancer Surgery at Dana-Farber Brigham Cancer Center**. Dr. Clancy concurred entirely, advising **against the operation** and outlining a clear monitoring plan.

IMPACT

The expert guidance provided the family with profound relief and the confidence to change course, **canceling the scheduled Whipple procedure**. A frightening and imminent surgery was replaced with a **safe, clear path forward, centered on careful monitoring**. We continue to keep in touch with this member and the family to ensure they continue to receive the support they need.

CONSULTATION



THOMAS E. CLANCY, MD

Director, Pancreatic Cancer Program
Brigham and Women's Hospital

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SATISFACTION WITH
SUMMUS (0-10)

Yes

BETTER UNDERSTAND
HEALTH CONCERN



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The doctors that you connected me with were top notch. Their advice **changed my mom's life**.

Expert Guidance on a Thyroid Nodule

MEMBER CONCERN

After finding a thyroid nodule on a screening exam, a member with a BRCA1 gene mutation and a significant personal history of surgery was advised to get a biopsy. This recommendation, coupled with her high-risk medical background, caused considerable stress and uncertainty for her and her family, who were unsure how to best proceed.

SUMMUS RESPONSE

- An initial, in-depth consultation with Summus MD, Dr. Jennifer Ludwig, provided immediate reassurance and context. The member noted, **“The Summus doctor was incredibly helpful and knowledgeable...alleviating much of my concern while also planning to connect me with the right specialists.”**
- After the member obtained a formal thyroid ultrasound locally, Summus facilitated a priority **Expert Consultation with Dr. Brendan Finnerty, a leading endocrine surgeon and Director of Interventional Endocrine Surgery.**
- Dr. Finnerty conducted a thorough review of her imaging and history, **concluding that the nodule had benign characteristics and did not warrant a biopsy at this time.**
- **He established a clear and reasonable surveillance plan tailored to her history**—a yearly ultrasound—providing a concrete path forward that balanced watchful waiting with her unique health profile.

IMPACT

The member received **immediate peace of mind and a clear action plan** from her first Summus interaction. The subsequent expert consultation provided critical, world-class guidance that prevented an unnecessary and stressful invasive biopsy. The family moved from a state of high anxiety to one of confidence, armed with an expert-validated **surveillance strategy that felt both safe and sensible.**

CONSULTATIONS



JENNIFER LUDWIG, MD

Family Medicine
Premise Health



BRENDAN FINNERTY, MD

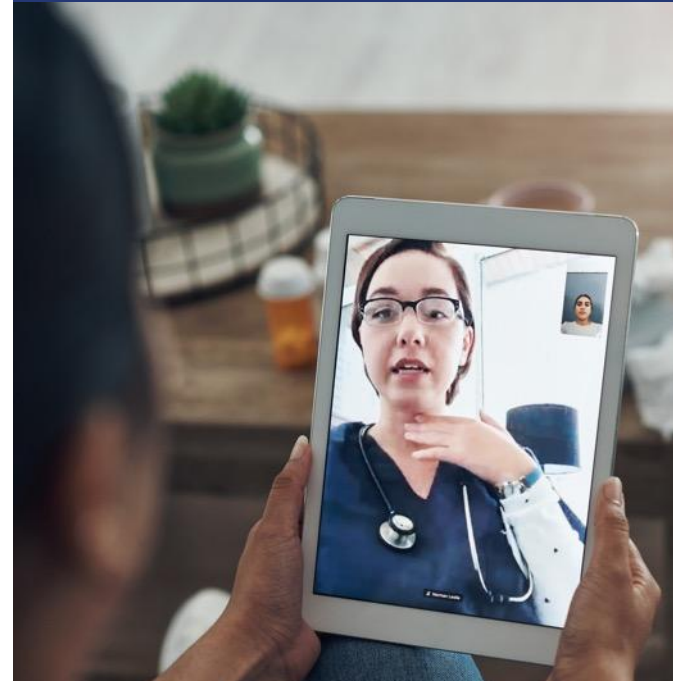
Assistant Professor, Interventional
Endocrine Surgery
New York-Presbyterian Hospital/Weill
Cornell Medical Center

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SATISFACTION WITH
SMD

Yes

BETTER UNDERSTAND
HEALTH CONCERN



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What really stood out was that **I never felt rushed**—there was plenty of time to ask questions and talk things through. I had already spoken with my nurse practitioner but still didn’t have a clear grasp of the diagnosis. **Without Summus, I wouldn’t have a plan for the next steps.**”

Expert Guidance for Endometrial Cancer Treatment

MEMBER CONCERN

Facing a devastating diagnosis of metastatic high-grade endometrial cancer that had spread to his wife's lymph nodes, a member and his family felt overwhelmed. Confronted with aggressive treatment recommendations, they felt turned to Summus for an expert opinion to ensure they were on the right path and to explore every possible treatment avenue.

SUMMUS RESPONSE

- Summus **connected the family with Summus MD, Dr. Kristie Busch**, who clarified their goals and recommended an expert oncology consultation.
- Subsequently, an **Expert Consultation was arranged with Dr. Andrew Berchuck, a renowned gynecologic oncology expert and the Director of Gynecologic Oncology at Duke University School of Medicine.**
- Dr. Berchuck **validated their current treatment plan**, confirming that the combination of chemotherapy and immunotherapy was the appropriate, aggressive approach, which **brought the family immense peace of mind.**
- He then **enhanced their strategy** by recommending targeted radiation and new genetic tests to help guide future treatment decisions.
- We also provided the family with access to our **clinical trial navigation tool** to explore other potential avenues for care.

IMPACT

The Expert Consultation provided immense clarity and profound reassurance to the family during a deeply challenging time. They also gained valuable insights into additional treatments and diagnostic steps to further combat the cancer.

CONSULTATIONS



KRISTIE BUSCH, DO

Emergency Medicine
Weill Cornell Medical Center



ANDREW BERCHUCK, MD

Director, Gynecologic Oncology
Duke University School of Medicine

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SATISFACTION WITH
EXPERT

43 MIN

EXPERT
CONSULTATION



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As my wife and I don't know anything about cancer, **it is a very good feeling to hear that what we are doing is the right thing to do.** Plus, Dr. Berchuck gave us some additional treatments that we can do to **attack the cancer even further.**”

Summus Case Studies - Wellbeing

A Lifestyle Transformation

MEMBER CONCERN

A member managing several chronic conditions, including diabetes and high blood pressure, wanted to improve their health but felt daunted by the significant lifestyle changes required. They sought a supportive, long-term coaching relationship to help them succeed.

SUMMUS RESPONSE

- Summus partnered the member with a dedicated care team, including Lifestyle Medicine physician Dr. Sohita Torgalkar and Jamie Gershel, RD, for a six-month journey.
- **The support began with foundational guidance on nutrition and evolved as they made progress.**
- Dr. Torgalkar provided a **personalized exercise plan** and crucial education on the importance of strength training to ensure healthy fat loss over muscle loss, offering consistent accountability to help them build sustainable new habits.

IMPACT

The member achieved a remarkable health transformation, losing **39 pounds (14% of their body weight)** in six months. Their efforts led to **improved blood pressure and blood sugar control**, and their local doctor began discussing a reduction in their diabetes medication, allowing them to take control of their chronic conditions

CONSULTATIONS



SOHITA TORGALKAR, MD
Internal Medicine, Lifestyle Medicine
Mount Sinai



JAMIE GERSHEL, RD
Registered Dietitian
Summus

82 MIN
CONSULTATIONS

10
SATISFACTION WITH
SUMMUS (0-10)



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I lost 39 pounds!”

A Wellbeing Transformation

MEMBER ISSUE

Two years ago, a member was living a high-stress, sedentary life and noticed muscle loss and weight gain. With high-cholesterol and a family history of diabetes, the member was concerned and wanted to avoid prediabetes and osteoporosis. They reached out to Summus for help lowering their risk factors for these chronic conditions.

SUMMUS RESPONSE

- **In May 2022, we facilitated a series of consultations with Lifestyle Medicine Physician Dr. Raquel Harrison.** Together they set goals to lower the member's cholesterol, create an exercise routine, and work on sleep health. From May 2022 – May 2023, the member lowered their LDL or "bad" cholesterol, developed a regimented exercise routine, and reduced their stress levels.
- **In May 2024, the employee reached out to Summus after having gastrointestinal, ankle and knee pain.** Dr. Harrison spoke with the member, providing both medical and lifestyle recommendations. After their call, the employee provided updated bloodwork.
- **In May 2024, their "bad" cholesterol was lower than it had been in both 2022 and 2023, showing sustained positive changes.** Their A1C level had increased slightly into the prediabetic range, and the member was concerned. Dr. Harrison outlined how their family history of diabetes impacts their risk and provided additional lifestyle changes to reduce their A1C level.
- **The employee is engaged again with Lifestyle Medicine** and will have another consultation with Dr. Harrison in September.

WELLBEING CONSULTATIONS



Raquel Harrison, MD

Summus MD, Emergency Medicine Physician
Yale New Haven Health – Bridgeport Hospital



Summus Case Studies - Health Navigation

Insurance Navigation for Hospital Bill

MEMBER CONCERN

A member recently gave birth and received a bill from their hospital. Wanting a comprehensive cost breakdown, she reached out to Summus for clarity.

SUMMUS RESPONSE

- After reviewing the member's bill and insurance coverage we **provided a detailed note to the member including a cost breakdown** of personal deductible, family deductible, and out of pocket expenses as they relate to the final cost.
- We then **provided a step-by-step guide on how to ensure her bill is process correctly with her insurance carrier**. This included questions to ask the insurance provider at each step and offered ongoing support.

IMPACT

The member received **crucial information on her medical expenses**, not having to wade through complex information and providing her a path forward to resolve her billing questions.



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Thank you! Super Helpful!”

Guidance on Critical Illness Claim + Records Collection

MEMBER CONCERN

A member's husband was hospitalized for several days due to congestive heart failure. As a result of this, the member filed a critical illness claim with her insurance provider. Receiving a denial to her claim, she reached out to Summus to better understand her options.

SUMMUS RESPONSE

- Summus first **reviewed the member's initial claim and decision notice**. We then **provided an explanation for the denial decision**.
- We then **reviewed all of the member's health benefit documents offered through their employer**, and provided information on two specific benefits that could **offer financial support** related to this health condition.
- We then went a step further and **collected all of the member's medical records** from his various hospital stays and organized them so they are easily digestible for the family and any new physicians.

IMPACT

The member had a sense of relief, now knowing about benefit options available to them. They also had a better understanding of the decision made by their insurance provider, and all of their records in one place.

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MEMBER
SATISFACTION (1 to 10)



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Summus has been a great resource for helping me navigate through this. I'm so glad I had someone to talk to versus trying to figure it all out on my own.