



HelixIQ²

Intelligence, Amplified. Rebate Management, Transformed.

AI-NATIVE MANAGED CARE REBATE ACCELERATOR

The first AI-native accelerator built for managed care rebate operations.

HelixIQ² puts the entire rebate lifecycle at your fingertips — accruals, payments, claims bucketing, and reconciliation — all in one real-time dashboard. Ask questions in plain English. Get instant answers with supporting charts. Navigate to any record, approve payment packages, and build custom dashboards — all through conversation. No SQL. No report writers. No waiting on IT.

Plain English

NO SQL OR CODING REQUIRED

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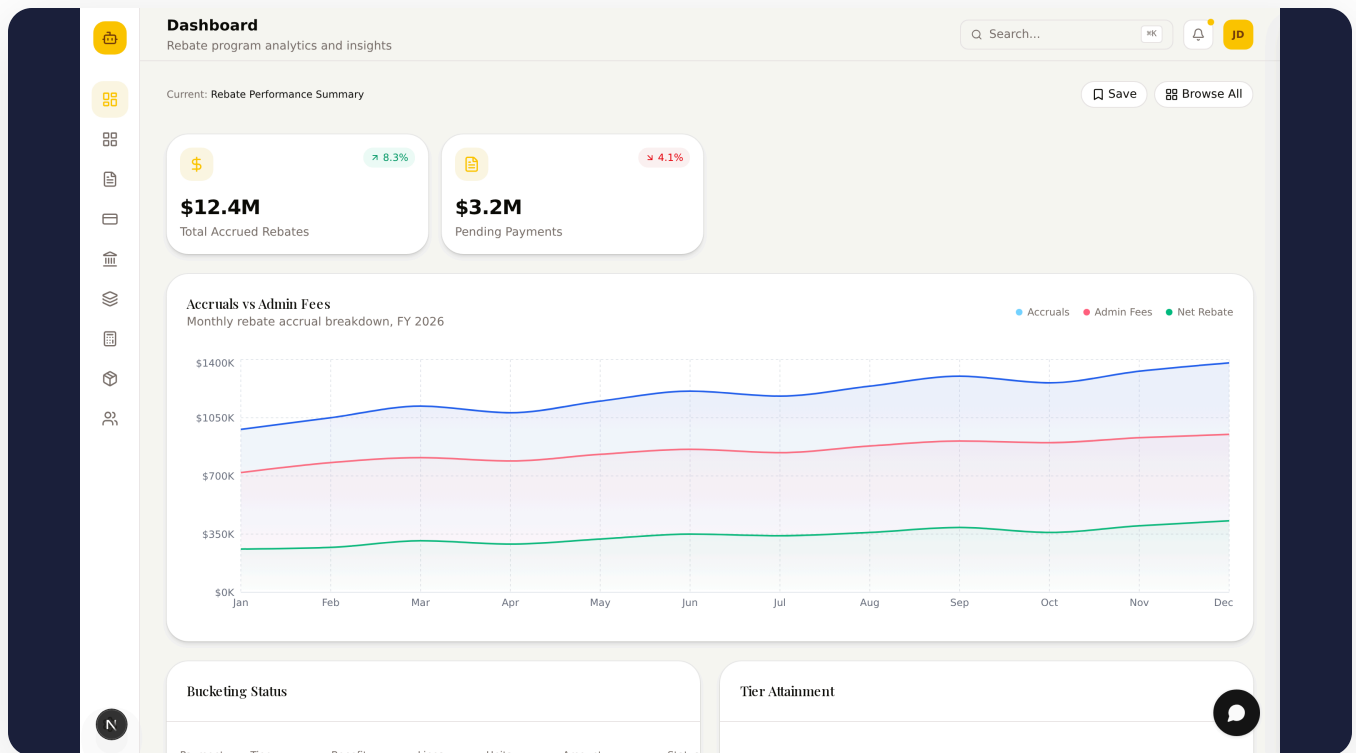
INTEGRATED MODULES

Instant

ANSWERS & INSIGHTS

Real-Time

DATA & ANALYTICS

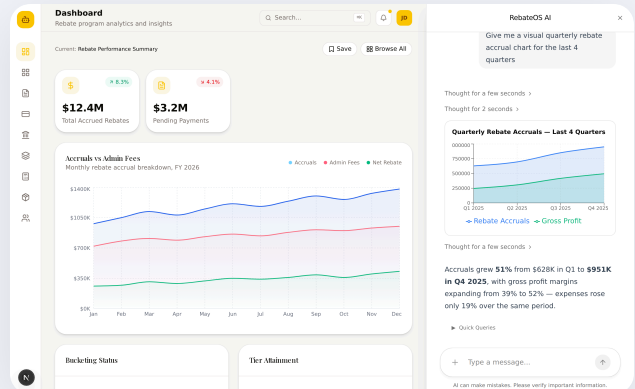


Ask questions. Get answers. Take action — all in plain English.

Your rebate operations, now conversational.

HelixIQ² understands the language of managed care rebates. No training required. Just ask:

- **Rebate analytics** — "What's our total accrued position across all Medicare Part D programs?"
- **Payment operations** — "Show me all Q1 payments pending release for Express Scripts."
- **Discrepancy resolution** — "Which programs have the highest dispute rates this quarter?"
- **Forecasting** — "Project our rebate accruals for the next 3 quarters under the base scenario."
- **Custom dashboards** — "Build me a dashboard tracking payment velocity by PBM."
- **Instant navigation** — "Take me to the OptumRx flagged claims that need review."



Claims bucketing input, NDC-level visibility, intelligent flagging.

From Claims to Buckets

Every utilization line is tracked at the NDC level with PBM attribution, unit counts, and status tracking.

NDC	DRUG NAME	CATEGORY	UNITS	FLAG THRESHOLD	UNIT PRICE	PBM	BUCKET	STATUS
NDC-00076-4330	Humira (adalimumab)	Immunology	45000	10000	\$2,480	Express Scripts	T1	Processed
NDC-00000-4837	Keytruda (pembrolizumab)	Oncology	12000	5000	\$5,600	CVS Caremark	T1	Processed
NDC-00105-2543	Ozempic (semaglutide)	Endocrinology	82000	20000	\$935	OptumRx	T1	Processed
NDC-00045-5050	Dupixent (dupilumab)	Immunology	28000	8000	\$1,650	Express Scripts	T1	Pending Review
NDC-00009-0182	Skyriz (risankizumab)	Immunology	15000	5000	\$3,200	CVS Caremark	T2	Processed
NDC-00074-2240	Stelara (ustekinumab)	Immunology	9500	4000	\$4,200	Humana	T1	Flagged
NDC-00000-4020	Tecentriq (atezolizumab)	Oncology	6000	2000	\$3,850	OptumRx	T2	Processed
NDC-00070-4883	Enbrel (etanercept)	Immunology	22000	8000	\$1,900	Prime Therapeutics	T1	Pending Review
NDC-00005-2180	Entyvio (vedolizumab)	Immunology	8000	3000	\$2,900	Express Scripts	---	Processed
NDC-00076-5000	Taltz (tekinumab)	Immunology	6000	2000	\$3,500	CVS Caremark	---	Processed
NDC-00000-2380	Avastin (bevacizumab)	Oncology	4000	1500	\$4,200	OptumRx	---	Processed
NDC-00045-5000	Trulicity (dulaglutide)	Endocrinology	35000	12000	\$850	Prime Therapeutics	---	Processed

- Processed, pending-review, and flagged status workflow keeps your team focused on exceptions
- Ask "review the flagged utilization lines from Humana" to instantly triage issues
- Claims approval decisions flow directly into bucketing — no re-keying, no spreadsheets
- Complete audit trail from claim submission through tier calculation to payment

Every module you need to run rebate operations end-to-end.

Dashboard & Templates

Real-time KPIs with 19 widget types — charts, tables, forecasts, heatmaps. Browse pre-built templates (Rebate Performance, Payment Velocity, Discrepancy & Reconciliation) or compose your own. Save, clone, and share dashboard layouts.

Rebate Payments

Full Payment Object lifecycle — Accrued, Approved, Released, Paid. Filter by PBM, program, status. Drill into payment details with one click.

Payment Packages

Group payments by PBM, contract, or period. Validate, approve, and release packages to AP. Built-in approval routing with complete audit trail.

Rebate Programs

Define any rebate program — Medicare Part D, Medicaid, Commercial Formulary, 340B, or your own custom contracts — with tier definitions, benefit structures, netting rules, and period-over-period accrual tracking.

Bucketing

Utilization lines automatically sorted into tier basis + benefit buckets. Product, formulary, and plan eligibility rules applied. Include/exclude with full audit trail.

Estimated Payments

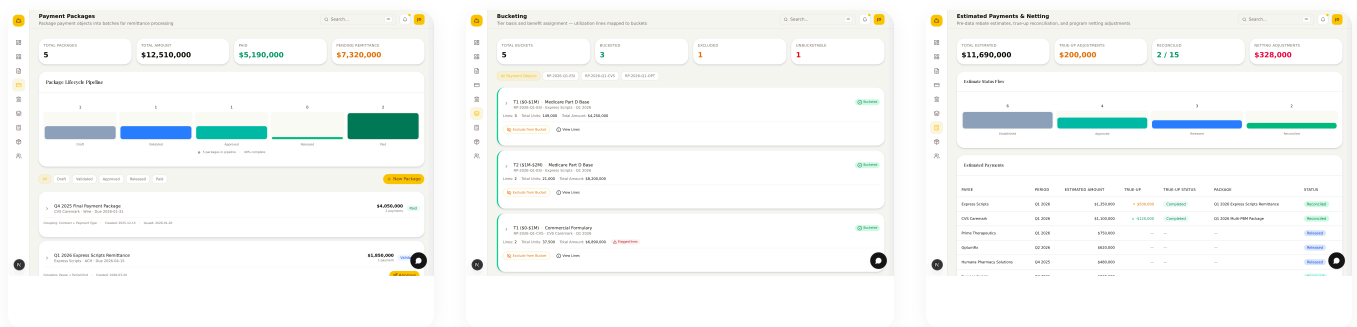
Advance payments made before claims data is finalized. True-up against actuals automatically. Netting adjustments and reversals tracked in full.

Utilization Data

NDC-level claims tracking with PBM attribution. Processed, pending-review, and flagged status workflow. Claims review decisions flow directly into bucketing.

Stakeholders

Contact directory for your entire partner network — PBMs, manufacturers, plan sponsors, and TPAs. Track roles, contract values, and relationships across any organization in your ecosystem.

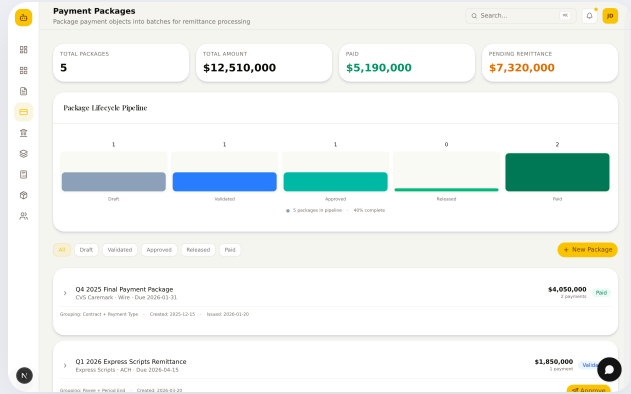


Streamlined approvals with complete audit trail.

Approve with Confidence

When a Payment Package is ready for release or claims need review, HelixIQ² presents every detail needed to make an informed decision:

- Payment Package details: PBM, amount, period, claims included — all on one screen
- Claims review: NDC-level utilization data with clear reasons for flagging
- One-click Approve or Return for Review — no hunting through menus
- Full audit trail — every decision logged with timestamp and user, auditor-ready





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www.helixstrategygroup.com
contact@helixstrategygroup.com

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Built for pharmaceutical manufacturer rebate operations.