

CAMPAIGNS AND OTHER TOOLS FOR IMPROVED HPV VACCINATION RATES

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The right side of the slide features a vibrant, abstract graphic design. It consists of various organic, flowing shapes in shades of green, yellow, orange, red, pink, and purple. A prominent dark blue shape with a white outline of a person's head and neck is positioned in the lower-left quadrant of this graphic area. At the bottom right, the year '2023' is displayed in a white, outlined font, with each digit partially overlaid by a stylized, colorful figure that resembles a person or a network node.

2023



Presenters



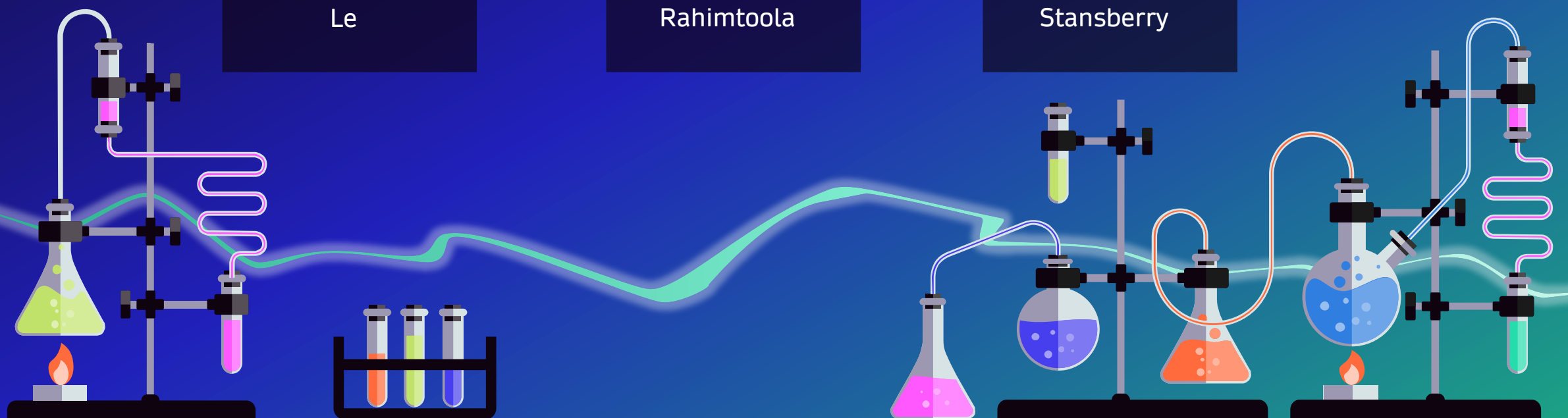
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Disclosures

The following speaker(s) have no relevant financial relationships with ineligible companies to disclose:

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UTHealth Houston | UT Physicians

Academic | Greater Houston area | Hyperdrive May 22

2 BEHAVIORAL HEALTH
HOSPITALS

538 BH BEDS

100+ CLINICS

2 Million OUTPATIENT VISITS

2,000+ CLINICIANS

1 Million PATIENTS

UTHealth Houston is an academic university that includes McGovern Medical School, a behavioral health campus, and the clinical practice of UT Physicians (UTPhysicians.com). Founded in 1972, the university focuses on education, patient care for the whole family, and research.

Learning Objectives

1. Describe how Campaigns can ease implementing and tracking patient care gaps and outreach
2. Apply Epic tools (i.e., Healthy Planet's bulk communication, Campaigns, Cogito SQL) to implement a patient reminder and recall system
3. Describe how to incorporate a population defined with complex randomization into Campaigns



Agenda



OVERVIEW

PROCESS

OUTCOMES & LESSONS LEARNED

WHAT'S NEXT

OVERVIEW

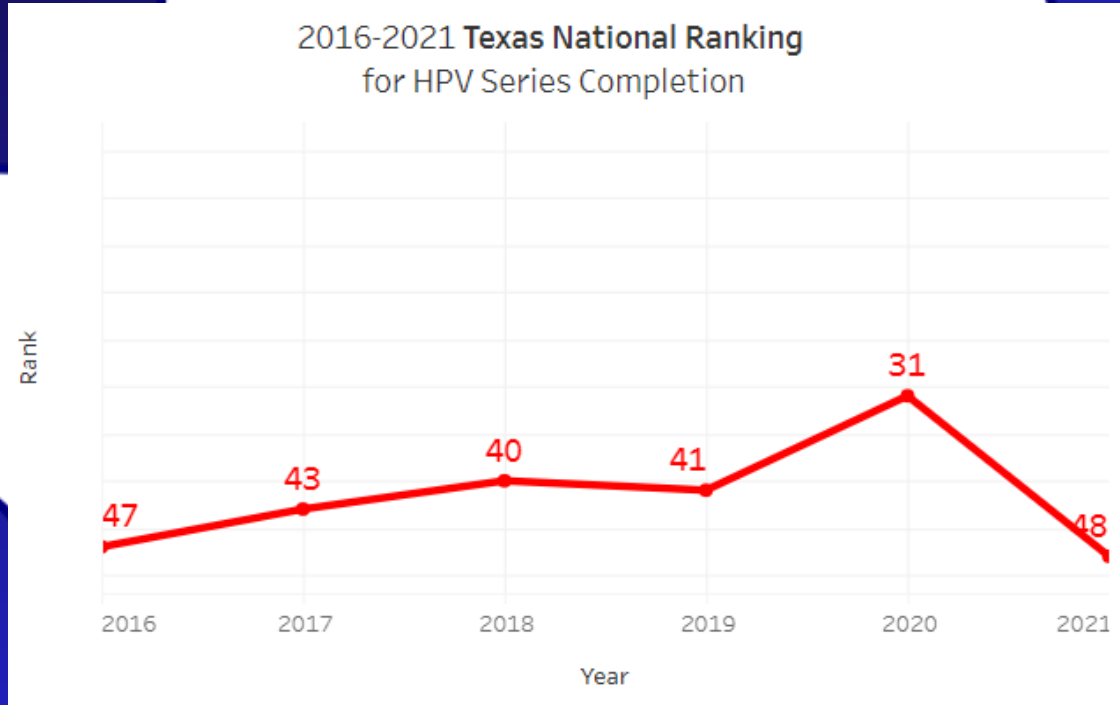
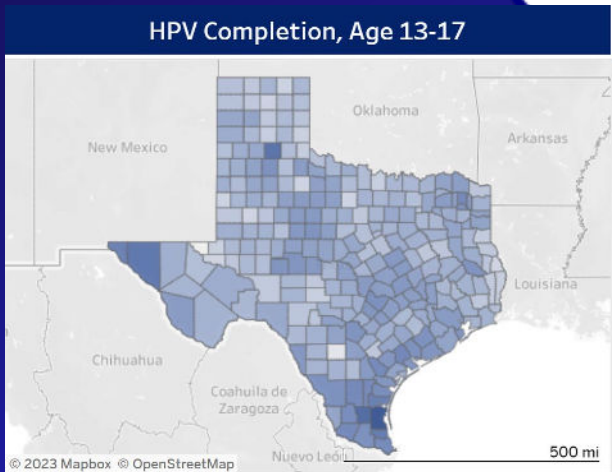
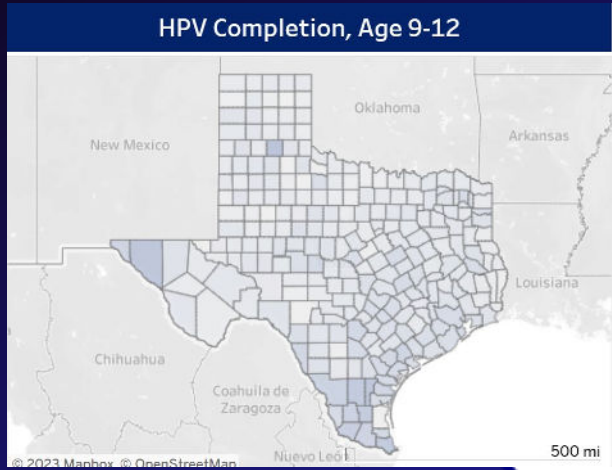


Challenge

2030

Healthy People Goal:

80% HPV Vaccine Coverage



In 2021,
Harris County

8.2% Ages 9-12
40.2% Ages 13-17

Overview

Research project using a pragmatic, stratified randomization to increase HPV vaccination for patients 9-26 years of age via electronic reminders

Aims:

1. Use Campaigns to improve HPV vaccination rates among target patients
2. Optimize reminder and recall systems for providers and patients
3. Compare vaccination and scheduling rates among Campaign and non-Campaign patients



Reference: Hanley, K., Chung, T. H., Nguyen, L. K., Amadi, T., Stansberry, S., Yetman, R. J., Foxhall, L. E., Bello, R., Diallo, T., & Le, Y. L. (2023). Using Electronic Reminders to Improve Human Papillomavirus (HPV) Vaccinations among Primary Care Patients. *Vaccines*, 11(4), 872. <https://doi.org/10.3390/vaccines11040872>

EpicShare: [Closing Preventive Care Gaps and Improving Population Health with Automated Outreach](#)

Overview

Study Design



Usual Care
(N=3,703)

Stratified randomization:

- Age
- Vaccine status
- Sex
- Clinic Location

Intervention
(N=3,705)

Overview

Study Design

Usual care (control):

- in-person, provider recommendation
- visual reminders in rooms
- bundling of vaccinations/opt-out
- pre-visit phone call
- standing orders (some clinics)

Intervention group:

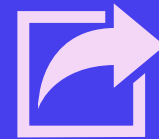
- usual care (as described)
- up to 3 personalized electronic reminders with physician recommendation and brief education



SMS



Email



Patient
Portal

Usual Care Health Maintenance; MyChart

Lucy Lego
Female, 16 y.o., 5/5/2007
MRN: 10000605
MHHS MRN: No Value Set
Code: Assume Full (no ACP docs)
Registries (6)

Health Maintenance

Topic	Due Date	Frequency	Date Com
Current Care Gaps			
MMR Vaccines (1 of 2 - Standard series)	Overdue - never done	Imm Details	
Varicella Vaccines (1 of 2 - 2-dose childhood series)	Overdue - never done	Imm Details	
HPV Vaccines (1 - 2-dose series)	Overdue - never done	Imm Details	
Adolescent Depression Screening	Overdue - never done	1 year(s)	
Well Child Check	Due since 5/5/2007	1 year(s)	

Health Maintenance Plans

- Adolescent Depression Screening
- COVID-19 Vaccine
- COVID-19 Vaccine Phase 3 (Age 12 to 17yr)
- DTaP,Tdap, and Td Vaccines
- HIB Vaccines
- HPV Vaccines
- Hepatitis A Vaccines
- Hepatitis B Vaccines
- IPV Vaccines
- Influenza Vaccine
- MMR Vaccines
- Meningococcal Vaccine
- Orthopox Vaccine
- Pneumococcal Vaccine: Pediatrics (0 to 5 Years) and At-Risk Patients (6 to 64 Years)
- Rotavirus Vaccine
- Varicella Vaccines
- Well Child 16 Year Check-Up

Status Legend

- Overdue
- Due Soon
- Postponed
- Ordered
- Tentative

Definitions

- Completed: Done with the required satisfactions
- Addressed: Overridden with the intention of not completing the topic
- Aged Out: No longer eligible based on patient's age to complete this topic
- Discontinued: Patient no longer due for this topic
- Sequential: Due dates may have irregular spacing

Override Type Abbreviations

- Done: Done
- Pt Refused: Patient Refused
- (N/S): Reason not specified

LAST 3YR

- No visits
- No results

CARE GAPS

- Well Child Check
- MMR Vaccines (1 of 2 - ...)
- Varicella Vaccines (1 of ...)
- HPV Vaccines (1 - 2-dos...)
- 3 more care gaps

PROBLEM LIST (0)

MyUTHealth | MyChart by Epic

Preventive Care

Preventive medicine plays an important part in your health and overall well-being. The following procedures are recommended for people of your age, sex, and medical history.

Overdue

HPV Vaccine
Overdue since November 2, 2022
Previously done: 5/2/2022
[Learn more](#)
 Hide reminder from home page

Mark as complete

Usual Care

My Panel Metrics – Custom Dashboard

Pediatric Primary Care

	Oct 22	Nov 22	Dec 22	Jan	Feb	Mar	YTD
Childhood Immunization Status	32 %	31 %	32 %	34 %	33 %	35 %	35 %
Immunization for Adolescents	37 %	37 %	37 %	41 %	41 %	41 %	42 %
Tobacco Use and Help with Quitting Among Adolescents	63 %	63 %	65 %	45 %	48 %	50 %	51 %
HPV Vaccine (9-10)	4 %	5 %	5 %	1 %	1 %	2 %	2 %
HPV Vaccine (11-14)	51 %	52 %	53 %	44 %	45 %	46 %	46 %
HPV Vaccine (15-18)	62 %	62 %	63 %	65 %	65 %	65 %	65 %
HPV Vaccine (18-26)	35 %	35 %	35 %	42 %	41 %	41 %	41 %

Usual Care Patient List at Department Level

HPV Vaccine (15-18) drilldown for 10/1/2022 through 10/31/2022 [1471134] as of Wed 4/5/2023 1:11 PM

Chart Encounter Communication Track Pt Outreach HM Modifiers Add to List Place Orders Questionnaire Series

Detail List Explore

Filter Select All

Patient	Outcome	Pt Age	PCP	Pt Comm Pref	Pt. Portal Status
	✗	16 years	Molly Hammond, MD	MyUTHealth	Not Used
	✓	16 years	Molly Hammond, MD	MyUTHealth	Inactivated
	✗	17 years	Molly Hammond, MD	MyUTHealth	Inactivated
	✗	15 years	Molly Hammond, MD	MyUTHealth	Inactivated
	✓	17 years	Molly Hammond, MD	MyUTHealth	Inactivated
	✗	15 years	Stacy Nayes, MD	MyUTHealth	Activated

My Panel Metrics Details My Panel Metrics Validation

HPV Vaccine (15-18) [202041389]

Description

Outcomes

Outcome from last update (4/2/2023 2:28 PM): [IN_DENOMINATOR](#)

Attribution

Wellness

	Attributed Target	Attribution Source
Provider	Molly Hammond, MD	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]
Provider Specialty	Pediatrics	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]
Department	UTP PEDI CENTER PEDIATRICS - BAY AREA	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]
Revenue Location	UTP PEDIATRIC CENTER AT BAY AREA	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]
Service Area	UTHEALTH	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]
Department Group	UT PHYSICIANS	MR MPM PATIENT PCP OR CARE TEAM MEMBER[2101111901]

Usual Care

Custom RWB: MPM Next Appointment Gap List

HTI MPM Next Appointment Gaplist [1471171] as of Wed 4/5/2023 1:22 PM

Chart Expand Appts Check In Check Out Change EQD Referrals FYI Open All Rfls Create Subset

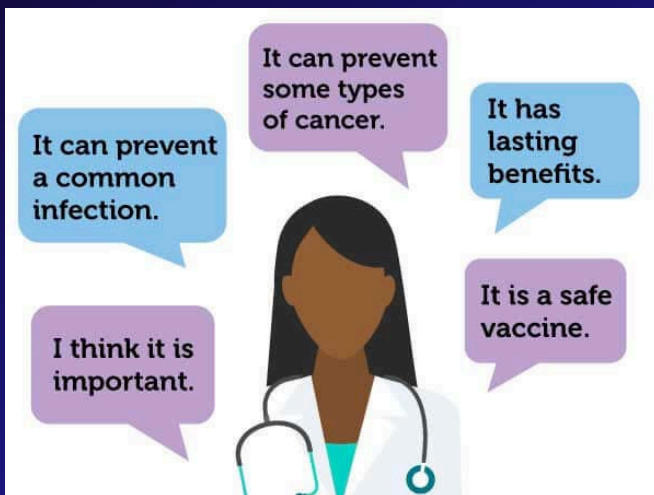
Detail List Explore Summary

Filter

MRN	Patient	PCP	bacco	Pedi BMI Measurement	Pedi Nutrition Counseling	Pedi Physical Activity Counseling	HPV 15-18	Childhood Imms	Adolescent Imms
		Michelle Barratt, MD MPH							
		Kristine O'Connor, MD					✓		
		Holly Dawn Smith, MD		✓	✗	✗	✓		
		Robert Yetman, MD					✗		
		Michelle Barratt, MD MPH		✓	✗	✗			
		Kimberly Smith, MD					✓		

Intervention – Campaigns

Evidence-based Custom Messaging



	Patients > 18 years old	Patients 18+ years
First	<p>Dr. Yetman recommends Jane complete their HPV vaccination to prevent cancers caused by HPV. To schedule, https://www.utphysicians.com/appt.</p> <p>Reply OK to confirm receipt.</p>	<p>John: Dr. Foxhall recommends you complete your HPV vaccination to prevent cancers caused by HPV. To schedule, https://www.utphysicians.com/appt.</p> <p>Reply OK to confirm receipt.</p>

Agenda



CHALLENGE & OVERVIEW

PROCESS

OUTCOMES & LESSONS LEARNED

WHAT'S NEXT

PROCESS



Process Project Timeline

Phase 1

Start: May 11, 2022

3,061 total

- SMS message (N=1,006)
- Patient Portal Message (N=653)
- Email (N=1,362)

Phase 2

Start: June 11, 2022

2,741 total

- SMS message (N=911)
- Patient Portal Message (N=599)
- Email (N=1,231)

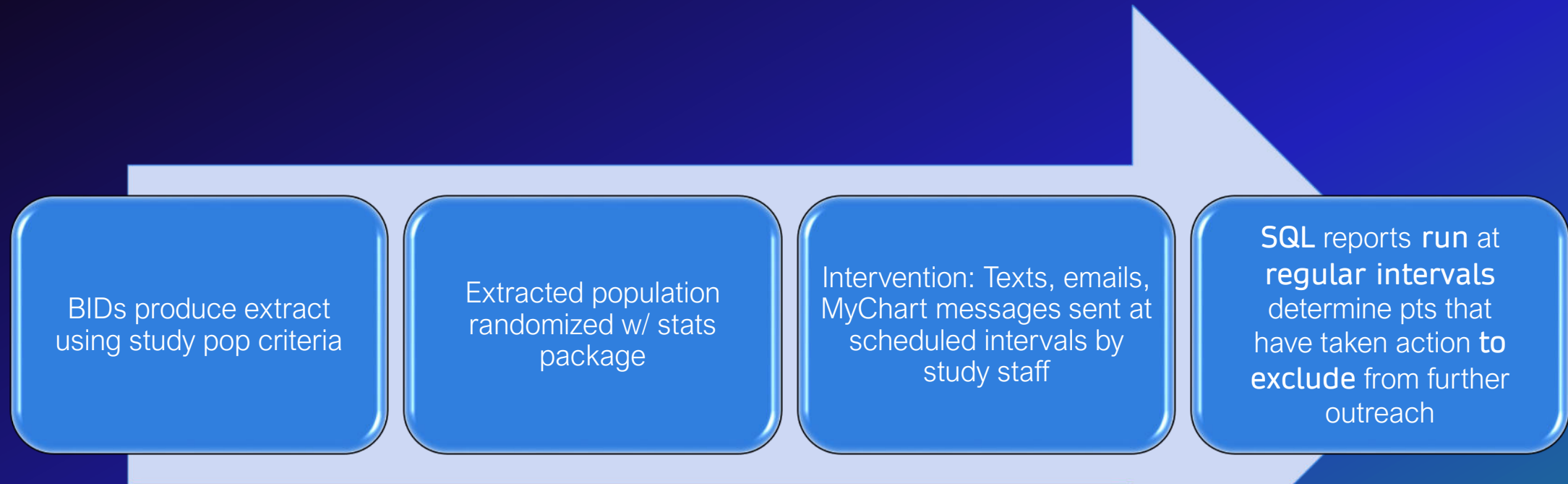
Phase 3

Start: July 11, 2022

2,566 total

- SMS message (N=859)
- Patient Portal Message (N=563)
- Email (N=1,114)

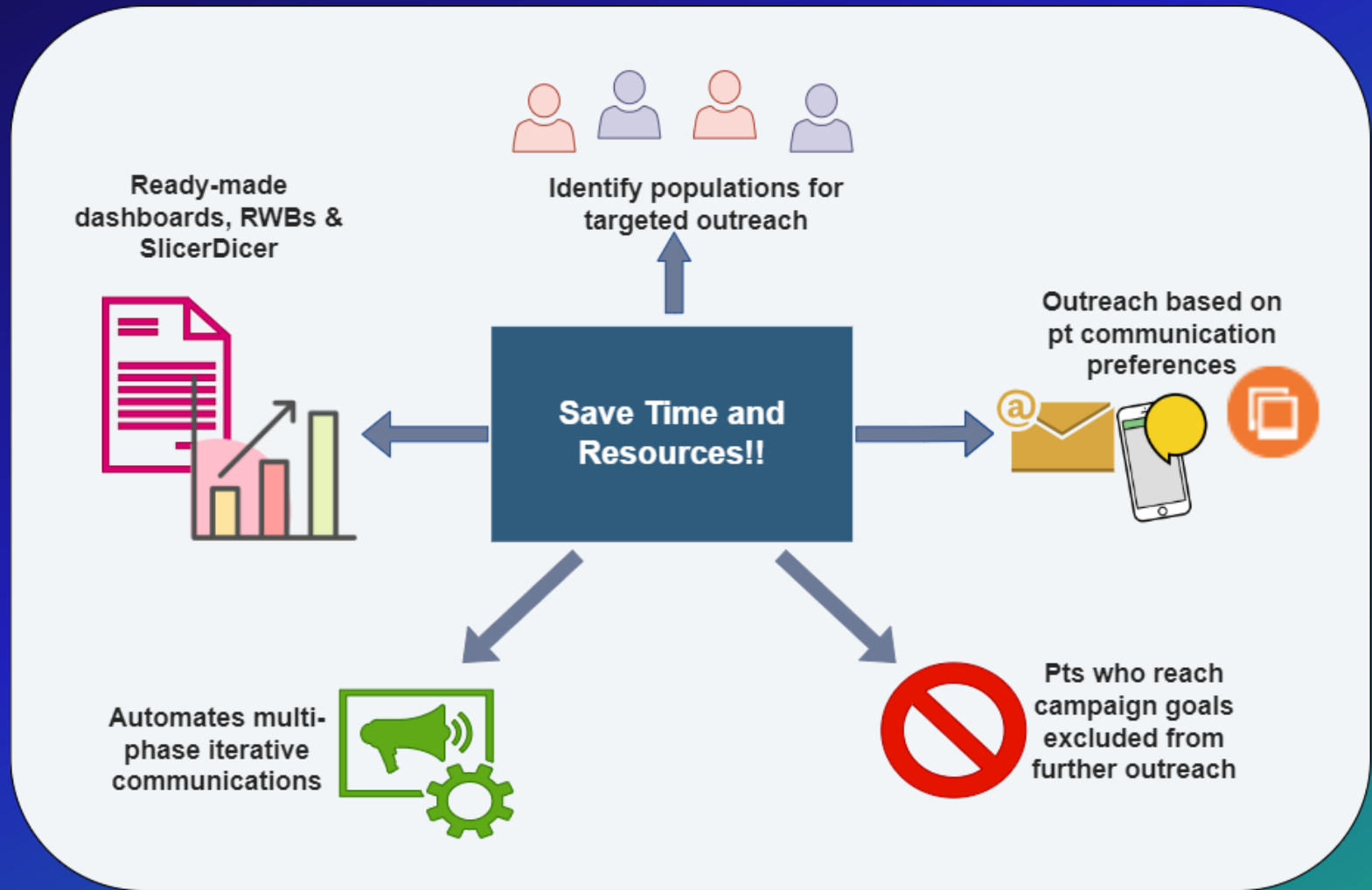
Process – If Campaigns Didn't Exist



- Patients who opt out must be tracked and manually excluded
- Monitoring by leadership/study staff on custom dashboards & RWB reports built by BIDs

Process

Why Campaigns?



Process

Target Population



Target **Population** = Intervention Arm of study

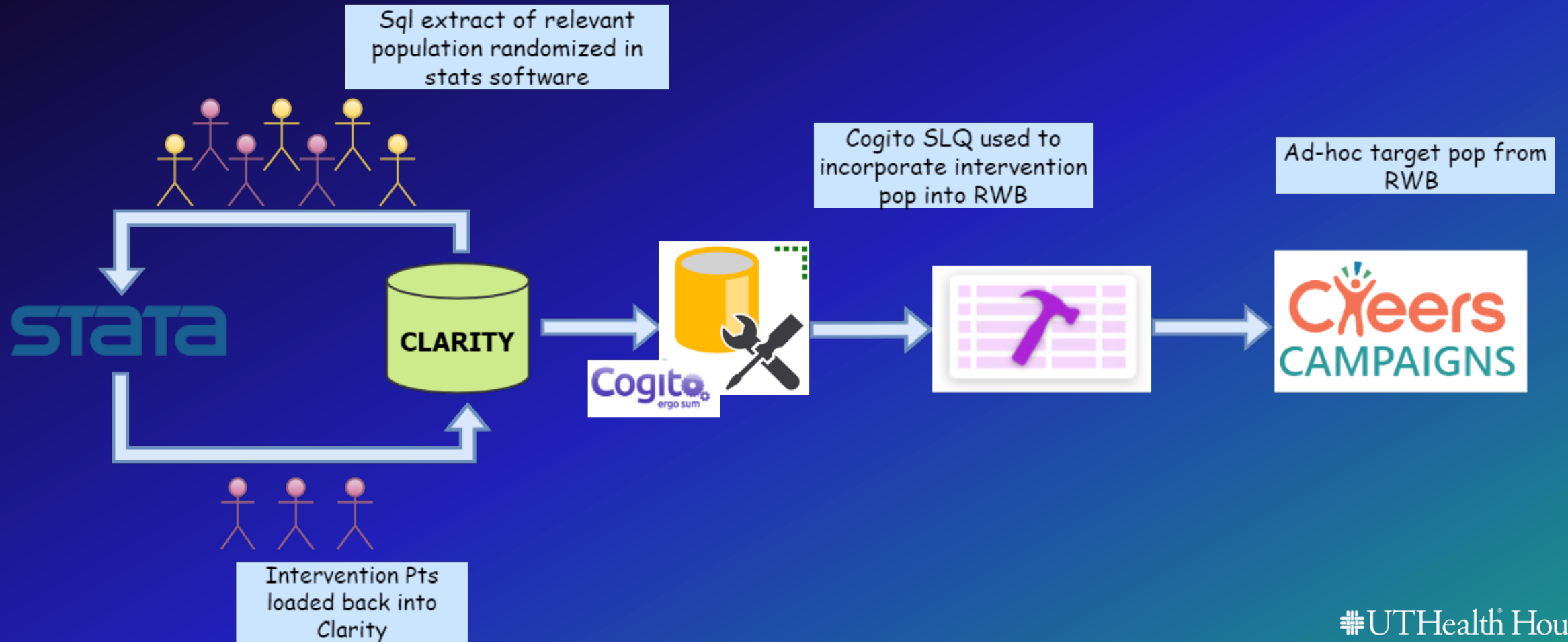


Campaigns can generate the entire population but cannot randomize. All patients meeting criteria would receive outreach



Process

Target Population using Cogito SQL



Process

Target Population using Cogito SQL

HPV Text Messaging [100184]

View Only | Preview

- Snapshot
- Basic Information
- Query Template
 - Parameters
 - SQL Query**
- User Interface
 - Parameters
- Viewer
 - Columns
 - Actions

RDBMS Platform

- SQL Server

Parameters

SQL Script

```
USE CLARITY
-----
--Script contains analysis to identify eligible patients for hpv study
--It continues from HPV target pop file. Enable sqlcmd mode to make temp tables from target pop script available
--Differs a bit from HPV sql measure. For instance, we are excluding any patients that have a documented refusal
-----

-----
--FROM SQL SCRIPT PART 2
-----
--DECLARE DATES (Commented out here, since using target pop code and dates already declared in that file)
DECLARE @MeasureStart date = '2021/01/01'
declare @MeasureEnd date = DATEADD(YEAR, 1, @MeasureStart)
decl @CurrYr date = '01/01/2022'

--Set date values
set @MeasureStart = '01/01/2021'
set @MeasureEnd = DATEADD(YEAR, 1, @MeasureStart)

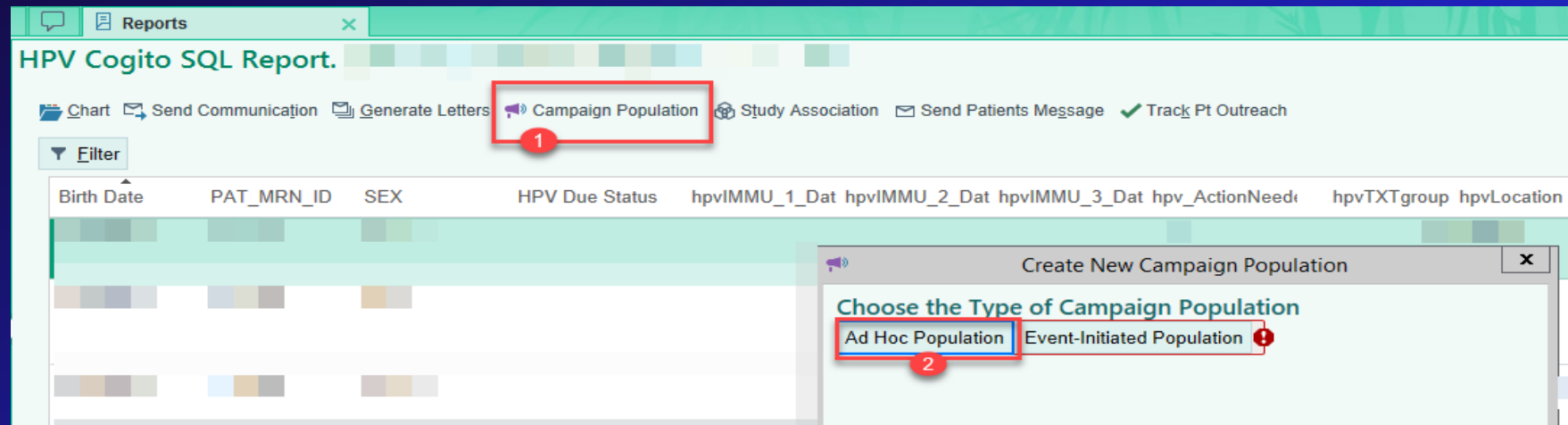
--Target population Table
if object_id ('tempdb..#temp_pop') <> 0 drop table #temp_pop
SELECT
    cast(PAT_MRN_ID as varchar(max)) as PAT_MRN_ID,
    PAT_NAME,
    PtDoB as BIRTH_DATE,
    AgeGroup,
    SEX,
    Ethnic_Group,
    LOC_NAME,
    AttProviderName,
    newloc_name,
    [status],
    [group],
    txt
into
    #temp_pop
FROM
    UTHTI.tbl_HTI_RPT_C1_389_HPVLlist

--Segment by age group.
```

Intervention group uploaded into Clarity DB

Process

Target Population using SQL Workbench report



- Select patients > Campaign population > Ad-hoc Population

Process – Campaign Set-up

Setup

Display Name
HPV Campaign

Lead Type **Recurrence Cycle**
Patient **Ad Hoc**

Ad Hoc Schedule
Start On or After
5/11/2022

➤ Ad Hoc > Start date

Population

Description
Will use an ad-hoc population generated from Cogito-SQL workbench report. It includes initiators or non-initiators that are due for their first or next dose of the vaccine.

Base Population

Ad Hoc Populations
HPV Campaign May 9

➤ Ad Hoc Populations > Select target population



Process – Campaign Set-up

Success

Description
Patients who have Scheduled or completed their HPV Vaccinations

Goal
The purpose of the campaign is to send reminder text messages to patients to schedule HPV immunizations.

Success Rules

+ Add Rule

#	Rule	Succeed if false	↑	↓	✎	🗑
1	HPV HM Overdue	<input type="checkbox"/>				
2	Appointment Scheduled During Campaign Recurrence	<input type="checkbox"/>				

Parameter Name: Lookback Days, Caption: Lookback, Default Value: 0

Parameter Name: NurseVisit, Caption: NurseVisit, Default Value: NURSE VISIT

6 Appointment Scheduled During Campaign Recurrence Succeed if false ↑ ↓ ✎ 🗑

Parameter Name: Lookback Days, Caption: Lookback, Default Value: 0

Parameter Name: MyChartWellWoman, Caption: MyChartWellWoman, Default Value: MYCHART WELL WOMA...

7 Appointment Scheduled During Campaign Recurrence Succeed if false ↑ ↓ ✎ 🗑

Parameter Name: Lookback Days, Caption: Lookback, Default Value: 0

Parameter Name: NewWellWomanExam, Caption: NewWellWomanExam, Default Value: NEW WELL WOMAN EXAM

8 Appointment Scheduled During Campaign Recurrence Succeed if false ↑ ↓ ✎ 🗑

Parameter Name: Lookback Days, Caption: Lookback, Default Value: 0

Parameter Name: Physical, Caption: Physical, Default Value: PHYSICAL

Evaluation logic: AND OR Custom

➤ Campaign Success > Success rules

Process – Campaign Set-up

#	Property	Operator	Value
1	Patient > Does HM Topic Have Specified Status	<=>	Yes [11]

Topic Grouper ID
HPV HM TOPICS [116105]

Statuses
 Due Soon Overdue

External Only: Due Soon Timing

Appointment Scheduled During Campaign Recurrence 50507

Returns 1-Yes if the patient scheduled an appointment of the specified visit type during the campaign recurrence, or up to a number of days prior to campaign start equal to the lookback specified. Returns 0-No otherwise. If the lookback period entered is negative, will default to a lookback of 0 days. Will ignore no-show appointments.

Evaluation logic: And Or Custom:

Rule Logic is currently read-only.
Rule is read-only because it is a released rule.

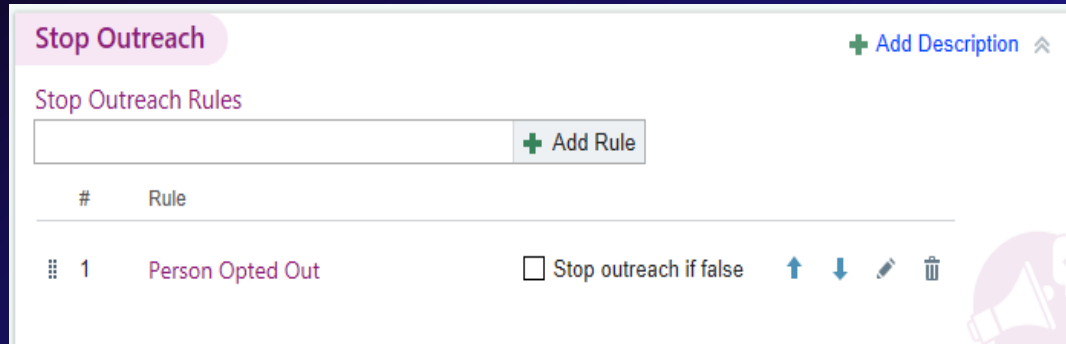
#	Property	Operator	Value
1	Patient > Evaluate For Patient Based on Extension Record	=	Yes [1]

Rule Parameter
 Visit Type [5] Lookback Days [2]

Campaign Extension
Campaigns - Appointment Sch...

➤ Campaign Success > Success rules

Process – Campaign Set-up



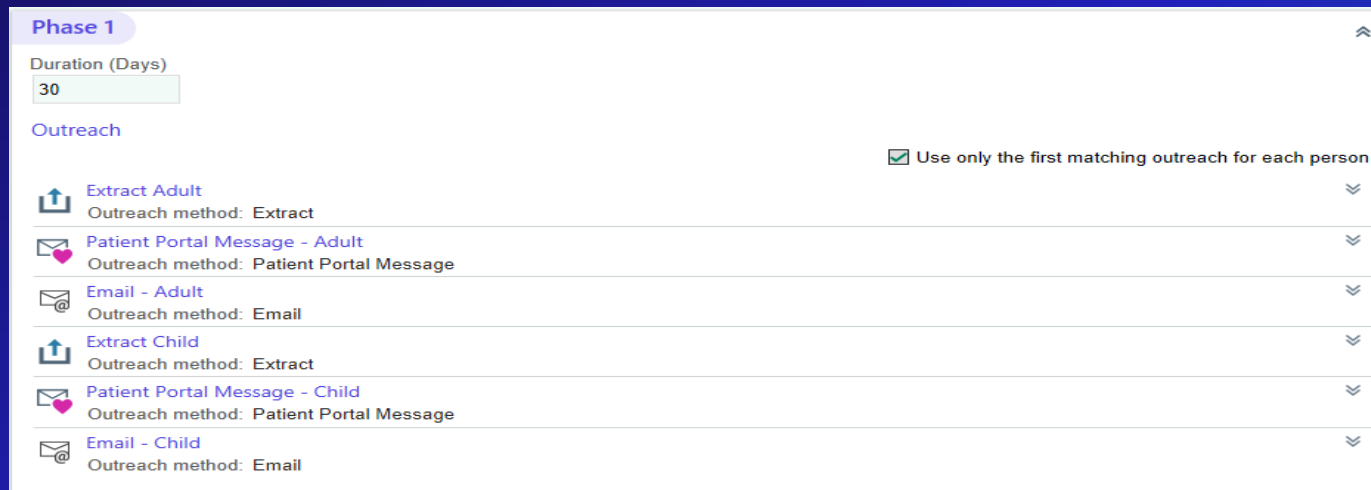
Stop Outreach + Add Description

Stop Outreach Rules

+ Add Rule

#	Rule	
1	Person Opted Out	<input type="checkbox"/> Stop outreach if false ↑ ↓ ✎ 🗑️

➤ Stop Outreach > Stop Outreach rule



Phase 1

Duration (Days)
30

Outreach Use only the first matching outreach for each person

- ↑ Extract Adult
Outreach method: Extract
- ✉️ Patient Portal Message - Adult
Outreach method: Patient Portal Message
- ✉️ Email - Adult
Outreach method: Email
- ↑ Extract Child
Outreach method: Extract
- ✉️ Patient Portal Message - Child
Outreach method: Patient Portal Message
- ✉️ Email - Child
Outreach method: Email

➤ Outreach Phase > Outreach types

Process – Campaign Set-up

Patient Portal Message - Adult
Outreach method: Patient Portal Message

Outreach Name: Patient Portal Message - Adult

Message Subject: HPV vaccination to prevent cancers

Send Patient Notification?: Yes

Allow Replies?: No

Questionnaire: [Empty]

Sending User Override: [Empty]

Sending Department Override: [Empty]

Rich Text Editor: @FNAME@ : Dr. @NOPCPENC@ recommends you complete your HPV vaccination to prevent cancers caused by HPV. [Schedule Appointment Now](#)

Outreach Inclusion Rules

#	Rule	Include if false
1	Patient Age >= 18	<input type="checkbox"/>

➤ Outreach > Outreach rule

Patient Portal Message - Child
Outreach method: Patient Portal Message

Outreach Name: Patient Portal Message - Child

Message Subject: HPV vaccination to prevent cancers

Send Patient Notification?: Yes

Allow Replies?: No

Questionnaire: [Empty]

Sending User Override: [Empty]

Sending Department Override: [Empty]

Rich Text Editor: Dr. @NOPCPENC@ recommends @FNAME@ complete their HPV vaccination to prevent cancers caused by HPV. [Schedule Appointment Now](#)

Outreach Inclusion Rules

#	Rule	Include if false
1	Patient Age < 18	<input type="checkbox"/>

Process Campaign Set-up

UTH invalid PCP

Describe what this rule is meant to do.

Evaluation logic: **And** Or Custom:

Show Parameter Values

#	Property	Operator	Value
1	Patient » PCP	<>	
PCP Type General			
2	Patient » PCP	<>	
PCP Type General			

Error message
Patient » PCP » Name - Last

UTH Last encounter provider

Describe what this rule is meant to do.

Evaluation logic: **And** Or Custom:

Show Parameter Values

#	Property	Operator	Value
1	Patient » C_COPY_OF_Last Encounter Provider	<>	
Encounter Types to Include <input checked="" type="checkbox"/> Office Visit <input checked="" type="checkbox"/> Office Visit - Legacy <input checked="" type="checkbox"/> Telemedicine			
Encounter Types to Exclude			
Ambulatory Encounter Types to Include			
Appointment Statuses to Include <input checked="" type="checkbox"/> Completed			
2	Patient » C_COPY_OF_Last Encounter Provider » C_Provider Type	=	Physician [1] Nurse Practitioner [9]

Error message
Patient » C_COPY_OF_Last Encounter Provider » Name - Last

➤ Outreach > Outreach rule

Process Campaign Set-up

Name: UTH HTI RULE ERROR MESSAGE SMARTLINK

General Smart_Link Smart_Text Smart_Phrase Smart_Block Used By

Override SmartLink: RULE ERROR MESSAGE SMARTLINK [60403]

Mnemonic: NOPCPENC

Short description: Returns the error message of the first rule to evaluate to 'true', or a default message if none evaluate to 'true'.

SmartLink Information

Default

Code template: REG RULE ERROR MESSAGE

User-entered parameters?

Parameters:

Name	Value
Rules	<input type="text"/> + Add <input checked="" type="checkbox"/> UTH invalid PCP [727830] <input checked="" type="checkbox"/> UTH Last encounter provider [727844]
Default Text	<input type="text"/>
Delimiter	HTML Break Return <input type="text"/> HTML Break Return
Which Contact When None Provided?	Most recent Reg contact for EPT <input type="text"/> Most recent Reg contact for EPT, standard rule API behavior for others [3]

Code: d getFirstMessageHHS^PACERLPP("727830^727844", "", 18,3)

➤ Outreach > Smartlink

Process

Campaigns set up

The screenshot displays a campaign configuration interface. On the left, a vertical timeline shows three stages: Day 91 (green circle), Day 101 (blue circle), and Day 106 (red octagon). The main area contains two configuration panels:

- Success Evaluation** (green header):
 - Duration (Days): 10
- Cooldown** (blue header):
 - Duration (Days): 5

- Success Evaluation and Cool Down





Agenda



CHALLENGE & OVERVIEW

PROCESS

— **OUTCOMES & LESSONS LEARNED** —

WHAT'S NEXT

OUTCOMES

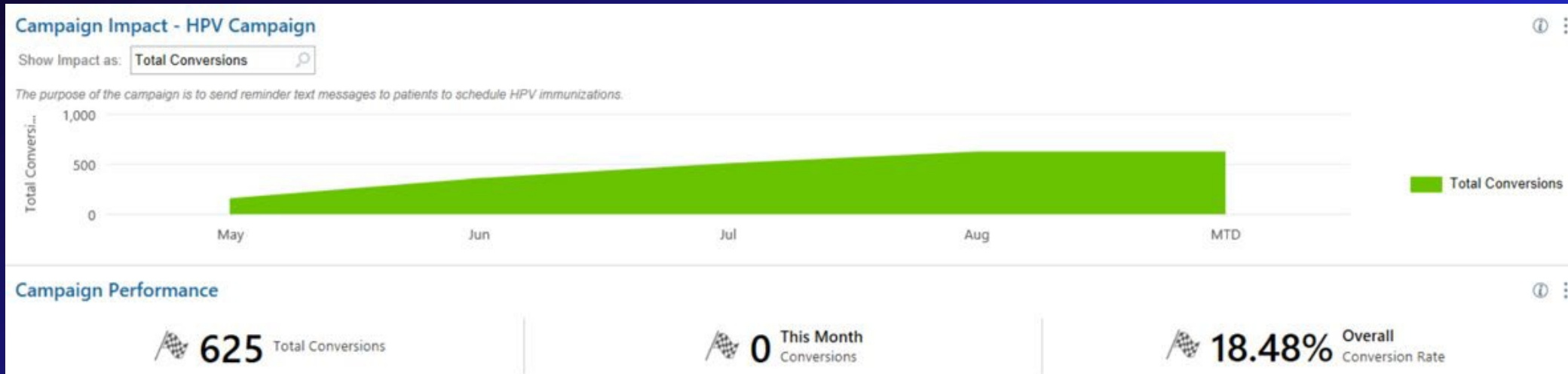


Outcomes: Target Population at Baseline

Baseline Characteristics	Campaigns (N=3,705) N (%)	Usual Care (N=3,703) N (%)	P-value
<u>Age</u>			0.689
9-14	1,511 (40.78)	1,535 (41.45)	
15-18	721 (19.46)	693 (18.71)	
19-25	1,473 (39.76)	1,475 (39.83)	
<u>Sex</u>			0.942
Male	1,676 (45.24)	1,672 (45.15)	
Female	2,029 (54.76)	2,031 (54.85)	
<u>Vaccine Status</u>			0.834
Not initiated	2,542 (68.61)	2,549 (68.84)	
Initiated	1,163 (31.39)	1,154 (31.16)	
<u>Race/Ethnicity</u>			0.176
Non-Hispanic White	865 (23.35)	939 (25.36)	
Non-Hispanic Black	955 (25.78)	962 (25.98)	
Hispanic	911 (24.59)	874 (23.60)	
Other/Unknown	974 (26.29)	928 (25.06)	
<u>Insurance</u>			0.134
Medicaid	1,317 (35.55)	1,337 (36.11)	
Private (managed Care)	2,014 (54.36)	2,049 (55.33)	
Uninsured	338 (9.12)	291 (7.86)	
Other	36 (0.97)	26 (0.70)	

Outcomes

Campaigns Successes



Outcomes

Scheduling, Visits, and Additional Doses

HPV outcomes	Electronic Reminder (N=3,705)			Usual Care (N=3,703)
	N (%)	Adjusted OR (95% CI**)	P-Value	N (%)
Appointment Scheduling	752 (20.3)	1.12 (1.00, 1.26)	0.056	700 (18.9)
Clinic Visit	423 (11.42)	1.07 (0.94, 1.23)	0.300	419 (11.32)
All additional HPV Vaccination(s)	450 (12.15)	1.17 (1.01, 1.36)	0.036	402 (10.86)

Multiple logistic regression* analysis results of HPV outcomes

Outcomes

Vaccination Initiation and Completion

	Electronic Reminder (N=2,529)			Usual Care (N=2,538)
	N (%)	Adjusted Odds Ratio (95% CI**)	P-Value	N (%)
HPV vaccine initiation rate	206 (8.15)	1.22 (0.98, 1.51)	0.076	181 (7.13)
	Electronic Reminder (N=3,705)			Usual Care (N=3,703)
	N (%)	Adjusted Odds Ratio (95% CI**)	P-Value	N (%)
HPV vaccine completion rate	225 (6.07)	1.12 (0.90, 1.38)	0.302	207 (5.59)

Subgroup vaccination outcomes

LESSONS LEARNED



Lessons Learned

- ▶ Learning new things takes more time than expected...Cogito SQL
- ▶ Is governance needed for contacting patients?
 - ◆ Whose patients: yours, mine or ours?
 - ◆ Proxy and adolescent access to MyChart
- ▶ Campaigns automated some things but not all things...
 - ◆ Text messages were done via extract and third party
 - ◆ No embedded opt-out for emails
 - ◆ Ability to do complex randomization in CER rules and SlicerDicer.

Lessons Learned

➤ Active Campaigns

- ◆ **Preventive:** Annual Well Child Check -up
- ◆ **Alternate Treatment:** Hypoglossal Nerve Stimulation for Patients with Sleep Apnea
- ◆ **Patient Access:** Adolescent to Adult MyChart Access

➤ Campaigns in Development

- ◆ **Preventive:** Annual Wellness Visit for Patients with Medicare
- ◆ **Alternate Treatment:** Treatment Options for Patients with Rhinitis
- ◆ **Patient Access:** MyChart Activation for <18



Agenda



CHALLENGES & OVERVIEW

PROCESS

OUTCOMES & LESSONS LEARNED

WHAT'S NEXT

WHAT'S NEXT



What's Next – Cheers Roadmap (as of April 2023)

Cheers

Offer Personalized Points of Contact

Designs customer service experiences that make conversations feel familiar and valuable.

Current Maturity: Adequate

Drive Outreach Campaigns

Automate timely, targeted outreach to keep patients and prospective patients engaged with your organization, deliver relevant information, and enhance the health and wellness of your communities.

Current Maturity: Adequate

What's not planned?

Available Today

- Maintain Comprehensive Call Records
- ★ Present 360-Degree Caller Information
- Personalize Calls Through Telephony Integration
- ★ Automatically Assign Follow-up Tasks
- Report on Contact Center Operations
- ★ Operate from a Flexible Call Hub
- Connect Agents to Provider Finder
- Recommend Next Best Actions

- Automate and Personalize Outreach
- Send Outreach Through Patients' Preferred Channels
- Simulate Campaigns
- Control the Amount and Timing of Your Communication
- Embed Questionnaires in Your Outreach
- Measure and Monitor the Effectiveness of Your Campaigns

Underway

- Guide Continuous Improvement from the Agent Home
- Operate an Omnichannel Communication Hub
- Enhance Customer Service with Live Chat
- Create Providers on the Fly
- ★ Simplified Call Center Scheduling

- Reach Out Through Epic SMS
- Identify and Attract Prospective Patients
- Monitor Campaigns with Even Greater Precision
- Analyze Patient Acquisition Trends
- Learn from Online Forms

Future

- Cultivate Relationships with Provider, Donors, and Volunteers
- Chat Bots
- Satisfaction Surveys + Service Recovery
- CRM SlicerDicer Data Model
- Take Next Best Actions Beyond the Contact Center
- Dynamic Next Best Action Prioritization

- Reach out through Epic Email
- Welcome Patients with Personalized Microsites
- Better Measure Campaign ROI & Downstream Health Outcomes
- Model Outreach Propensity
- Enable Campaigns for Utility Servers
- Outreach Beyond Patients
- ★ Automate Care Companion Campaigns

What's Next - Considerations

- ▶ **Additional features for outreach now available**
 - ◆ Hello World SMS platform (Feb 2023 via Nebula)
 - ◆ Opt-out of individual campaigns vs communication concept / method. - (Feb 2023)
- ▶ **Epic Cheers**
- ▶ **Developer collaboration on new features**
 - ◆ Complex randomization options
 - ◆ Additional recurrence options

Acknowledgements

Care Teams:

Veronica Martinez, CHW Supervisor

Epic TS:

Austin Sailing
Nicole Jain
Lizzie Koptik
Noah Brennick
Alina Yan

Epic UTHealth:

Brittney Townsend, RN
Carrie De Los Santos
Rajesh Dikonda
Victoria Egbetokun

Funding

The UTHealth Academic Excellence Endowment and donors to The University of Texas MD Anderson Cancer Center's Annual Fund



Providers/Clinical Staff:

Olasunkanmi Adeyinka, MD
Sarah Cavanaugh, MD
Christina Fok, MD
Robert Yetman, MD

HTI Analytics:

Tochi Amadi, MPH
Jordan Godfrey-Stovall
Sandra Stansberry, MPH
Kathleen Hanley, PhD
Tong Han Chung, PhD
Linh Nguyen, PhD
Isaac Mancillas
Hannah Reygaerts, MPH

School of Biomedical Informatics:

Todd Johnson, PhD

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THANKS
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