azara
USER CONFERENCE
APR 29–MAY 1
BOSTON, MA
2025

Targeted Outreach, Tangible Results

Enhancing Patient Care with APO

Today's Speakers

Kate Anderson
Director of Clinical Education and Training
Open Door Health Services

Cam Winter
Population Health Coordinator
Open Door Health Services

Carrie Taylor
Director of Clinical Transformation
Azara Healthcare

Today’s Agenda

APO | OVERVIEW
Azara

APO | IN ACTION!
Open Door Health Services

APO | PRODUCT UPDATE
Azara

Q&A

APO Overview

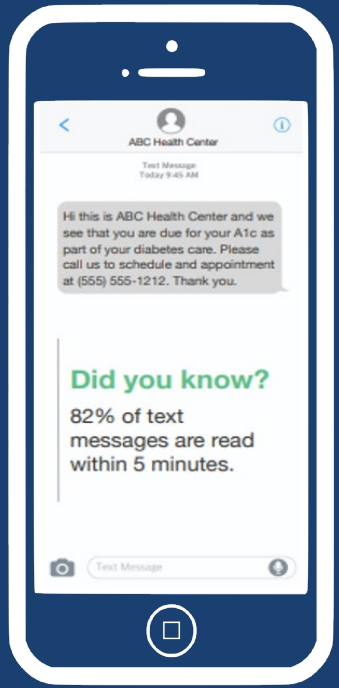
What is APO?

Automated Outreach: “Set it and Forget it” programs that initiate patient contact without manual intervention.

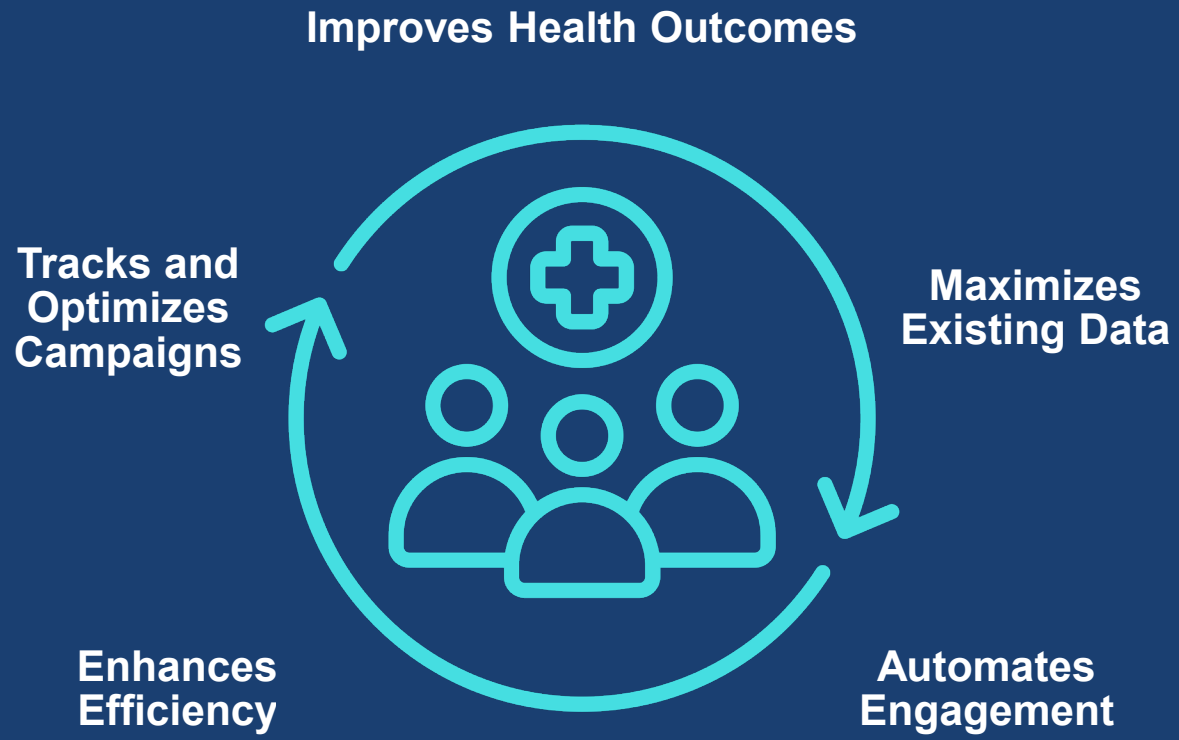
Dynamic Patient Engagement: Sends timely reminders for overdue immunizations, well-child visits, and other preventive care.

Data-Driven Insights: Utilizes DRVS dashboards to monitor the efficacy of outreach efforts and improve care gap closure.

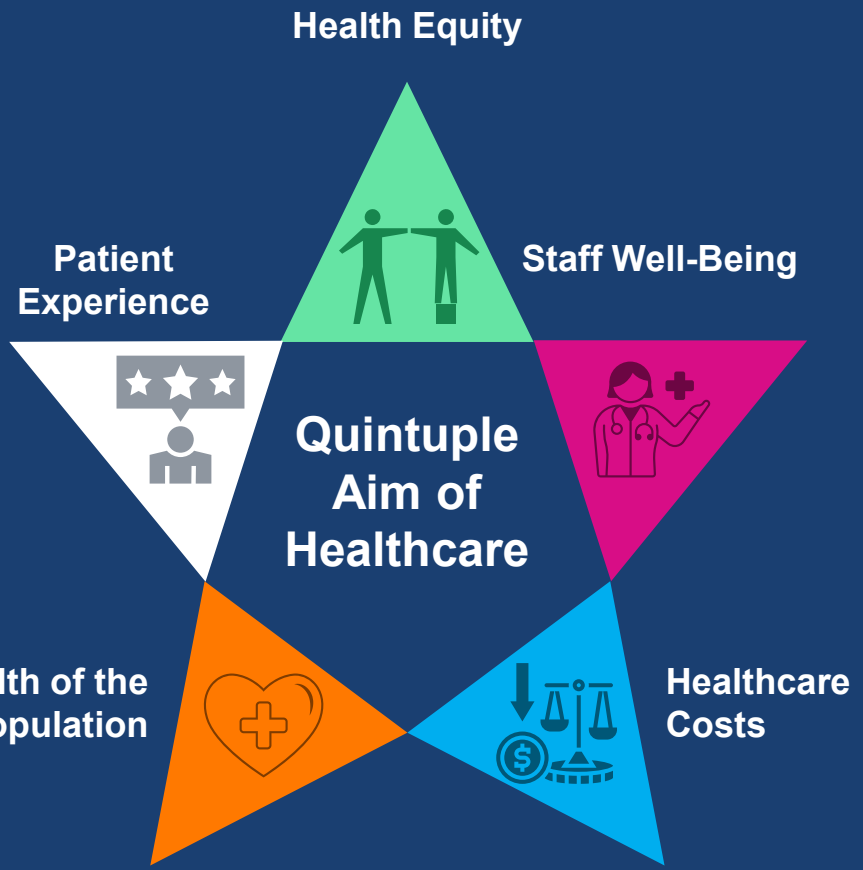
Efficient Resource Allocation: Targets unengaged patients, reduces staff workload, and ensures consistent communication.



APO Impact

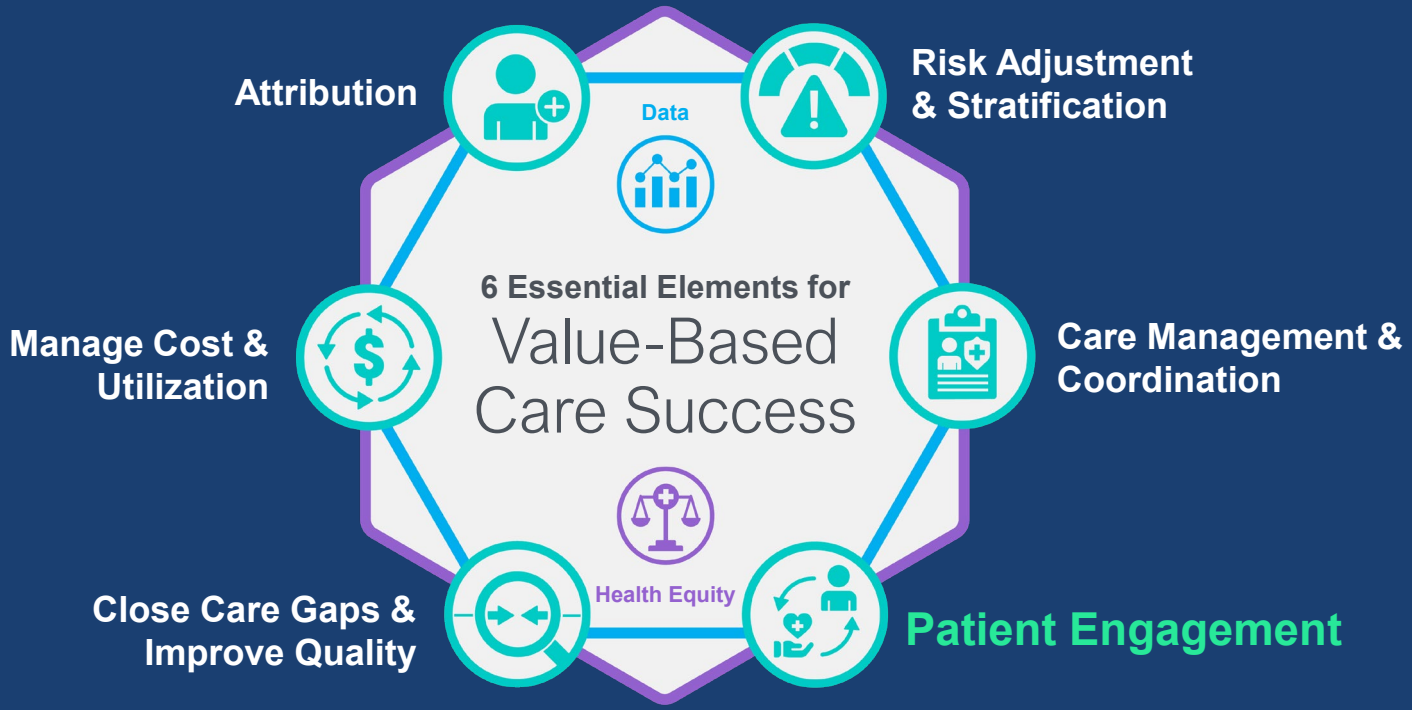

Improves Health Outcomes
Maximizes Existing Data
Automates Engagement
Enhances Efficiency
Tracks and Optimizes Campaigns

The Quintuple Aim



Source: The Quintuple Aim for Health Care Improvement

Essential Elements of VBC



Patient Outreach Connectors

Set It & Forget it Campaigns

Export Patient List

artera™ CareMessage luma™

Available SiFi Campaigns

Cancer Screening

- Breast
- Cervical
- Colorectal
- Unreturned FIT Kits

Chronic Disease

- Diabetes A1c
- Comprehensive Diabetes
- Undiagnosed Hypertension
- Hypertension Control
- CKD Screening: Patients w/ HTN, Diabetes

Pediatrics

- Childhood Immunizations
- Well-Child Visits
- Adolescent Immunizations
- HPV Vaccination

Preventative Visits

- Patients Without Visits
- Primary Care No Shows
- Seasonal Flu
- Chlamydia Screening

COVID-19

- Immunization Availability
- 2nd Dose Reminder
- Booster Dose Reminder

VBC

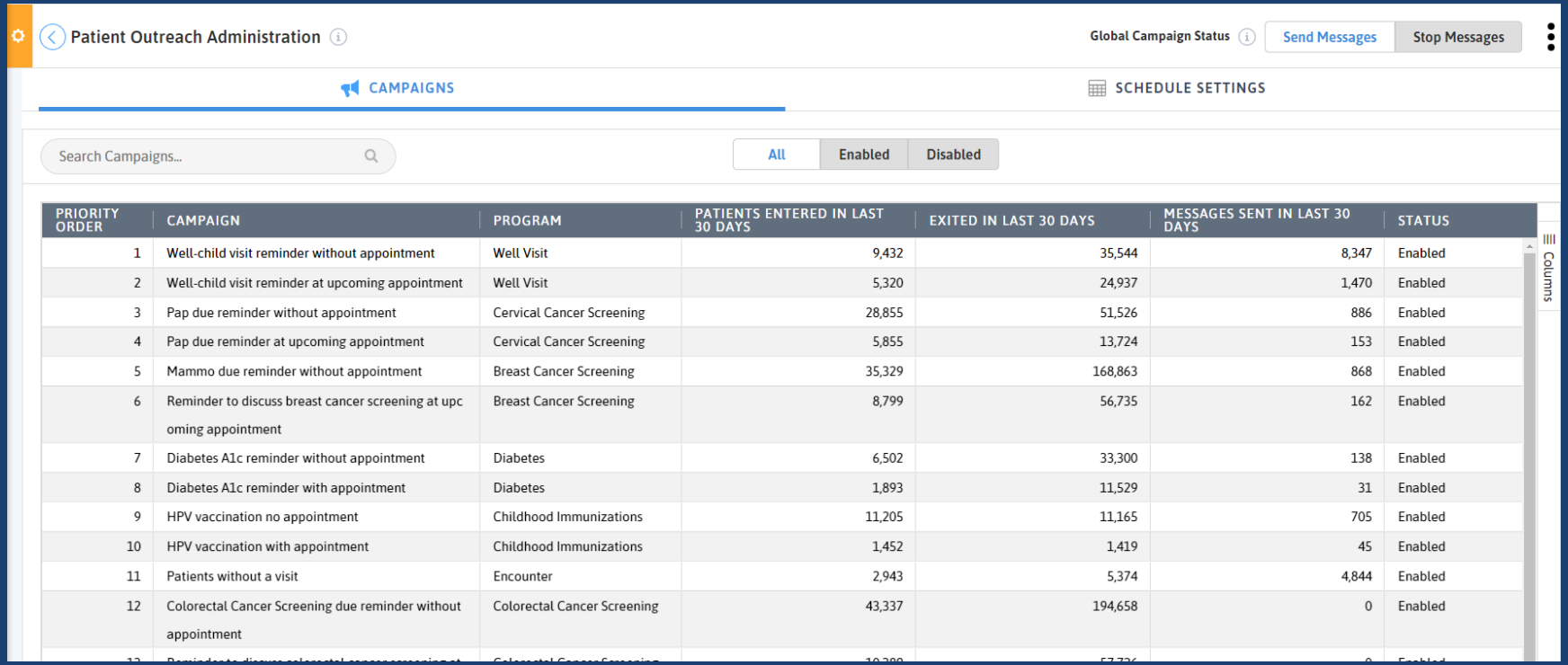
- IP Discharge Follow-Up
- ED Discharge Follow-Up
- Members without Visits
- Unmatched Members
- Medicaid Redetermination

◆ Requires Payer Integration

⬟ Requires HIE

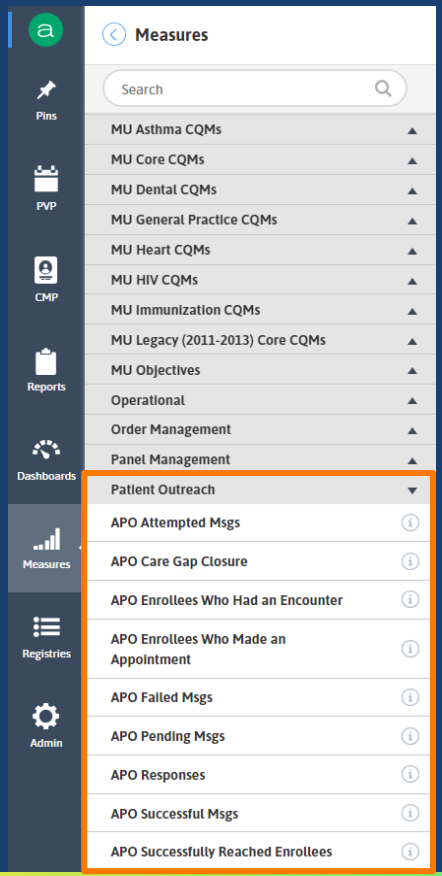
Campaign Control

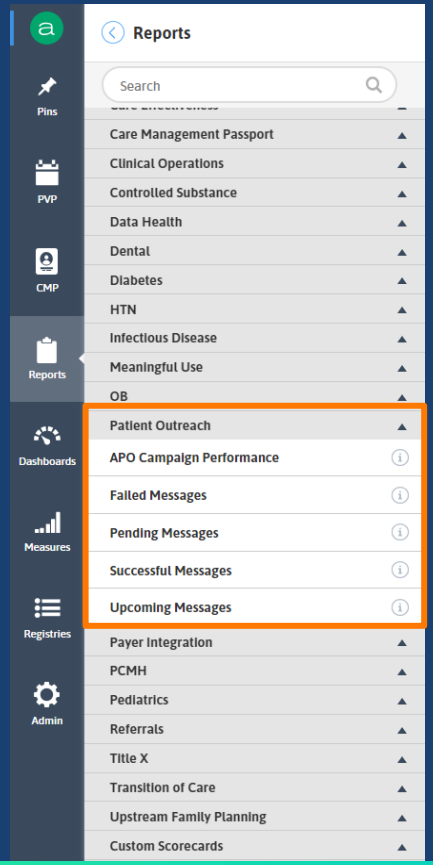
Data-powered outreach—tailored messages to the right patients at the right time.



PRIORITY ORDER	CAMPAIGN	PROGRAM	PATIENTS ENTERED IN LAST 30 DAYS	EXITED IN LAST 30 DAYS	MESSAGES SENT IN LAST 30 DAYS	STATUS
1	Well-child visit reminder without appointment	Well Visit	9,432	35,544	8,347	Enabled
2	Well-child visit reminder at upcoming appointment	Well Visit	5,320	24,937	1,470	Enabled
3	Pap due reminder without appointment	Cervical Cancer Screening	28,855	51,526	886	Enabled
4	Pap due reminder at upcoming appointment	Cervical Cancer Screening	5,855	13,724	153	Enabled
5	Mammo due reminder without appointment	Breast Cancer Screening	35,329	168,863	868	Enabled
6	Reminder to discuss breast cancer screening at upcoming appointment	Breast Cancer Screening	8,799	56,735	162	Enabled
7	Diabetes A1c reminder without appointment	Diabetes	6,502	33,300	138	Enabled
8	Diabetes A1c reminder with appointment	Diabetes	1,893	11,529	31	Enabled
9	HPV vaccination no appointment	Childhood Immunizations	11,205	11,165	705	Enabled
10	HPV vaccination with appointment	Childhood Immunizations	1,452	1,419	45	Enabled
11	Patients without a visit	Encounter	2,943	5,374	4,844	Enabled
12	Colorectal Cancer Screening due reminder without appointment	Colorectal Cancer Screening	43,337	194,658	0	Enabled

APO Measures & Reports





Evaluate Engagement Programs

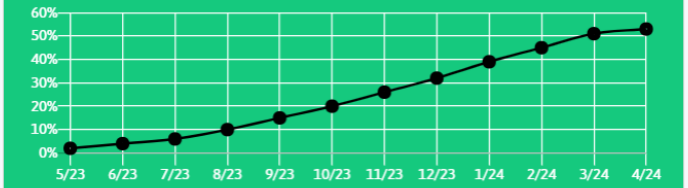
Actionable insights into patient engagement and outcomes per campaign.

IMPACT

473
CARE GAPS CLOSED
▲ 18 Last Month

53% CARE GAP CLOSURE RATE

ENROLLEES W/CARE GAP CLOSURES BY MONTH



EFFECTIVENESS

+46.6%
SINCE BASELINE
▲ 2.0% Last Month

HOW IS THIS CALCULATED?
Increase in % of patients who received a Diabetes A1c compared to the baseline

CAMPAIGN DETAILS

1,003
TOTAL ENROLLEES
TY April 2024

925
ENROLLEES MESSAGED
TY April 2024

Campaign Name	Diabetes A1c reminder without appointment
Start Date	Jan 2023 *15 months*
Duration	1 messages after 27 days
Success Criteria	Diabetes A1c

5,383
MESSAGES SENT
TY April 2024
▲ 225 Last Month

PATIENT ENGAGEMENT

892
PTS SUCCESSFULLY REACHED
TY April 2024
▲ 18 Last Month

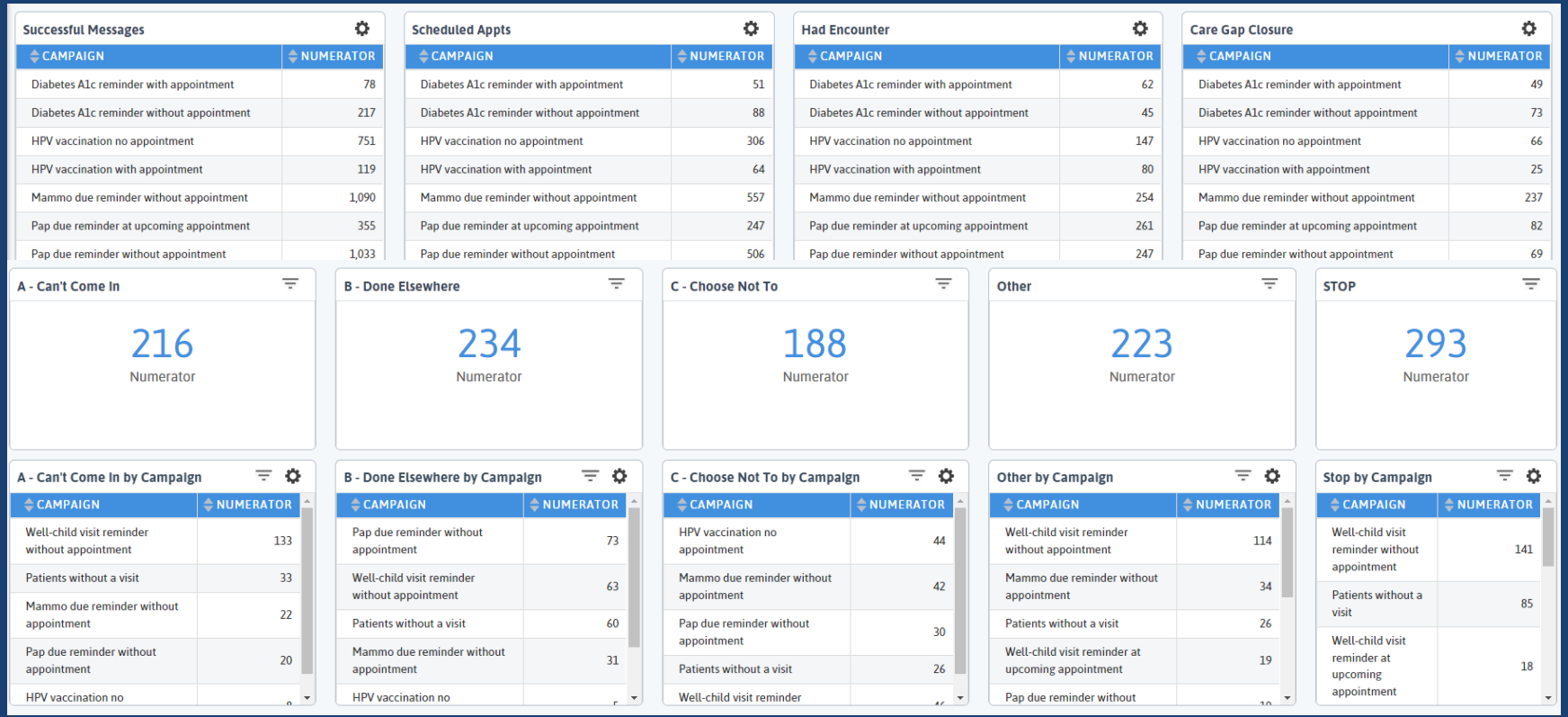
59% MADE APPT

50% KEPT APPT

53% CARE GAP CLOSED

Custom APO Dashboards

Campaign-specific dashboards designed to track key engagement metrics.



Successful Messages

CAMPAIGN	NUMERATOR
Diabetes A1c reminder with appointment	78
Diabetes A1c reminder without appointment	217
HPV vaccination no appointment	751
HPV vaccination with appointment	119
Mammo due reminder without appointment	1,090
Pap due reminder at upcoming appointment	355
Pap due reminder without appointment	1,033

Scheduled Appts

CAMPAIGN	NUMERATOR
Diabetes A1c reminder with appointment	51
Diabetes A1c reminder without appointment	88
HPV vaccination no appointment	306
HPV vaccination with appointment	64
Mammo due reminder without appointment	557
Pap due reminder at upcoming appointment	247
Pap due reminder without appointment	506

Had Encounter

CAMPAIGN	NUMERATOR
Diabetes A1c reminder with appointment	62
Diabetes A1c reminder without appointment	45
HPV vaccination no appointment	147
HPV vaccination with appointment	80
Mammo due reminder without appointment	254
Pap due reminder at upcoming appointment	261
Pap due reminder without appointment	247

Care Gap Closure

CAMPAIGN	NUMERATOR
Diabetes A1c reminder with appointment	49
Diabetes A1c reminder without appointment	73
HPV vaccination no appointment	66
HPV vaccination with appointment	25
Mammo due reminder without appointment	237
Pap due reminder at upcoming appointment	82
Pap due reminder without appointment	69

A - Can't Come In

216
Numerator

B - Done Elsewhere

234
Numerator

C - Choose Not To

188
Numerator

Other

223
Numerator

STOP

293
Numerator

A - Can't Come In by Campaign

CAMPAIGN	NUMERATOR
Well-child visit reminder without appointment	133
Patients without a visit	33
Mammo due reminder without appointment	22
Pap due reminder without appointment	20
HPV vaccination no	

B - Done Elsewhere by Campaign

CAMPAIGN	NUMERATOR
Pap due reminder without appointment	73
Well-child visit reminder without appointment	63
Patients without a visit	60
Mammo due reminder without appointment	31
HPV vaccination no	

C - Choose Not To by Campaign

CAMPAIGN	NUMERATOR
HPV vaccination no appointment	44
Mammo due reminder without appointment	42
Pap due reminder without appointment	30
Patients without a visit	26
Well-child visit reminder	

Other by Campaign

CAMPAIGN	NUMERATOR
Well-child visit reminder without appointment	114
Mammo due reminder without appointment	34
Patients without a visit	26
Well-child visit reminder at upcoming appointment	19
Pap due reminder without	

Stop by Campaign

CAMPAIGN	NUMERATOR
Well-child visit reminder without appointment	141
Patients without a visit	85
Well-child visit reminder at upcoming appointment	18

APO in Action

With Open Door Health Services!

Open Door Health Services | Population

Federally Qualified Health Center

East Central Indiana in Muncie

Population: 65,081

- School aged children (5-17): 15,033
- Medicare & Medicaid population: 33%
- Unemployment rate: 6.3%
- Poverty rate 29.9%

Open Door Health Services | Locations

Blackford

Anderson

White River Peds

Downtown Muncie

School-Based Clinic

Open Door Health Services | Services Offered

- Behavioral Health
- Medication Assisted Treatment Program
- Madison/Delaware Co WIC
- Chronic Kidney Failure
- Dental and Chiropractic
- Primary Care
- Women’s Health
- Family Practice
- OB/GYN
- Pediatrics
- Urgent Care

About Us

Health Resources and Services Administration
HRSA
Health Center Program
ADDRESSING SOCIAL RISK FACTORS
2023
Awardee

Health Resources and Services Administration
HRSA
Health Center Program
ADVANCING HIT FOR QUALITY
2023
Awardee

PATIENT-CENTERED MEDICAL HOME
NCQA
RECOGNIZED PRACTICE

The Problem

Manual, tedious outreach

- Difficulty in successfully contacting patients to schedule for preventive exams

Time constraints & staffing limitations

- Staff hold multiple roles and have limited time to conduct patient outreach
- Only two people in the organization working to close care gaps

The Solution | Why APO?

Enhances patient outreach and care integration to improve appointment attendance and overall quality outcomes

Streamlines communication and allows customizable messages for each campaign

Saves time, allows staff to focus on less time-consuming tasks, and ensures timely follow-ups

How To Choose Campaigns

Look at what our quality focus areas are for each quarter as well as if there are any awareness months coming up (breast cancer awareness in October, etc.) and turn on related campaigns.

Focus on measures with a high number of gaps that would require more time intensive manual outreach.

Only have 2 campaigns turned on at a time for different populations, so patients aren’t messaged too frequently.

Focused a lot on cancer screenings, well child visits, and Medicare Annual Wellness exams in 2024.

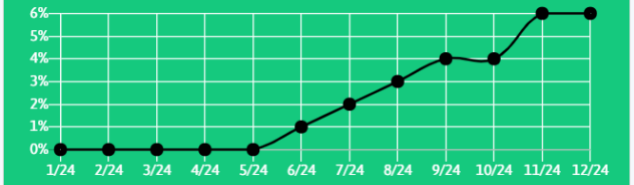
Campaign Performance Report | Colorectal Cancer Screening

IMPACT

187
CARE GAPS CLOSED
▲ 34 Last Month

7%
CARE GAP CLOSURE RATE

ENROLLEES W/CARE GAP CLOSURES BY MONTH



EFFECTIVENESS

+5.6%
SINCE BASELINE
▲ 1.2% Last Month

HOW IS THIS CALCULATED?
Increase in % of patients who received a Colorectal Cancer Screening compared to the baseline

CAMPAIGN DETAILS

2,931
TOTAL ENROLLEES
2024

2,810
ENROLLEES MESSAGED
2024

Campaign Name	Colorectal Cancer Screening due reminder without appointment
Start Date	Jun 2024 *8 months*
Duration	1 messages after 1 days
Success Criteria	Colorectal Cancer Screening

9,176
MESSAGES SENT
2024
▲ 1,444 Last Month

PATIENT ENGAGEMENT

2,757
PTS SUCCESSFULLY REACHED
2024
▲ 35 Last Month

39%
MADE APPT

17%
KEPT APPT

7%
CARE GAP CLOSED

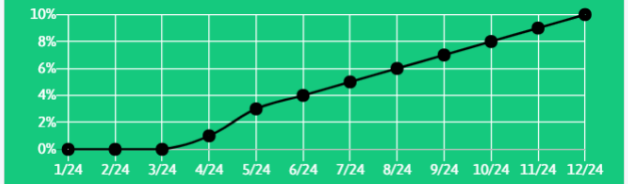
Campaign Performance Report | Breast Cancer Screening

IMPACT

296
CARE GAPS CLOSED
▲ 53 Last Month

11% CARE GAP CLOSURE RATE

ENROLLEES W/CARE GAP CLOSURES BY MONTH



CAMPAIGN DETAILS

2,795
TOTAL ENROLLEES
2024

2,665
ENROLLEES MESSAGED
2024

Campaign Name	Mammo due reminder without appointment
Start Date	May 2024 *9 months*
Duration	1 messages after 1 days
Success Criteria	Breast Cancer Screening

13,721
MESSAGES SENT
2024
▲ 1,622 Last Month

EFFECTIVENESS

+9.1%
SINCE BASELINE
▲ 2.0% Last Month

HOW IS THIS CALCULATED?
Increase in % of patients who received a Breast Cancer Screening compared to the baseline

PATIENT ENGAGEMENT

2,632
PTS SUCCESSFULLY REACHED
2024
▲ 55 Last Month

47% MADE APPT

23% KEPT APPT

11% CARE GAP CLOSED

Added direct link for self-scheduling mammograms at our local imaging center!

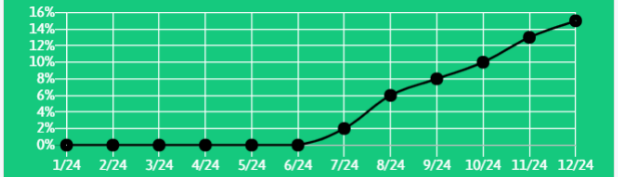
Campaign Performance Report | Well Child Visits

IMPACT

264
CARE GAPS CLOSED
▲ 55 Last Month

16% CARE GAP CLOSURE RATE

ENROLLEES W/CARE GAP CLOSURES BY MONTH



CAMPAIGN DETAILS

1,685
TOTAL ENROLLEES
2024

1,643
ENROLLEES MESSAGED
2024

Campaign Name	Well-child visit reminder without appointment
Start Date	Jun 2024 *8 months*
Duration	1 messages after 1 days
Success Criteria	well-child visit

4,593
MESSAGES SENT
2024
▲ 847 Last Month

EFFECTIVENESS

+10.8%
SINCE BASELINE
▲ 3.4% Last Month

HOW IS THIS CALCULATED?
Increase in % of patients who received a well-child visit compared to the baseline

PATIENT ENGAGEMENT

1,608
PTS SUCCESSFULLY REACHED
2024
▲ 55 Last Month

34% MADE APPT

17% KEPT APPT

16% CARE GAP CLOSED

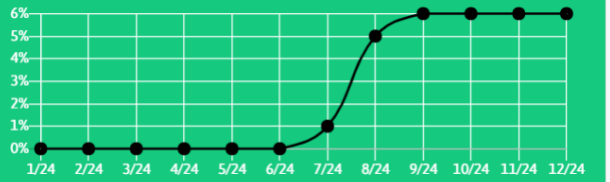
Campaign Performance Report | Medicare Annual Wellness Visits

IMPACT

56
CARE GAPS CLOSED
0 Last Month

6%
CARE GAP CLOSURE RATE

ENROLLEES W/CARE GAP CLOSURES BY MONTH



EFFECTIVENESS

+3.8%
SINCE BASELINE
0% Last Month

HOW IS THIS CALCULATED?
Increase in % of patients who received a Patient has an Annual wellness visit recorded within the 8 weeks after the last message the

CAMPAIGN DETAILS

978
TOTAL ENROLLEES
2024

959
ENROLLEES MESSAGED
2024

Campaign Name	Medicare AWV without appointment
Start Date	Jun 2024 *8 months*
Duration	1 messages after 1 days
Success Criteria	Patient has an Annual wellness visit recorded within the 8 weeks after the last message the patient received.
Disabled Date	Oct 2024

2,277
MESSAGES SENT
2024
0 Last Month

PATIENT ENGAGEMENT

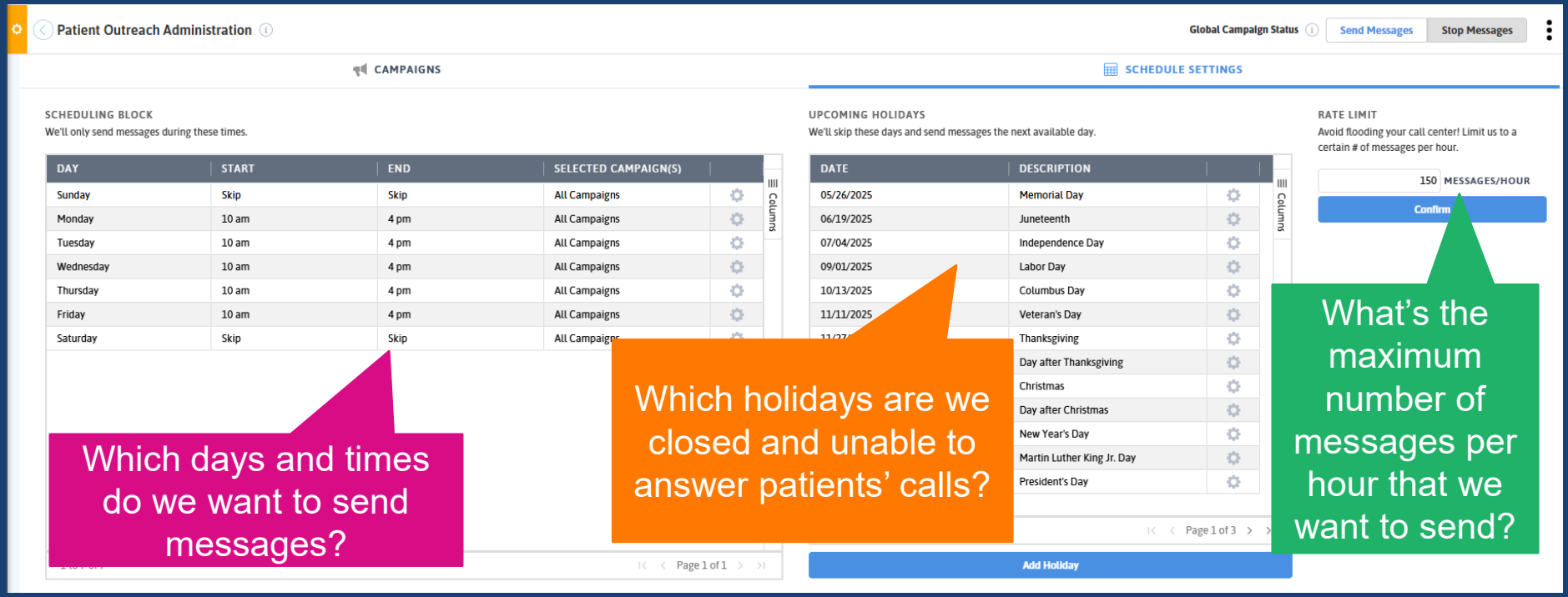
926
PTS SUCCESSFULLY REACHED
2024
0 Last Month

50%
MADE APPT

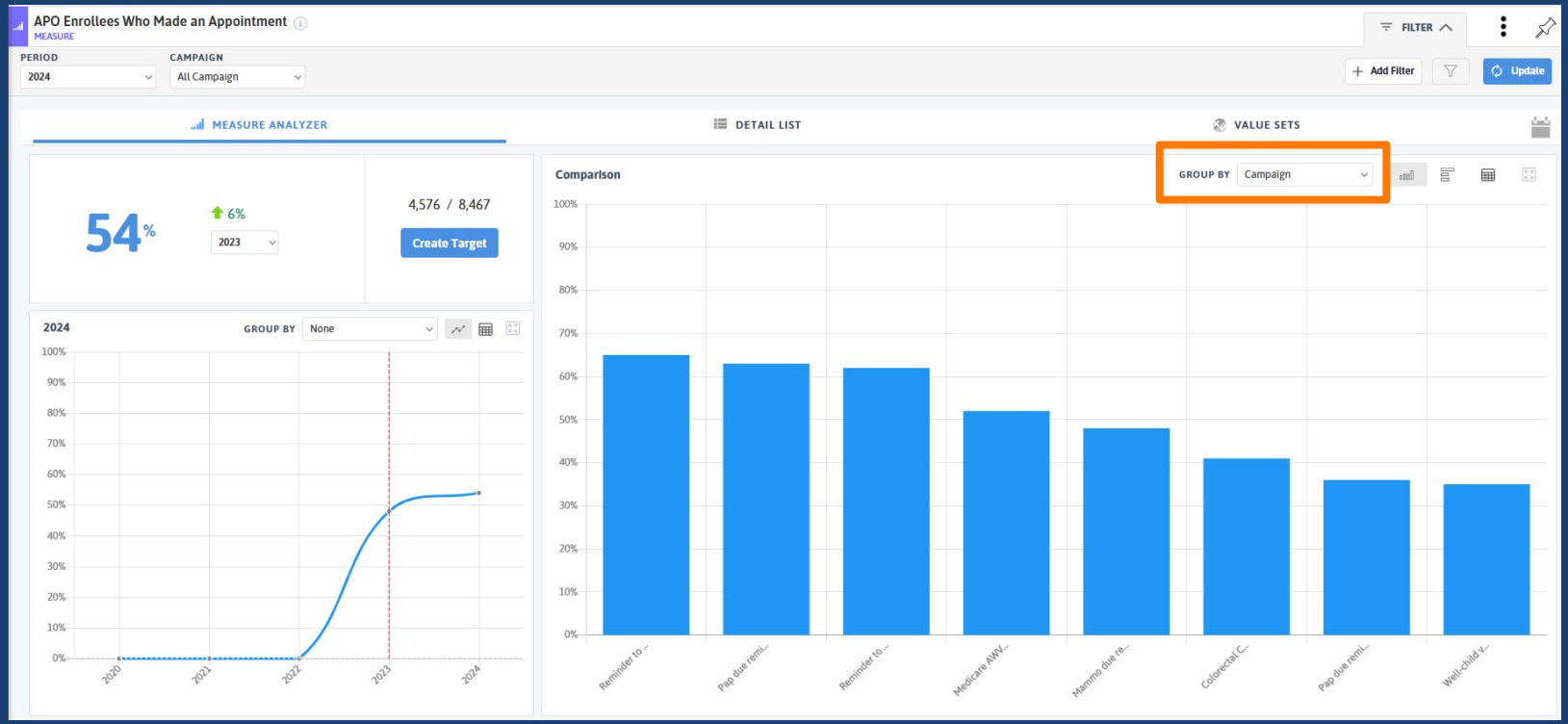
21%
KEPT APPT

6%
CARE GAP CLOSED

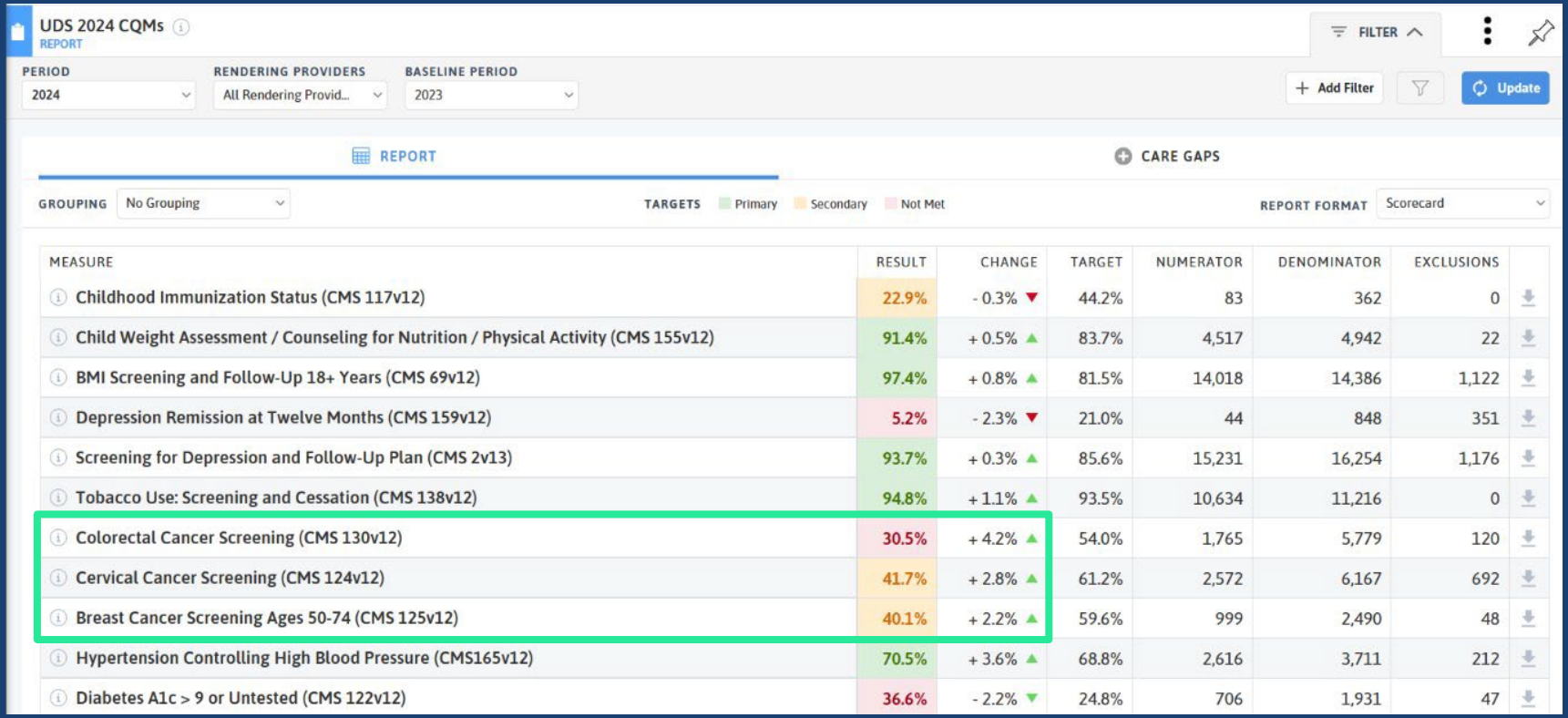
APO | Customization



Measure | APO Enrollees Who Made an Appointment



Overall Outcomes | 2023-2024



UDS 2024 CQMs
REPORT

FILTER

PERIOD: 2024 | RENDERING PROVIDERS: All Rendering Provid... | BASELINE PERIOD: 2023

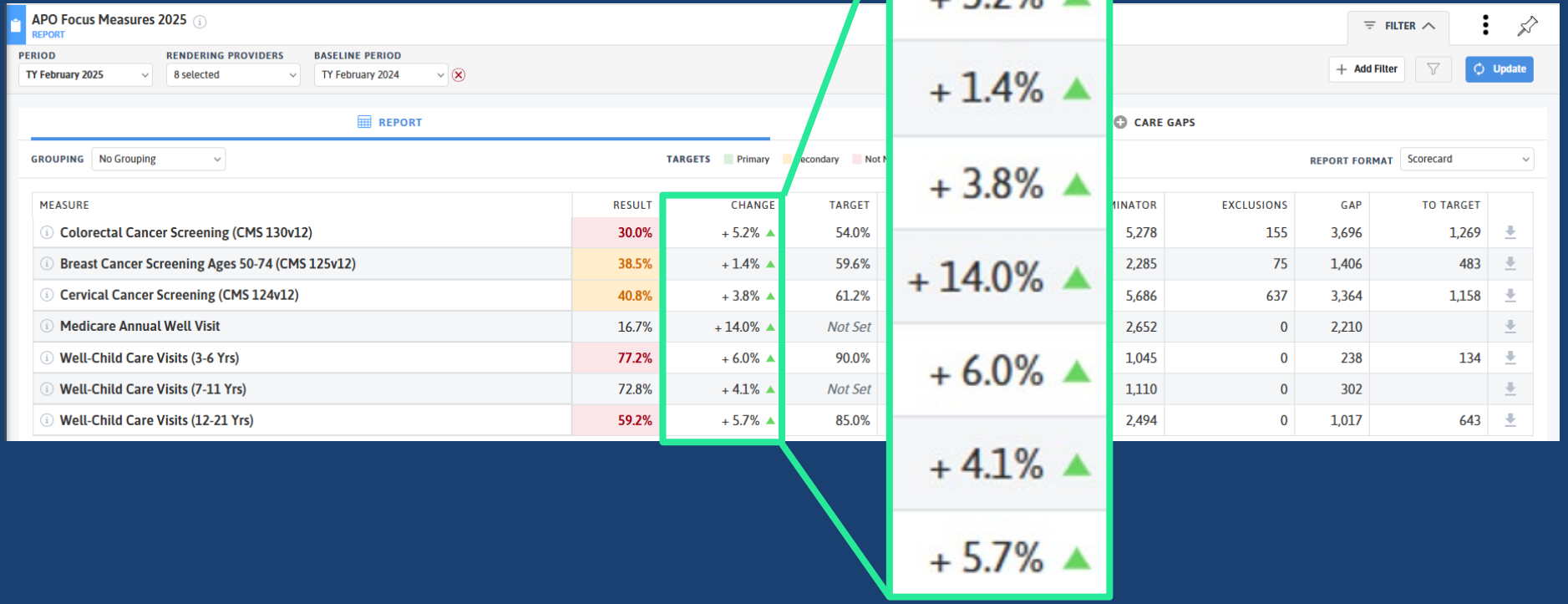
Add Filter | Update

REPORT | CARE GAPS

GROUPING: No Grouping | TARGETS: Primary, Secondary, Not Met | REPORT FORMAT: Scorecard

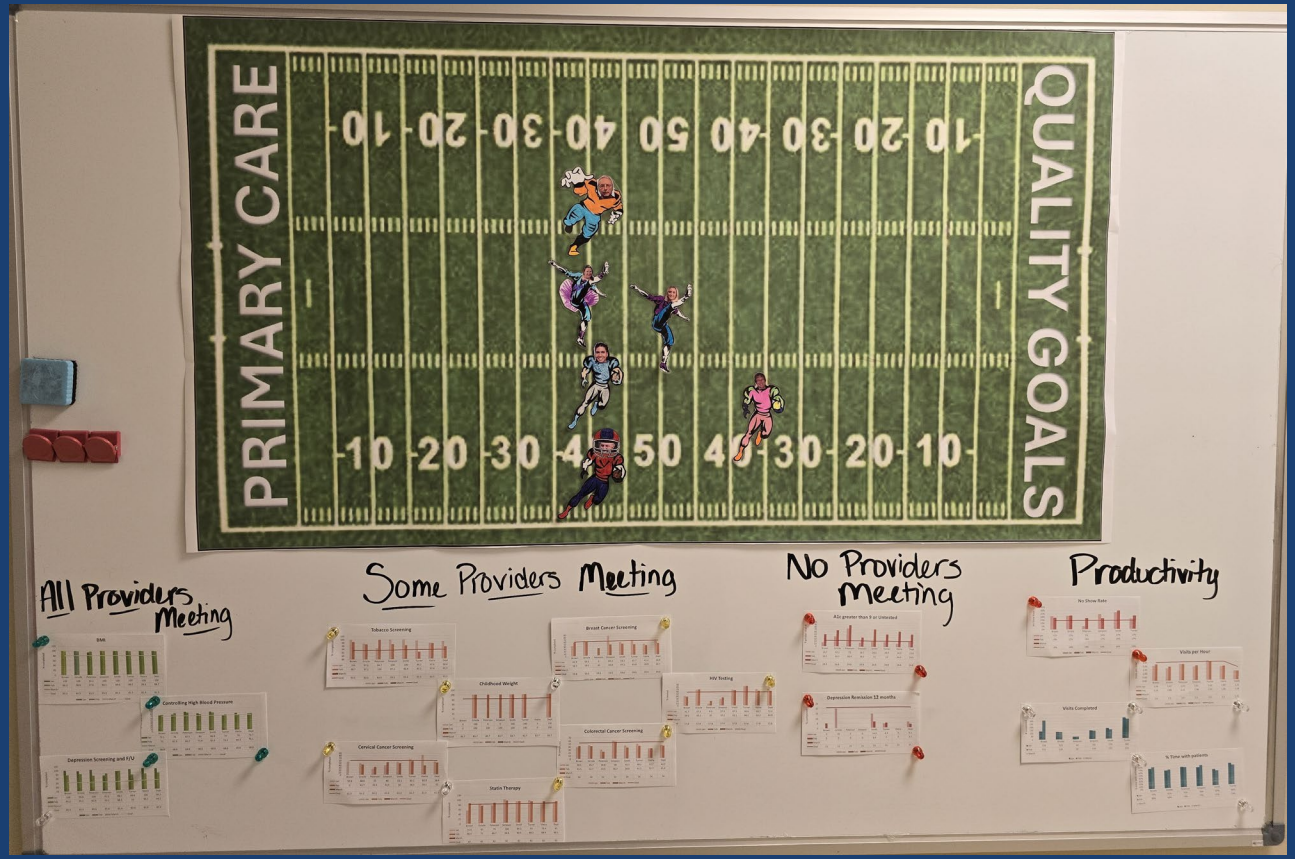
MEASURE	RESULT	CHANGE	TARGET	NUMERATOR	DENOMINATOR	EXCLUSIONS
Childhood Immunization Status (CMS 117v12)	22.9%	- 0.3% ▼	44.2%	83	362	0
Child Weight Assessment / Counseling for Nutrition / Physical Activity (CMS 155v12)	91.4%	+ 0.5% ▲	83.7%	4,517	4,942	22
BMI Screening and Follow-Up 18+ Years (CMS 69v12)	97.4%	+ 0.8% ▲	81.5%	14,018	14,386	1,122
Depression Remission at Twelve Months (CMS 159v12)	5.2%	- 2.3% ▼	21.0%	44	848	351
Screening for Depression and Follow-Up Plan (CMS 2v13)	93.7%	+ 0.3% ▲	85.6%	15,231	16,254	1,176
Tobacco Use: Screening and Cessation (CMS 138v12)	94.8%	+ 1.1% ▲	93.5%	10,634	11,216	0
Colorectal Cancer Screening (CMS 130v12)	30.5%	+ 4.2% ▲	54.0%	1,765	5,779	120
Cervical Cancer Screening (CMS 124v12)	41.7%	+ 2.8% ▲	61.2%	2,572	6,167	692
Breast Cancer Screening Ages 50-74 (CMS 125v12)	40.1%	+ 2.2% ▲	59.6%	999	2,490	48
Hypertension Controlling High Blood Pressure (CMS165v12)	70.5%	+ 3.6% ▲	68.8%	2,616	3,711	212
Diabetes A1c > 9 or Untested (CMS 122v12)	36.6%	- 2.2% ▼	24.8%	706	1,931	47

Change Impact



Fostering Friendly Competition

Fostering Friendly Competition

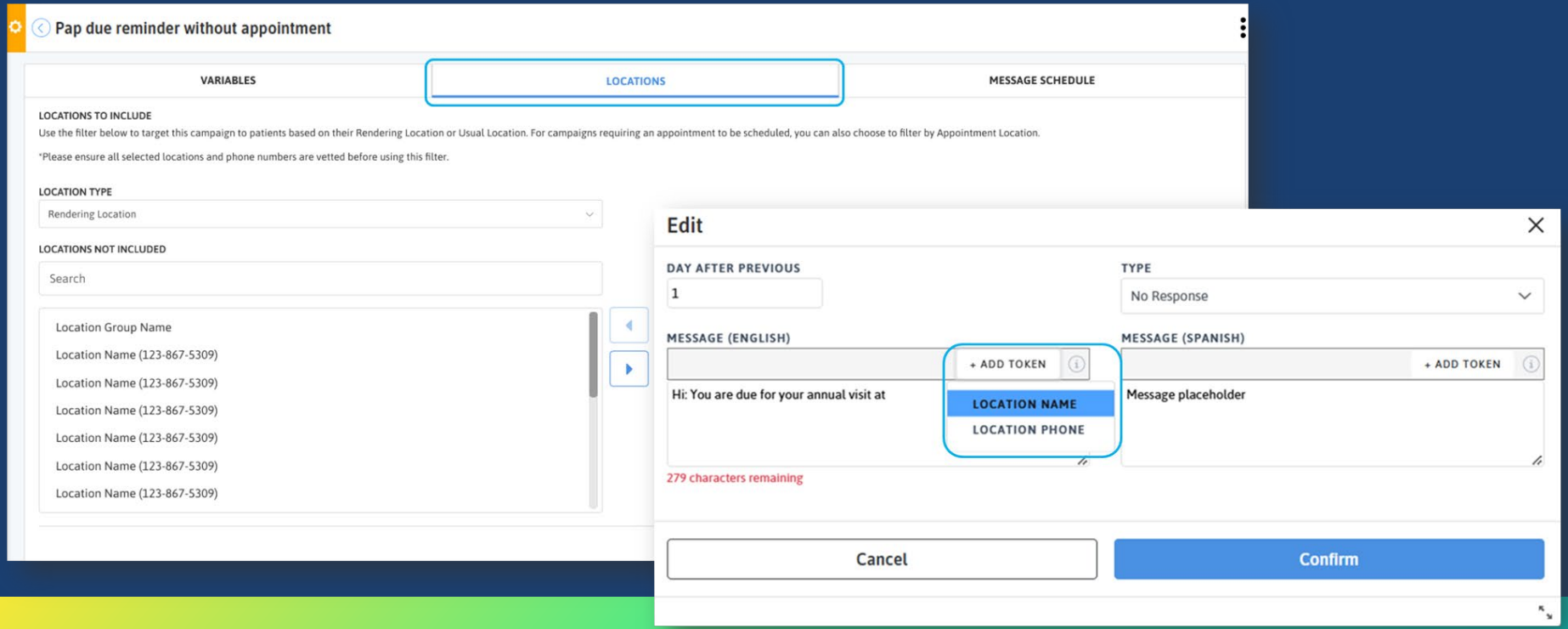


APO Product Update

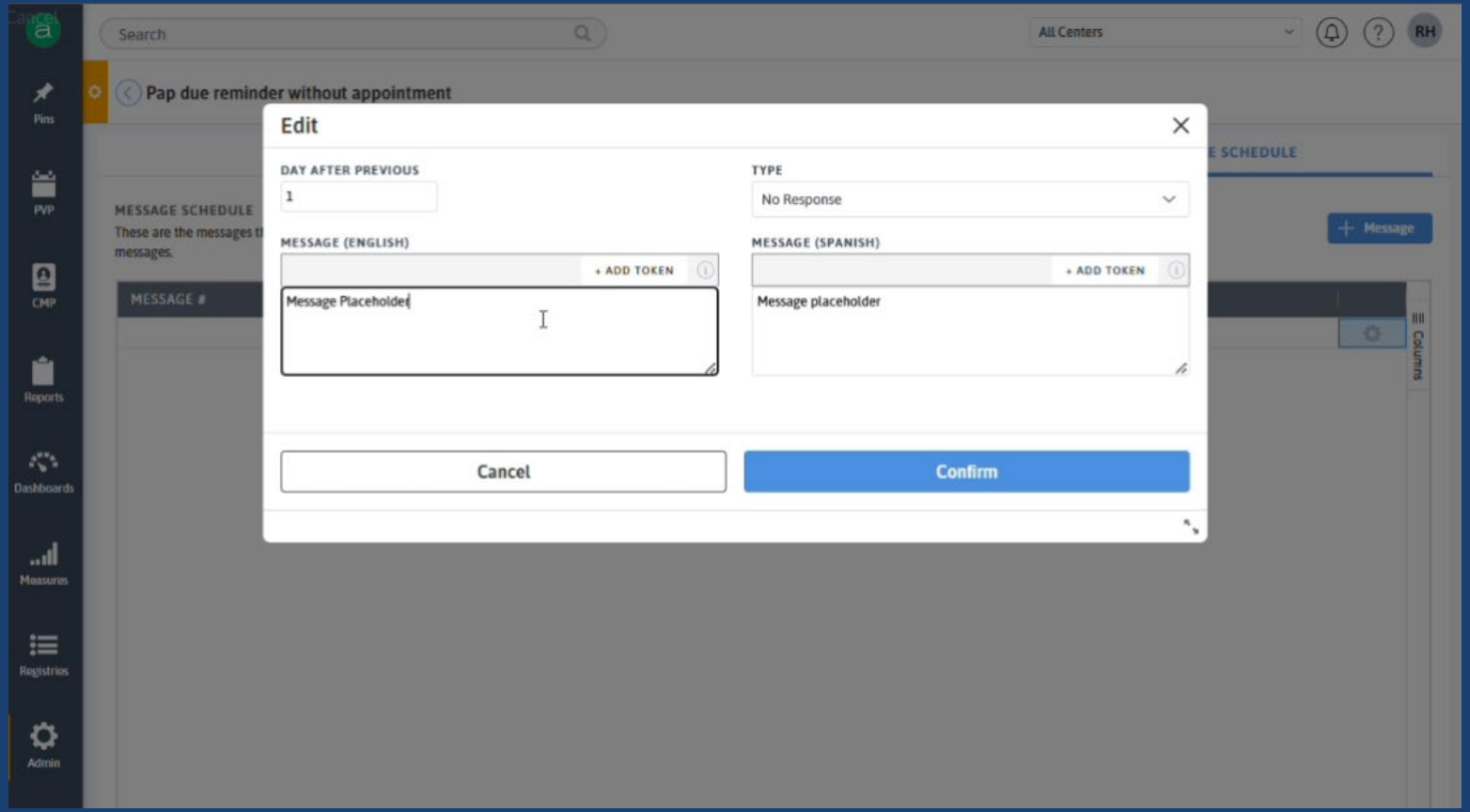
Location Dynamic Messaging

Location Dynamic Messaging

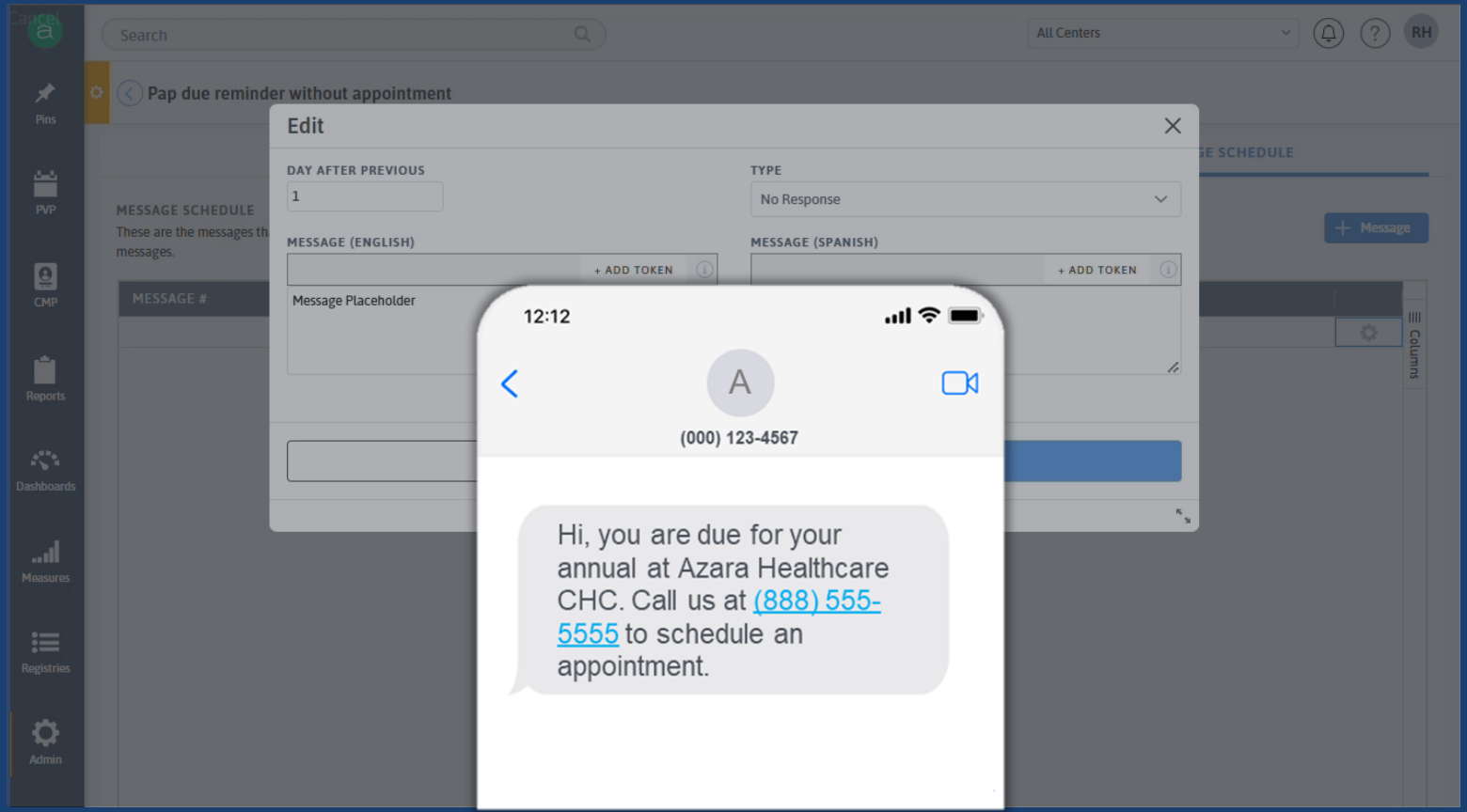
Utilize Location Dynamic Messaging to **conduct outreach based on clinic locations**. Personalize messages by inserting dynamic location-specific details such as **location name** and **phone number** via Smart Tokens.



Location Dynamic Messaging

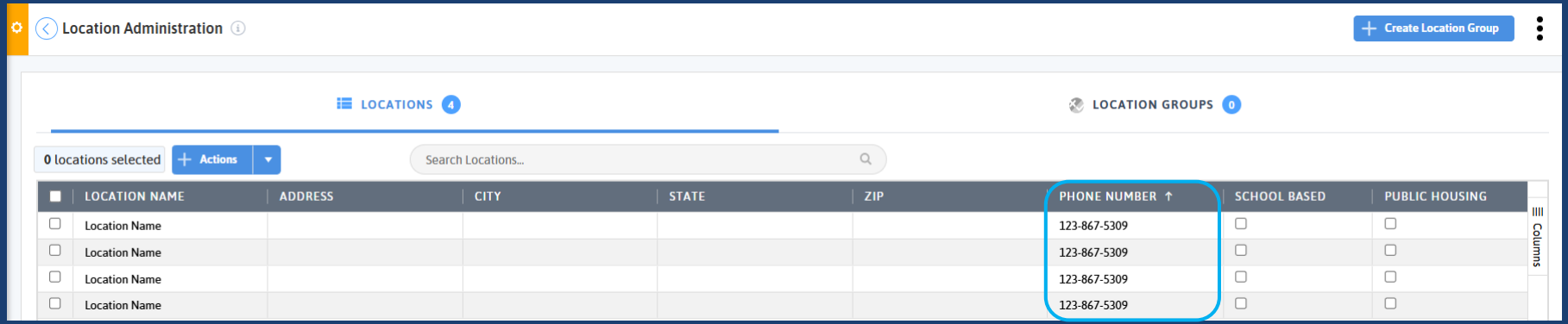


Location Dynamic Messaging



Location Dynamic Messaging

Admins can add **phone numbers** in a free-text field within **Location Administration**

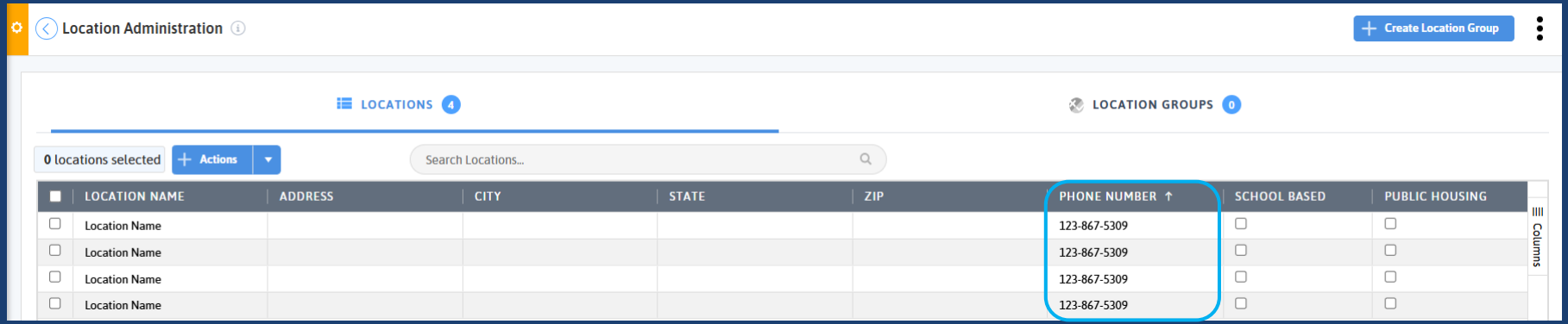


Enter phone numbers in various formats

Example 1 (123) 456 7891
Example 2 1234567891
Example 3 555-555-5555
Example 4 999.000.1234

Location Dynamic Messaging

Admins can add **phone numbers** in a free-text field within **Location Administration**

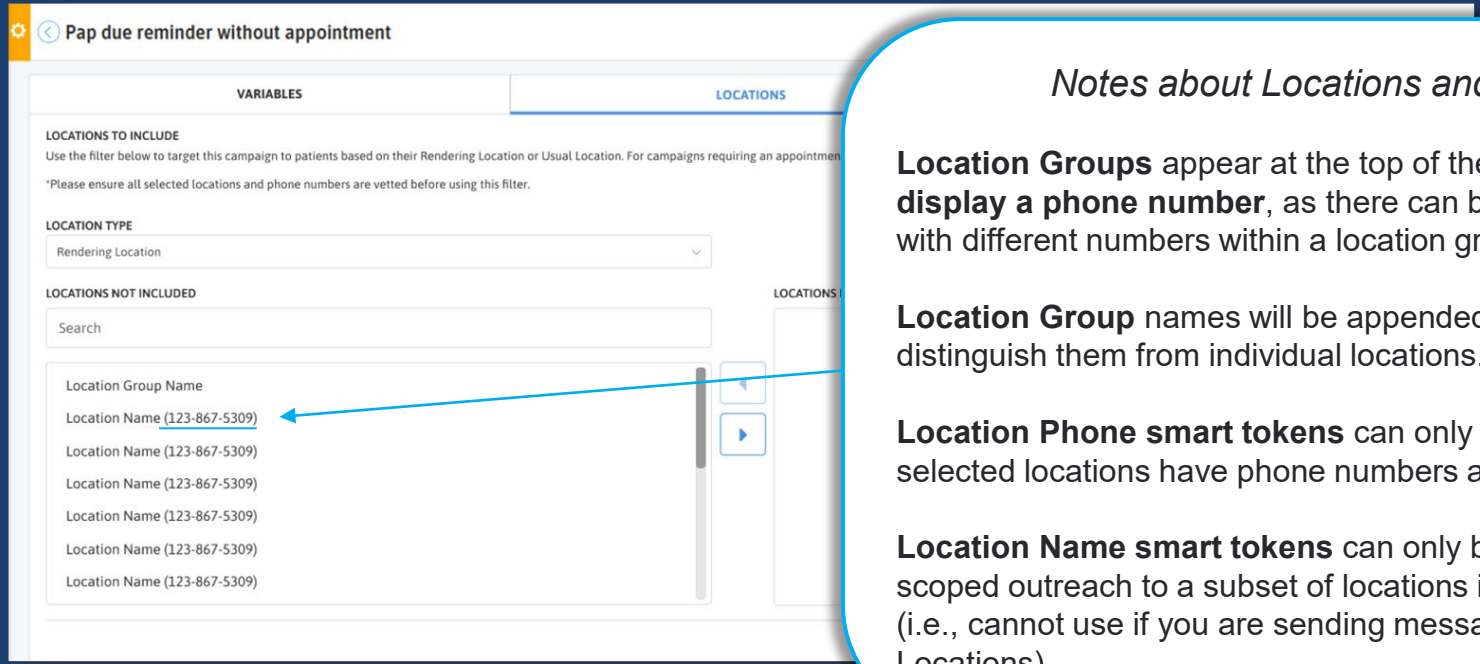


Additionally, include **extensions** in your Location Phone number

Example 1 (800) 000-0000 ext. 12345
Example 2 800 000 0000 ext 12345
Example 3 800-000-0000 x12345

Location Dynamic Messaging

Admins can add **phone numbers** in a free-text field within **Location Administration**. Phone numbers are visible to the right of each location name in APO Admin.



Notes about Locations and Tokens

Location Groups appear at the top of the list and **do not display a phone number**, as there can be multiple locations with different numbers within a location group.

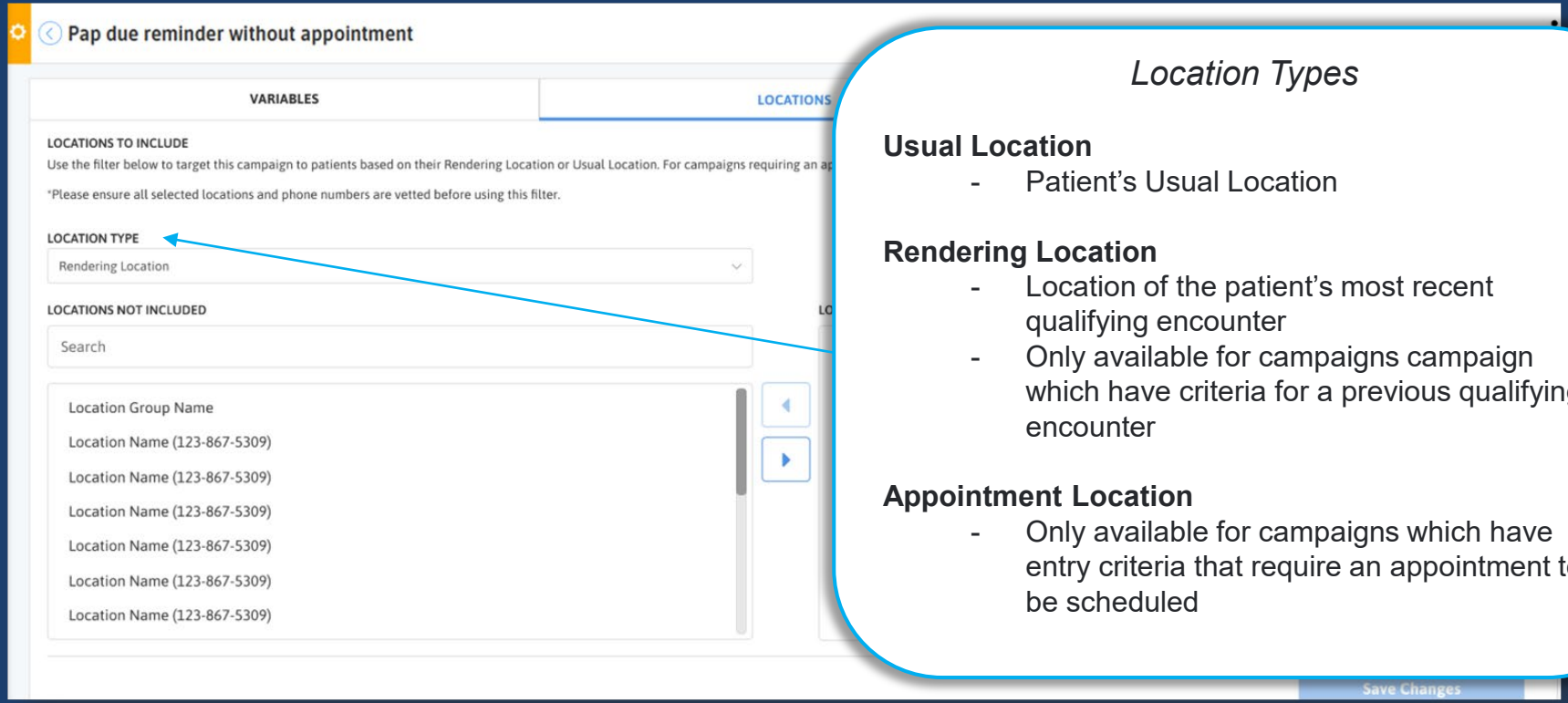
Location Group names will be appended with “-Group”, to distinguish them from individual locations.

Location Phone smart tokens can only be used if *all* selected locations have phone numbers associated with them.

Location Name smart tokens can only be used if you have scoped outreach to a subset of locations in the Locations tab (i.e., cannot use if you are sending messages for All Locations).

Location Dynamic Messaging

Use the **Location Type** selector to **choose how to consider patients** for campaigns based on a location type



Location Types

Usual Location

- Patient's Usual Location

Rendering Location

- Location of the patient's most recent qualifying encounter
- Only available for campaigns campaign which have criteria for a previous qualifying encounter

Appointment Location

- Only available for campaigns which have entry criteria that require an appointment to be scheduled

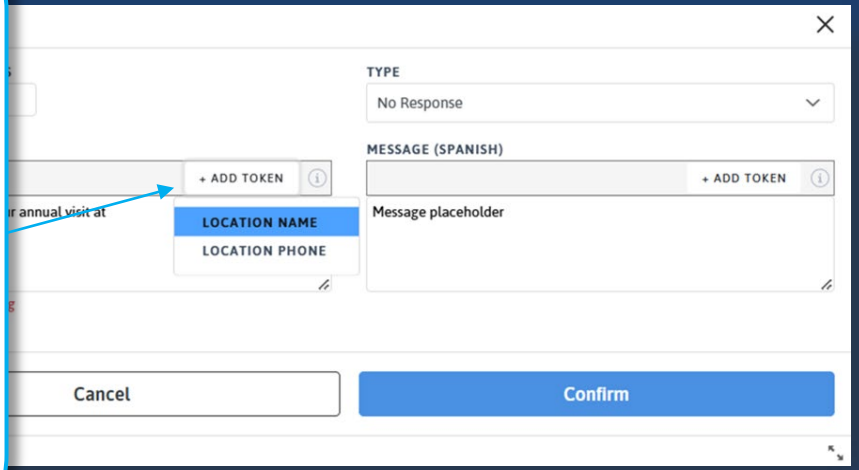
Location Dynamic Messaging

Utilize **Smart Tokens** in your messaging

Click “**Add Token**” and select Location Name or Phone – this automatically inserts the smart token into the message body.

Before messages are sent to patients, APO **dynamically replaces Smart Tokens** with the location-specific information based on the patient’s matched location: Rendering, Usual, or Appointment (*where applicable*).

When patients receive the campaign message, **they see the information of the location they matched to**, in place of the Smart Token.



Location Dynamic Messaging

Campaigns available with this functionality:

1. Diabetes A1c reminder without appointment
2. Pap due reminder without appointment
3. Pap due reminder at upcoming appointment
4. Mammo due reminder without appointment
5. Open FIT order
6. Colorectal Cancer Screening due reminder without appointment
7. Members without a visit
8. Well-child visit reminder without appointment
9. Childhood Immunizations with No Appointment

All other campaigns forthcoming in incremental roll-outs:
look for announcement updates in DRVS!

Location Nicknames

Give your clinic location a Nickname in the Locations Admin, and use it in your messaging via a “Location Nickname” Smart Token.

<u>Example Use Case</u>

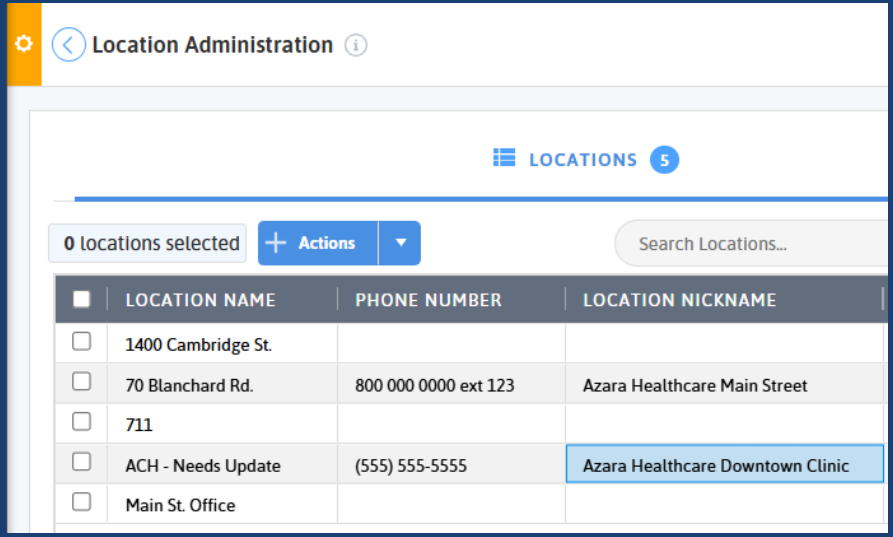
We have a school-based clinic named “The Health Center at Burlington High”.

However, in the EHR and DRVS,...

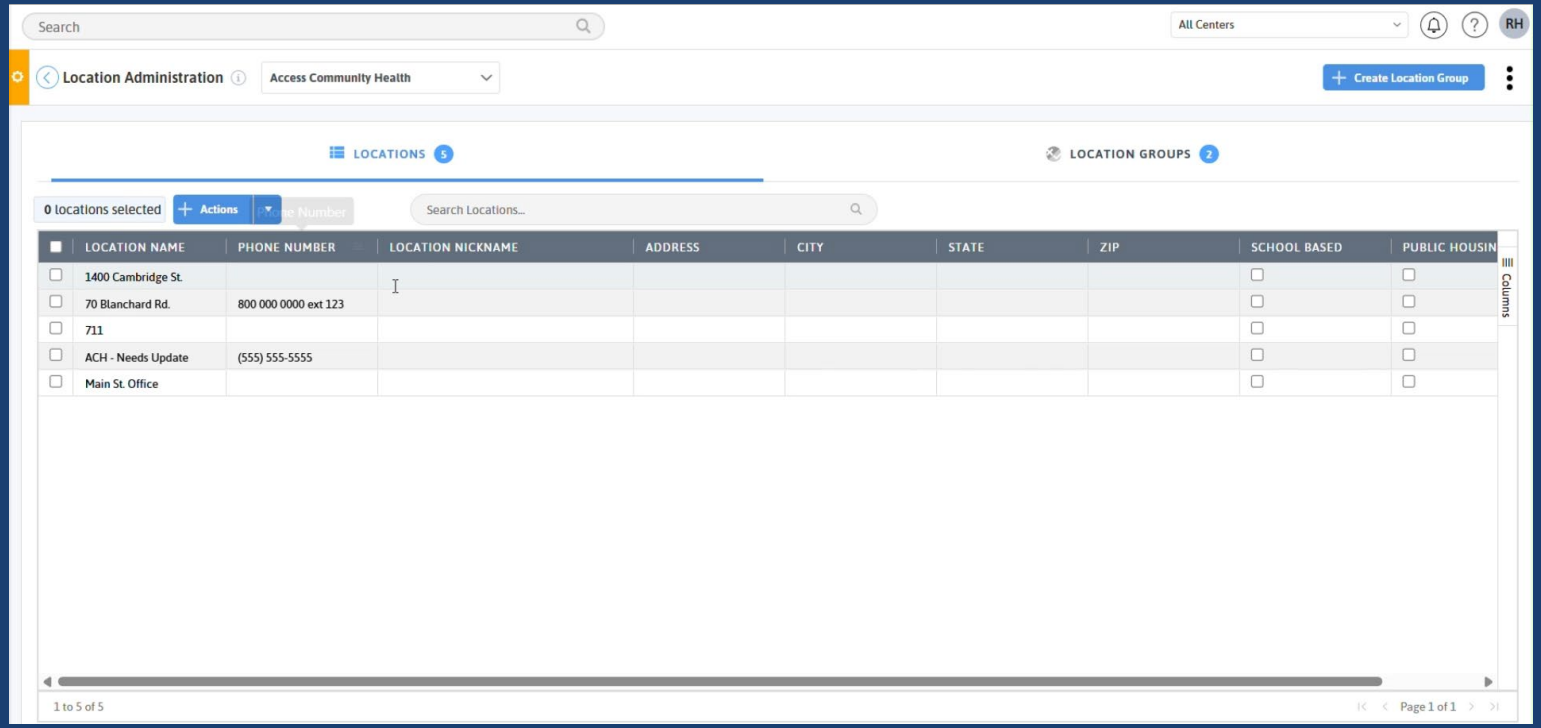
- Clinic location 1 is named “ACHC – Medical”
- Clinic location 2 is named “ACHC – BH”
- Clinic location 2 is named “ACHC – Vision”

Patients won’t know what those names mean!

→ Assign locations a nickname and use the **Location Nickname token**, so patients will see a name they **know** and **trust**, “The Health Center at Burlington High”



Location Dynamic Messaging



Location Dynamic Messaging

FYIs

1. More LDM enhancements coming – look for announcements in DRVS!
2. Scoping your outreach by Locations will reset your campaign (start at “day 1”)
3. Scoping your outreach by Locations may result in **fewer texts going out**

Example Case

You have the Colorectal Cancer Screening Reminder without Appointment campaign enabled.
For the Location you selected, there aren’t currently any patients who are due for a Colorectal Cancer Screening.

Result

If you saw many messages going out before, and see fewer or none now, that is because there aren’t as many patients to message that match with the Location and Location Type you selected.

What should you do?

Run associated measure for Colorectal Cancer Screening for the location/location type you have set in your campaign. If you see patients that should have been included – submit a support ticket so we can investigate!

APO: What's Coming

Next Up!

1. TOC Campaign Updates

   ED and IP F/U campaigns will include (1) additional entry criteria for qualifying encounter lookback months, and (2) variables for previous qualifying encounter service line

2. Plan Variable

   Additional stock variable for "Plans" to consider in your messaging

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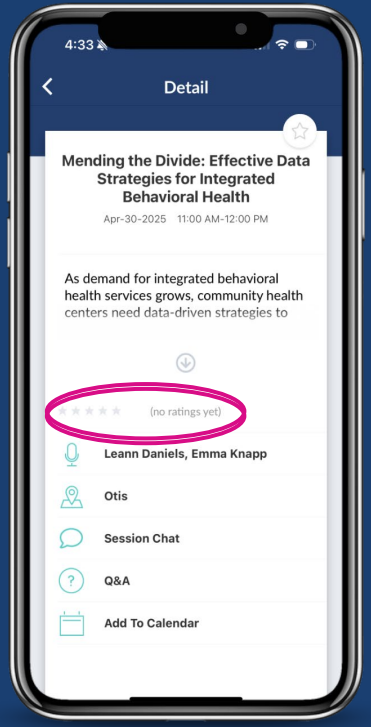
Questions?

We want to hear from you!

Click on the session from your agenda in the conference app.
Click the stars in the center of your screen to rate and provide feedback.



Quick and Easy

Provide brief feedback or ideas

Rate the session and the speaker(s)

Help us continue to improve

Achieve, Celebrate, Engage!

ACE'd it? Share your DRVS success story and become an Azara ACE!

Show your organization has used DRVS to **A**chieve measurable results, **C**elebrate improvement in patient health outcomes, and effectively **E**ngage care teams and/or patients. Stories should showcase how DRVS helped your organization overcome a challenge, the tools and solutions used to drive improvement and details of the successes that resulted from your initiatives. ACEs should be able to provide examples that quantify quality improvement, cost savings, operational efficiency or patient health improvement.

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ACE Program

Benefits:

- Azara will help tell your story and provide a client-branded version for your use
- Potential to create a 2-4 minute video or hour-long Azara-hosted webinar
- Potential to be featured at next year's Azara User Conference
- Win Azara swag!

Submit your success story by completing the form at this link.

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Thanks for attending!