

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



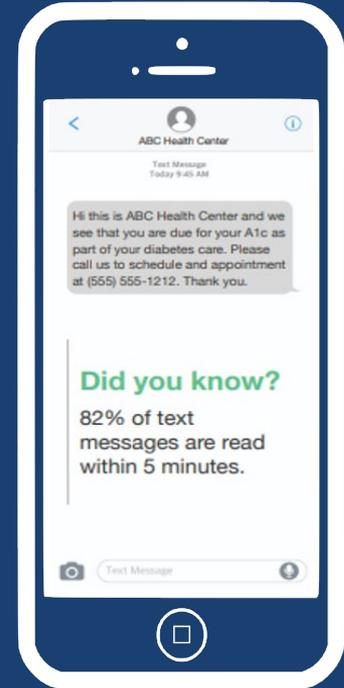
# What is APO?

**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

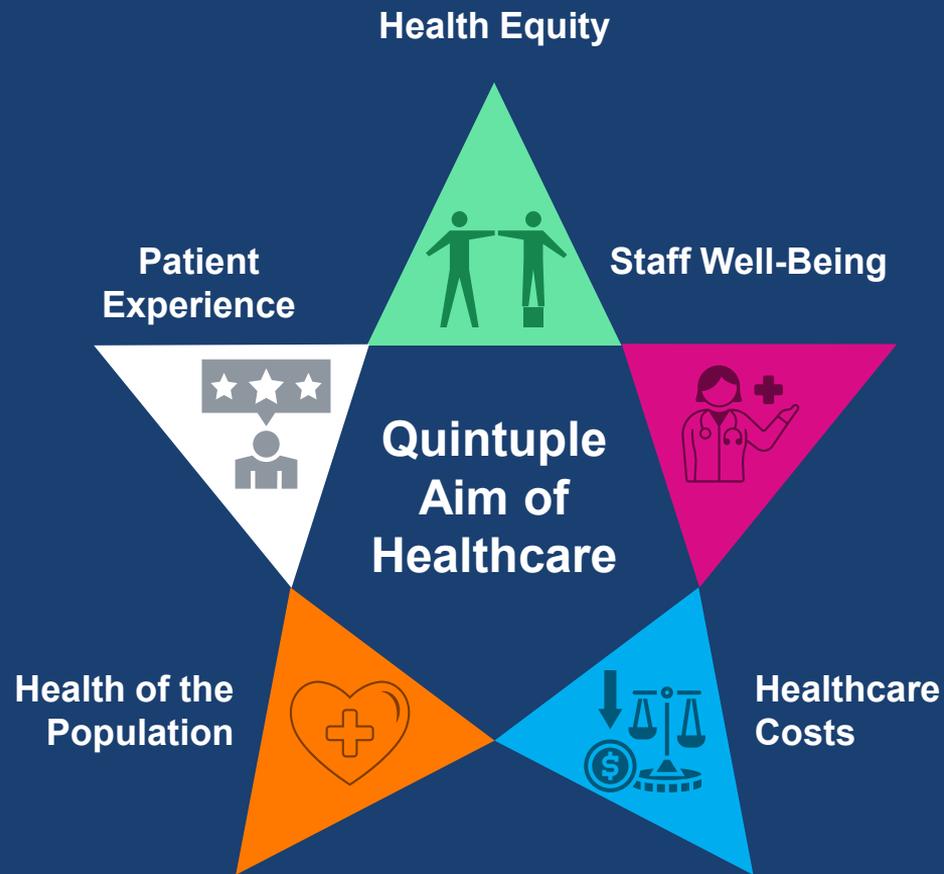


Improves Health Outcomes



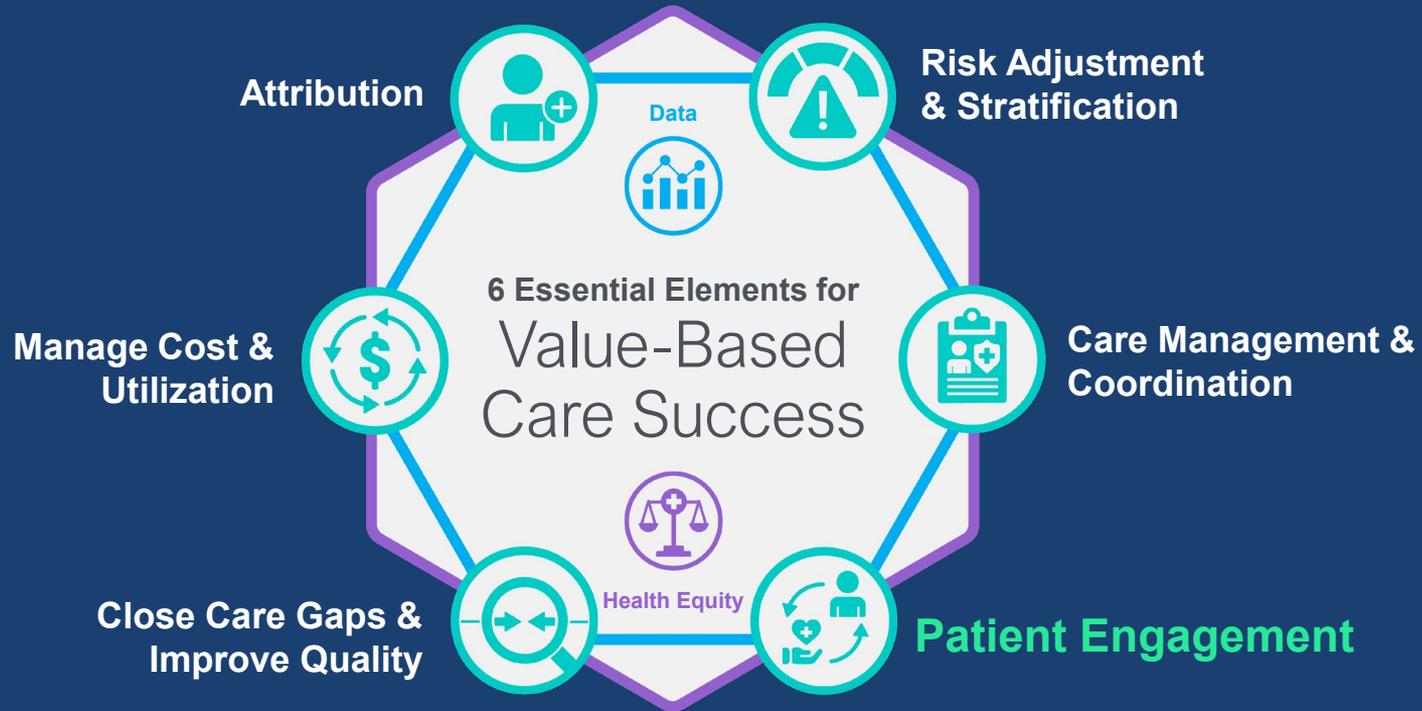


# The Quintuple Aim



Source: [The Quintuple Aim for Health Care Improvement](#)

# Essential Elements of VBC



# Patient Outreach Connectors



Set It & Forget  
it Campaigns

Export Patient  
List

**artera**<sup>™</sup>



CareMessage



**luma**<sup>™</sup>

# 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
- 2<sup>nd</sup> 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.

⚙ Patient Outreach Administration ⓘ Global Campaign Status ⓘ [Send Messages](#) [Stop Messages](#)

📄 CAMPAIGNS [SCHEDULE SETTINGS](#)

Search Campaigns... 🔍 [All](#) [Enabled](#) [Disabled](#)

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
13	Reminder to discuss colorectal cancer screening at upcoming appointment	Colorectal Cancer Screening	10,380	57,736	0	Enabled

Columns

# APO Measures & Reports



**Measures**

Search

- MU Asthma CQMs ▲
- MU Core CQMs ▲
- MU Dental CQMs ▲
- MU General Practice CQMs ▲
- MU Heart CQMs ▲
- MU HIV CQMs ▲
- MU Immunization CQMs ▲
- MU Legacy (2011-2013) Core CQMs ▲
- MU Objectives ▲
- Operational ▲
- Order Management ▲
- Panel Management ▲
- Patient Outreach ▼**
- APO Attempted Msgs ⓘ
- APO Care Gap Closure ⓘ
- APO Enrollees Who Had an Encounter ⓘ
- APO Enrollees Who Made an Appointment ⓘ
- APO Failed Msgs ⓘ
- APO Pending Msgs ⓘ
- APO Responses ⓘ
- APO Successful Msgs ⓘ
- APO Successfully Reached Enrollees ⓘ



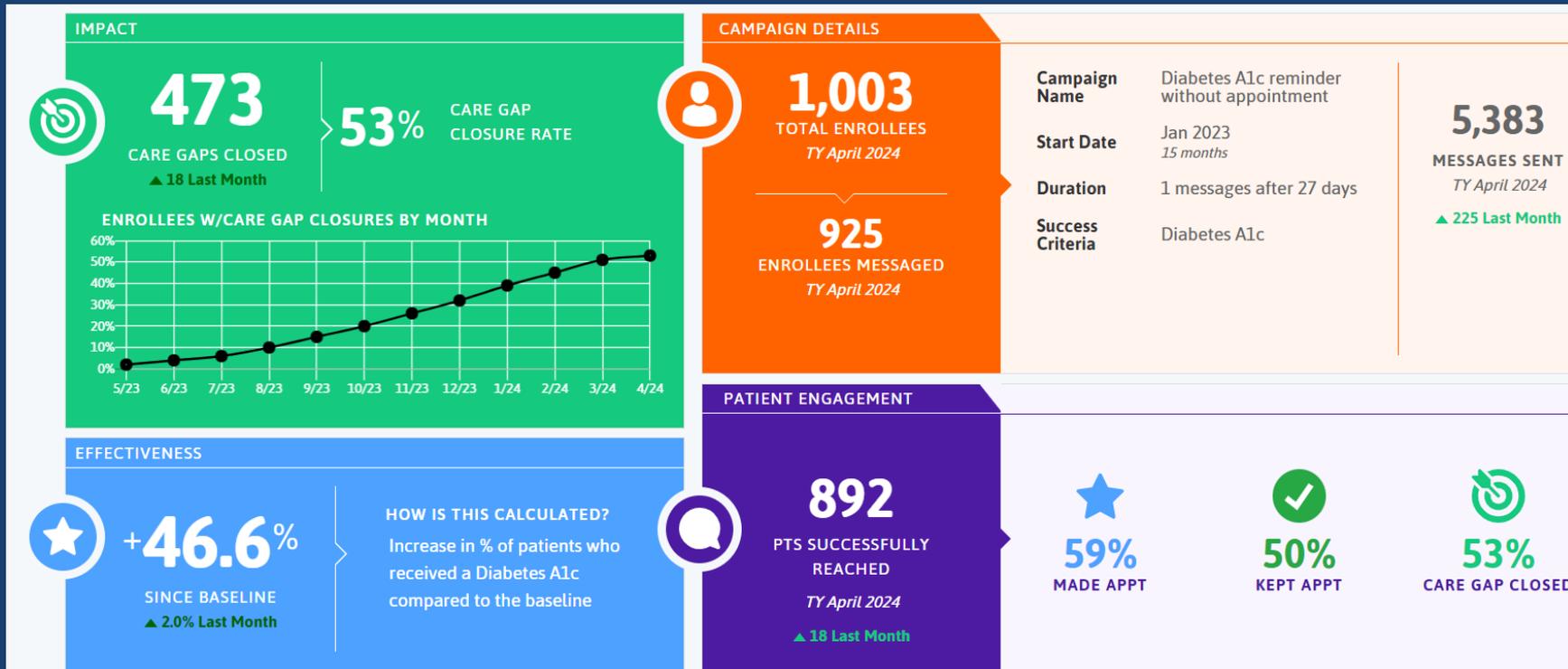
**Reports**

Search

- Care Management Passport ▲
- Clinical Operations ▲
- Controlled Substance ▲
- Data Health ▲
- Dental ▲
- Diabetes ▲
- HTN ▲
- Infectious Disease ▲
- Meaningful Use ▲
- OB ▲
- Patient Outreach ▲**
- APO Campaign Performance ⓘ
- Failed Messages ⓘ
- Pending Messages ⓘ
- Successful Messages ⓘ
- Upcoming Messages ⓘ**
- Payer Integration ▲
- PCMH ▲
- Pediatrics ▲
- Referrals ▲
- Title X ▲
- Transition of Care ▲
- Upstream Family Planning ▲
- Custom Scorecards ▲

# Evaluate Engagement Programs

Actionable insights into patient engagement and outcomes per campaign.



# Custom APO Dashboards

Campaign-specific dashboards designed to track key engagement metrics.

Successful Messages		Scheduled Appts		Had Encounter		Care Gap Closure	
CAMPAIGN	NUMERATOR	CAMPAIGN	NUMERATOR	CAMPAIGN	NUMERATOR	CAMPAIGN	NUMERATOR
Diabetes A1c reminder with appointment	78	Diabetes A1c reminder with appointment	51	Diabetes A1c reminder with appointment	62	Diabetes A1c reminder with appointment	49
Diabetes A1c reminder without appointment	217	Diabetes A1c reminder without appointment	88	Diabetes A1c reminder without appointment	45	Diabetes A1c reminder without appointment	73
HPV vaccination no appointment	751	HPV vaccination no appointment	306	HPV vaccination no appointment	147	HPV vaccination no appointment	66
HPV vaccination with appointment	119	HPV vaccination with appointment	64	HPV vaccination with appointment	80	HPV vaccination with appointment	25
Mammo due reminder without appointment	1,090	Mammo due reminder without appointment	557	Mammo due reminder without appointment	254	Mammo due reminder without appointment	237
Pap due reminder at upcoming appointment	355	Pap due reminder at upcoming appointment	247	Pap due reminder at upcoming appointment	261	Pap due reminder at upcoming appointment	82
Pap due reminder without appointment	1,033	Pap due reminder without appointment	506	Pap due reminder without appointment	247	Pap due reminder without appointment	69

A - Can't Come In	B - Done Elsewhere	C - Choose Not To	Other	STOP
216 Numerator	234 Numerator	188 Numerator	223 Numerator	293 Numerator

A - Can't Come In by Campaign	B - Done Elsewhere by Campaign	C - Choose Not To by Campaign	Other by Campaign	Stop by Campaign	
CAMPAIGN	NUMERATOR	CAMPAIGN	NUMERATOR	CAMPAIGN	NUMERATOR
Well-child visit reminder without appointment	133	HPV vaccination no appointment	44	Well-child visit reminder without appointment	141
Patients without a visit	33	Mammo due reminder without appointment	42	Patients without a visit	85
Mammo due reminder without appointment	22	Pap due reminder without appointment	30	Well-child visit reminder at upcoming appointment	18
Pap due reminder without appointment	20	Patients without a visit	26	Pap due reminder without	
HPV vaccination no		Well-child visit reminder			

# 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



# The Problem

## Manual, tedious outreach

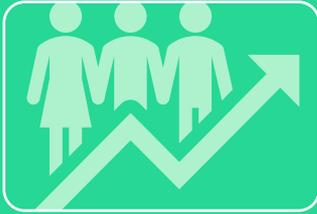
- Difficulty in successfully contacting patients to schedule for preventive exams

## 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.

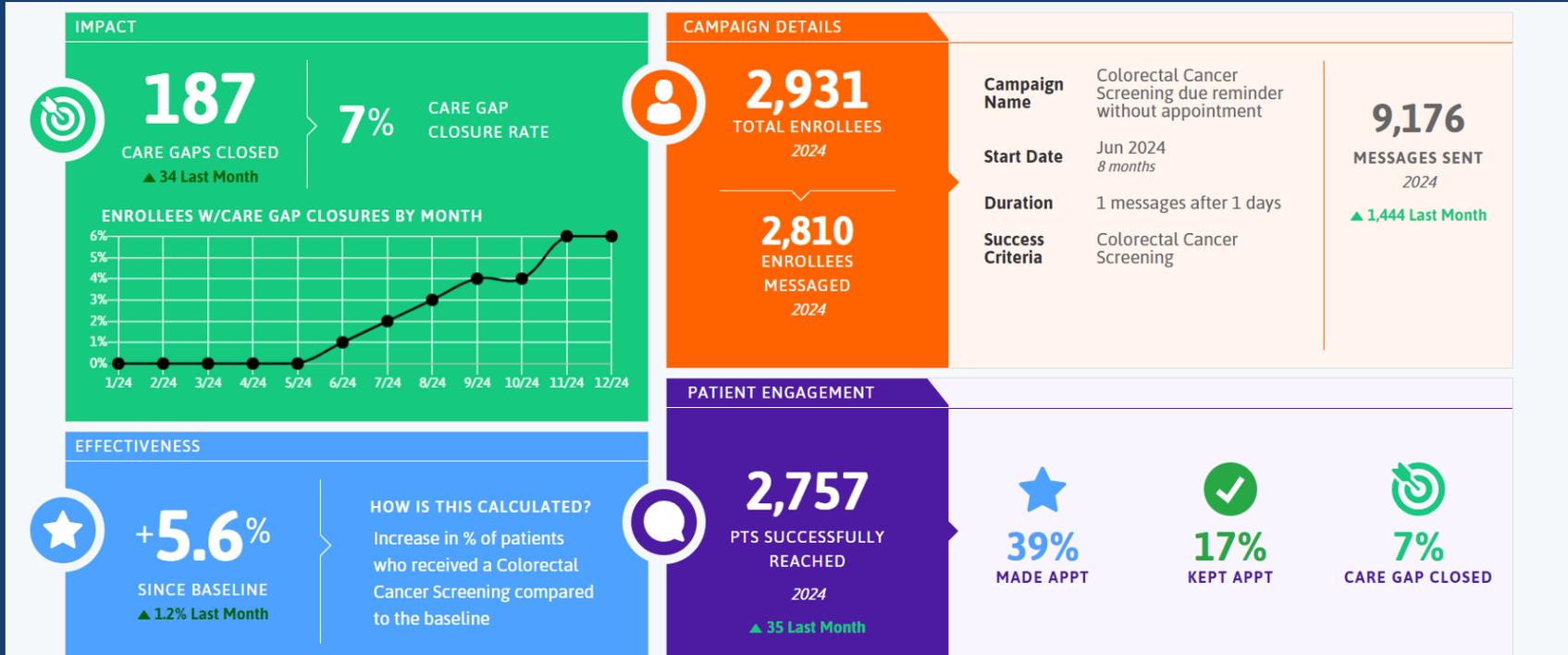


Only have 2 campaigns turned on at a time for different populations, so patients aren't messaged too frequently.

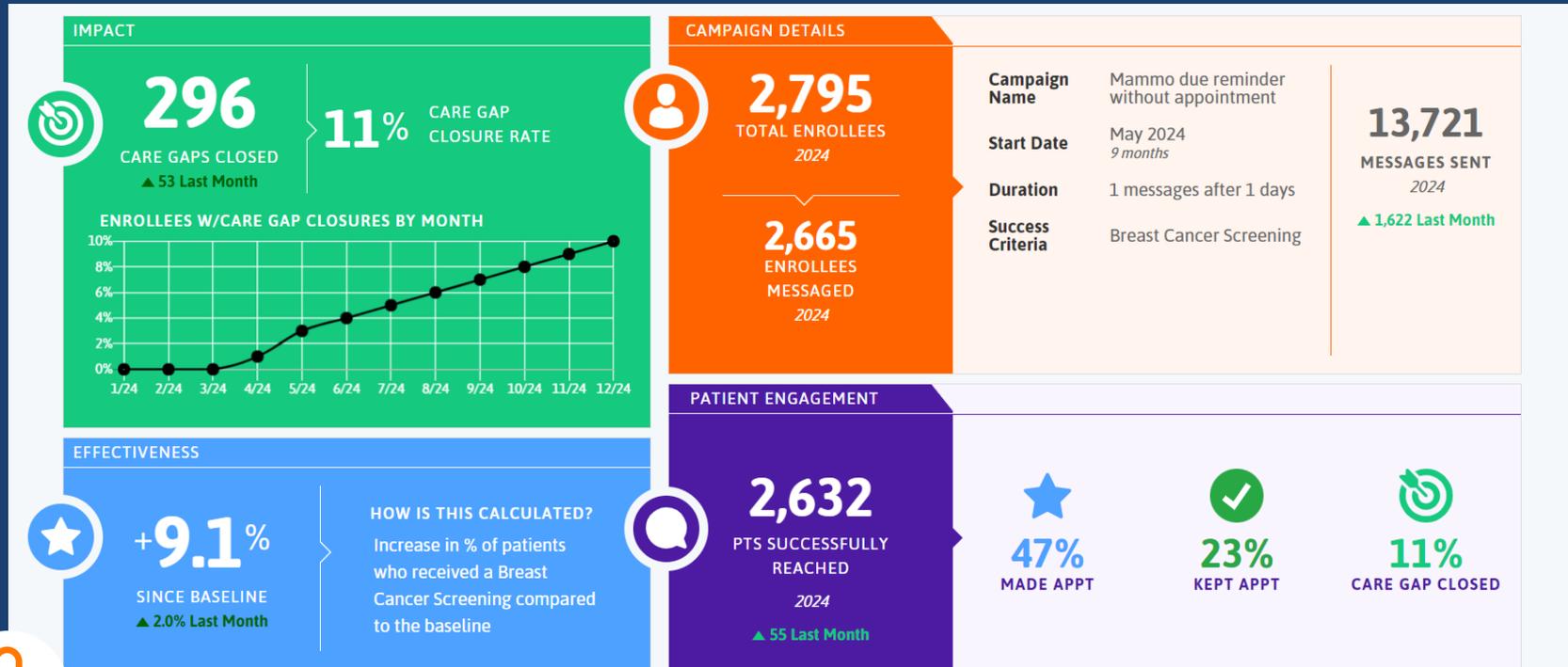


Focused a lot on cancer screenings, well child visits, and Medicare Annual Wellness exams in 2024.

# Campaign Performance Report | Colorectal Cancer Screening

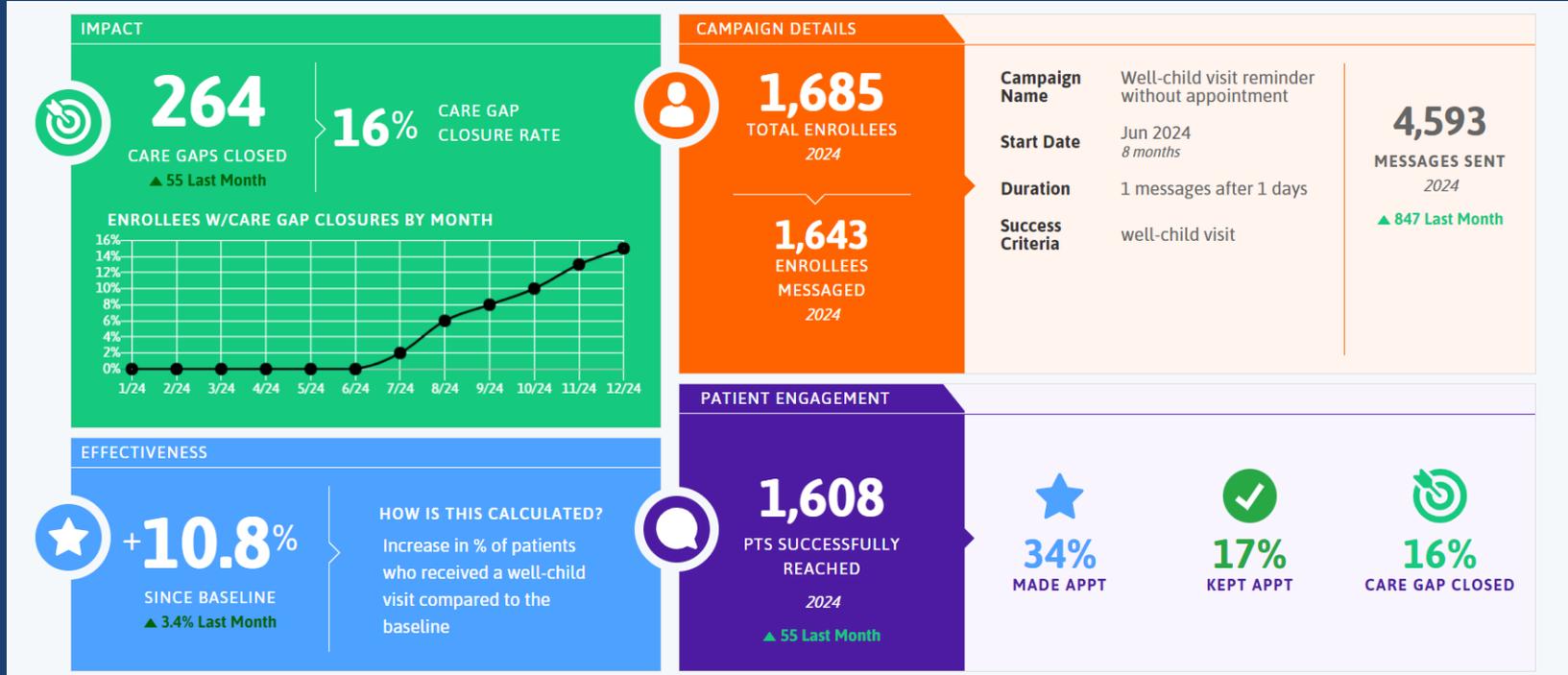


# Campaign Performance Report | Breast Cancer Screening

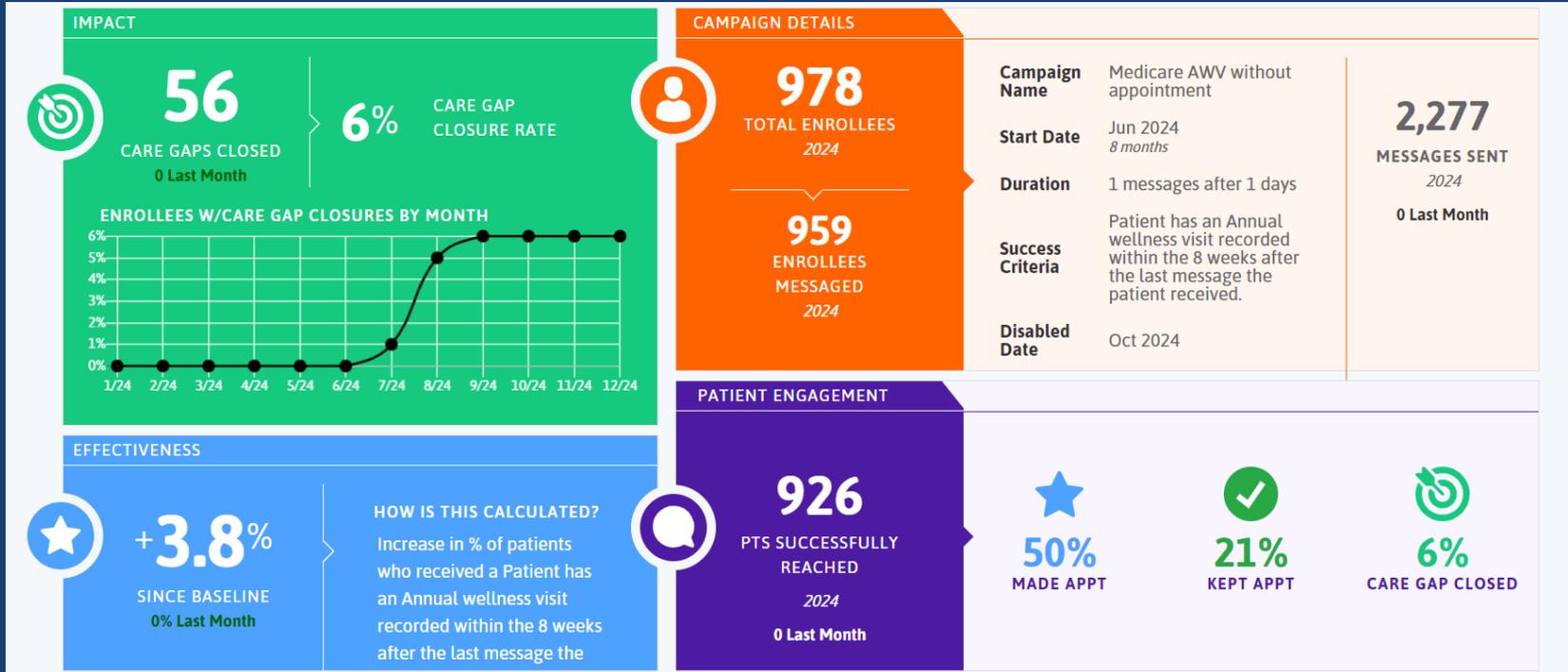


Added direct link for self-scheduling mammograms at our local imaging center!

# Campaign Performance Report | Well Child Visits



# Campaign Performance Report | Medicare Annual Wellness Visits



# APO | Customization



⚙️ Patient Outreach Administration ⓘ

Global Campaign Status ⓘ [Send Messages](#) [Stop Messages](#) ⋮

🔊 CAMPAIGNS 📅 SCHEDULE SETTINGS

**SCHEDULING BLOCK**  
We'll only send messages during these times.

DAY	START	END	SELECTED CAMPAIGN(S)	
Sunday	Skip	Skip	All Campaigns	⚙️
Monday	10 am	4 pm	All Campaigns	⚙️
Tuesday	10 am	4 pm	All Campaigns	⚙️
Wednesday	10 am	4 pm	All Campaigns	⚙️
Thursday	10 am	4 pm	All Campaigns	⚙️
Friday	10 am	4 pm	All Campaigns	⚙️
Saturday	Skip	Skip	All Campaigns	⚙️

**UPCOMING HOLIDAYS**  
We'll skip these days and send messages the next available day.

DATE	DESCRIPTION	
05/26/2025	Memorial Day	⚙️
06/19/2025	Juneteenth	⚙️
07/04/2025	Independence Day	⚙️
09/01/2025	Labor Day	⚙️
10/13/2025	Columbus Day	⚙️
11/11/2025	Veteran's Day	⚙️
11/27/2025	Thanksgiving	⚙️
	Day after Thanksgiving	⚙️
	Christmas	⚙️
	Day after Christmas	⚙️
	New Year's Day	⚙️
	Martin Luther King Jr. Day	⚙️
	President's Day	⚙️

**RATE LIMIT**  
Avoid flooding your call center! Limit us to a certain # of messages per hour.

MESSAGES/HOUR

[Confirm](#)

⏪ < Page 1 of 1 > ⏩

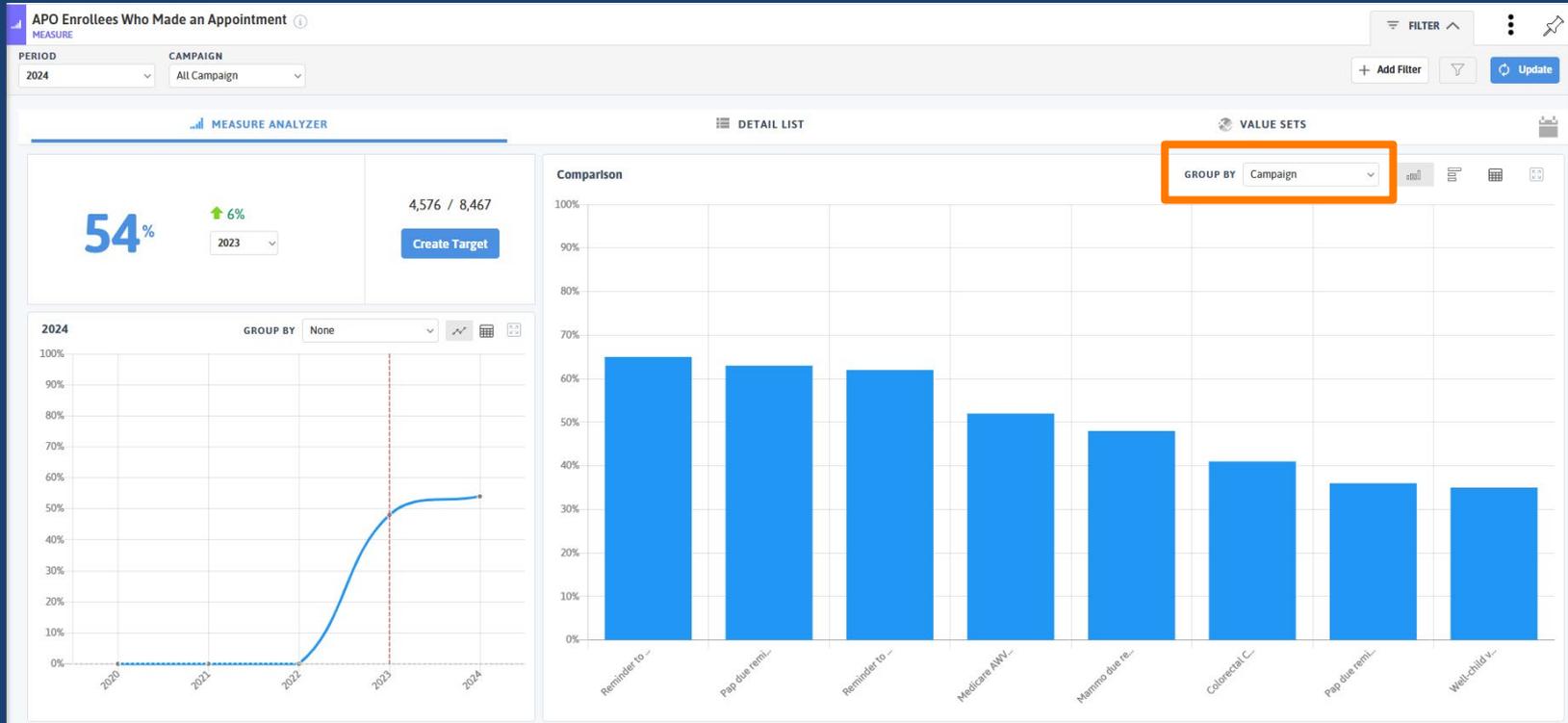
[Add Holiday](#)

**Which days and times do we want to send messages?**

**Which holidays are we closed and unable to answer patients' calls?**

**What's the maximum number of messages per hour that we want to send?**

# Measure | APO Enrollees Who Made an Appointment



# Overall Outcomes | 2023-2024



UDS 2024 CQMs <sup>i</sup>  
REPORT

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

# Change Impact



**APO Focus Measures 2025** REPORT

PERIOD: TY February 2025 | RENDERING PROVIDERS: 8 selected | BASELINE PERIOD: TY February 2024

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

MEASURE	RESULT	CHANGE	TARGET
Colorectal Cancer Screening (CMS 130v12)	30.0%	+ 5.2% ▲	54.0%
Breast Cancer Screening Ages 50-74 (CMS 125v12)	38.5%	+ 1.4% ▲	59.6%
Cervical Cancer Screening (CMS 124v12)	40.8%	+ 3.8% ▲	61.2%
Medicare Annual Well Visit	16.7%	+ 14.0% ▲	Not Set
Well-Child Care Visits (3-6 Yrs)	77.2%	+ 6.0% ▲	90.0%
Well-Child Care Visits (7-11 Yrs)	72.8%	+ 4.1% ▲	Not Set
Well-Child Care Visits (12-21 Yrs)	59.2%	+ 5.7% ▲	85.0%

MINATOR	EXCLUSIONS	GAP	TO TARGET
5,278	155	3,696	1,269
2,285	75	1,406	483
5,686	637	3,364	1,158
2,652	0	2,210	
1,045	0	238	134
1,110	0	302	
2,494	0	1,017	643

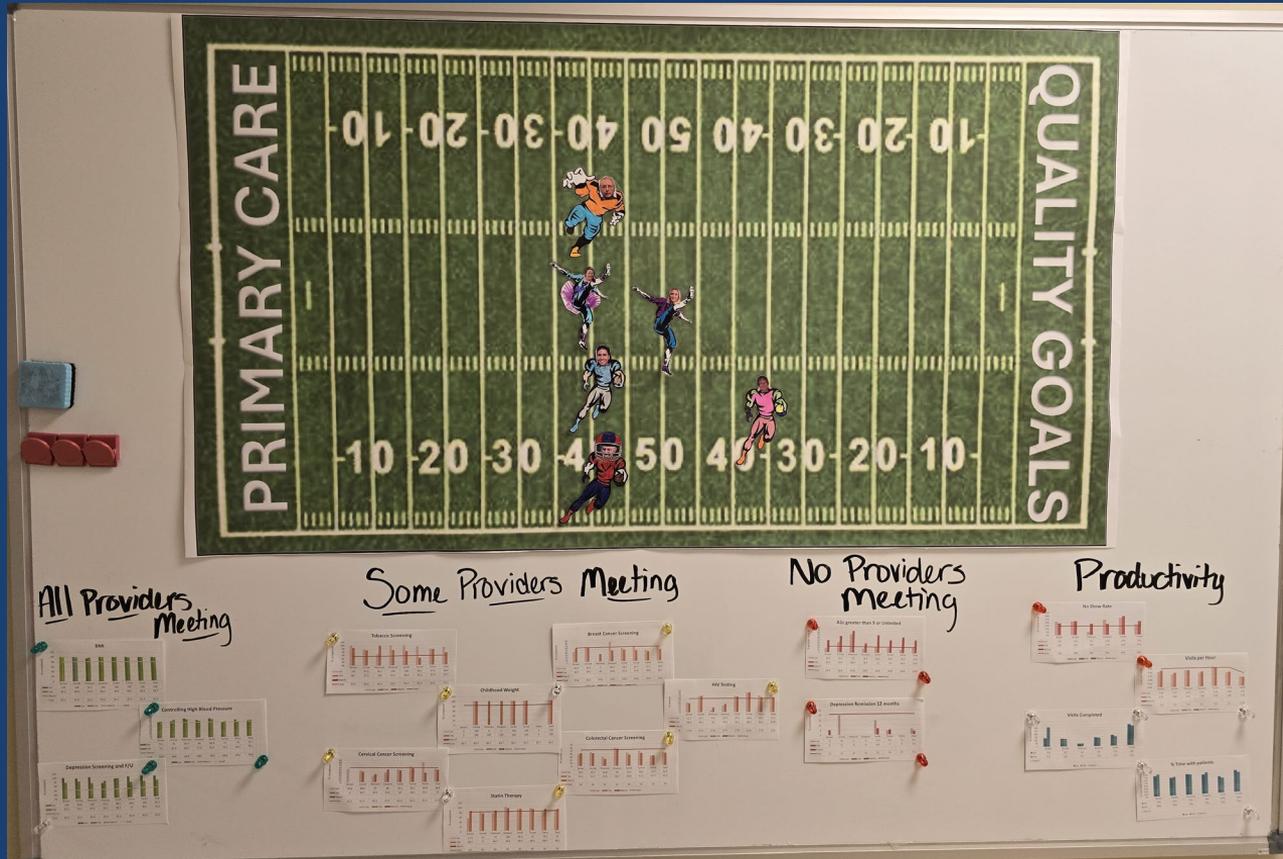
**CHANGE**

- + 5.2% ▲
- + 1.4% ▲
- + 3.8% ▲
- + 14.0% ▲
- + 6.0% ▲
- + 4.1% ▲
- + 5.7% ▲

# 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.

The screenshot displays a messaging campaign configuration interface. The main window is titled "Pap due reminder without appointment" and has three tabs: "VARIABLES", "LOCATIONS", and "MESSAGE SCHEDULE". The "LOCATIONS" tab is active and highlighted with a blue border. Below the tabs, there is a section for "LOCATIONS TO INCLUDE" with a filter instruction and a note: "\*Please ensure all selected locations and phone numbers are vetted before using this filter." Underneath, there is a "LOCATION TYPE" dropdown menu set to "Rendering Location". A "LOCATIONS NOT INCLUDED" section has a search bar. A list of location entries is shown, each with "Location Group Name" and "Location Name (123-867-5309)".

An "Edit" modal window is overlaid on the right side. It has a close button (X) in the top right corner. The modal contains two columns for message configuration. The left column is for the "ENGLISH" message and includes a "DAY AFTER PREVIOUS" field set to "1". The right column is for the "SPANISH" message and includes a "TYPE" dropdown set to "No Response". Both columns have a "+ ADD TOKEN" button with an information icon. The English message text is "Hi: You are due for your annual visit at" followed by a blue button labeled "LOCATION NAME" and another blue button labeled "LOCATION PHONE". The Spanish message text is "Message placeholder". A red text indicator at the bottom of the English message field says "279 characters remaining". At the bottom of the modal, there are "Cancel" and "Confirm" buttons.

# Location Dynamic Messaging



The screenshot displays a software interface with a dark sidebar on the left containing navigation icons for 'Fins', 'PVP', 'CMP', 'Reports', 'Dashboards', 'Measures', 'Registries', and 'Admin'. The main content area shows a 'MESSAGE SCHEDULE' section with the title 'Pap due reminder without appointment'. A modal dialog box titled 'Edit' is open in the center. The dialog contains the following elements:

- DAY AFTER PREVIOUS:** A text input field containing the number '1'.
- TYPE:** A dropdown menu currently showing 'No Response'.
- MESSAGE (ENGLISH):** A text area containing 'Message Placeholder' with a cursor. A '+ ADD TOKEN' button is visible to the right.
- MESSAGE (SPANISH):** A text area containing 'Message placeholder'.
- Buttons:** 'Cancel' and 'Confirm' buttons at the bottom.

# Location Dynamic Messaging

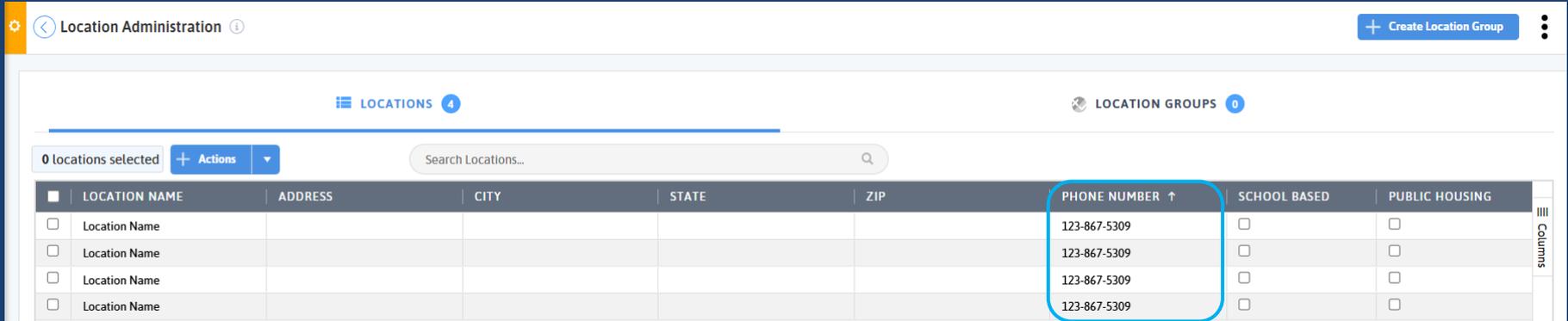


The image displays a healthcare messaging system interface. In the background, a web application window shows a message schedule editor for a reminder titled "Pap due reminder without appointment". The editor includes fields for "DAY AFTER PREVIOUS" (set to 1), "TYPE" (set to "No Response"), and message content in English and Spanish. The English message content is "Message Placeholder".

In the foreground, a mobile phone screen shows a received text message. The message content is: "Hi, you are due for your annual at Azara Healthcare CHC. Call us at [\(888\) 555-5555](tel:8885555555) to schedule an appointment." The phone's status bar shows the time as 12:12 and signal strength, Wi-Fi, and battery icons.

# Location Dynamic Messaging

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



The screenshot shows the 'Location Administration' interface. At the top, there is a navigation bar with 'Location Administration' and a 'Create Location Group' button. Below this, there are two tabs: 'LOCATIONS 4' and 'LOCATION GROUPS 0'. The 'LOCATIONS' tab is active, showing a table with the following columns: LOCATION NAME, ADDRESS, CITY, STATE, ZIP, PHONE NUMBER ↑, SCHOOL BASED, and PUBLIC HOUSING. The 'PHONE NUMBER' column is highlighted with a blue box. The table contains four rows, each with a checkbox in the first column and 'Location Name' in the second column. The 'PHONE NUMBER' column contains the value '123-867-5309' for all four rows. The 'SCHOOL BASED' and 'PUBLIC HOUSING' columns contain checkboxes.

	LOCATION NAME	ADDRESS	CITY	STATE	ZIP	PHONE NUMBER ↑	SCHOOL BASED	PUBLIC HOUSING
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>

Enter phone numbers in various formats

**Example 1** (123) 456 7891

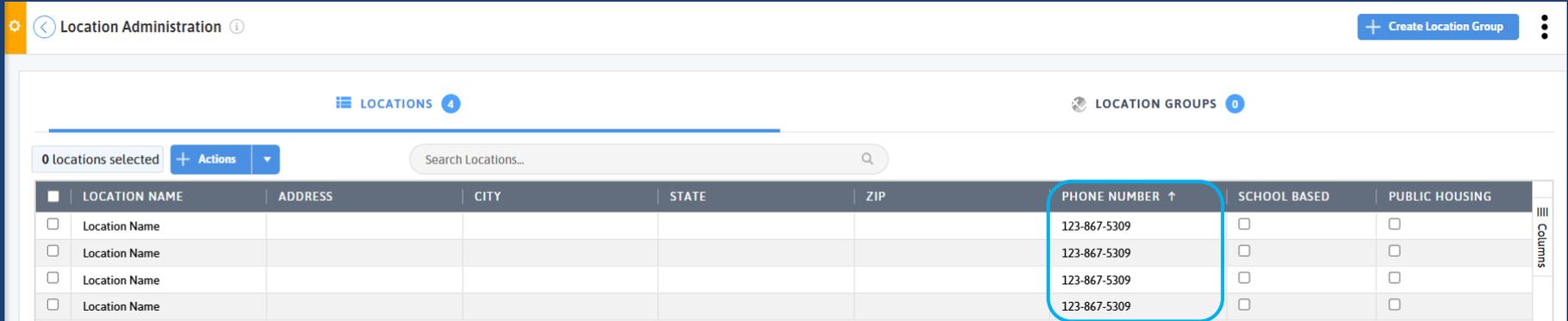
**Example 2** 1234567891

**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**



The screenshot shows the 'Location Administration' interface. At the top, there is a navigation bar with 'Location Administration' and a 'Create Location Group' button. Below this, there are tabs for 'LOCATIONS 4' and 'LOCATION GROUPS 0'. A search bar is present with the text 'Search Locations...'. Below the search bar is a table with the following columns: 'LOCATION NAME', 'ADDRESS', 'CITY', 'STATE', 'ZIP', 'PHONE NUMBER ↑', 'SCHOOL BASED', and 'PUBLIC HOUSING'. The 'PHONE NUMBER' column is highlighted with a blue box. The table contains four rows, each with a checkbox in the first column and the text 'Location Name' in the second column. The 'PHONE NUMBER' column contains the value '123-867-5309' for each row. The 'SCHOOL BASED' and 'PUBLIC HOUSING' columns contain checkboxes.

	LOCATION NAME	ADDRESS	CITY	STATE	ZIP	PHONE NUMBER ↑	SCHOOL BASED	PUBLIC HOUSING
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Location Name					123-867-5309	<input type="checkbox"/>	<input type="checkbox"/>

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.

Pap due reminder without appointment

VARIABLES LOCATIONS

LOCATIONS TO INCLUDE

Use the filter below to target this campaign to patients based on their Rendering Location or Usual Location. For campaigns requiring an appointment

\*Please ensure all selected locations and phone numbers are vetted before using this filter.

LOCATION TYPE

Rendering Location

LOCATIONS NOT INCLUDED

Search

Location Group Name

Location Name (123-867-5309)

## *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



⚙️ ⏪ Pap due reminder without appointment

VARIABLES LOCATIONS

**LOCATIONS TO INCLUDE**  
Use the filter below to target this campaign to patients based on their Rendering Location or Usual Location. For campaigns requiring an appointment, please ensure all selected locations and phone numbers are vetted before using this filter.

**LOCATION TYPE** ←

Rendering Location

**LOCATIONS NOT INCLUDED**

Search

Location Group Name

Location Name (123-867-5309)

Save Changes

## *Location Types*

### **Usual Location**

- Patient's Usual Location

### **Rendering Location**

- Location of the patient's most recent qualifying encounter
- Only available for campaigns 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

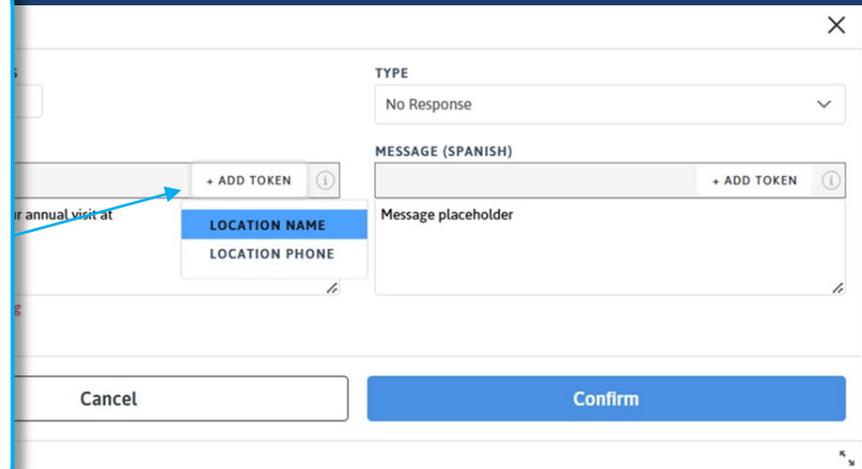
Utilize **Smart Tokens** in your messaging

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.



The screenshot shows a messaging interface with a dropdown menu open. The dropdown menu has two options: "LOCATION NAME" and "LOCATION PHONE". A blue arrow points from the text "for annual visit at" to the "LOCATION NAME" option. The interface also includes a "TYPE" dropdown set to "No Response", a "MESSAGE (SPANISH)" field with a "Message placeholder" and an "+ ADD TOKEN" button, and "Cancel" and "Confirm" buttons at the bottom.

# 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.

## Example Use Case

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

However, in the EHR and DRVS,...

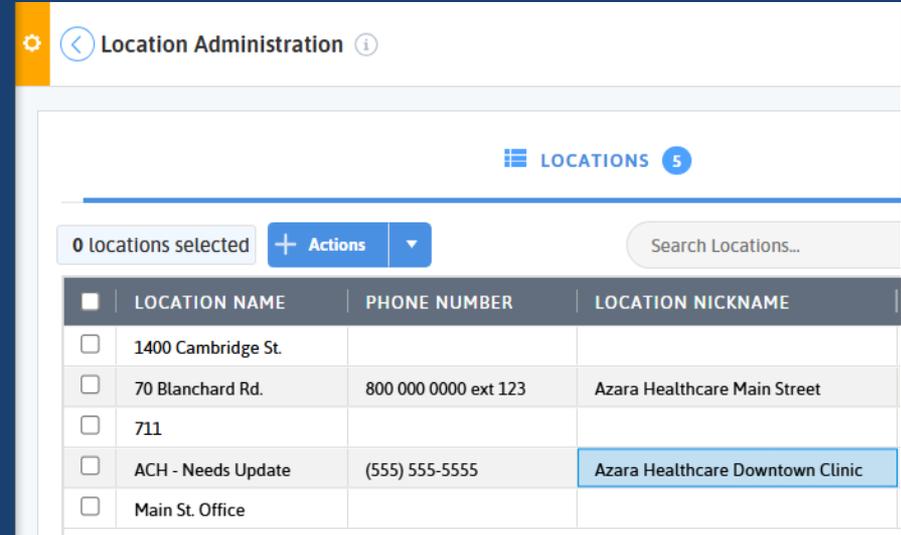
Clinic location 1 is named “ACHC – Medical”

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”



The screenshot shows the 'Location Administration' interface. At the top, there's a header with a gear icon, a back arrow, and the text 'Location Administration'. Below the header, there's a navigation bar with a hamburger menu icon, the word 'LOCATIONS', and a blue circle containing the number '5'. Underneath, there's a summary bar showing '0 locations selected', a '+ Actions' button with a dropdown arrow, and a search bar labeled 'Search Locations...'. The main content is a table with the following columns: 'LOCATION NAME', 'PHONE NUMBER', and 'LOCATION NICKNAME'. The table contains five rows of data:

	LOCATION NAME	PHONE NUMBER	LOCATION NICKNAME
<input type="checkbox"/>	1400 Cambridge St.		
<input type="checkbox"/>	70 Blanchard Rd.	800 000 0000 ext 123	Azara Healthcare Main Street
<input type="checkbox"/>	711		
<input type="checkbox"/>	ACH - Needs Update	(555) 555-5555	Azara Healthcare Downtown Clinic
<input type="checkbox"/>	Main St. Office		

# Location Dynamic Messaging



Search All Centers

Location Administration Access Community Health Create Location Group

LOCATIONS 5 LOCATION GROUPS 2

0 locations selected Actions Number Search Locations...

	LOCATION NAME	PHONE NUMBER	LOCATION NICKNAME	ADDRESS	CITY	STATE	ZIP	SCHOOL BASED	PUBLIC HOUSIN
<input type="checkbox"/>	1400 Cambridge St.							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	70 Blanchard Rd.	800 000 0000 ext 123						<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	711							<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	ACH - Needs Update	(555) 555-5555						<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Main St. Office							<input type="checkbox"/>	<input type="checkbox"/>

1 to 5 of 5 Page 1 of 1

# 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

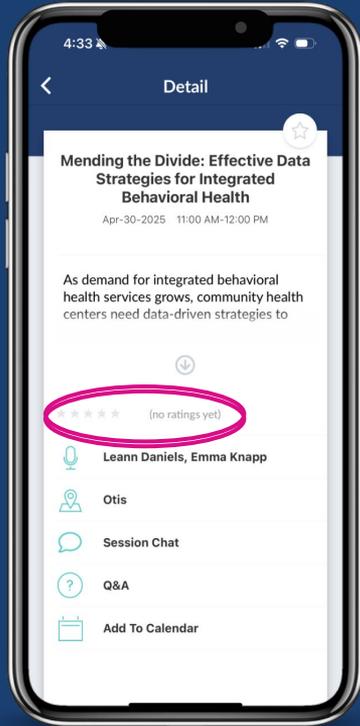
# Questions?



# 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.

### 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!

