



Step-By-Step Guide: Population Management Approach to Reaching Eligible Key Populations for the COVID-19 Vaccine

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STEP 1: Identify State Specific Mandates on Eligibility

- Requires review of state specific mandates in detail
- Be attentive to state's timeline for vaccine eligibility
- Ensure center has direct communication with the state legislature to serve as a voice for patients and an ear in the conversation

STEP 2: Identify Existing Data Sets

- Existing Data Sets Include:
 - Patient Registries
 - EHR Reports
 - Data Warehouse

STEP 3: Match Eligibility with Key Elements about Patients

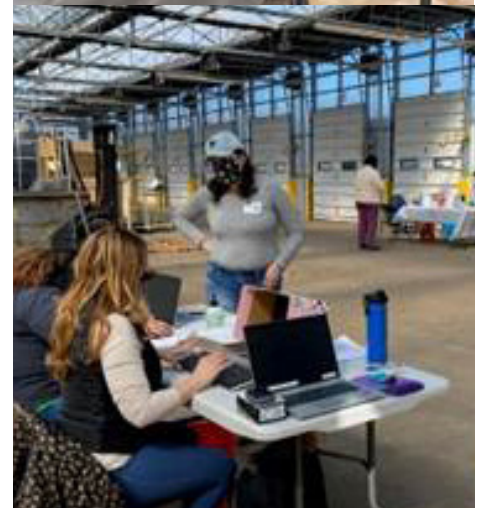
- Common Key Elements:
 - Date of Birth
 - Date of Last Visit at Health Center
 - Preferred Language
 - Insurance Status
 - City of Residence
 - Employment Status*
- Recognize missing key elements to inform operational processes
 - Example: No employment status information would require ID verification of employment (e.g., work ID)
- Eligibility and Key Element Match Example:
 - Eligibility: People age 75+ living/working in state
 - Key Element about Patients: Requires DOB and City of Residence

STEP 4: Identify Population Using Existing Data Sets

- Factors to consider:
 - How do you define "patient"
 - What data can inform eligibility
 - Patient proximity to vaccine site: transportation
 - Digital divide—patients with/without emails and mobile phones
 - Insurance status of patients
 - Patients' preferred languages
- Ensure you are pulling contact information for communication strategy (e.g., phone, email)

STEP 5: Identify your Method of Outreach

- Recommend using existing communication strategies: text campaign, robocalls, live calls, email, postcard, etc.
 - Multiple and varied approaches result in the greatest success
- Recommended elements of outreach communication
 - Highlight the eligibility category
 - Outline steps to schedule
 - Recommend using your center
 - Provide assistance line or method to reach center for assistance





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Data Strategy Guide—Recommended Fields

Data Field	Overview
PCP	Informs outreach strategy (e.g. assigning providers medical assistants to conduct outreach calls)
PCP Site	Critical for multisite primary care organizations to recommend COVAC clinics to patients
First Name	Necessary for outreach strategies (e.g. automated communications, live phone calls)
Last Name	Necessary for outreach strategies (e.g. automated communications, live phone calls)
Email	Necessary for email outreach VAMs* requires email addresses. Recommend targeted phone outreach to those patients without emails
Preferred Language	Informs outreach strategy (e.g. assigning Spanish speaking staff to specific patients, targeted communication in Spanish via email/mailing)
Phone	Necessary for outreach strategies (e.g. automated communications, live phone calls)
Phone Type	To provide additional context regarding outreach capabilities (e.g. texting, call)
City	Allows for targeted outreach based on location
Address	Necessary for mailing outreach
Zip Code	Another option for targeting and sorting based on location
Insurance Carrier	Presuming that the most vulnerable are uninsured or insured by Medicaid. Allows for prioritized outreach to those individuals
Birth Date and/or Age	Allows for targeting based on age eligibility
Race	Allows for assessing reach in order to inform success with reaching specific patient populations
Ethnicity	Allows for assessing reach in order to inform success with reaching specific patient populations
Any Encounter Last 3 Years	CHC recognized these individuals as “patients”
Last Encounter	Informs outreach strategy on engagement with the clinic. Recommend identifying specific discipline (e.g. medical, BH or dental) of last encounter to inform outreach strategy