Instructions for the Epic
Electronic Health Record (EHR) System

Configuring Vaccination Outreach Campaigns

for appropriate child and adolescent patients

Table of Contents

01. Overview 3

02. Background and Limitations 4

03. Technical Instructions for Setting Up a Campaign Template, Details, and Frequency 5

04. Technical Instructions Setting Up Campaign Outreach 8

05. Example Campaign Outreach Copy 13

06. Disclaimers 17

07. Notes 18

01. Overview

This EHR guide provides instructions to enable health systems to configure outreach campaigns with educational immunization messaging for appropriate child and adolescent patients. This guide may accompany the "Population Health Insights Guide to Help Identify Appropriate Child and Adolescent Patients for Vaccination and Evaluate Vaccination Rates in Your Health System." While the insights guide utilizes Epic's EHR Population Health Suite (Healthy Planet) to identify and monitor child and adolescent patients' vaccination rates and associated population health metrics across a health system, this campaign guide provides instructions to create targeted patient outreach to select patient populations to help improve vaccination rates. The vaccination series for child and adolescent patients includes the following:

- COVID-19
- DTaP
- Hepatitis A
- Hepatitis B
- Hib
- HPV
- Influenza
- Meningococcal ACWY
- Meningococcal B
- MMR
- Pneumococcal
- Polio
- Rotavirus
- RSV
- Tdap
- Varicella

NOTE: The above list does not cover all recommended child and adolescent vaccines. A comprehensive immunization schedule may be found **here**.

In the Epic EHR system, the campaign module allows health system customers to configure campaign templates (including recommended outreach messages) and to specify the communication details (eg, audience, method, campaign period, delivery times).

This guide provides specific technical instructions to complete both of the aforementioned activities for outreach specific to appropriate child and adolescent patients.

DTaP=diphtheria, tetanus, acellular pertussis; Hib=*haemophilus influenzae* type b; HPV=human papillomavirus; MMR=measles, mumps, rubella; RSV=respiratory syncytial virus; Tdap=tetanus, diphtheria, acellular pertussis.

02. Background and Limitations

This EHR instructions guide for child and adolescent patients is created specifically to leverage the Epic campaign solution and will not work for other conditions, treatments, or therapeutic areas, or for other EHR systems. The intent of this resource is to provide suggestions to leverage Epic's campaign management tool to create campaigns for identified patients at the health system level.

The processes outlined in this piece are variable and not all steps will apply to every customer. Any steps or settings that are not part of a customer's standard process should be excluded or modified accordingly. Any questions should be directed to the appropriate service provider. The practice is solely responsible for the implementing, testing, monitoring, and ongoing operation of any EHR tools.

This guide is designed for organizations using the Epic 2022 version or later. Setting up a campaign in Epic requires a clinical analyst.

This guide provides instructions on how to help identify child and adolescent patients who may be due for a vaccination based on the CDC recommendations. The child and adolescent immunization schedule by age can be found **here**.

CDC=Centers for Disease Control and Prevention.

03. Technical Instructions for Setting Up a Campaign Template, Details, and Frequency

To create a Campaign Template Record, follow the steps below:

1. **Access the Campaign Template Editor** using the search feature.
2. **Click the Create tab** in the Select Campaign view.
3. **Enter a unique Name for the campaign** (eg, "Child and adolescent immunization campaign").
4. In the Display Name field, **enter the desired display name** (eg, "Child and adolescent immunization campaign").
5. In the Inclusion Cycle field (alternatively known as Recurrence Cycle), **select the period when the campaign runs**. Consider Ad Hoc or Periodic depending on health system preference. Cadenced outreach messages can be set up at various intervals throughout the year to align with the child and adolescent vaccination forecasts. Suggested health content to include in patient outreach messaging can be found below:
    - January: General Vaccination Messaging
    - April: National Infant Immunization Week Messaging
    - July: Back to School Vaccination Messaging
    - August: National Immunization Awareness Month
6. In the Max Leads per Cycle field (may be labeled as Max People in Recurrence), **set the maximum number of patients per cycle**.
7. In the Goal field, **enter the message a user would see when accessing the campaign** (eg, "Improving child and adolescent vaccination rates.").
8. In the Success Rules field, **enter the desired rule** (a standard rule 50507 – Patient Scheduled Visit During Campaign is available).

COPD=Chronic obstructive pulmonary disease.

→ *See next page for additional steps.*

03. Technical Instructions for Setting Up a Campaign Template, Details, and Frequency (continued)

9. In the Registry field of the Population section, **enter the desired registry** (consider the Wellness - All Registry). **The patients selected for the campaign can be further refined by adding additional Population Inclusion Rule(s)**, all with a Patient Context. For example, consider selecting standard properties (eg, "Is HM Topic Due Date in Range", "Is on Health Maintenance Modifier").

   a. For example, to set up a campaign focused on general children and adolescent vaccination messaging, consider the Population Inclusion Rules for the campaign listed in the first row of the table below:

Campaign Focus	Inclusion Rules
General Vaccination Messaging (January)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*
National Infant Immunization Week (April)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*
Back to School Messaging (July)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*
National Immunization Awareness Month (August)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*

*Wellness – All registry follows CDC recommendations for child and adolescent vaccinations.
ICD-10=International Classification of Diseases 10th Revision, Clinical Modification.

→ *See next page for additional steps.*

03. Technical Instructions for Setting Up a Campaign Template, Details, and Frequency (continued)

10. In the Success Evaluation section, **set the desired evaluation period**. For child and adolescent vaccinations, consider adding "30 days" in this field to evaluate the success of the campaign after it has ended.
11. In the Cooldown section, **enter the desired number of days before the patient can be re-enrolled in the same child and adolescent immunization campaign**.
12. **Save and Accept the Campaign Template** when finished.
13. After the Campaign Template is configured, set the **Campaign Outreach Template**.

→ *See next page for additional steps.*

04. Technical Instructions for Setting Up Campaign Outreach

Identified patients can be reached in their preferred communication preference. To set up all aspects of campaign outreach, follow the steps below:

1. **Access the Campaign Template Editor** using the search feature.
2. **Open the newly created Child and Adolescent Immunization Campaign.**
3. **Select the Outreach Settings section.**
4. **Confirm the "Do not remove communication method" radio button is not checked** to allow patients to opt out of the campaign.
5. **Set the Outreach Phases as desired.** For each of the phases, **set the desired number of days**. For example, the first phase of the campaign could be focused on general child and adolescent vaccination messaging. A second phase could focus on another factor influencing child and adolescent vaccinations.
6. **Set each of the desired outreach methodologies**. Sample content for each campaign can be found at the links below:
   - January: General Vaccination Messaging
   - April: National Infant Immunization Week Messaging
   - July: Back to School Messaging
   - August: National Immunization Awareness Month

See next page for additional steps.

04. Technical Instructions for Setting Up Campaign Outreach (continued)

6. (Continued)

NOTE: The provided example text is suggested for each of the patient types. Health systems may customize the provided text to meet standard practices of the organization.

Option 1:

Setting up the Phone Tab

1. **Click** the Phone tab.
2. **Set the desired InBasket recipient**—for example, a care manager assigned to the campaign.
3. **Set the priority** as desired.
4. **Set the Routing Action** to "Initiate Calls" and the Reason for Call to "General Child and Adolescent Vaccination Messaging".
5. **Create an outreach message** as desired. Suggested text for a general child and adolescent vaccination messaging campaign can be found on **page 13**. Additional templates can be created for additional campaigns.

The health system may have various phone outreach options, ranging from an Interactive Voice Response (IVR) system to manually reaching out to patients. Please contact your EHR team for additional support if needed.

NOTES: The instructions on this page should be repeated for each desired campaign message. The "Reason for Call" found in step 4 should be modified for each campaign message, as per below:

- Vaccine reminder for Infant Immunization Awareness Week
- Child and adolescent vaccine reminder for back-to-school season
- Child and adolescent vaccine reminder for National Immunization Awareness Month

See next page for additional steps.

04. Technical Instructions for Setting Up Campaign Outreach (continued)

6. (Continued)



Option 2:

Setting up the Mail Tab

1. **Click** the Mail tab.
2. **Enter a reason** for the letter (eg, "General Children and Adolescent Vaccination Messaging").
3. **Use the Template search field to find the optimal template**. Consider using terms such as "Child and Adolescent Vaccines." **Click on the desired template**.

   NOTE: An example of a template for the General Children and Adolescent Vaccination Messaging campaign is provided on **page 13**. Additional examples provided can be added for a National Infant Immunization Week campaign (**page 14**), a Back to School campaign (**page 15**), and National Immunization Awareness Month campaign (**page 16**).
4. **Review the template** to ensure all information displays as desired. Select the radio button next to Show Template to display the templated letter, or select the radio button next to Show Preview For to display the customized letter for the selected patient. Suggested text for each campaign can be found via links in the note above.

See next page for additional steps.

04. Technical Instructions for Setting Up Campaign Outreach (continued)

6. (Continued)



Option 3:

Setting up the MyChart Tab

1. **Click** the MyChart tab.
2. **Enter a subject line** (eg, "General Children and Adolescent Vaccination Messaging").
3. **Set the Reply options** (eg, "Allow reply directly to me").
4. **Use the Template search field to find the optimal template**. Consider using terms such as "Child and Adolescent Vaccines." **Click on the desired template**.

   NOTE: An example of a template for the General Children and Adolescent Vaccination Messaging campaign is provided on **page 13**. Additional examples provided can be added for a National Infant Immunization Week campaign (**page 14**), a Back to School campaign (**page 15**), and National Immunization Awareness Month campaign (**page 16**).
5. **Enter** desired text. Suggested text for each campaign can be found via links in the note above.

NOTE: Any outreach can be tracked in Reporting Workbench or at the patient level under the Patient Outreach History section.

See next page for additional steps.

04. Technical Instructions for Setting Up Campaign Outreach (continued)

6. (Continued)



Option 4:

Sending an Individual Patient Message (MyChart)

1. **Click** Send Patient Message.
2. **Enter a subject line** (eg, "General Children and Adolescent Vaccination Messaging").
3. **Set the Reply options** (eg, "Allow reply directly to me").
4. **Use the Template search field to find the optimal template**. Consider using terms such as "Child and Adolescent Vaccines." **Click on the desired template**.

   NOTE: An example of a template for the General Children and Adolescent Vaccination Messaging campaign is provided on **page 13**. Additional examples provided can be added for a National Infant Immunization Week campaign (**page 14**), a Back to School campaign (**page 15**), and National Immunization Awareness Month campaign (**page 16**).
5. **Enter** desired text. Suggested text for each campaign can be found via links in the note above.

NOTE: Any outreach can be tracked in Reporting Workbench or at the patient level under the Patient Outreach History section.



Option 5:

Do Not Contact

NOTE: Patients who have selected "do not contact" will be automatically excluded from patient outreach.

1. **Click the Test button** for each of the outreach options to confirm that the outreach message renders as expected.
2. **Click the Test Activity button** to evaluate which cohort of patients would be part of the RSV Campaign.
3. **Leverage the Build Inspector** to confirm all configuration settings are accurate.
4. **Click the Active radio button** to complete the configuration.

05. Example Campaign Outreach Copy

General Immunization Message

Phone

Hello, this is [Name], calling from [Health System Name].

We're reaching out because your child's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to provide you with the support you need, including scheduling appointments or answering questions. We encourage you to talk to your child's doctor about your child's risk and prevention options.

Mail/MyChart

Dear [Caregiver Name],

We're reaching out because your child's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to provide you with the support you need, including scheduling appointments or answering questions. We encourage you to talk to your child's doctor about your child's risk and prevention options.

05. Example Campaign Outreach Copy (continued)

Infant Immunization Awareness Week Message

Phone

Hello, this is [Name], calling from [Health System Name].

We're reaching out because your infant's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your baby may be due for scheduled vaccinations.

Without the appropriate vaccines, your infant is at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

This April, we observe National Infant Immunization Awareness Week. Know that we're here to provide you with the support you need, including scheduling appointments or answering questions. We encourage you to talk to your child's doctor about your child's risk and prevention options.

Mail/MyChart

Dear [Caregiver Name],

We're reaching out because your infant's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your baby may be due for scheduled vaccinations.

Without the appropriate vaccines, your infant is at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

This April, we observe National Infant Immunization Awareness Week. Know that we're here to provide you with the support you need, including scheduling appointments or answering questions. We encourage you to talk to your child's doctor about your child's risk and prevention options.

05. Example Campaign Outreach Copy (continued)

School Year Messaging

Phone

Hello, this is [Name], calling from [Health System Name].

As the new school year approaches, it's a great time to make sure your child is up to date on all required and recommended vaccinations. Staying current on vaccinations helps protect your child. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to support you as you prepare for the school year, including helping you schedule any needed appointments or answering questions. Be sure to talk to your child's doctor about staying up to date and meeting school immunization requirements.

Mail/MyChart

Dear [Caregiver Name],

As the new school year approaches, it's a great time to make sure your child is up to date on all required and recommended vaccinations. Staying current on vaccinations helps protect your child. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to support you as you prepare for the school year, including helping you schedule any needed appointments or answering questions. Be sure to talk to your child's doctor about staying up to date and meeting school immunization requirements.

05. Example Campaign Outreach Copy (continued)

National Immunization Awareness Month Messaging

Phone

Hello, this is [Name], calling from [Health System Name].

August is National Immunization Awareness Month. We're reaching out because your child's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to provide you with the support you need, including scheduling appointments or answering questions. We encourage you to talk to your child's doctor about your child's risk and prevention options.

Mail/MyChart

Dear [Caregiver Name],

We're reaching out because your child's health is important to us, and we want to make sure they're vaccinated against vaccine-preventable diseases. Our records indicate that your child may be due for scheduled vaccinations.

Without the appropriate vaccines, your child could be at risk of contracting a preventable disease that may have serious consequences. That's why it is always better to prevent a disease than to treat one after it occurs.

We're here to provide you with the support you need, including scheduling appointments or answering questions. Talk to your child's doctor about your child's risk and prevention options.

06. Disclaimers

- The customer (ie, physician, medical group, IDN) shall be solely responsible for the implementation, testing, and monitoring of the instructions to ensure proper orientation in each customer's EHR system
- Capabilities, functionality, and setup (customization) for each individual EHR system vary. GSK shall not be responsible for revising the implementation instructions it provides to any customer if the customer modifies or changes its software or the configuration of its EHR system, after such time as the implementation instructions have been initially provided by GSK
- While GSK tests its implementation instructions on multiple EHR systems, the instructions are not guaranteed to work for all available EHR systems and GSK shall have no liability thereto
- While EHRs may assist providers in identifying appropriate patients for consideration of assessment, treatment, and referral, the decision and action should ultimately be decided by a provider in consultation with the patient, after a review of the patient's records to determine eligibility, and GSK shall have no liability thereto
- The instructions have not been designed to and are not tools or solutions for meeting Advancing Care Information and/or any other quality/accreditation requirement
- All products are trademarks of their respective holders, all rights reserved. Reference to these products is not intended to imply affiliation with or sponsorship of GSK and/or its affiliates

07. Notes

Reference: 1. Centers for Disease Control and Prevention. Reasons to vaccinate. CDC; August 9, 2024. Accessed March 23, 2026. https://www.cdc.gov/vaccines-children/reasons/index.html

Trademarks are property of their respective owners.

©2026 GSK or licensor.
NPUS-AVULBND260004 May 2026
Produced in USA.