Instructions for the Epic
Electronic Health Record (EHR) System

Configuring Outreach Campaigns

for appropriate older adult patients at increased risk for severe RSV disease

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01. Overview

This EHR guide provides instructions to enable health systems to configure outreach campaigns with educational messages for appropriate older adult patients at increased risk for severe RSV disease. This guide may accompany the "Population Health Insights Guide to Help Identify Appropriate Older Adult Patients for RSV Vaccination and Evaluate RSV Immunization in Your Health System." While the Insights Guide utilizes Epic's EHR Population Health Suite (Healthy Planet) to identify and monitor RSV immunization 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 immunization rates.

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 older adult patients at increased risk for severe RSV disease.

02. Background and Limitations

This EHR instructions guide for severe RSV disease 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 an RSV campaign 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 older adult patients who may be appropriate to receive RSV vaccination based on the CDC recommendations.[1] These are:

- All adults ages 75 and older
- Adults ages 50 to 74 at increased risk of severe RSV disease

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, "RSV campaign").
4. In the Display Name field, **enter the desired display name** (eg, "RSV 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. Suggested health content to include in patient outreach messaging can be found below:
    - January: General RSV Vaccination Messaging
    - February: Heart Month
    - October: RSV Awareness Month
    - November: COPD 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 RSV immunization 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"). Select the RSV immunization series to limit to only patients due for an RSV immunization.

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

Campaign Focus	Inclusion Rules
General RSV Vaccination Messaging (January)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*
Heart Month (February)	• Is HM Topic Due Date in Range • Is on Wellness – All registry* • Example conditions for certain cardiovascular diseases - See Table 1 on page 7 for example ICD-10 codes
RSV Awareness Month (October)	• Is HM Topic Due Date in Range • Is on Wellness – All registry*
COPD Awareness Month (November)	• Is HM Topic Due Date in Range • Is on Wellness – All registry* • Diagnosis for COPD - See Table 1 on page 7 for example ICD-10 codes

*Wellness – All registry follows CDC recommendations for RSV vaccination.
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)

Health system customers are encouraged to rely on existing Diagnosis Related Groups (DRGs) within their EHR systems to identify specific patient populations.

The Wellness Registry will identify patients for RSV vaccination per CDC recommendations. You may also want to educate these patients regarding their risk of severe RSV associated with certain chronic conditions. The following diagnosis codes may help identify those patients in your search query.

Table 1: Examples of Comorbidities That Have Been Associated With Increased Risk of Severe RSV Disease[2]

Disease	**ICD-10 Code/Description**[3]
Coronary Artery Disease (CAD)	I25 - Chronic ischemic heart disease
COPD	J44.0 - Chronic obstructive pulmonary disease with (acute) lower respiratory infection J44.1 - Chronic obstructive pulmonary disease with (acute) exacerbation J44.9 - Chronic obstructive pulmonary disease, unspecified
Congestive Heart Failure	I50.2 - Systolic (congestive) heart failure

NOTE: The conditions listed in Table 1 are not exhaustive and only serve as an example to help identify older adult patients who may be at increased risk for severe RSV. Health system stakeholders should review and amend as they see fit to identify and manage older adult patients.

→ *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 RSV, 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 RSV 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 RSV 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 RSV vaccination messaging. A second phase could focus on another factor influencing RSV immunizations.
6. **Set each of the desired outreach methodologies**. Sample content for each campaign can be found at the links below:
   - January: General RSV Vaccination Messaging
   - February: Heart Month
   - October: RSV Awareness Month
   - November: COPD 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 RSV Vaccination Messaging**".
5. **Create an outreach message** as desired. Suggested text for a General RSV Vaccination Messaging campaign can be found on **page 14**. 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:

- RSV prevention reminder for Heart Month
- RSV prevention reminder for RSV Awareness Month
- RSV prevention reminder for COPD 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 RSV Vaccination Messaging**").
3. **Use the Template search field to find the optimal template**. Consider using terms such as "RSV." **Click on the desired template**.

   NOTE: An example of an RSV template for the General RSV Vaccination Messaging and RSV Awareness Month campaigns is provided on **page 14**. Additional examples provided can be added for a Heart Month campaign (**page 15**) and COPD 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 RSV 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 "RSV." **Click on the desired template**.

   NOTE: An example of an RSV template for the General RSV Vaccination Messaging and RSV Awareness Month campaigns is provided on **page 14**. Additional examples provided can be added for a Heart Month campaign **(page 15**) and COPD 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 RSV 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 "RSV." **Click on the desired template**.

   NOTE: An example of an RSV template for the General RSV Vaccination Messaging and RSV Awareness Month campaigns is provided on **page 14**. Additional examples provided can be added for a Heart Month campaign (**page 15**) and COPD 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 RSV Vaccination Messaging (January) and RSV Awareness Month (October)

Dear [Patient],

Are you aware that you may be at increased risk of severe RSV?
Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like asthma, chronic obstructive pulmonary disease (COPD), or heart failure, which could lead to hospitalizations.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

Phone

Hello,

This is [name] calling you from [health system name]. Are you aware that you may be at an increased risk for severe RSV?

Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like asthma, chronic obstructive pulmonary disease (COPD), or heart failure, which could lead to hospitalizations.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

05. Example Campaign Outreach Copy (continued)

Heart Month (February)

Dear [Patient],

Are you aware that you may be at increased risk of severe RSV?
Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like heart failure, which could lead to hospitalizations.

February is Heart Month
Chronic cardiovascular disease, including heart failure and coronary artery disease, can increase the risk for severe RSV illness for adults age 50+. Adults who become severely ill from RSV may need to be hospitalized.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

Phone

Hello,

This is [name] calling you from [health system name]. Are you aware that you may be at an increased risk for severe RSV?

Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like heart failure, which could lead to hospitalizations.

Chronic cardiovascular disease, including heart failure and coronary artery disease, can increase the risk for severe RSV illness for adults age 50+. Adults who become severely ill from RSV may need to be hospitalized.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

05. Example Campaign Outreach Copy (continued)

COPD Awareness Month (November)

Dear [Patient],

Are you aware that you may be at increased risk of severe RSV?
Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like chronic obstructive pulmonary disease (COPD), which could lead to hospitalizations.

November is COPD Awareness Month
Chronic lung or respiratory disease, including chronic obstructive pulmonary disease and emphysema, can increase the risk for severe RSV illness for adults age 50+. Adults who become severely ill from RSV may need to be hospitalized.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

Phone

Hello,

This is [name] calling you from [health system name]. Are you aware that you may be at an increased risk for severe RSV?

Respiratory syncytial virus (RSV) is a common, contagious virus that usually causes mild symptoms. However, in older adults, including those with certain underlying conditions, RSV can cause severe infections. Symptoms of RSV can range from mild to severe and can last up to 2 weeks. Furthermore, RSV can cause severe infections in adults ages 75 years and older and adults ages 50+ years with certain underlying conditions like chronic obstructive pulmonary disease (COPD), which could lead to hospitalizations.

Chronic lung or respiratory disease, including chronic obstructive pulmonary disease and emphysema, can increase the risk for severe RSV illness for adults age 50+. Adults who become severely ill from RSV may need to be hospitalized.

Our records indicate that you may be due for an RSV vaccination. Talk to your doctor or pharmacist about your risk of severe RSV and how to help protect yourself.

06. Disclaimers

- Conditions and ICD codes listed in this guide are only examples to help identify patients. Ultimately it is up to the HCP/health system to select the conditions, ICD codes, and/or medications they feel put a patient at increased risk of severe RSV disease and to determine whether a patient is appropriate for RSV vaccination

- 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

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- 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

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07. Notes

References: 1. Centers for Disease Control and Prevention. Respiratory syncytial virus infection (RSV). RSV vaccine guidance for adults. Accessed March 23, 2026. https://www.cdc.gov/rsv/hcp/vaccine-clinical-guidance/adults.html **2.** Centers for Disease Control and Prevention. Respiratory syncytial virus infection (RSV). Clinical overview of RSV. Accessed March 23, 2026. https://www.cdc.gov/rsv/hcp/clinical-overview/index.html **3.** Centers for Medicare & Medicaid Services. ICD-10 codes. Accessed March 23, 2026. https://www.cms.gov/medicare/coding-billing/icd-10-codes



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