**A logo on a blue background

Description automatically generated with low confidence**

**UC Tech Awards 2023 Candidate**

**Category:** INNOVATION **Name:** Artera Referral Outreach Project (11)   
**Number of people:** (11)  
**Location:** UC San Diego Health

1. **Person submitting the application/nomination**
   1. Staff: Lauren Alden Clinical Application Supervisor
   2. **Email address:** [**lalden@health.ucsd.edu**](mailto:lalden@health.ucsd.edu)
   3. **The name of your organization:** UC San Diego Health
2. **Award category:** INNOVATION
3. **Name of person, name of the team, or name of the project to receive the award**

Artera Referral Outreach Project

1. **All project team members - if applicable** (Name, title, department, location/organization, and please indicate if they are faculty or staff, along with their email address(s).

All are staff:

1. Tomorrow Singleton, Clinical Applications Professional 4 (Cadence/Referrals) [tshorty@health.ucsd.edu](mailto:tshorty@health.ucsd.edu)
2. Shiela Lokareddy, Clinical Applications Professional 4 (Cadence/Referrals) [slokareddy@health.ucsd.edu](mailto:slokareddy@health.ucsd.edu)
3. Michael Lomangino, System Integration Engineer 4 (Integration and Interoperability) [mlomangino@health.ucsd.edu](mailto:mlomangino@health.ucsd.edu)
4. Andrea Cerda, Information Services PACC Account Manager [acerda@health.ucsd.edu](mailto:acerda@health.ucsd.edu)
5. Leiyah Shan, Information Services PACC Director [ljshan@health.ucsd.edu](mailto:ljshan@health.ucsd.edu)
6. Jamie Janis, Clinical Applications Professional 4 (Artera) [jjanis@health.ucsd.edu](mailto:jjanis@health.ucsd.edu)
7. Kathrina Bidwell, Care Navigation Hub Director [kbidwell@health.ucsd.edu](mailto:kbidwell@health.ucsd.edu)
8. Aaron Hart, Care Navigation Hub Asst. Director [ajhart@health.ucsd.edu](mailto:ajhart@health.ucsd.edu)
9. Gennecis Martin-Baluyot, Hospital Ast. PD 3 (Training and Communication) [gmartinbaluyot@health.ucsd.edu](mailto:gmartinbaluyot@health.ucsd.edu)
10. Christine Hartinger, Practice Director cmhartinger@health.ucsd.edu
11. Rutillo Mallillin, System Integration Engineer 4 (Corepoint) [rnmallillin@health.ucsd.edu](mailto:rnmallillin@health.ucsd.edu)
12. **Which location was affected by the work?** (the name(s) of the organization affected)

UC San Diego Health

1. **Summary** (1-3 sentences synthesizing the longer “Narrative - see below)

The Artera Referral Outreach Project helps UC San Diego Health deliver service excellence, making it convenient for patients to schedule important appointments to help maintain and increase their wellbeing. The project team contributed to creating a healthier world — one life at a time — through new technology.

1. **Narrative** (1.5-2 pages in Word - up to about 1,000 words- feel free to include visuals). This is a descriptive narrative about the person/team (and their portfolio of work - or the initiative/project - in terms of the selection criteria for that award. Please include:
   1. Description of the initiative(s) or portfolio of work that supports the nomination based on the award description.
   2. How they meet selection criteria (complexity, impact, and mission alignment).
   3. How their success is measured/quantified.
   4. The time during which the work was done.

For more information to help you create this narrative, please scroll below to learn more about each award category.

At UC San Diego Health (UCSDH), connecting to our patients about referrals that need scheduling increases patient satisfaction, reduces hospital re-admissions, and contributes to positive financial bottom line. Artera automated system improves our patient outreach and replaces our aging Televox system. Automating referral outreach reduces sudden heavy call volume, allowing staff to complete other tasks and focus on patients presenting in the physician’s office. Artera Phase I Referral Outreach is an integrated referral management solution replacing the Televox system at UCSDH.

When using the old Televox system, an Epic Electronic Health Record (EHR) report sends a file of referrals from a work queue to Televox. This generates 300-320 calls an hour to patients during weekly business hours. A larger number of referrals in the file in turn generates a larger volume for call centers. With the Televox system, Mondays are typically challenging for the call centers because of significant call volume due the held files from the weekend. This decreases patient satisfaction due to long hold times along with decreased compliance to complete the ordered services when patients hang up before an agent can assist with scheduling. Additionally, Televox only offers calls to patients and does not offer SMS messaging. Understanding the opportunity to turn this bottleneck of dissatisfaction around, the Artera project was implemented.  Artera sends referrals that qualify in real time through interface messaging, decreasing the sudden influx of incoming calls.  The type of message the patient receives is based on the patient’s Epic EHR Communication Preference of either a phone call or text. When an order/referral is created that meets all the conditions, it automatically triggers the interface in real-time to send a message to Artera and begin an automated referral outreach to the patient.

In fall 2022, the project team collaborated with operations to determine which referrals they wanted for patient outreach. Different specialties preferred distinct referral authorization statuses to send messages to the patient for scheduling. To reduce long-term maintenance for Information Services (IS), IS analysts worked with operations to standardize workflows at the specialty level. For example, the Referral Scheduling Status table and specialty workflows were created to make sure business needs were met. The Referral Scheduling Status table automates assigning the scheduling status to referrals so that staff members know when to schedule and when not to schedule referrals. This increases efficiency by decreasing staff “touching” the referral and missing critical updating that may slow the patient’s ability to schedule.

In Epic, the Referral System Definitions Scheduling Status was automated to meet 50 specialty needs across UCSDH, which impacts all our patients. The referral’s scheduling status can be used to help identify which still needs to be scheduled. Because the timing of referral notifications varied by specialty, IS analysts built custom rules to automatically align the scheduling status on the needs of the referred to department and the specialty. Additionally, analysts worked with Artera for customizations that directed specific referrals to the Care Navigation Hub team to schedule. These customizations enable messaging to go across the interface in real-time and to stop or continue as staff updates a referral. Artera allows for a smooth stream of patient incoming calls to schedule, instead of a sudden increased volume as was experienced with the old Televox system.

Beginning in March 2023, when a referral is placed and meets the criteria outlined by the department, specialty, or scheduling status, an interface message is sent to Artera and the automated call/text goes out to the patient on days two, four, and 10 (business days). There are three outreach attempts made per referral. To keep track of the outreach to patients, all attempts are logged in the Epic EHR.

Managers and directors provided steering, subject matter expertise, and collaborated with other operational areas to get buy-in on standardizing workflows for Artera. The engagement of managers and directors helped foster the transition to Artera.  Currently, UCSDH is the leader in Artera adoption across the University of California system and UCSDH has partnered with other University of California health systems for the best adoption of this software for improved patient experience. UCSDH’s Kathrina Bidwell also presented our successes at the Beryl Conference and will present at the Artera customer conference. As of March, we are approximately:

* 16 percentage points above Artera’s Enterprise Benchmark for Appointment Reach
* 17 percentage points above Artera’s Enterprise Benchmark for Response Rate
* 17 percentage points above Artera’s Enterprise Benchmark for Confirmation Rate