ONE HEALTH LINK

Digital Concierge Experience: Medication Onboarding for HTN, DM, and Cholesterol

Objectives

Digitally onboard a member who has newly filled one or more *Stars-related medications* (D08 Diabetes, D09 Hypertension, D10 Cholesterol).
Goals:

1. Improve early adherence (first 90 days)
2. Build confidence in taking meds correctly
3. Identify barriers for pharmacist follow-up and resolve
4. Educate using evidence-based microlearning

Conditions: Hypertension (HTN), Diabetes (DM), Cholesterol (CHOL)
Goals: Improve first-fill adherence, educate with empathy, escalate intelligently

1. Trigger: New Fill Event

Source: Rx claims feed from client – SFTP file feed daily
Trigger Logic:

- New prescription for D08, D09, or D10 class

Action: Send outreach via SMS, email, or Voice

"Hi [Name], this is your One Health Link Digital Concierge, based on our claim record, I noticed you recently filled a new medication for your [blood pressure/diabetes/cholesterol]."

KB Needed: Medication class → condition mapping
(e.g., "metformin → diabetes," "atorvastatin → cholesterol")

2. Welcome & Consent

Bot:

"My job is to help you understand what your new medication does, how to take it safely, and what to expect.
You can chat here, speak with a live pharmacist, or schedule a call, whichever you prefer."

Options:

- 💬 Continue to chat

ONE HEALTH LINK

- 💬 Chat with live person
- 📞 Talk to someone now (click-to-dial)
- 🗓 Schedule a call for later

Logic:

- If *Chat*, proceed to chatbot conversational flow
- If *Talk now*, click to dial and connect to client call center
- If *Schedule*, open calendar API (show pharmacist availability within 48 - 72h)

KB Needed:

- Live chat connection workflow (agent pool availability)
- Call scheduling API (calendar slots + routing rules)

3. Medication Verification

Bot:

"I see you recently filled:
• Lisinopril (for blood pressure)
• Metformin (for blood sugar)
• Atorvastatin (for cholesterol)

Are these correct?"

Options:

- ✅ Yes, that's right
- ⚠️ Not sure / something looks wrong → *offer live chat or call*
- ➕ I take others too → *offer pharmacist call*

Escalation Triggers:

- If unsure or mismatch → offer **live chat** with pharmacist assistant or schedule **call**

"No problem — sometimes records differ. Would you like to connect with a pharmacist to double-check?"

KB Needed:

- Medication reconciliation dictionary
- Response templates for brand/generic confusion

![ONE HEALTH LINK logo]

4. Confidence & Barriers Check

Bot:

"How confident are you about starting your new medication?"
(Scale 1–10)

"Do you have any concerns?"
• Possible side effects
• Cost/refill issues
• Unsure why I need it
• None right now

Escalation Logic:

- Confidence ≤6 → *offer live chat or schedule pharmacist call*

"I can connect you to a pharmacist to talk through your concerns — want to chat now or book a quick call?"

KB Needed:

- Motivational templates ("Many people feel unsure at first…")
- Barrier-specific guidance (cost, side effects, purpose)

5. Education Modules (Condition-Specific)

Dynamic personalization by medication type

Condition	Chatbot Script	Optional Actions	KB Needed
HTN	"This medicine relaxes your blood vessels so your heart doesn't work as hard. Keep taking it even if your blood pressure feels normal."	"📞 Talk to a pharmacist about side effects"	HTN education module, lifestyle tips, teach-back questions
DM	"Metformin helps your body use sugar better and protects your kidneys and heart. Take with food to reduce stomach upset."	"💬 Ask how metformin works"	DM education module, hypoglycemia prevention, meal timing
CHOL	"Statins protect your heart by lowering 'bad' cholesterol. You won't feel different day-to-day, but they prevent future heart problems."	"📅 Schedule pharmacist call to review your meds"	CHOL education module, myth/fact sheet, side effect handling

Bot adds:

"Would you like me to send you short daily tips about your meds?"

- Yes → enroll in micro-education drip
- No → skip

6. Build Routine & Reminders

Bot:

"Would you like help remembering your meds?"
Options:

- ⏰ Set daily text reminder
- 📋 Set up auto-refill
- 🗓 Add to calendar
- 🧑‍⚕️ Talk to someone about routine setup

If "Talk": connect to **live chat** (non-clinical agent → pharmacist escalation if needed).

KB Needed:

- Reminder scripting ("Take after breakfast")
- Habit-building tips
- Integration to SMS / app reminder service

7. Safety & Side Effect Check

Bot:

"Have you noticed any side effects or new symptoms since starting your medication?"
Options:

- 😌 No issues
- 🙁 Mild side effects (dizziness, nausea)
- 😣 Something bothersome

Logic:

- Mild → Provide reassurance + self-care tip, offer **chat** with pharmacist if persists
- Bothersome → Offer **click-to-dial** or **schedule pharmacist call within 24h**

"Let's make sure you're okay — would you like to speak to a pharmacist right now or schedule a call later today?"

KB Needed:

- Symptom triage rules
- Escalation thresholds (urgent vs non-urgent)
- Pharmacist response templates

8. Wrap-Up & Reinforcement

Bot:

"You're off to a great start, [Name]! Taking your [blood pressure/diabetes/cholesterol] medication every day keeps your heart, kidneys, and eyes healthy. ♡

Would you like a quick follow-up in a week to check in?"

Options:

- ☑ Yes, check in next week
- ▦ Schedule call instead
- ✖ No thanks

If yes: create follow-up reminder in system (Day 7 / Day 30).
If call: launch scheduling widget.

KB Needed:

- Reinforcement narratives ("How meds work together")
- Follow-up content templates

Escalation Summary Table

Scenario	Trigger	Action	Channel	Owner
Medication mismatch	Member says "Not sure"	Offer live chat → schedule call if unresolved	Chat / Call	Pharmacist
Low confidence ≤6	Risk score	Offer immediate chat or callback	Chat / Call	Pharmacist
Reported side effect	Mild → reassure / Serious → escalate	Click-to-dial or scheduled pharmacist call	Call	Pharmacist
Cost/refill concern	Barrier selection	Route to client call center	Chat / Call	Support Team
No barriers + engaged	None	Continue auto follow-up at Day 7, Day 30	SMS / Chat	Bot

Knowledge Base Expansion Map

KB Domain	Examples	Used In Steps
Medication Dictionary	Lisinopril, Metformin, Atorvastatin (brand/generic, indication, dosing)	2, 3, 5
Condition Education Modules	HTN, DM, CHOL plain-language overviews	5
Side Effect Guidance	Dizziness, fatigue, muscle pain → what to do	7
Barrier Response Templates	Cost, forgetfulness, skepticism	4, 7
Motivational Messaging Library	"You're taking a big step toward heart health"	All
Safety & Escalation Rules	Symptom → urgency → routing logic	7
Integration Connectors	Chat handoff, click-to-dial, calendar API, SMS reminder	2, 6, 8
Multilingual & Accessibility Content	Spanish, large-font, low-literacy phrasing	All
Follow-Up Drip Library	Day 3, 7, 30 educational nudges	8

Optional Enhancements

- **Interactive Education Cards:** "Tap to learn why blood pressure meds matter even when you feel fine."
- **Data Feedback Loop:** Member responses feed adherence risk model → informs outreach cadence.