



SO, HOW DOES H&H'S UTM CONNECT WORK?



UTM CONNECT

UTM Connect is a tool that:

- Reads and captures UTM parameters
- Ensures those values persist across the user's website journey
- And finally get appended to links driving into scheduling or lead capture within Epic

Your team will provide our team access to your CMS and website analytics tools and we will work directly with either your internal Epic implementation team or your Epic TS to conduct QA.

WHAT ARE WE TALKING ABOUT?

UTM parameters are a standard way that businesses and marketing teams attribute outcomes to marketing tactics.

[https://hedyandhopp.com/?utm_campaign="Lead_Gen"&utm_medium="email"&utm_source="hubspot"&utm_content="utm_connect_announcement"](https://hedyandhopp.com/?utm_campaign=)

[https://hedyandhopp.com/?utm_campaign="Lead_Gen"&utm_medium="email"&utm_source="hubspot"&utm_content="utm_connect_announcement"](https://hedyandhopp.com/?utm_campaign=)

HEDY & HOPP

Who We Are ▾

Who We Serve

Our Expertise ▾

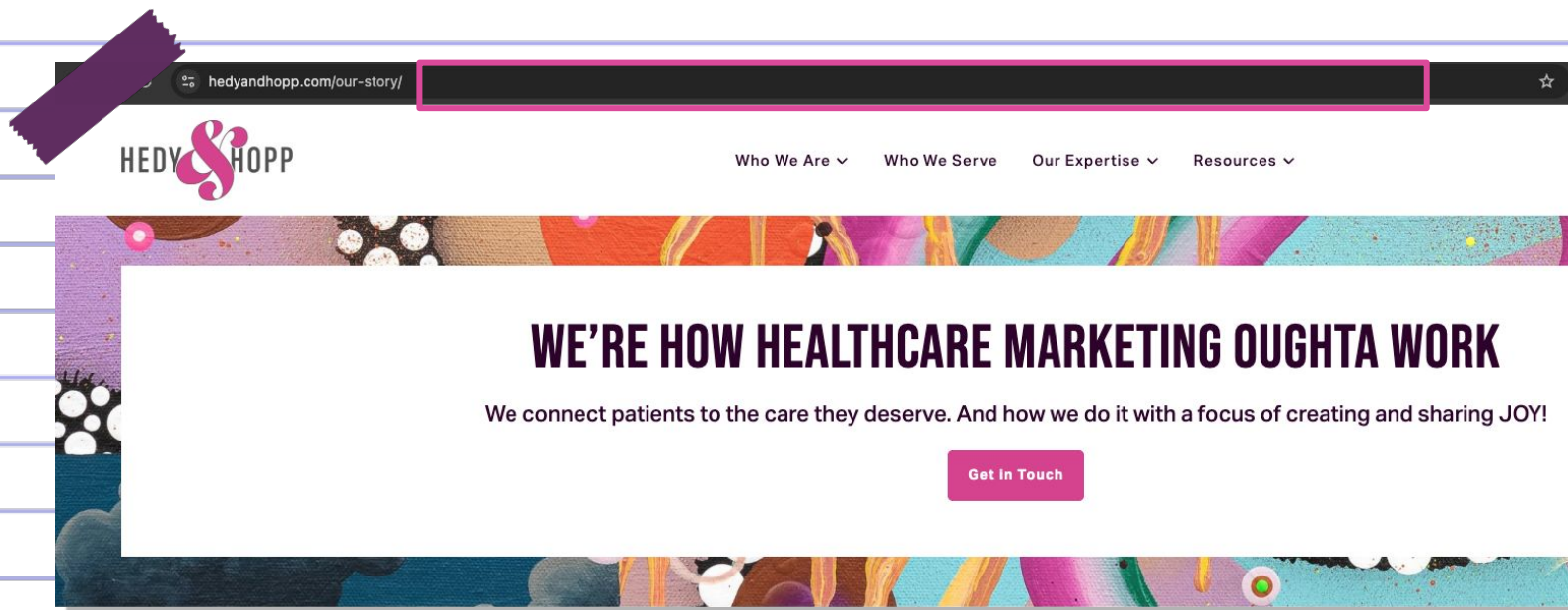
Resources ▾

A FULL-SERVICE, FULLY HEALTHCARE MARKETING AGENCY.

As an independent, women-owned agency, we help healthcare clients build brands and exceed their goals with high-performing, HIPAA-compliant marketing strategies—delivering results and joy.

WHAT ARE WE TRYING TO FIX?

Unfortunately, these parameters are designed to be picked up by a web analytics software that's present on every page like Google GA4 or Adobe Analytics. If a user navigates around the site (jumping from MyChart Builder page to your main site, for example) the UTM parameters are lost. But not with UTM Connect!



SO HOW DOES THIS WORK?

Our UTM Connect product captures those UTM parameters when the user hits the website and saves them even if the user goes to another page.

```
utm_campaign="Lead_Gen"  
utm_medium="email"  
utm_source="hubspot"  
utm_content="utm_connect_announcement"
```

The diagram illustrates the flow of UTM parameters. A box on the left contains four UTM parameters: utm_campaign="Lead_Gen", utm_medium="email", utm_source="hubspot", and utm_content="utm_connect_announcement". Two arrows point from this box to a database cylinder icon on the right. A single arrow then points from the database cylinder down to a URL "MyChart/openscheduling" in a dark bar at the bottom of the slide.



MyChart/openscheduling

Then once that user gets to the desired action, say clicking on a link to Open Scheduling, UTM Connect will take those parameters and add them back to those URLs so they are available to MyChart when the page loads. We do not modify or need access to your Epic instance.



FAQS

Here are the top three questions we receive for UTM Connect:

01 WHAT PHI/PII IS SHARED?

None. The tool only holds UTM parameter within the user's browser. We recommend using parameter values that are non descriptive, such as "AB124" instead of "Mammography campaign." This will provide an additional layer of data obscurity.

02 IS PATIENT ACTIVITY WITHIN MYCHART TRACKED?

No. The tool holds the UTM parameters in the browser and attaches it to the links users use to access Open Scheduling. Epic then adds that information to the patient record, using its normal data flow process. It does not continue tracking the user's actions within MyChart or share any information back from Epic to the browser.

03 DOES H&H SEE THE UTM DATA?

No. H&H will setup the tool but there is no ongoing monitoring or agreement for the tool usage. The UTM parameters persist only in the user's own browser and it is not shared with H&H or any other third party.



MEASUREMENT ISN'T ALWAYS EASY

3 key Attribution Challenges



EPIC LIMITATIONS VS. EXTERNAL TOOLS



MULTI-TOUCH JOURNEYS



OFFLINE + ONLINE DISCONNECT



MEASURING ROI



**SERVICE LINE CAMPAIGN SUCCESS
CONSIDERATIONS**



**COST PER ACQUISITION (CPA) AND
RETURN ON AD SPEND (ROAS)**

BRIDGING MARKETING + OPERATIONS DATA

LINKING SCHEDULING DATA WITH CAMPAIGN DATA

IDENTIFYING BOTTLENECKS
(availability vs. demand) -
throttling based on access

ALIGNING GROWTH STRATEGY WITH OPERATIONAL CAPACITY

THE MARKETING TRAP

Driving 1,000 leads to a Bariatric Surgery campaign when the next available appointment is 6 months out. This wastes budget and frustrates patients.

USING EPIC ACCESS METRICS

Marketers must look at "Next Available Appointment" or fill rates before launching campaigns.

OPERATIONAL ALIGNMENT

Build an automated workflow where if a service line's utilization drops below 75%, a digital campaign automatically triggers; if it goes above 95%, the campaign is throttled or paused.

TRACKING PATIENT JOURNEYS END-TO-END (UTM CONNECT)

FULL FUNNEL



THE UTM PARAMETER IS ADDED TO THE PATIENT RECORD, ALLOWING FOR FULL JOURNEY TRACKING

TRACKING DOWNSTREAM REVENUE (PROCEDURES, FOLLOW-UPS) AND CONTRIBUTION MARGIN

“LEAKAGE” METRIC

Tracking if patients acquired through marketing are staying in-network for their downstream care (e.g., did the primary care campaign lead to an in-network cardiology referral, or did they leak to a competitor?).

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

How does Epic "see" the technical identifier to tie ROI?

PHASE 1 Patient Journey

1. **The Campaign:** Integrated marketing campaign (e.g., Google Ad for "Mammogram in Seattle").
2. **The Traffic:** The URL includes specific UTM parameters (e.g., `utm_campaign=sea_mam_2024` and `utm_source=google`).
3. **The Click:** Patient clicks the ad and lands on the health system's landing page.
4. **The Handshake:** Epic's LinkSource (or H&H UTM Connect) or Cheers (CRM) must be active on the landing page to capture the inbound URL parameters. This technology binds the specific `utm_campaign` ID to a unique Epic Web Session ID.

BUILDING A DASHBOARD - TYING IT ALL TOGETHER

How is anonymous data tied to a real patient record?

PHASE 2 Inbound Data Capture

1. **Patient Scheduling:** The patient uses an integrated Open Scheduling (e.g., MyChart) workflow on the landing page to book an appointment.
2. **Patient Identification & Binding:**
 - a. **New Patient:** If a new record is created, the Epic Web Session ID (containing the UTM) is written directly into a new Patient-Level Data Field (e.g., PAT_ID) in Chronicles.
 - b. **Existing Patient:** If they log into MyChart, the session ID is matched to their existing PAT_ID.
3. **Data Placement in Chronicles:** The UTM data is now stored in Chronicles (Epic's real-time transactional database). It is directly linked to the Patient ID (PAT_ID), the Appointment ID (CSN), and potentially a specific Campaign ID.