



## Smartsheet helps UTHealth expedite COVID-19 vaccination scheduling, follow-up, and data reporting for its 12,000 employees

UTHealth used Smartsheet to manage appointment scheduling and follow-up on COVID-19 vaccinations for its 12,000 employees, and to report key data to health system leadership and federal and state health authorities.

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**Through Smartsheet, we could log in, see upcoming appointments for the next several days, and make sure we had the appropriate staffing. Having those numbers at our fingertips to report to the state (of Texas) enabled us to remain in compliance with what was required of us as a vaccine hub.**

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Lindy Anderson-Papke, MHA, CLSSBB, PCMH CCE, Director of Clinic Operations Performance Improvement, UT Physicians, The University of Texas Health Science Center at Houston



**Customer:**

University of Texas Health Science Center at Houston

**Industry:**

Healthcare

**Organization Size:**

Enterprise (10,000+ employees)

**Region:**

North America

**Website:**

[uth.edu](http://uth.edu)

Established in 1972 by The University of Texas System Board of Regents, The University of Texas Health Science Center at Houston (UTHealth) is Houston's Health University and Texas' resource for health care education, innovation, scientific discovery and excellence in patient care.

### Background

When the U.S. Food and Drug Administration (FDA) allowed emergency use of the first vaccines for COVID-19, The University of Texas Health Science Center at Houston (UTHealth) needed a way to manage the process of vaccinating its 12,000 employees. UTHealth worked with Smartsheet to set up a solution that streamlined appointment scheduling, follow-ups, and reporting of key health data to state and federal authorities.

*"Our mission is to provide Houston and its surrounding areas with the best care that they can get within the region, and across the nation in many cases," says Lindy Anderson-Papke, director of clinic operations performance improvement at UT Physicians, a medical group practice of McGovern Medical School at UTHealth. "My team works to improve operations and performance, and we utilized Smartsheet in that."*

UTHealth is a regional and national leader in health care and medical education, with 12,000 employees across six schools and four clinical practices. With its staff at the top of the priority list for COVID-19 vaccinations, UTHealth needed to put an administrative process in place as quickly as possible.

### Solution:

*"When vaccines became available, we evaluated our options for documentation and tracking," Anderson-Papke says. "Our choices were to use paper or to figure out a digital way to do it. We used Smartsheet for automation, collection of information through forms, and data management and reporting."*

In addition to scheduling appointments, the staff at the vaccination hub needed to record manufacturers and lot numbers for the vaccines, and monitor employees for side effects at multiple points after their shots. UTHealth also needed to share data vaccination numbers and follow-

### Customer:

Phuthomdi built dashboards to simplify reporting to TDEM and ImmTrac, the state's vaccine registry, UTHealth executive leadership, and the organization's employee health and infectious disease groups. When the vaccine hub closed in the evening, she could quickly pull real-time numbers to show the day's progress.

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up reporting with the organization's leadership and health oversight groups, and was required to report data each day to the Texas Department of Emergency Management (TDEM), which shared that information with the U.S. Centers for Disease Control and Prevention (CDC).

## Setting up a system

By streamlining their programs, projects, and processes in Smartsheet with forms, automated alerts and actions, and dashboards, the team has gained significant efficiencies in the way they capture information, move projects and processes forward, and manage project resourcing. *"The efficiencies that we gained from Smartsheet are incredible,"* says Lingwall. *"We saw a 30 percent efficiency gain from my entire team."* *"Those kinds of efficiencies have really helped us to be successful,"* adds Willoughby. *"We can respond quickly. We've got the data, we can track it, and we're just more efficient with Smartsheet."*

## Reporting

Orapun Phuthomdi, BSIE, CLSSBB, operations performance improvement specialist at UT Physicians, and Anderson-Papke worked with a team at Smartsheet to build a solution, starting with a set of fields identified from the institution's existing electronic health record (EHR) system. The first version was ready for implementation within a week, with adjustments made based on the UTHealth team's experience. The framework created for UTHealth provided a foundation for the COVID-19 vaccine template set that Smartsheet now offers.

UTHealth's mass vaccination process for employees began with setting appointments, which was managed through Smartsheet forms. Automated reminders were sent in advance of appointments for both the first and second doses, with links to forms for completion and guidance on where to park and check in. UTHealth staff

### In a Nutshell:

The solution helped the team tally appointments in advance and schedule enough staff for each day's vaccinations. The system add-on allowed staff to view only the fields needed for check-in and dose logging. At the height of the vaccinations, this reduced the time employees waited in line for their vaccinations.

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members were cycled through to help an average of 200 employees receive vaccines each day, seven days a week.

When employees arrived for their shots, staff used the system to check them in, record the lot numbers for the vaccine doses, and record any symptoms observed during the post-vaccination observation period. Automated emails went out at intervals after a dose with a simple form that asked employees about any symptoms they had experienced.

## Next Steps

As the majority of employees have completed their vaccine doses, Phuthomdi and Anderson-Papke are turning to planning for the next stages of immunizing their colleagues. The information captured in Smartsheet will help UHealth set up a process for ensuring new hires have the opportunity to be vaccinated as well as planning to administer booster shots if health authorities confirm they will be needed.

*“The whole process was new for all of us,” Anderson-Papke says. “But we were able to send information to our leadership and the state and other entities in a timely manner.”*

A Smartsheet mobile app is available, which assisted Anderson-Papke during her field visits to the vaccine hub. She was able to locate an appointment record, and could confirm whether an employee had received Pfizer or Moderna at their previous appointment.

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