

Acid Reflux HRA			
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element
Serious Symptoms Reported	Follow up with a Gastroenterologist	Lead participants to a nurse navigator or online scheduling tool to book an appointment.	'serious_symptoms_reported'
Diagnosed & Symptomatic	Follow up with a Gastroenterologist	Lead participants to a nurse navigator or online scheduling tool to book an	'diagnosed_symptomatic'
Diagnosed & Asymptomatic	Follow up with a Gastroenterologist	Lead participants to a nurse navigator or online scheduling tool to book an	'undiagnosed_increasedRisk'
Undiagnosed with Increased	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'undiagnosed_symptomatic'
Undiagnosed with Some	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'diagnosed_asymptomatic'
Undiagnosed & Asymptomatic	Education & Intervention	Online appointment scheduling option or to 'find a physician' page with a	'undiagnosed_asymptomatic'

Repeat CTAs in follow up emails/nurturing messages

Anxiety HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Anxiety Assessment Recommended	Schedule a screening/referral to Mental Health	Offer the participant the option to schedule an appointment with a mental health specialist.	'recommended'	At-Risk
Tell a Doctor about your Symptoms	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'not_recommended_symptomatic'	At-Risk
Keep a Symptom Journal	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'not_recommended_asymptomatic'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Back & Neck HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'spinePrimaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Seek Immediate Medical Attention	Referral to Nearest ER or Urgent Care	Suggest 911 call and if available, lead to ER queue (online wait list or phone number)	'meningitis_or_heart_symptoms'	High-Risk
Seek Medical Attention	Referral to Nearest ER or Urgent Care	Suggest 911 call and if available, lead to ER queue (online wait list or phone number)	'incontinence_symptoms'	High-Risk
See a Doctor Soon	Referral to Spine Specialist	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an appointment	'other_symptoms_reported'	At-Risk
Severe Spine Impairment	Consultation with Orthopedic Surgeon	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an evaluation	'severe_impairment'	At-Risk
Moderate Spine Impairment	Consultation with Orthopedic Specialist	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an appointment	'moderate_impairment'	At-Risk
Mild Spine Impairment	Referral to Physical Therapy	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an appointment	'mild_impairment'	At-Risk
No Spine Impairment	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'no_impairment'	Low-Risk

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Bladder Control HRA			
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element
Worrisome Urinary Symptoms	Follow up with a Urologist	Offer the participant the option to schedule an appointment with a urologist through online scheduling or a nurse navigator follow up phone call.	has_worrisome_urinary_symptoms
Greatly Bothered by Stress	Follow up with a Urologist	Offer the participant the option to schedule an appointment with a urologist	greatly_bothered_by_stress_leaks
Urge or Stress Leaks or	Follow up with a Urologist	Offer the participant the option to schedule an appointment with a urologist	has_urge_or_stress_leaks_or_frequent_urination
Other Cause Leaks	Follow up with a Urologist	Offer the participant the option to schedule an appointment with a urologist	has_leaks_not_related_to_urge_or_stress
No Reported Urinary Problem	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	no_leaks_or_frequent_urination

Repeat CTAs in follow up emails/nurturing messages

Breast Cancer HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Screening for Genetic Factors	Referal to genetic counselor	Confirm what genetic screening options are available. Connect the	'genetic_screening_recommended'	At-Risk
Re-Screening for Genetic	Schedule a Genetic Screening	Confirm what genetic screening options are available. Connect the	genetic_rescreening_recommended	At-Risk
Schedule Screening	Schedule a Mammogram	Lead to online scheduling for a mammogram.	'screening_recommended'	At-Risk
Follow Recommended	Learn More about recommended screening	Online appointment scheduling option to see a gynecologist or to 'find a	'follow_recommended_screening'	Low-Risk
Discuss Future Screening	Learn More about breast cancer risks; Follow	Online appointment scheduling option to see a gynecologist or to 'find a	'discuss_future_screening'	Low-Risk
Continue Annual Screening	Follow Up with Gynecologist or Primary Care	Online appointment scheduling option to see a gynecologist or to 'find a	'continue_annual_screening'	Low-Risk
Continue Recommended	Continue to schedule regular mammograms;	Online appointment scheduling option to see a gynecologist or to 'find a	'continue_recommended_screenin	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Colon Cancer HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Personal Cancer History -	Follow up with a Specialist	Confirm what chronic care management options are available. If no program	'monitoring_rec_existing_crc'	At-Risk
Discuss Screening Schedule	Schedule a Colonoscopy	Confirm whether or not a primary care referral is needed before scheduling a	'discuss_screening_schedule'	At-Risk
Discuss Symptoms with a	Follow up with a Specialist	appointment.	'discuss_symptoms'	At-Risk
Schedule Routine Screening	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'schedule_routine_screening_now'	At-Risk
Continue Routine Screening	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'continue_routine_screening'	At-Risk
Above Recommended Age for	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'above_rec_screening_age'	Unknown
Below Recommended Age for Screening	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'below_rec_screening_age'	Unknown

Repeat CTAs in follow up emails/nurturing messages

COPD HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element
Screening Recommended	Schedule a Screening with a Pulmonologist	Confirm whether or not a primary care referral is needed before scheduling an appointment with a pulmonologist. Lead participants to a nurse navigator or online scheduling tool to book an appointment.	screening_recommended
Manage Your COPD With Your Doctor	Schedule Annual Physical with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	manage_existing_copd
Talk to a Doctor About Your COPD	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	discuss_existing_copd
Screening May Be Recommended	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	screening_may_be_recommended
Tell a Doctor About Any Symptoms	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	discuss_symptoms

Repeat CTAs in follow up emails/nurturing messages

Depression HRA			
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element
Depression Assessment Recommended	Schedule a screening/referral to Mental Health	Offer the participant the option to schedule an appointment with a mental health specialist.	'recommended'
Tell a Doctor about your Symptoms	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'not_recommended_symptomatic'
Keep a Symptom Journal	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'not_recommended_asymptomatic'

Repeat CTAs in follow up emails/nurturing messages

Diabetes HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
At-Risk, Existing Diabetes	Enroll in Chronic Care Management	Confirm what chronic care management options are available. If no program exists, offer the participant the option to schedule an appointment.	'existing_diabetes'	At-Risk
At Very High-Risk, Blood Sugar	Schedule a Diabetes Screening	Online appointment scheduling option to Diabetes screening.	'very_high_risk'	High-Risk
High-Risk	Schedule a Diabetes Screening	Online appointment scheduling option to Diabetes screening.	'high_risk'	High-Risk
Moderate Risk	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'moderate_risk'	At-Risk
Unknown Risk/More Info Needed	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'more_info_needed'	Unknown
At Low-Risk	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'low_risk'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Healthy Weight HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values v3	Map Risk Level to LionShare CRM
Unexplained Weight Loss	Follow up with a Primary Care Provider for Any Concerns and Annual Screenings	Schedule a Primary Care Visit (online or through nurse navigator)	'unexplained_weight_loss'	High-Risk
Current: Obesity	Follow up with a Primary Care Provider for Any Concerns and Annual Screenings	Schedule a Primary Care Visit (online or through nurse navigator)	'obese_lose_weight'	High-Risk
Current: Overweight - Lose Weight	Enroll in Weight Management Program; Follow Up with Primary Care	Online enrollment for a Weight Management Program/Seminar	'overweight_lose_weight'	At-Risk
Current: Overweight - Maintain Weight	Learn More through Healthy Weight Education; Follow Up with Primary Care	Find a Primary Care Doctor Tool and/or Landing Page for Further Reading	'overweight_maintain_weight'	Low-Risk
Healthy Weight	Learn More through Healthy Weight Education; Follow Up with Primary Care	Find a Primary Care Doctor Tool and/or Landing Page for Further Reading	'normal_maintain_weight'	Low-Risk
Underweight	Enroll in Weight Management Program; Follow Up with Primary Care	Online enrollment for a Weight Management Program/Seminar	'underweight_gain_weight'	At-Risk

Repeat CTAs in follow up emails/nurturing messages

Heart HRA				
Risk Levels	Best Performing CTAs,	Support Required	Expected Values v3	Map Risk Level to LionShare CRM
At High-Risk, Existing	Enroll in Chronic Care Management	Confirm what chronic care management options are available. If no program available, confirm whether or not a primary care referral is needed before scheduling an appointment.	'existing'	High-Risk
At High Near-term Risk	Schedule a Cardiovascular Screening	Repeat CTA in nurturing journeys post-inkatolimention, targeting each lead.	'highNearTerm'	High-Risk
At High Long-term Risk	Follow up with a Primary Care Provider	Repeat CTA in nurturing journeys post-inkatolimention, targeting each lead.	'highLongTerm'	High-Risk
At Moderate Risk	Follow up with a Primary Care Provider	Repeat CTA in nurturing journeys post-inkatolimention, targeting each lead.	'moderate'	At-Risk
At Increased Risk	Follow up with a Primary Care Provider	Repeat CTA in nurturing journeys post-inkatolimention, targeting each lead.	'increased'	At-Risk
At Low-Risk	Follow up with a Primary Care Provider	Repeat CTA in nurturing journeys post-inkatolimention, targeting each lead.	'low'	Low-Risk
Unknown Risk	Blood Pressure Screening	Confirm whether or not there is a blood pressure screening or heart scan option available for HRA participants and if so, what the option is.	'unknown'	Unknown

Repeat CTAs in follow up emails/nurturing messages

Knee & Hip HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'jointAssessment' Data Element	Map Risk Level to LionShare CRM Risk Level
Severe Symptoms	Referral to an orthopedic surgeon	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an evaluation	'severe_problems'	High-Risk
Moderate Symptoms	Referral to an orthopedic specialist	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an appointment	'moderate_problems'	At-Risk
Mild Symptoms	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'mild_problems'	At-Risk
No Symptoms	Annual screening with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	'no_problems'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Lung Cancer HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'screening' Data Element	Map Risk Level to LionShare CRM Risk Level
Screening May Be Recommended	Schedule LDCT Scan	Confirm whether or not a primary care referral is needed before scheduling an	'recommended'	At-Risk
Not Currently Recommended	Follow up with Primary Care/Enroll in Smoking Cessation	Online appointment scheduling option or to 'find a physician' page with a	'not_recommended_smoker'	At-Risk
Discuss Screening Options with a Doctor	Schedule a Consultation	Lead participants to a nurse navigator or online scheduling tool to schedule a	'discuss'	At-Risk
Former Smoker - Not Recommended	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'not_recommended_quit'	At-Risk
Discuss Screening Options at Age 50	Establish Screening Schedule with Primary Care/Enroll in Smoking	Online appointment scheduling option or to 'find a physician' page with a	'not_recommended_young'	At-Risk
Not Recommended Due to Age	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'not_recommended_old'	Unknown
Never Smoker - Not Recommended	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a	'not_recommended_never'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Medical Weight Loss HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'screening' Data Element	Map Risk Level to LionShare CRM Risk Level
Likely Eligible	Refer to primary care or metabolic specialist	Schedule a Primary Care Visit (online or through nurse navigator)	'likely_eligible'	At-Risk
Possibly Eligible	Follow up with a primary care provider for any concerns and annual screenings	Schedule a Primary Care Visit (online or through nurse navigator)	'possibly_eligible'	At-Risk
Not Eligible	Learn more through healthy weight education; Follow up with primary care	Online enrollment for a Weight Management Program/Seminar	'not_eligible'	Low-risk

Peripheral Artery Disease HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Seek Medical Attention Soon	Referral to Nearest ER or Urgent Care	Suggest 911 call and if available, lead to ER queue (online wait list or phone number)	'recommended_symptomatic'	High-Risk
Screening Recommended	Follow up with a Vascular Specialist	Online appointment scheduling option to a vascular screening.	'recommended'	At-Risk
More Information Needed	Schedule vascular screening and refer to	Online appointment scheduling option to	'info_needed'	At-Risk
No Screening Recommended	Follow up with Primary Care, Enroll in lifestyle related health management program	Online appointment scheduling option or to "find a physician" page with a number to call to schedule	'not_recommended'	Low-Risk
Unknown Risk	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule	"	Unknown

Repeat CTAs in follow up emails/nurturing messages

Prostate Cancer HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
At-Risk, Existing Condition	Follow up with a Specialist	Confirm what chronic care management options are available. If no program	'existing_pca'	At-Risk
At-Risk, has existing screening plan	Schedule a Prostate Screening	confirm whether or not a primary care referral is needed before scheduling a	'has_existing_screening_plan'	At-Risk
At moderate risk, discuss screening	Schedule Annual Physical with Primary Care	On the appointment scheduling option or to "into a physician" page with a	'discuss_screening'	At-Risk
Average Risk (under 40),	Follow up with Primary Care	On the appointment scheduling option or to "into a physician" page with a	'discuss_screening_at_age_forty'	At-Risk
At moderate risk (under 45),	Follow up with Primary Care	On the appointment scheduling option or to "into a physician" page with a	'discuss_screening_at_age_forty_five'	At-Risk
Low risk, discuss screening at age 50	Follow up with Primary Care	On the appointment scheduling option or to "into a physician" page with a	'discuss_screening_at_age_fifty'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Shoulder & Elbow HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Severe Symptoms	Referral to an orthopedic surgeon	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an evaluation	severe_symptoms	High-Risk
Moderate Symptoms	Referral to an orthopedic specialist	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an appointment	moderate_symptoms	At-Risk
Mild Symptoms	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	mild_symptoms	At-Risk
No Symptoms	Annual screening with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	no_symptoms	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Sleep HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
At High-Risk	Schedule a sleep study or referral to sleep disorder center	Confirm what sleep studies are available. Lead to online scheduling or a nurse online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'high_risk'	High-Risk
Unknown Risk	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'unknown_risk'	Unknown
At Low-Risk	Follow up with Primary Care	Online appointment scheduling option or to "find a physician" page with a number to call to schedule.	'low_risk'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Stroke HRA

Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
High-Risk, Existing Condition	Enroll in Chronic Care Management	Confirm what chronic care management options are available. If no program	'high2'	High-Risk
High-Risk	Schedule a Screening	confirm whether or not there is a vascular screening available and at what	'high1'	High-Risk
Moderate Risk	Follow up with Primary Care	confirm appointment scheduling option or to find a physician page with a	'moderate'	At-Risk
Low-Risk	Schedule Annual Physical with Primary Care	confirm appointment scheduling option or to find a physician page with a number to call to schedule	'low'	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Substance Use HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Get Confidential Help Today	Schedule an appointment/referral to treatment center or substance use specialist	Offer the participant the option to schedule an appointment with a substance use specialist or find a treatment center	seek_immediate_help	High-Risk
See a Healthcare Professional	Schedule a screening/referral to Mental Health	Offer the participant the option to schedule an appointment with a mental health specialist.	evaluation_recommended	At-Risk
Learn More About Treatment Options	Follow up with Primary Care (for caregivers)	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	learn_about_treatment	At-Risk
Tell a Healthcare Provider If Things Change	Follow up with Primary Care	Online appointment scheduling option or to 'find a physician' page with a number to call to schedule.	notify_pcp_of_future_changes	Low-Risk

Repeat CTAs in follow up emails/nurturing messages

Weight Loss HRA				
Risk Levels	Best Performing CTAs, Nationally	Support Required	Expected Values 'primaryResult' Data Element	Map Risk Level to LionShare CRM Risk Level
Possible Surgery Candidate	Refer for Bariatric Surgery Evaluation	Confirm availability for a nurse navigator to complete follow up calls to discuss next steps and schedule an evaluation	'possible_surgery_candidate'	At-Risk
Screening Needed to Determine Eligibility	Refer to Primary Care for Physical Evaluation	Schedule a Primary Care Visit (online or through nurse navigator)	'screening_needed'	At-Risk
Weight Loss Recommended	Enroll in Weight Management Program	Online enrollment for a Weight Management Program/Seminar	'weight_loss_recommended'	At-Risk
Recommend "Quality of Life" Follow-up	Refer to Primary Care for Physical Evaluation	Schedule a Primary Care Visit (online or through nurse navigator)	'recommend_qol_followup'	At-Risk
Weight Loss May Be Recommended	Enroll in Weight Management Program	Online enrollment for a Weight Management Program/Seminar	'weight_loss_may_be_recommended'	At-Risk
Weight Loss Not Recommended	Learn More through Healthy Weight Education; Follow Up with Primary Care	Find a Primary Care Doctor Tool and/or Landing Page for Further Reading	'weight_loss_not_recommended'	Low-Risk

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