

Summary: Artera is a patient communication, appointment reminder, and patient texting platform designed to help facilitate efficient and simple patient messaging. Communications are stored and saved for seven years within Artera.

Support: Ambulatory Informatics at 231-392-0229 or Help Desk at 231-935-6053.

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Glossary

User Definitions




- Enterprise Level User
 - This access level is designed for users who need to configure an Artera account during implementation and are ongoing account administrators.
- Manager Level User
 - This access level is designed for users overseeing individual departments and is typically given more access than staff users, including the creation of user groups.
- Staff Level User
 - This access level is designed for users communicating with patients via bi-directional messaging.




Frequently Used Terms

- Broadcast
 - Allows the same message to be sent to multiple patients with a single action. Broadcasts can be used to let patients know about a change in the schedule or follow up with No Shows. With Broadcasts, you can quickly select up to 3000 patients per practice and send the chosen patients a customized message through text, call, or email.
- Internal Mentions
 - Simplifies collaboration across Artera, bringing together all relevant parties and ensuring action items make it into the hands of the correct individuals. You can tag individual users or user groups.
- Patient Channels
 - Contains all messages that have been sent to or from the patient, all internal messages sent in that channel, and event messages related to patient updates.
- Quick Response
 - Templated responses to common patient questions.
- Smart Phrase
 - Create individualized messages for your patients. Messages appear with the generic Smart Phrase placeholder before they are sent but will populate with the related data from your EMR.
- User Groups
 - Allows users to tag relevant groups of people using the Internal Messages functionality in Patient Channels.

Icon Legend

Blue Side Bar

Icon	Function
	Displays recent messages
	Displays scheduled patients
	Allows easy access to pinned messages or channels

Icon	Function
	Displays messages where you are mentioned
	Support
	Settings & Preferences

Schedule Colors

Color	Function
Gray	Unconfirmed – The patient has not confirmed their appointment. This status may require follow-up.

Color	Function
Green	Confirmed – The patient has confirmed their appointment.

Color	Function
Red	Canceled – The patient has requested to cancel their appointment.

Color	Function
Yellow	Rescheduled – The patient has requested their appointment be rescheduled.

Color	Function
Blue	Viewed - The patient has viewed their appointment details through the {eventConfirmLink} but has not taken any action.

FP Same Day UNCONFIR... Thu. 06/9/22 9:00AM	...	FP Same Day CONFIRMED Thu. 06/9/22 9:00AM	...	Video Visit CANCELED Thu. 06/16/22 12:10PM
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Channel Statuses

Name	Function
OPEN 	Open Channels are active and typically require manual intervention to resolve. Channels typically open when a patient sends a message to the practice.

Name	Function
PENDING 	Active and requires internal action or are waiting on a response from the patient. Channels are put into pending automatically by internal mention, by inbound message automations, or manually.

Name	Function
CLOSED 	Closed channels are inactive and no longer need attention. Channels can be closed automatically through inbound message automations or manually.

Messaging Tools

Icon	Function	Icon	Function
	A secure message requires a patient to login to view it. This ensures that PHI and other sensitive information is protected. By default, all messages sent in Artera are secure. An unsecured message will appear as a normal text message.	 (not implemented at this time)	The paper icon allows a user to attach a form to a message.
	The wand icon opens the Smart Phrase menu. Smart Phrases populate with patient, event, or practice information and dynamically update once the message is sent.		The paper clip icon allows users to attach a file to a message. Files over 600KB will need to be sent in a secure message format.
	The speech bubble with bolt icon opens the Quick Responses menu. Quick Responses are templated responses that can be used to answer frequently asked questions or other inbound messages. Each response can be customized before sending it to a patient.		Sends messages via text to the patient.
			Sends messages internally and are only visible to staff.

Icon	Function
	To send a message to a Patient

Icon	Function
	To send a message internally within Artera.

Icon	Function
	Displays Channel Status

Though available, we will not be using all options/buttons as part of this application.

Access

Logging In

1. Open an internet browser.
2. Go to: <https://app.wellapp.com/login/staff>.
 - a. Enter your **MHC email**.
 - b. Click **Continue**.
 - i. Your credentials are synced with Munson Healthcare’s Active Directory.



Add this site to your browser favorites for easier access.

Staff Member Sign In

Enter the email address associated with your account. If the email is found, we will send you a confirmation code to verify your identity.

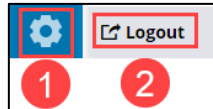
Email

Enter your email a

Continue b


Logging Out


1. Click the **Settings** icon.
2. Scroll to the end and choose **Logout**.





Viewing

Inbox Views

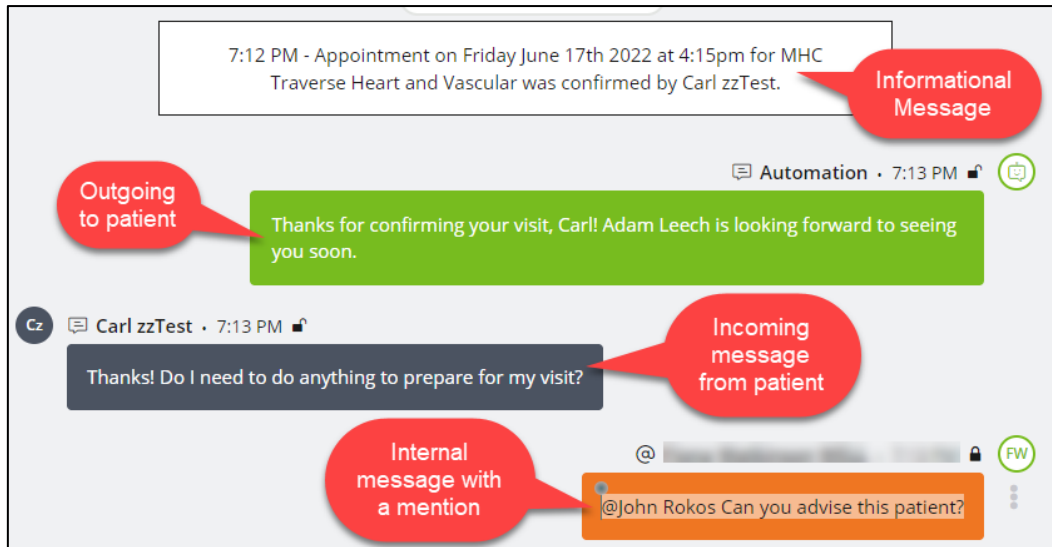
- Recent Messages
 -  ○ Displays the 200 most recent messages.

- Scheduled Patients
 -  ○ Displays patients with appointments scheduled on the selected day and their related appointment confirmation status.

- Starred Patients
 -  ○ For quick reference, users can “pin” patient conversations to their Starred Patients view.

- Mentions
 -  ○ Contains all the patient channels where you or a user group you belong to have been tagged through Internal Mention. Internal Mentions are designed to allow Artera users to communicate through the platform (patients are not able to view these comments).

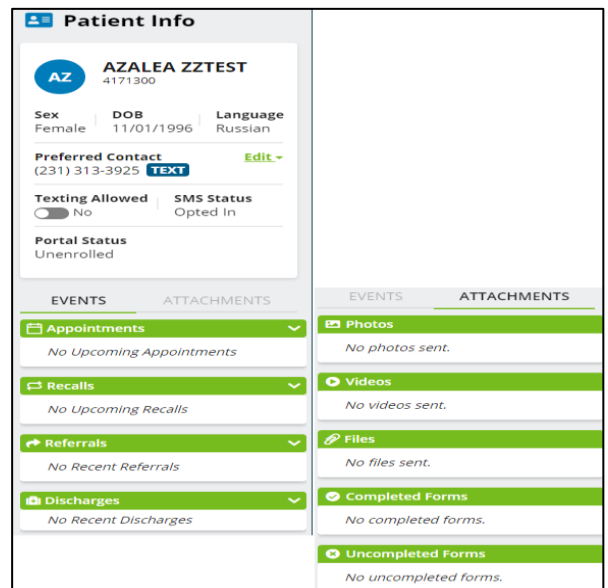
Sample Message



Viewing Patient Info

With a patient selected, the right side will display details, such as:

- Basic patient demographics
- Preferred Contact (pulls from RevCycle)
- Upcoming Events (I.e.: Appointments, Recalls, Referrals)
- Sent Attachments (I.e.: Photos, Files)

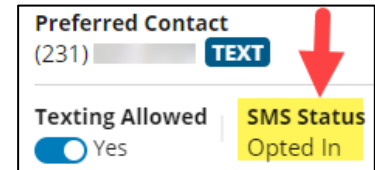


<p>A verified patient is one that has had a past or future appointment at this practice.</p>	<p>When you see a (?) icon next to the patient’s name, it means the patient doesn't have a past or future appointment within this practice. The patient may have a past or future appointment in another practice or was added during implementation with a historic patient upload.</p>	<p>If you see a (?) icon next to a patient without a related name, it means the user is not verified in any practice within your enterprise.</p>
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Opted In / Opted Out

The patient controls the status of being **Opted In** or **Opted Out** using specific keywords through their cellular carrier. This determines whether the patient can receive text messages and can be helpful when troubleshooting message delivery.

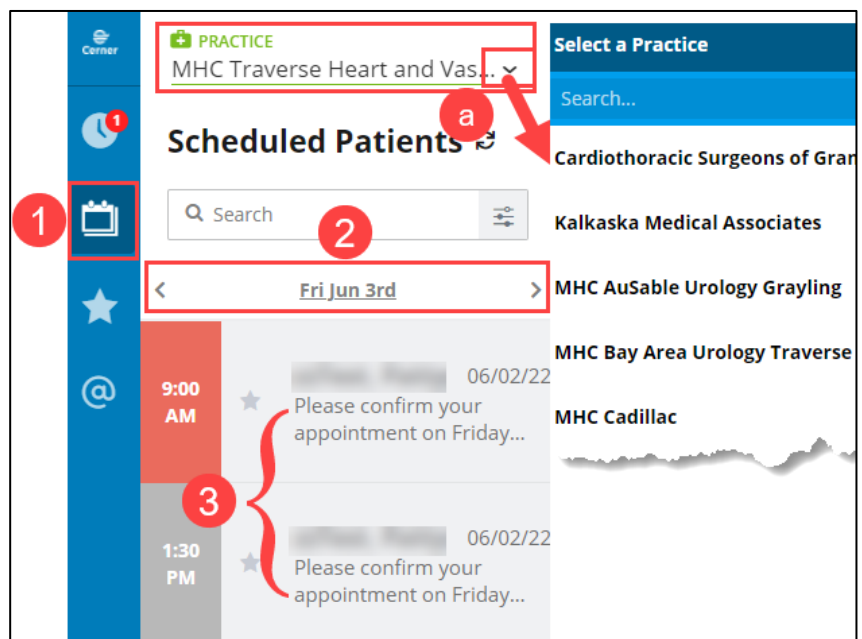
Note: Patients who have Opted Out of SMS messages cannot receive texts from the patient channel. The blue TEXT bubble next to the phone number only denotes that it is a textable line. Preferred contact information is available within Revenue Cycle.



The patient will only be Opted Out of texts from that specific line. If the patient is receiving messages from other lines in your enterprise, they'll need to opt out of each number individually. Once the patient has Opted Out, the SMS Status will update to **Opted Out** and the **Send Text** button will be disabled.

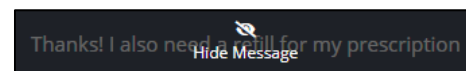
View Scheduled Patients

1. Click on the **Scheduled** icon.
 - a. If you are a member of multiple locations, select the correct practice.
2. Use the calendar, back, or forward buttons to navigate days.
3. The patient's schedule and status (color) will display.



Hiding a Message or Image

1. Click on the message or image.
2. Hold down the **Shift** key and click on the image or message.
3. A **Hide Message** indicator will appear.



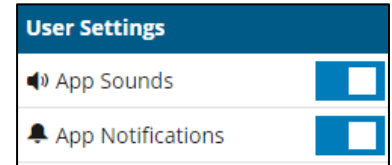
Note: Images and messages can only be unhidden by users who have permission to hide the message/image. These users can click on the hidden message to unhide.

User Settings

By default, App Sounds are **On**, and App Notifications are **Off** each time you log into Artera. When you log out, any changes made to your notification settings will revert back to these defaults.

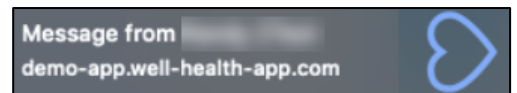
App Sounds

When enabled, Artera will make a sound each time a patient messages your practice or when you are mentioned internally. Please make sure the volume on your computer is On and turned up to an audible level.



App Notifications

When enabled, you will receive a pop-up notice for patient messages received by your practice when logged into Artera. The notification displays in the top-right corner of your screen, even if you are currently viewing a different window. The app notification format displays as Message from {Patient Name}.



Messaging


Automatic reminders are sent at seven-day, two-day, and one-day intervals. If a patient confirms on the first sending, they will not receive a reminder to confirm at two days. However, they will still receive a reminder for the date & time of the appointment the day before. If the patient has canceled, the confirmation and reminders will stop.

A Doxy.me video visit link will be sent one-hour before the virtual visit appointment.


Writing or Replying to a Patient Message

1. Click on the patient.
 - a. Details will open to the right.
2. Determine if the message is appropriate to the patient or if further Internal conversations need to occur.
3. Type response details.
4. Use Smart Phrases or Quick Responses as needed.
5. Click **Send**.



Providers will not have access to monitor Artera. If a patient asks a medical question, direct the patient to their patient portal or create a phone message within PowerChart. Messages can be sent securely by selecting the padlock icon . The patient will be required to authenticate to view the message.

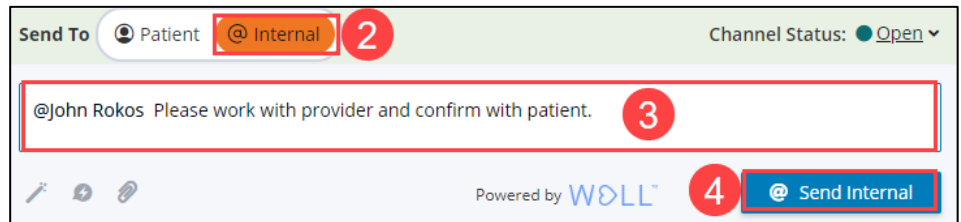
When conversations have completed, make sure to set the Channel Status to Closed. This will prevent further messages within the same conversation.

Channel Status: ● Closed 

Sending an Internal Message or Mention

At times, a patient may write in with questions, concerns, or comments that need further input. You can send a message internally to another user without the patient being tagged or notified.

1. Follow the steps for **Writing or Replying to a Patient Message**.
2. Select **@Internal**.
3. Type message.
 - a. Use the @ symbol to mention or tag a user or user group.
4. Click **@Send Internal**.
5. A message will appear in the left blue band, under Mentions.



Smart Phrases

Smart Phrases, like shortcuts, allow a practice to customize communication with patients across Artera and can be used in text, call, and email messages. Messages appear with the generic Smart Phrase placeholder before they are sent but will populate with the related data from the EMR or scheduling system.

- The Event Smart Phrase will populate with the patient's first upcoming appointment information when manually messaging the patient. If the patient has more than one upcoming appointment, the soonest appointment details will be populated in the message. Additionally, if the patient doesn't have an upcoming appointment scheduled and an Event Smart Phrase is used, the message won't be delivered to the patient.
- In the **Scheduled Patients** view, the Event Smart Phrase will populate with the appointment details of whatever appointment the user selected when sending a Broadcast.
- For **Automations**, the Event Smart Phrase will pull in the appointment details for the event that triggered the Automation to send.

Quick Responses

Artera enables you to use Quick Response templates to provide quick, consistent responses, without the need to type the same sentences day after day.

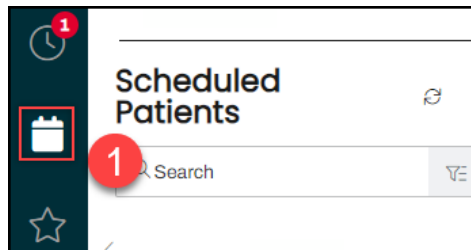
1. Within the patient channel:
 - a. Click for pre-built **Smart Phrases**.
 - b. Click for pre-built **Quick Responses**.
2. Complete the remaining message.
3. Click **Send**.



Broadcast Messaging

Sending A Broadcast Message

1. Within the Scheduled Patients pane:



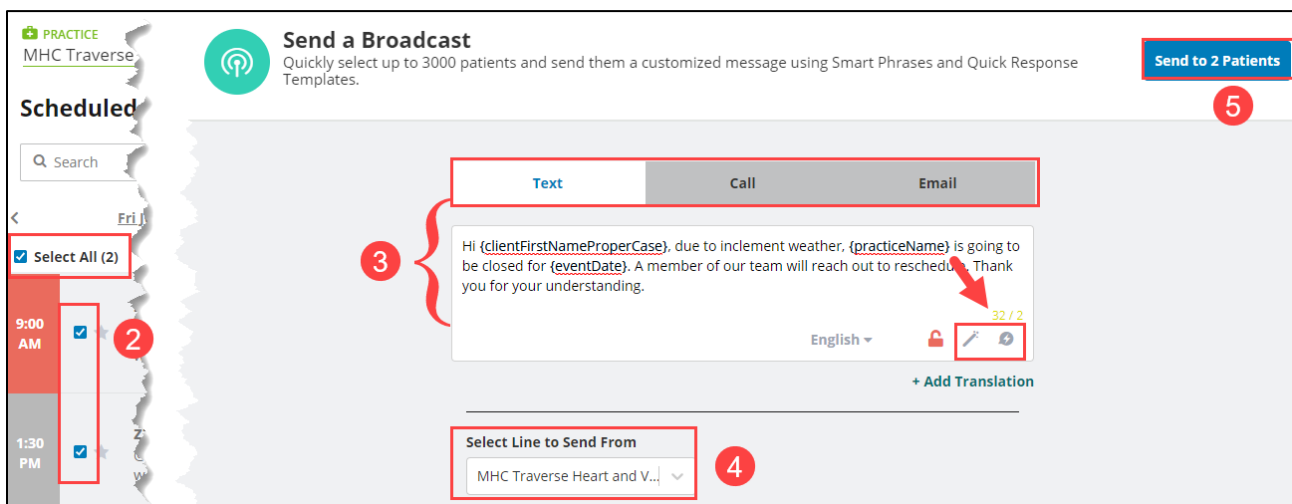
- a. Click.

- b. Select **Send a Broadcast**.



2. Select all or specific patients.
 - a. Advance the date as needed to select additional patients.
3. Craft the appropriate text, call, or email using Smart Phrases or Quick Response.
4. Select the Line to Send From.
5. Click **Send**.

Note: If you need to cancel, click



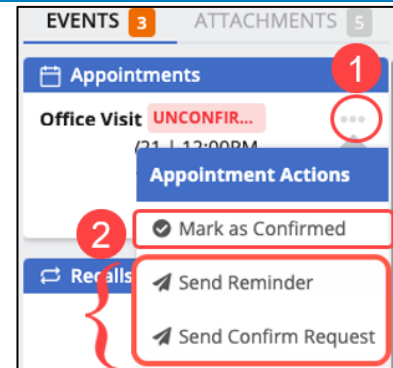
Manual Intervention

Manual Appointment Confirmation

To manually confirm the appointment directly from the Event:

1. Click the (...) menu for the upcoming appointment.
2. Select **Mark as Confirmed**.

You can also send a manual Reminder or send a Confirm Request to the patient if needed.



The Patient Experience

Outgoing messages retrieve information directly from Cerner Revenue Cycle and will be patient and appointment specific.

The standard appointment confirmed one-day format of the reminder is: {clientFirstNameProperCase}, {eventProviderName} is looking forward to seeing you tomorrow {eventDateAtTimeShort} at {eventLocationAddress}. Please arrive at {eventArrivalTime15}.

As an example, this translates to: John, Dr. House is looking forward to seeing you tomorrow 05/21/2022 12:00pm at 100 Main Blvd, Traverse City, MI. Please arrive at 11:45AM.

Reminder Type & Name	Confirmation Status	Verbiage
Booking Confirmation	N/A	John, thanks for scheduling a visit with Dr. House on 06/21/2022 12:00pm at 100 Main Blvd, Traverse City, MI. We look forward to seeing you!
Appointment Follow Up - Thank You	N/A	Hi, John, thank you for coming in to your appt with Dr. House. We look forward to seeing you next time!
Standard No Show	N/A	John, we're sorry that you missed your appt with Dr. House on 05/21/2022 12:00pm. Please text us to reschedule.
Standard Acknowledgement Confirmation	Upon confirming	Thanks for confirming your visit, John! Dr. House is looking forward to seeing you soon.
Standard Appointment Confirmation - 1D Confirmed	Day prior confirmation	John, Dr. House is looking forward to seeing you tomorrow 05/21/2022 12:00pm at 100 Main Blvd, Traverse City, MI. Please arrive at 11:45AM.
Appointment Confirmation - 7D Unconfirmed	7 Day- Unconfirmed	Hi John, your visit at Main Office is on 05/21/2022 12:00pm. Does this time still work? [Event Confirm Text]

Standard Appointment Confirmation - 2D Unconfirmed	2 Day- Unconfirmed	John, will you please confirm your visit on 05/21/2022 12:00pm with Dr. House? [Event Confirm Text]
Standard Appointment Confirmation - 1D Unconfirmed	1 Day- Unconfirmed	John, are you coming to your visit with Dr. House on 04/13/2017 12:00pm? [Event Confirm Text]
Virtual Visit	1hr Before	John, you have a Virtual Visit on Tuesday June 21st 2022 at 6:00pm with Dr. House. Please use this link to login to your appt. Please text us if you have any questions. https://munson.doxy.me/munsonfamilypractice

Artera is configured to recognize the following keywords (Confirm, Cancel, or Reschedule) allowing the patient to take action on their appointment by texting in an assortment of responses to their appointment reminder.

A patient response that is less than 31 characters and contains any of the following letters or words will update the patient’s appointment status only if texted in response to appointment reminders that include {eventConfirmLink} or {eventConfirmText}:

	Confirm Appointment	Cancel Appointment	Reschedule Appointment
Patient Response	Y, Yes, Confirm, Sí, Voy a ir, Confirmar, Confirmado	N, No, Cancel, Cancelar	Reschedule, Reprogramar, Cambiar
Resulting Appointment Status			

- If the patient responds with one of the designated keywords listed above in English or Spanish but the message is 31 characters or longer, the Patient's Channel will open, and the appointment status will not be updated.
- If the patient’s message contains a question mark, Artera will not update the appointment status and will automatically open the Patient's Channel.

The {eventConfirmText} Smart Phrase is an integral part of Artera's Appointment Reminder workflows. This Smart Phrase allows patients to quickly confirm their attendance or request to cancel/reschedule an upcoming appointment.

- How this Smart Phrase appears in a text reminder: “Reply Y to confirm or N if you can't make it.”
- How this Smart Phrase sounds in a phone reminder: “To confirm your visit please press 1, to cancel your visit please press 5, to repeat this message please press 9”.

Additional Resources

[Artera Academy](#)

[Artera Patient Reminder Demo](#)