

New to Artera: Admin Users

Review the information below to learn more about navigating the Artera platform



Note: Always follow the guidelines and governance set by your Enterprise or Organization when using Artera.

AUTOMATION MODULES

Visit app.wellapp.com to log into Artera

Enter your work email address and Artera password

You will be routed into Artera
Click [here](#) for full login details.

Google Chrome is the suggested browser

Access in Artera is based on your role within your organization

Artera is a combination of several scheduling departments

ARTERA USER TYPES

There are three types of users within Artera: **Enterprise, Manager, and Staff.**

Enterprise Users

Unrestricted access within Artera and typically responsible for ongoing administration within Artera for things like creating new Practices or updating Permissions.

Manager Users

Created at the Practice-level and have more limited access compared to Enterprise Users. Can access all Lines and Resources within their Practice.

Staff Users

Created at the Practice-level and have the *most* restricted access. Can only access Lines and Resources tied to their User Profile within the Practice.

Note: Manager and Staff Users

Manager and Staff users can be added across multiple Practices, but will need to be manually added within each individual Practice.

PERMISSIONS



Permissions allow Enterprise users to be prescriptive about what Staff and Manager users can view and edit in Artera.

Enterprise users can indicate the **Minimum Access Level** required for each Permission module as Staff, Manager, or Enterprise.

The Minimum Access Level set for each Permission will vary from organization to organization based on which teams are responsible for certain tasks.

QUICK RESPONSES

Quick Responses allow you to create and share templated messages to support your staff in addressing common patient questions or initiating outbound patient communication. Over time, your organization can build a personalized library of Quick Responses that meet most patient needs.

Default Quick Responses

Default Quick Responses can only be created by Enterprise Users and are located within the Enterprise Settings menu.

Default Quick Responses are available for use across all Practices within an Artera Enterprise and should be built when there is a message template applicable across multiple Practices.

Practice Quick Responses

Practice Quick Responses are built at the Practice-level and are usually created by Manager users.

Practice Quick Responses are only available within the Practice in which the Quick Response is created. Practice-level Quick Responses should be built when there's a specific message that users find themselves regularly sending to patients in that Practice.

DEFAULT AUTOMATIONS

As an Enterprise User, you can create Automations that can be used across your Practices. These are referred to as Default Automations. This allows you to set a standard for your organization, controlling both message timing and brand voice.

Creating Automations at the Enterprise-level and enabling them within each necessary Practice drives efficiency and consistency.

Default Automations

Built at the Default-level by Enterprise Users

Available for enablement within each Practice

Resource filters can be added at each Practice-level prior to enablement

NOTE: Connect with your Artera Admin to discuss Artera's Leading Practice Automations.

Visit the Artera Knowledge Base: knowledge.artera.io

