artera™

Enterprise Communication Platform

Solution Overview

Executive Summary

As patients continue to have more options for their healthcare providers, offering a patient experience that allows your organization to stand out is essential to remaining competitive. Patients of all ages have adopted technology across different facets of their lives and have begun to expect more flexible ways to connect with their providers. They want more than robo dialers, or one-way email and text systems. Patients want the convenience and efficiency of choosing their preferred channel of communication whether it be text, phone, and email.

Artera™ is the number one unified patient communication hub for enterprise health systems. With bidirectional text messaging at its core, Artera connects providers to patients at each stage of their healthcare journey, meeting patients on their terms.

Artera serves many of the leading enterprise health systems, including Cedars-Sinai, Houston Methodist, and Hackensack Meridian Health. Artera is HITRUST CSF-certified and HIPAA-compliant.

Unite Communication

Artera makes it possible for health systems to reach out through one integrated source from any vendor in their patient-facing infrastructure. Artera leverages real-time integrations with the EHR, EPM, and patient portal through HL7 and API standards. This allows for unprecedented specificity and timeliness in how message automations can be configured using discrete EHR data fields.

Built for Enterprise

The Artera platform is designed for enterprise health systems with robust self-service tools to allow appointed administrators access to create, update, and maintain patient communications. Artera provides both organization-wide and department-specific settings to provide consistency and flexibility, where needed.

Ease of Implementation

The Artera service delivery model is a cloud-hosted, web-deployed application. As a result, the platform demands minimal capital expenditure from the client and creates a small technology footprint. Upgrades and enhancements require no client IT support. Implementations are tightly controlled to ensure they are completed on time and within budget.

Increase Transparency

Artera provides a transparent communication record for administrative and clinical staff which eliminates siloed communication, interdepartmental redundancy, and operational bottlenecks.

- Appointment Reminders
- Patient Education
- Recalls
- Revenue Cycle
- Lab Results
- Telemedicine
- Insurance Eligibility
- Patient Satisfaction Surveys
- Community/Population Health

Benefits & Results

Artera has been used to improve a number of different operational measures. Our communication hub has the flexibility health systems need to be able to tackle the evolving priorities associated with running a successful health care facility.

Whether you are aiming to realize existing technology investments, increase patient satisfaction and engagement, or reduce staff time spent on common tasks, our team is here to collaborate on how to best use Artera to meet your organization's specific needs.

Our Sales and Implementation teams work with each client to understand the milestones, targets, and KPIs that are important to you. From this strong foundation, Artera clients see meaningful, measurable results within weeks of go-live.

Cedars - Sinai Medical Center

19% increase in MyChart enrollment

Houston Methodist Learning Medicine

508% increase in electronic check-Ins

Signature Medical Group

50% decrease in no-shows

Eisenhower Medical Center

88% reduction in staff time on phones

MemorialCare Health System

25% engagement increase in patient satisfaction surveys

SCL Health

26 Implementation took only 26 days

Artera Usage

Artera is used by front office staff, clinical support teams, call center departments, billing staff, home health nurses, and more, to centralize patient communication activities. Having a single hub for users that participate in different parts of the patient's care journey helps ensure smooth handoffs and clarity across all staff supporting the patient.

Artera clients are large IDNs, ambulatory practices of varying sizes, and specialty care divisions from hundreds of healthcare organizations nationwide. Artera powers communication to thousands of patients over millions of messages annually.

Annually

96%
patient reach rate

257M
messages sent

1.335M
messages sent daily
(on average)

4,650+
practices

1.8M
Users

3,000
automations

1,000
Use Cases

How the Platform Works

Set Message Sender
Select the practice, department, and phone line that the patient will see.

AI-Enabled Conversations
Independent navigation of patient conversations based on responses with automatic escalation to staff members, if needed.

EHR Integration
Relevant patient information is sent from your EHR and displayed for easy access.

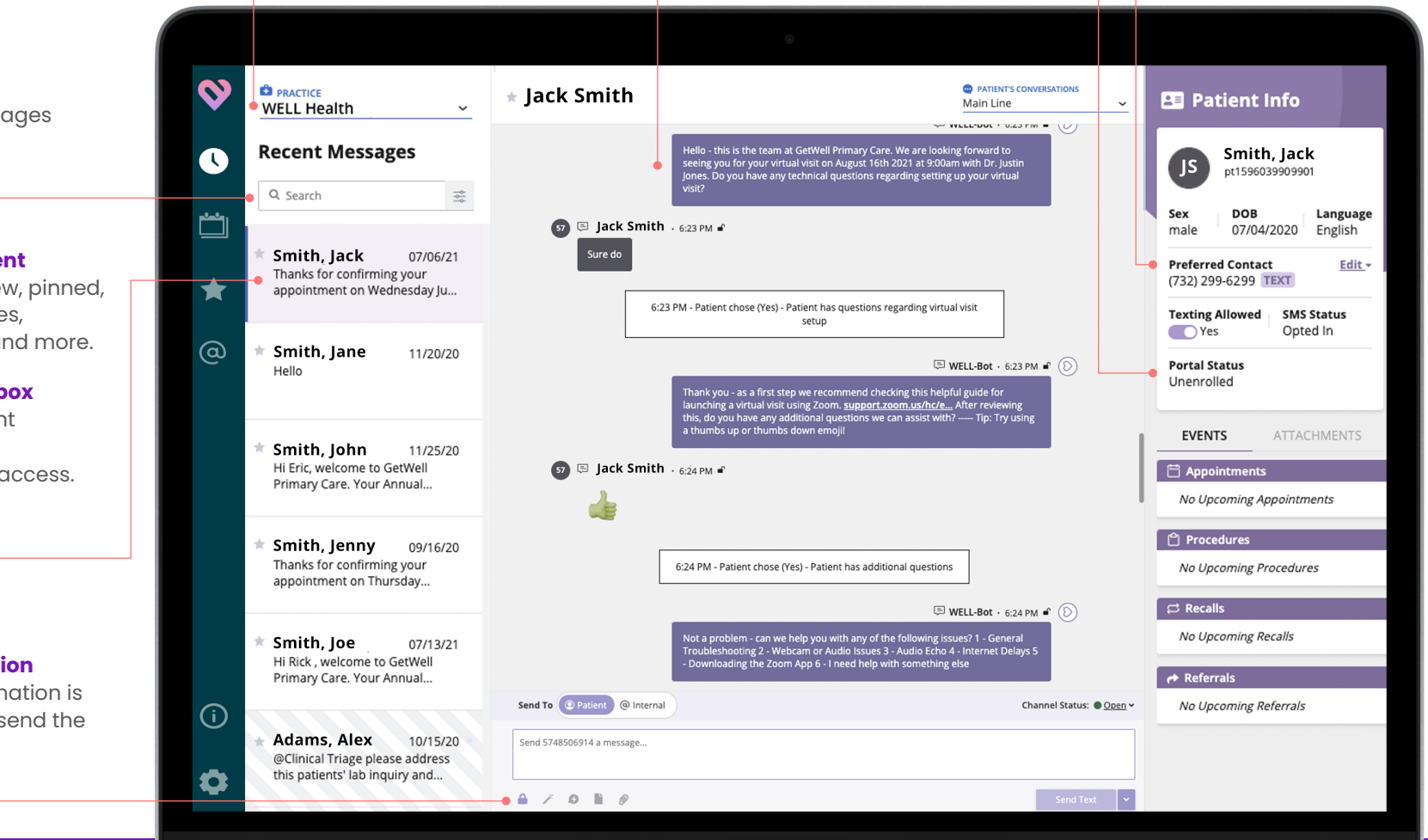
Use Patient Preferences
Messages will be sent using the patient's preferred method, as documented in the EHR.

Filter Views
Quickly find the messages you are looking for.

Message Management
Navigate between new, pinned, and internal messages, practice schedules, and more.

The Collaborative Inbox
Manage active patient conversations with cross-departmental access.

Secure Communication
When sensitive information is being sent, staff can send the message securely.



Platform Features

ChatAssist AI

Artera ChatAssist AI independently navigates common patient communication needs based on patient responses. If needed, ChatAssist AI will automatically escalate that conversation to staff when there is an action they need to take. ChatAssist AI is designed to assist staff with common tasks and questions while blending the handoffs between AI and your team to provide an engaging patient experience.

Automated Reminders

Unlimited, self-service automation rules streamline repetitive outreach tasks. Via the Artera EHR integration, you can schedule automated appointment reminders, confirmation requests, recalls, referral workflows, follow-ups, thank you messages, and more. Access can be restricted to specific users, enabling complete oversight.

Smart Phrases

Artera allows customized communication with patients across messaging types. Messages appear with the generic Smart Phrase before they are sent. Once the message is sent, the data dynamically populates from the EHR or scheduling system with each patient's information.

Keyword Actions

Inbound words or phrases can be set to automatically trigger a response to the patient or an alert to a user or user group. For example, a message that says, “I don’t understand my bill,” will automatically alert the billing department.

Quick Responses Templates

Pre-written responses can be created and shared to quickly address common patient questions or initiate outbound messages. Operations are streamlined for staff and ensure consistency in patient outreach via the Artera EHR integration:

- schedule automated appointment reminders
- confirmation requests
- recalls
- referral workflows
- follow-ups
- thank you messages
- and any other form of outreach.

Platform Features

Broadcast Messaging

Providers can quickly select up to 1,000 patients in Artera and send them all a customized message using Smart Phrases and Quick Response Templates. This functionality is ideal for last minute schedule changes, inclement weather, or notifications.

Campaign Messaging

Population outreach can be simply and quickly designed, using any administrative, clinical, or SDOH data. A CSV file from any third-party database can be imported on an ad hoc or scheduled basis. Campaigns can push text, email, or calls based upon patient preferences and/or specified modality.

Secure Messaging

Patients are reassured with the knowledge that every single message sent through Artera is secure. Patients see secure messages as a link with a customizable message that requires them to verify Protected Health Information to view the content of their message.

Conversation Templates

We provide an in-product Content Library pre-populated with templates for ChatAssist AI conversation flows. These can be quickly updated and deployed using a self-service builder so your staff can build, update, and iterate without needing to submit tickets or involve the Artera team.

Internal Messaging/Mentions

Internal Messaging streamlines collaboration between staff members and across teams, allowing inclusion of all relevant users in the conversation in one platform. This ensures action items make it into the hands of the correct people. The health team can loop in a clinician, a biller, or another department when necessary. Even if the user who needs to be alerted doesn't normally have access to the conversation, if they are mentioned in an internal message, they are granted access to the specific channel in order to read and take action as necessary.

Multilingual Support

Patients will be able to receive messages in their preferred languages. Artera supports over 100 different language translations, including:

- French
- German
- Japanese
- Mandarin,Russian
- Spanish.

Administrative Functionality

The Artera platform provides all the necessary tools to be client self-serviced. The platform eliminates the need to submit tickets, minimizes unnecessary vendor oversight, and streamlines change management.

You can fully configure workflow automations, enterprise and practice settings, and staff role-based permission. This flexibility accommodates deployments across a diverse range of staff, accounting for varying skill sets and degrees of patient access on an as-needed basis.

Enterprise and Practice Default Settings

Enterprise settings allow for streamlined deployment. Practice settings accommodate specificity of office hours, time zones, auto responses, secure message copies, and open channel status.

Unlimited User Licenses

Web-based deployment and scalability allow unlimited user licenses with permission set specific to practice, role, and patient visibility.

Dedicated Fallback Numbers

Sometimes messages will fail, but Artera has fallback mechanisms that ensure the delivery of the message. Each line enabled in Artera is paired with a dedicated toll-free fallback.

User Groups

An unlimited number of specified end-users can be assigned to customized User Groups based on their role and responsibilities. This allows a singular mention (i.e. @BillingDepartment) within a patient channel to notify all end-users assigned to that User Group.

Role-Based Hierarchical Permission Sets

Multiple levels of configurable permissions ensure every staff member has the correct level of access and patient visibility.

IP Whitelisting

Limit access to the Artera console to users on your corporate network.

SSO/SAML

An extra layer of security and ease of use can be added for staff members by integrating with the Artera single sign-on system.

Dedicated Short Code

For broadcasts and campaigns, a short code (a five-digit number used in lieu of the full phone number) can be used due to carrier restrictions placed on the number of texts that can be sent from a single phone number.

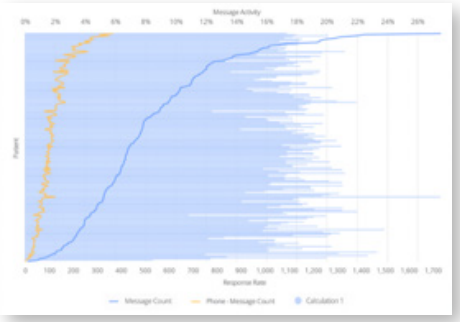
Text Enable Existing Land Lines

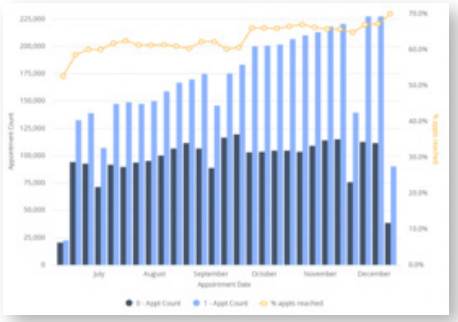
Artera can text-enable existing lines, so patients receive healthcare communication from a trusted number.

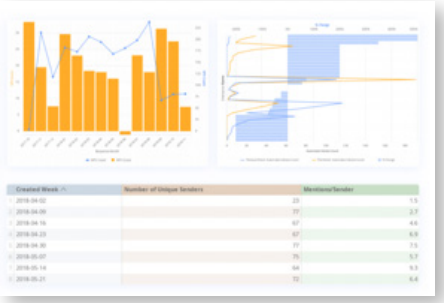
Analytics and Reporting

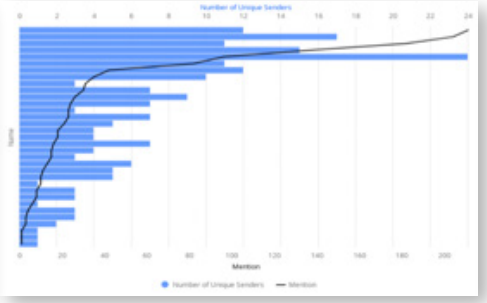
With patient communications, the data matters. If it can't be measured, it can't be improved. Artera offers reports and dashboards that provide in-depth insights on a range of metrics: patient responses, channel stats, appointment reach stats, and product usage stats.

Clients also have the option of customizing their dashboards and reports, with or without the assistance of a Artera analyst.









Delivering Effective Messaging

Artera promises a patient communication platform that will help you achieve your goals, and our analytics give you the data to optimize configurations for your patient populations and organization structure.

Artera analyzes inbound patient messages and provides data on the content, timing, and sentiment of those messages so that you can understand your patients' needs and provide the resources to meet them. The platform also allows you to analyze the effectiveness of your outbound messages, including automations such as Appointment Reminders, Recalls, Referrals, Broadcasts, and Campaigns as well as individual patient messages.

Measure:

- Average number of messages per appointment type
- Message clickthrough and response rates
- Effectiveness of portal enrollment message
- Opt-outs
- Response time to inbound messages
- Appointment data: confirmations, cancellations

Analytics and Reporting

Dashboards for Team Managers

Management Dashboards deliver actionable insights to your operations team. It allows them to measure staff efficiency, response rates, and collaboration with others in the organization.

Dashboards for Executive Leadership

Executive Dashboards allow you to track KPIs and generate reports for others in the organization based on the metrics that matter to you, such as:

- Channel open time
- Volume of patients reached
- Volume of appointments reached
- Response rates
- Confirmation rates
- Number of active users per month

Peer Benchmarking

Artera Analytics also provides benchmarking reports showing you how well you are doing compared to other health systems of the same size.

Optimizing Staff Efficiency

Artera promises to help you optimize the efficiency of your staff, and our analytics give you the data to measure it. Artera analyzes the way your staff users work within the platform. The platform can provide insights into individual user behavior and user behavior at specific locations. The platform allows you to monitor, among other items:

- Response time to inbound messages
- Administrative effectiveness
- Feature usage
- Collaboration between users

Flexible Data Architecture

Artera offers reporting tools that support the ability to create structured data models for specific use cases as well as comprehensive data dictionaries. Data points can be sent via a schedule through SFTP or AWS S3. It can also be downloaded directly through reports and dashboards from the Artera Analytics UI through the following formats:

- PDF
- CSV
- TXT (tab-separated values)
- Excel Spreadsheet (2007 up)
- JSON
- HTML
- MARKDOWN
- PNG

Integration/Interfacing

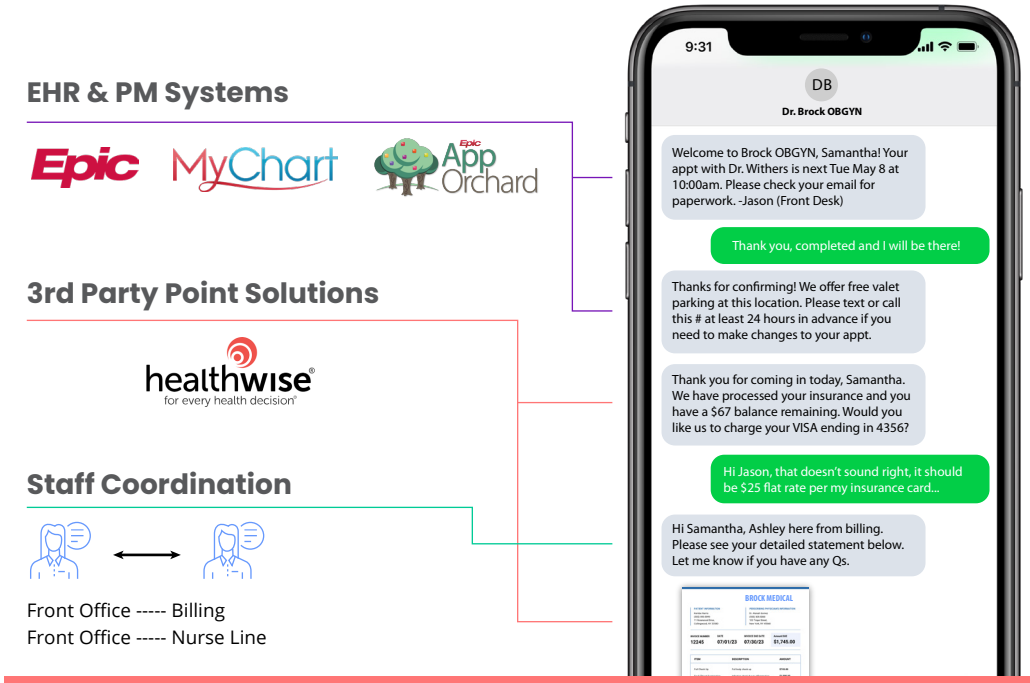
An effective communication platform requires real-time message exchange. This immediacy ensures that the platform can function as an exchange layer between the provider's vendors, departments, staff, and patients.

Artera supports a wide range of integration methodologies depending on the Practice Management (PM), Electronic Health Record (EHR) system, and third-party applications. Artera adheres to industry standard HL7, FHIR, and API specifications. The platform supports real-time IP based transfers, SFTP, and VPN of industry standard HL7 files. The majority of real-time data exchanges are via HL7 with ADT, SIU, and SRM messages.

Data is provided by client-side systems, and are transacted securely to Artera over a VPN tunnel (HL7) or HTTPS (webservices). Artera automatically sends communication to patients who meet criteria programmed by the enterprise.

The ability of Artera to partner with best-of-breed vendors via a consolidated communication layer makes the platform infinitely scalable and future-state ready.

Artera offers workflows and automation patterns that are specific to vendors—focused on scheduling, registration, care plans, referrals, satisfaction, billing, and all other functions.



To date, the Artera platform has successfully interfaced with more than 200 real-time HL7 and API feeds, and partnered with more than 50 vendors via API specifications.

Integration/Interfacing



Full EHR Integration

Patient communication preferences are imported from the provider's EHR into Artera (including in real-time), and appointment status is written back to the EHR.



API

Access to the Artera API enables users to directly trigger messages via the Epic Gateway or another system.



Portal Enrollment

Integration with your EHR to trigger automated portal enrollment messages with unique, patient-specific embedded links based on the patients' current enrollment status.



EHR Standard Data Sync

Artera integrates with industry leading EHRs via HL7 v2, API, FHIR, SFTP, etc.

Integration/Interfacing

Epic

Artera offers a portfolio of integrations that support and enhance the core functionality within Epic. Through a combination of integrations via open standards and customer-supported custom development, Artera has built integrations that support the following workflows:

- **Self-Rescheduling powered by Epic's App Orchard API**
  Presents patients with the option to reschedule an appointment at their convenience.
- **Enable appointment reminders in a real-time, automated capacity**
  Improve timeliness, increase confirmation rates, and reduce no-show rates. Appointment confirmations, direct cancellations, and requests to cancel or reschedule.
- **Utilize Bidirectional/Conversational text for appointment scheduling**
- **Automate workflows associated with pre- and post-operative intake**
  Send instructions directly to the patient via text, email, or MyChart Integration.
- **Enrollment status identification**
  Outreach, token generation, and distribution for MyChart via SMS.
- **Integrate with OpTime and send texts directly to family.**
- **Achieve increased visibility across systems**
  Eliminate discrepancies with antiquated batch file uploads.
- **Deliver and automate specific "event type"**
  communication threads to the patient.
- **"SMS Gateway" to support tickler messages**
  MyChart and Cadence Quick Reminders.
- **Increase MyChart adoption**
  by easing the enrollment process for patients and encouraging its use through messaging.
- **Enjoy "open" integrations, including:**
  - Automated Appointment Confirmations
  - Automated Recall Notifications
  - Outgoing Patient Administration
  - Outgoing Surgical Case Scheduling

Security & Hosting

Artera is committed to working with customers to robustly protect patient health information. Artera consistently deploys and enforces the latest information security frameworks to protect the integrity, confidentiality, and availability of data received.

In 2019, the Artera platform received HITRUST CSF Certification and was recertified in 2020, confirming the company's commitment to data security and HIPAA compliance.

Health Information Trust Alliance (HITRUST), is a standards organization whose programs and services help safeguard sensitive information and manage risk for global organizations across all industries. The firm BDO conducted a wide-ranging audit of Artera's security operations and architecture. BDO evaluated Artera across 19 domains designed to address every facet of Artera's security operations.

HITRUST DOMAINS

HITRUST has evaluated Artera across 19 domains designed to address every facet of our security operations

- Information protection program
- Endpoint protection
- Portable media security
- Mobile device security
- Wireless security
- Configuration management
- Vulnerability management
- Transmission protection
- Network protection
- Password management
- Access control
- Audit logging and monitoring
- Education, training, and awareness
- Third-party assurance
- Incident management
- Business continuity and disaster recovery
- Risk management
- Physical and environmental security
- Data privacy and protection

Security & Hosting

Developing with Security in Mind

The Artera development team employs secure coding techniques and best practices from The Open Web Application Security Project (OWASP) as well as SANS. Every Artera developer is formally trained in secure web application development practices. Additionally, Artera scans the code base on a regular basis to proactively identify potential threats and ensure secure coding practices are being followed.

Simulating Threats

Artera works with third parties to conduct penetration tests on a regular basis. These tests mimic an outside attack to ensure a full view of Artera's environment.

Securing Data in Transit and at Rest

Artera has a robust program for storing and encrypting data. Data is stored in multiple geographic regions and secure databases are operated on private networks. Artera also encrypts data in transit and at rest, and performs nightly backups. The company maintains a documented vulnerability management program, which includes periodically scanning, identifying, and fixing security vulnerabilities on servers, workstations, network equipment, and applications.

In the latest external penetration test performed by Veracode, Artera received a 100% score with no vulnerabilities found.

Implementation and Support

Every Artera Client Success Executive comes to the table with a minimum of five years of project management and healthcare experience.

During implementation and onboarding, clients are assigned a dedicated Artera Project Manager who acts as a primary point of contact throughout the process. Over a series of planning and design meetings, the Project Manager and their implementation team work with the client to meet their unique goals. Artera recommends designation of an internal project manager to work alongside the Artera implementation team and drive client-side assignments and tasks.

Over the course of their careers, the Artera team has collectively been responsible for the development, implementation, and support of health information administrative and management tools for over 80,000 providers, across more than 35 specialties, among 4,000 separate organizations.

The Client Success Executive provides each client with a tailored implementation plan and roll-out schedule. These are tailored to the specifics of the organization and cover timelines, resource allocation, and overall scope.

Plans are organized by the following key criteria.

Workflow Design	Integration & Build	Integrated Testing	Training	Go Live
Determine Success Criteria Review current patient communication with Current Reminder System Prepare for Integration	Establish connection to Artera API Build & Unit test Artera Demo environment	Test Artera Demo environtment Build Artera Production Environment	Conduct user training Prepare for go-live	Roll-out & optimize

During each phase of the implementation, the client signs off on key milestones (once they are completed to their satisfaction). Artera uses a web-based project management and ticketing system, allowing the client to have 24-hour access to the project steps and milestones, see who is responsible for what, and view estimated completion time periods.

Implementation and Support



Transformational Change

Changing to a new system can act often act as a catalyst for transformational change within an organization. Artera works to maximize the effectiveness of this change during the project kick-off by recommending the formation of work groups if they are not already in place. These work groups help deploy the platform across the organization, disseminate new policies, establish oversight, and ensure that all key stakeholders are involved.



Ongoing Improvement Strategy

After the initial roll-out of the Artera™ HealthPlatform, a dedicated Client Success Executive ensures that the platform remains optimized on an ongoing basis. They also ensure that stakeholders are using the latest embedded analytics and reports for the most effective patient outreach possible.

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Let's Talk

Email us at sales@artera.io or

call (833) 234-9355 to get started.

Visit us at www.artera.io to learn more.

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