WELL
Go Live Guide & Tip Sheet

Go-Live Best Practices

- Login to WELL at the start of each shift & have open on second monitor with notifications turned on.
- Logout of WELL at the end of each shift if sharing a computer. Lock screen when leaving workstation.
- Incoming or Open Channels should be addressed within 30 minutes (note: this does not necessarily mean resolved, but rather directed to appropriate staff or changed to pending status).
- Open channels should be closed by the end of each shift.
- Stick to Quick Responses (QRs). If the patient's needs cannot be addressed with a QR, direct the patient to the PSC with the QR "Line Not Monitored".

General WELL Responsibilities: Phase 1

- Filter & monitor incoming messages by site & address open channels until closed
- Close & Resolve open mentions once complete
- Cancel appointments in Epic and send cancel notice to patients following our late cancel policy
- Direct patients to the PSC where appropriate

Automations

Automations are messages built in WELL that are sent automatically at a designated time or after a specific action. You can identify automations as the Well-Bot. Here is a list of the current automatons that are sent via well at this time- more may be added.

| Instant Booking	Trigger: 15 min after appt Schedule	WELL-Bot · 9:31 AM — ████, thank you for scheduling an appt with DONNA KELLY on Thu Feb 27 2020, 10:20am at 14625 Puritas Ave , Cleveland, OH. We look forward to seeing you!
2 Day Confirmation	Trigger: 48 hours before Appt	WELL-Bot · 1:41 PM — Hello Test, please confirm your appt on Thu May 28 2020, 1:40pm with CHAD GARVEN. Reply Y to confirm, N if you can't make it.
Doxy Link	Trigger: 5 min After Pt. marked "Arrived" in Epic	WELL-Bot · 2:43 PM — ████, you're checked in! NFP.doxy.me/amynp Click the link to begin your appt. with AMY EBBITT.

Quick Response (QR) Cheat Sheet

Quick responses that start with "AA" were created by NFP and include a Spanish Translation. All other QRs are pre-built in the system. Always send QR to patient BEFORE taking other action in EPIC.

|		
AA Appt Cancel Notice	Test, your appt with CHAD GARVEN on Mon Aug 31 2020, 3:40pm has been cancelled. Please call us at 216-281-0872 to reschedule.	
AA Appt Reminder In-Person	Test, CHAD GARVEN is looking forward to seeing you on Monday August 31st 2020 at 3:40pm at 2358 Professor Ave , Cleveland, OH. Please arrive at 3:25pm.	
AA Appt Reminder Telemed	Hello, Test. Your telemedicine appointment is on Mon Aug 31 2020, 3:40pm with CHAD GARVEN.	
AA Confirmation Request	Test, please confirm your appt on Mon Aug 31 2020, 3:40pm with CHAD GARVEN. Reply Y to confirm, N if you can't make it.	
AA Confirm Thank You	Thanks for confirming your appt, Test! CHAD GARVEN is looking forward to your appointment. Questions? Call us at 216-281-0872.	
AA Doxy Link *THIS QR REQUIRES EDITING BEFORE SENDING!	Test, click the link to begin your appt. with CHAD GARVEN. [LINK HERE]	
AA Line Not Monitored	Hello, this line is not currently being monitored. To reach Neighborhood Family Practice, please call us at 216-281-0872.	
AA Phone Number Removed	Hello, this is Neighborhood Family Practice. Your number has been removed. Thank you.	
AA Emergency	If you are having a medical emergency, please dial 911 or go to the nearest emergency room. For all other concerns, please call us at 216-281-0872,	

Note: There may be more automations that you use at your site. Please ask your site manager if your site is sending additional QR's.
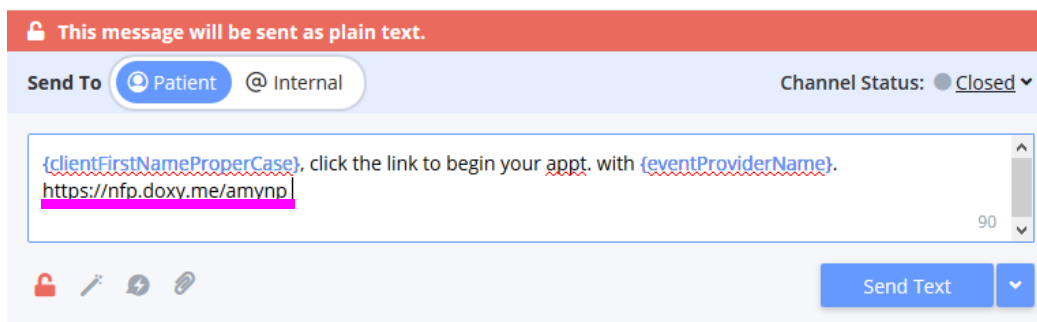
Manually Sending a Doxy Link

1. Click the Doxy Link QR
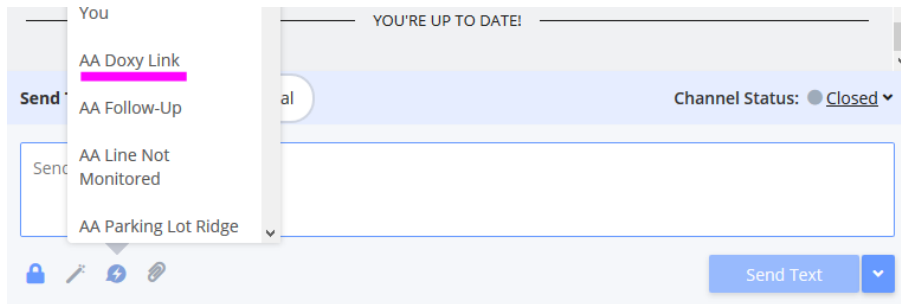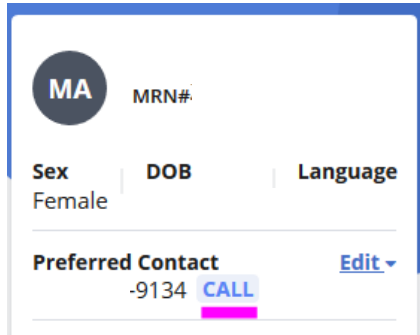
2. In the message field, erase where it says "[LINK HERE]"
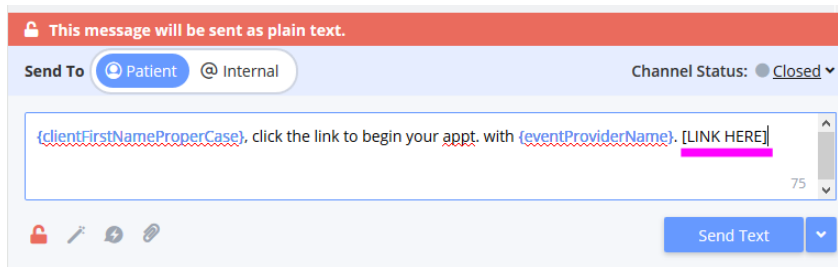
3. Replace "[LINK HERE]" with the scheduled provider's Doxy.me Link. The links can be found here. Copy the link and paste in the patient message box.

Troubleshooting: Patient is not receiving texts

Check to make sure the device is text enabled. If it is not, it will say "CALL" next to number.


Check the SMS Status: The SMS status will indicate if the patient has opted out of receiving texts through their phone carrier (Verizon, Sprint, Tmobile, etc.) by replying "Stop" or "Cancel". Sometimes patients will send "Cancel" to cancel their appointment, but it will opt them out of receiving texts from us. If the SMS status says "Opted Out", the patient has blocked our line. To unblock our line, ask the patient to send the word "Start" to our number (216-281-0872) to unblock.
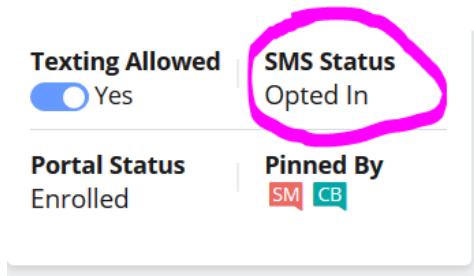
Check that the patient's communication preference is the correct number. If it is not, change the primary preferred contact in Epic and it will reflect in WELL.

Check to see if the patient has texting enabled. If the patient does not have texting turned on in Epic, it will say "Do Not Contact". See below for steps to change patient communication preferences.
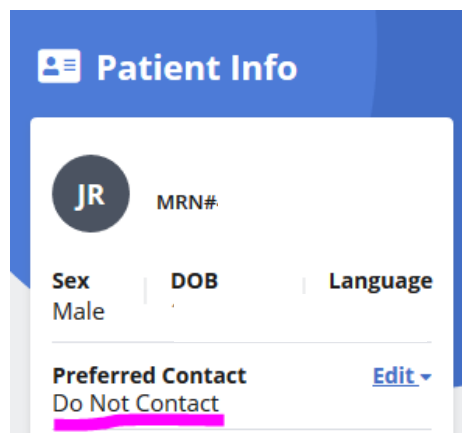
If all of the above do not apply, but you are still receiving the following error, the patient may not be able to receive texts from us for a number of reasons outlined below.

> 2:43 PM - This message was not delivered to the patient after multiple attempts. Please check the phone number.

- The patient has settings on their phone that won't allow texts from unknown numbers. Instruct the patient to check their phone settings.
- The patient has a text enabled line, but it is temporarily not accepting texts. Most common example of this is a lapse in a pre-paid phone, or patients who are only able to receive texts when connected to wifi.

Changing Patient Communication Preferences In Epic

Open the patient chart in Appts view
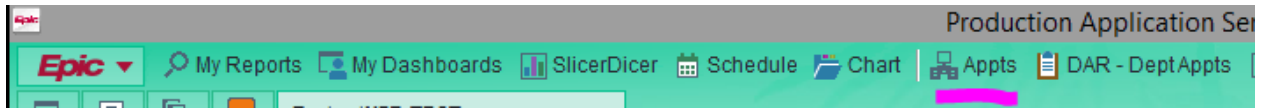
Click "Patient Options". Click "Communication Preferences"
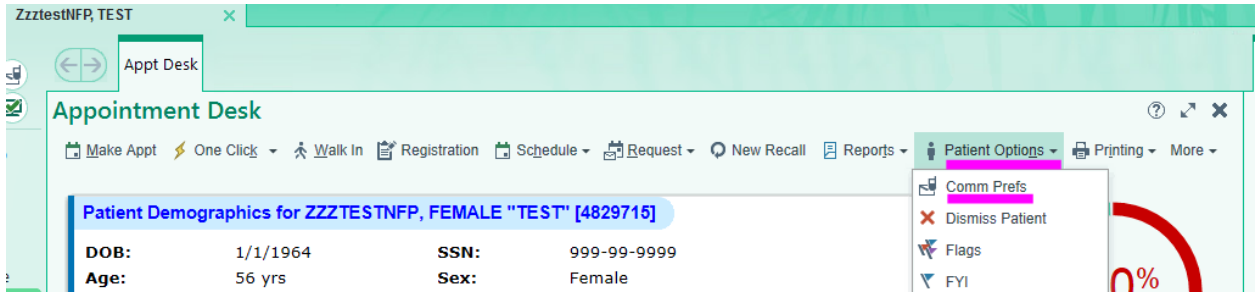
Scroll down to bottom. Ensure Texting is Enabled. Note: please get patient permission before changing text to ON if currently OFF

Under General Communication Preference, click dropdown for Appointments. Ensure Call and Text are enabled for Well App Automatic Appointment Reminders. If they are enabled, the phone and text bubble will be colored in.

Click "Accept"

› Health	📮	—	—	✉@	🖥
› Messages	📮	☎	—	✉@	🖥

✔ Mark as Reviewed	Last reviewed by BEETLER, CAITLIN on 3/23/2020 10:11:30 AM Last edited by ZINDREN, ABIGAIL on 6/3/2020 9:35:41 PM	⏮ Restore	✔ Accept	✖ Cancel

If the patient requests to no longer receive texts from NFP, only turn text enabled preference **off** and leave call services **on**.

Well App Automatic Appointment Reminders

	—	☎	💬	—

WELL Hunt Groups

If you need to direct the patients to a site, or language group, use one of the following as an internal mention.

- @Admin Group- Members: WELL Admin Staff. Use this for questions in WELL or Errors in Automations/QR
- @Spanish Group- Members: Spanish Speaking Staff. Use this group for help in addressing incoming Spanish messages.
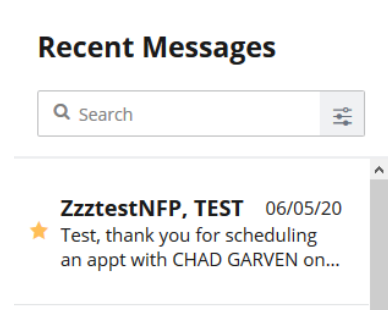- @Arabic Group- Members: Arabic Speaking Staff. Use this group for help in addressing incoming Spanish messages.

There is also a Group for each site as follows:
- @Tremont Group
- @ABR Group
- @W117th Group
- @NorthCoast Group
- @Puritas Group
- @DSO Group
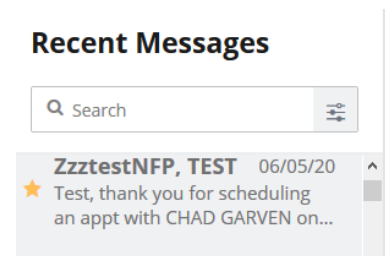- @Ridge Group

Open, Closed, and Pending Channels

Open channels- appear in white. Triggers include:

- When the patient messages us
- When the patient attempts to cancel their appointment in within 24 hours of their appointment time. If this occurs and the appointment has not been removed from the right-side bar, staff will need to manually send the cancellation Quick Response and cancel the appointment in Epic following late cancel guidelines.
- When a message will not go through to the patient
- When manually opened by staff member

Recent Messages

Search

ZzztestNFP, TEST   06/05/20
Test, thank you for scheduling an appt with CHAD GARVEN on...

Closed channels- appear in grey. Triggers include:
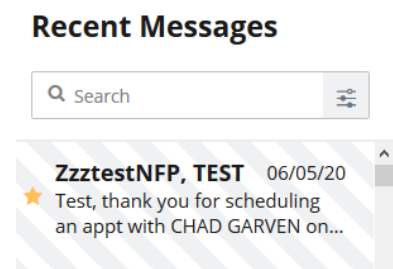
- When reply is sent to the patient (exception: pending channel status. See below)
- When manually closed by staff member

Recent Messages

Search

ZzztestNFP, TEST   06/05/20
Test, thank you for scheduling an appt with CHAD GARVEN on...

Pending channels: appear in striped grey and white. Triggers include

- When an internal mention is sent
- When manually marked pending by staff member

Note: replying to a patient that has a pending channel status will NOT automatically close the channel. Pending channels must be closed and resolved manually.

Recent Messages

Search

ZzztestNFP, TEST   06/05/20
Test, thank you for scheduling an appt with CHAD GARVEN on...

Please Close a channel when patient needs have been addressed so that other staff know the issue has been resolved. We want as few open and pending channels as possible!