Beta Opt-In

**Subject line:**

Your organization is invited to a Beta: {CLIENT\_FACING\_FEATURE\_NAME}



**Your organization is invited to a Beta: {CLIENT\_FACING\_FEATURE\_NAME}**

This invitation is for the following practice ID(s):

You need to fill out the opt-in form: {OPT\_IN} by {OPT\_IN\_DEADLINE} at 3 p.m. ET, to enroll in this test – if you don’t take this step, your organization will not receive this functionality.

Please notify any athenaOne users at your organization who should be aware of this feature. For more information, please check out the Release Note: {RELEASE\_NOTE}.

**This Beta is scheduled to begin on {ALPHA\_START\_DATE}.**

{BRIEF\_DESCRIPTION}

If there’s specific criteria for targeting: We think your organization will find this feature useful as {TARGETING\_REASON}

**What should I expect?**

By participating in this Beta, you’ll see: {WORKFLOW\_CHANGES}

**Opt-in to enroll in this test. For more information and relevant screenshots of the functionality, please check out the Release Note: {RELEASE\_NOTE}.**

**Additional notes on this feature:**

{ADDITIONAL\_NOTES}

**Tell us what you think!** You know what could improve your daily workflows on athenaOne better than anyone, so your feedback during this test is vital to help us shape a feature that addresses your needs.

***If feedback channel already exists*: Feedback:** During this test, we’ll use feedback method to hear from you; please actively utilize this channel to provide feedback and ensure your voice is heard.

For any questions about the test, you can submit a case to our dedicated support team by navigating to Support > Success Community > Contact the Client Support Center > Enter Descriptive Details > Additional Services > Alpha/Beta Support > Review Resources > Create Online Case. Please use this [Alpha/Beta Support Case Routing](https://success.athenahealth.com/s/article/000119757) article for more information.

**Why am I receiving this?**

You’re receiving this as a beta coordinator for your organization, which means you’ve been identified as the person to review and act on Beta and invitations. This invite has been sent to coordinators responsible for {WHY\_AM\_I\_RECEIVING\_THIS}, so it’s possible that other coordinators at your organization could respond to this communication as well. [Learn more about coordinators>](https://success.athenahealth.com/s/article/000008946)

**Note**: If you'd like to opt out of all future alphas and betas, please contact your Customer Success Manager.

We’re always testing new features and collecting feedback to prepare for each product release – alphas and betas help us to test the functionality with user participation. That’s where you come in! To learn more, please visit our [Overview: Alpha & Beta Participation](https://success.athenahealth.com/s/article/000008946) page on the Success Community.

Help us improve! Share your thoughts on alpha and beta documentation [here](https://athenahealthrc.iad1.qualtrics.com/jfe/form/SV_eVX27nhQDryFPFQ).

**Introducing the Alpha and Beta Engagement page!**

This page is your one stop shop to discover new alpha and beta opportunities and track the status of tests your organization is involved in. In the Success Community go to **Collaboration> Alpha and Beta**.

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CSM Notification: *{CLIENT\_FACING\_FEATURE\_NAME} Beta* – *{INVITE\_DATE}*

Notification

Task Title (80 characters):

Notification: Beta - {CLIENT\_FACING\_FEATURE\_NAME}

Task Summary (5,000 characters):

We’re reaching out to your customer’s beta coordinators via email on {INVITE\_DATE} about the {CLIENT\_FACING\_FEATURE\_NAME} Beta.

Task Details (5,000 characters)

{TASK\_DETAILS}

# **Resources**

**All resources to be included with Notification must be noted in this section. Please include placeholders for documents and other items stored elsewhere (e.g. Smartsheet) to ensure they can be included.**

Internal contact for questions: {PROPS\_OWNER}

Release Note: {RELEASE\_NOTE}

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**Reminder Email – Beta Opt-in**

**Direct Customer Email (single send) – *Feature Reminder***

***Subject:***

Reminder:You're invited to {CLIENT\_FACING\_FEATURE\_NAME} Beta

Hello,

Your organization is invited to the {CLIENT\_FACING\_FEATURE\_NAME} Beta. If you have not done so already, please fill out this form: {OPT\_IN} to opt-into this Beta by {OPT\_IN\_DEADLINE} at 3 p.m. ET. This Beta will begin on {BETA\_START\_DATE}.

Please review the Release Note: {RELEASE\_NOTE} for more detail.

athenaNet Posting –Feedback Survey *-* Deployment date

Title (85 characters max): Survey: {CLIENT\_FACING\_FEATURE\_NAME} Beta

Body (3,998 characters max):

Your organization has been participating in the {CLIENT\_FACING\_FEATURE\_NAME} Beta for two weeks, so you’ve had some time to get to know this functionality, including what works well and what could be improved. We're asking you to share your thoughts to help us improve this functionality.

{BRIEF\_DESCRIPTION}

Please take this brief survey to help us better understand your experience with this feature – your insight is incredibly valuable in guiding the direction of this feature. Thank you for your time!

For more information on this feature, check out the Release Note: {RELEASE\_NOTE}.

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**CSM Invite Needed**

Hello!

We're reaching out so you can contact your customers about the {CLIENT\_FACING\_FEATURE\_NAME} – beta wave #{WAVE\_NUMBER}. Please invite your customer(s) accordingly.

**This email is not meant to be forwarded, please use the details outlined below for your calls or to form your own invitation to your clients.**

**Contexts For Consideration: [fill out table]**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Context ID** | **Account Name** | **CS Team** | **Service Tier** | **CSM Name** | **CSM Email** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**Highlights of this feature:**

* **Short Summary:** {BRIEF\_DESCRIPTION}
* **Why your customer is invited:** {TARGETING\_REASON}
* **What to expect:** {WORKFLOW\_CHANGES}
* Opt-In Form: {OPT\_IN}
* **Last Day to** **Opt-in:** {OPT\_IN\_DEADLINE}
* **Launch Date:** {ALPHA\_START\_DATE}
* **Release Note:** {RELEASE\_NOTE}

**More details:**

* **Roadmap Timeframe:** {ROADMAP\_TIMEFRAME}
* **Enablement Options:** (Context-Level, User-Level, Department-Level]
* **Available Testing Environments: [**Preview, Client Train, Client Sandbox]
* **Internal Contact/PrOps Owner:** {PROPS\_OWNER}
* **Functionality Questions:** Please submit a case to the Alpha/Beta Support case classification.
* **Form of Notification for Changes:** [anet or email]

**Note:** If your customer is not on the list, then you received this email as a part of a Swimlane distro for Top 25 Enterprise customers. You may contact the PrOps Owner if you have a customer that would also be interested in participating.

**Please contact the PrOps Owner for the following:**

* There are additional contexts you’d like included but are not listed
* You have more than a few contexts to opt-in and would prefer to send a list of contexts versus completing the opt-in form
* You miss the opt-in deadline and would still like your client to be enabled

You can view the full list of customers already participating in a given alpha or beta via the Alphas & Betas dashboard in Salesforce, once the wave has launched. Click the waffle in the upper-left corner, search for or click on "Alphas and betas", and ensure the drop-down list is set to "All". From there, you can search for specific alphas or betas to see the full list of organizations who are live on this beta.

Thank you,

Alpha Beta Team