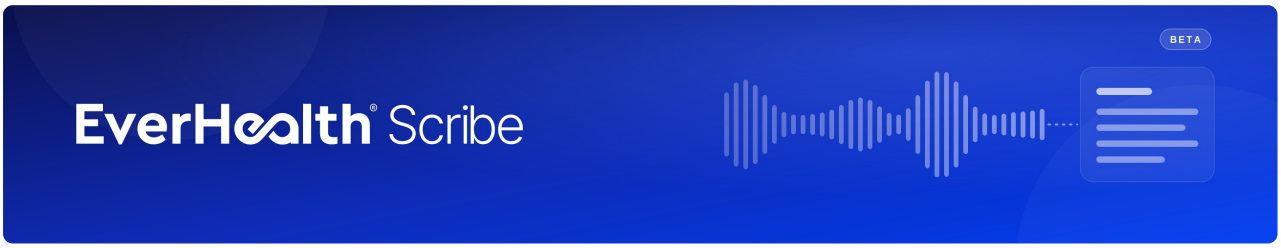
Onboarding

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The iSalus Implementation team will work with your practice to complete contracting, configure your system, and train providers. This section will describe all the necessary configurations required for a successful Go-live.

Project Overview

1. iSalus will coordinate a Project Kick-Off Call with your team after submitting the Access Request Form. This call will be used to determine the following information necessary for configuring your database:
    - Desired Chart Tabs & respective templates for scribe output - **HPI, Exams, ROS, Treatment Plan**
    - Necessary changes to the Intelligent Intake *(if applicable)*.
    - Confirm the contract signer's contact details
    - Request the list of providers (iSalus username & company email) expected to use EverHealth Scribe
    - Confirm availability for provider training
2. Desired **configurations are complete** by the iSalus team
3. **Training** is held for selected providers
4. Practice Readiness **Checklist completed** by you & your team
5. **Validate the process end-to-end** using a test patient with a provider
6. **Go-Live**

Practice Readiness Checklist

Prepare every provider (email on file, the list to enable, and the extension or app installed), confirm your templates and patient-consent language, run a pilot, then roll out.

For practice administrators. This is your operational companion to Getting started with EverHealth Scribe. The single biggest predictor of a smooth launch is preparing every provider account before go-live.

Pre-flight: for each provider

☐ **Email address on the iSalus user** (User Setup). EverHealth Scribe reads it at sign-in to identify the provider and to set up two-factor authentication. Without it, sign-in fails, including a “two-factor authentication is required” message.

☐ **Providers to enable are identified.** Give your iSalus project contact the list of providers to turn on. Implementation enables them for EverHealth Scribe; your job is to provide the list.

☐ **Default Resource set correctly.** In **User Setup → Resources**, confirm each provider's **Default Resource** matches the schedule resource their appointments are booked under. If these do not match, the provider's appointments will not appear in EverHealth Scribe.

☐ **Browser extension and/or mobile app ready.** Each provider has the EverHealth Scribe Chrome extension and/or iPhone app installed and ready on the device(s) they will use.

Download the Chrome Extension

Available in the Chrome Web Store

Best for in-office visits, with the patient chart open beside Scribe.

Download the Mobile App

Download on the App Store

For capturing on the go.

Managed devices and shared computers

If your practice uses managed devices and your technology team must install new software, complete the extension or app installation before go-live. Also, remember the browser extension must be present on every computer a provider uses. If providers do not each have a single laptop, for example, a shared desktop in each exam room is used by all staff seeing patients there. Be sure to install the extension on each of those computers.

Pre-flight: for the practice

☐ **Templates configured** so each intended chart tab can receive Scribe content (Setup → Interface Setup → Scribe Configuration), handled with your iSalus Implementation team.

☐ **Patient consent and privacy reviewed.** Confirm your Notice of Privacy Practices and consent or intake forms cover ambient listening.

☐ **Pilot test completed.** One provider has done a successful test sign-in and a test encounter, end-to-end.

Phased rollout

- **Start with a pilot.** Pick 2-5 providers and validate the full flow: sign-in, capture, Send to EHR, and the note landing in the chart.
- **Expand in waves.** Once the pilot is smooth, add providers in groups rather than all at once.
- **Name a champion.** Designate an internal go-to who fields day-to-day questions and gathers feedback.

Training & distribution

- **Train the first wave with iSalus.** The iSalus Implementation team trains your initial (pilot) cohort directly.
- **Cascade to later waves.** Your champion and the first-trained providers help train the remaining waves, which builds in-house expertise and lets your practice expand at its own pace.
- Share the provider articles, Getting Started with EverHealth Scribe and Using EverHealth Scribe safely, with every provider.
- Pick one recommended telehealth capture method for consistency (see How EverHealth Scribe Works in OfficeEMR).
- Offer light-touch office hours in the first weeks to reduce tickets.

Track adoption & support

- **Track who is live.** A provider is live at their first signed note via Scribe. Work with your team to review a few notes to ensure everything is coming in as expected.
- **Watch early signals.** Heavy editing or slow time-to-sign can flag a configuration or training gap.
- **Set the escalation path.** Provider → your champion → iSalus Implementation / Support. Once live, submit provider add/remove changes through a support ticket.

Getting started with EverHealth Scribe

Download EverHealth Scribe, sign in with your OfficeEMR account, record a visit, review the draft, and send it to the chart.

Step 1: Get EverHealth Scribe

Add the browser extension, the iPhone app, or both. Use whichever suits you best.

Download the Chrome Extension

Available in the Chrome Web Store

Best for in-office visits, with the patient chart open beside Scribe.

Download the Mobile App

Download on the App Store

For capturing on the go.

This **may already have been done for you**, as described in the Practice Readiness Checklist

Step 2: Sign in with iSalus

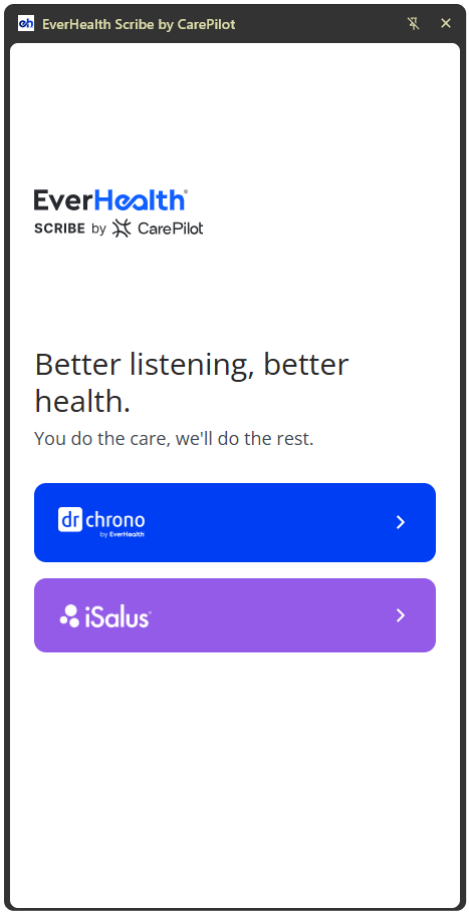
[redacted]

Open EverHealth Scribe and choose “iSalus.”

[redacted]

Enter your iSalus (OfficeEMR) credentials. This connects EverHealth Scribe to your provider profile and schedule

Sign-in trouble? If you see “Something Went Wrong” (including a “two-factor authentication is required” message), your iSalus user most likely needs an email on file in User Setup. See FAQs for more information.



Step 3: See your first patient

[redacted]

On your first sign-in, two sample appointments are added so you can practice. Your real appointments appear right alongside them.

[redacted]

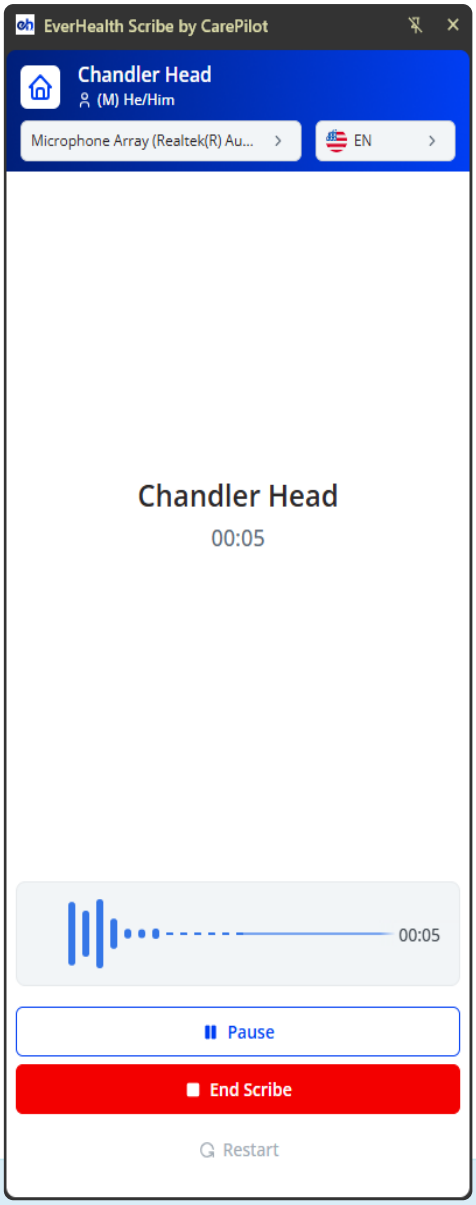
Select your patient and start recording at the beginning of the visit.

[redacted]

When the visit is over, **stop the recording.** You can keep recording after the patient leaves to capture any extra dictation.

[redacted]

EverHealth Scribe **generates the note.** Wait for it, or move on to your next patient while it works in the background.

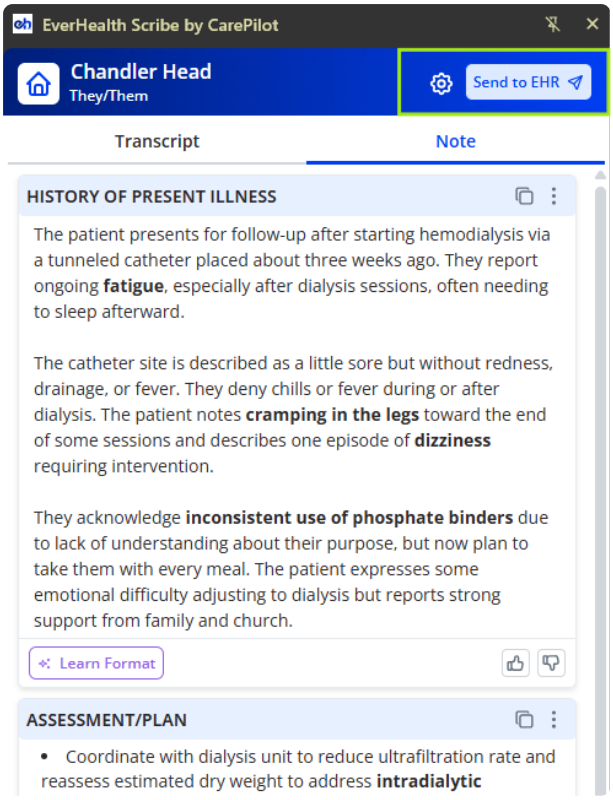


On **first sign-in** you will see two ready-made items:

- **Practice Visit** is the hands-on one. Open it, press record, and read a few lines aloud to watch Scribe build a note.
- **Sample Note** is a finished example. It shows what a generated note looks like, with no recording to attempt.

Both are **entirely in-app demos**. Nothing is written back to OfficeEMR. To try this end-to-end on a test patient. A test account will need to be added to your schedule within OfficeEMR.

Step 4: Review and send



[redacted]

Open the patient and review the generated note. Make any edits, and set your formatting preferences. EverHealth Scribe learns them and applies them next time.

[redacted]

When the note looks right, select **Send to EHR**. EverHealth Scribe writes the content into the chart tabs your practice configured in OfficeEMR.

You own the note. EverHealth Scribe creates a draft. Always review and edit before you sign. Double-check medications and doses, numbers and labs, left vs right, and negations (“denies” vs “has”). See Using EverHealth Scribe Safely.

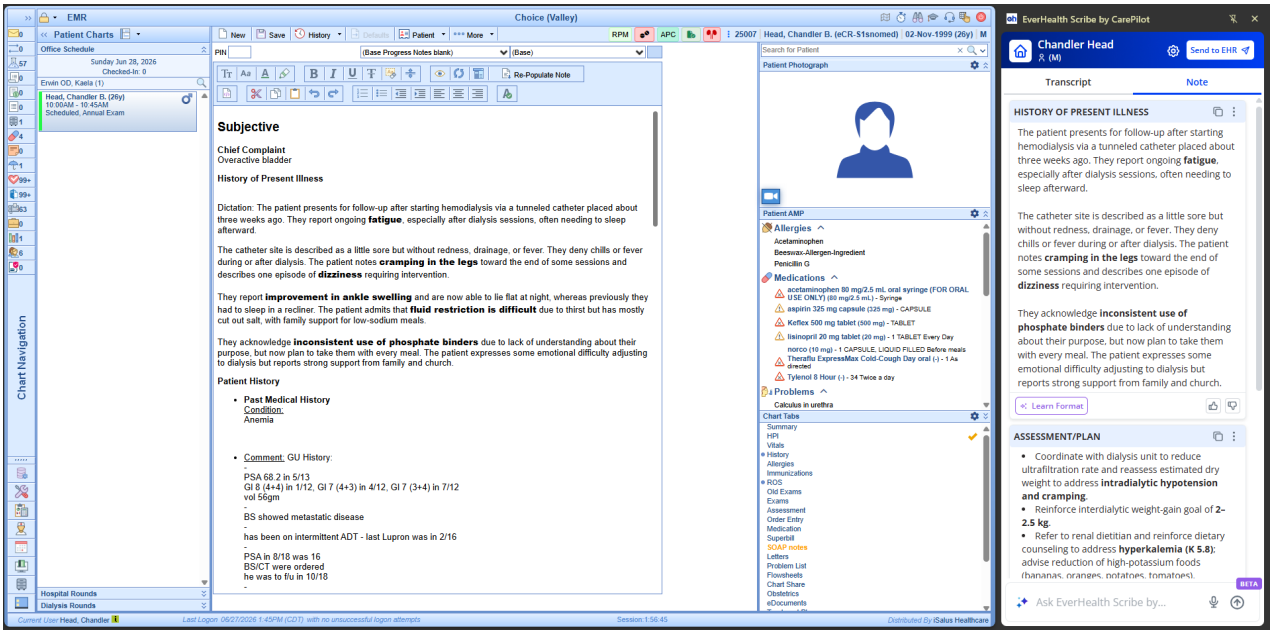
Step 5: Confirm in the chart

[redacted]

Back in OfficeEMR, **reload the patient** to see the content placed in the right chart tabs.

[redacted]

You do not need to open each tab one by one. Review it all together during your normal **sign-off**, from the chart or your **My Tasks** list.



Frequently asked questions

Do I have to type anything during the visit?

No. Talk with your patient as usual; Scribe drafts the note from the conversation. Your job afterward is to review and send. Data that is not captured within templates (Orders, Medications, Superbill) will still need to be entered until those features are made available.

What if the note has a mistake?

Edit it directly, tell Scribe what to change in plain language, or select Regenerate. Always review before sending, since you're the author of record. You can also make corrections within OfficeEMR before you sign off on the note.

Can I add things the patient did not hear, like my assessment?

Yes. After the visit, dictate any private findings and EverHealth Scribe will include them in the note. It is best to **pause** the recording for this **instead of hitting Stop**

Is my patient's information safe?

Yes. See Using EverHealth Scribe Safely for how audio is handled, where data is stored, and the HIPAA protections in place.

Explaining EverHealth Scribe to Patients

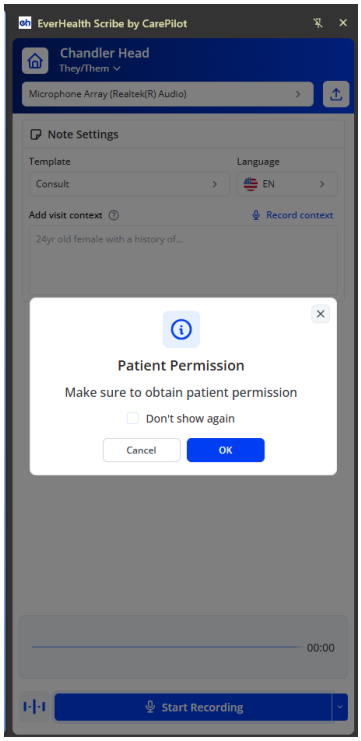
> Tell the patient you're using a tool that helps with notes so you can focus on them, confirm they're comfortable, and reassure them their information is private and protected. Consent is voluntary and can be withdrawn at any time.

A short, friendly explanation goes a long way. This article gives you simple ways to tell patients you're using EverHealth Scribe to help with documentation, plus clear answers to the questions patients tend to ask. The goal is a quick, reassuring exchange that lets you get the patient's okay and get on with the visit.

How to introduce it: a few examples

Use whatever sounds natural to you. A sentence or two is plenty:

- “I’m using a new tool that helps me take notes during our appointment. It lets me focus more on our conversation and finish your chart faster. Is that okay with you?”
- “This tool helps me capture the details of our discussion accurately, so I can spend more time on your concerns.”
- “I have a tool that helps with documentation, so all the important details are captured without taking time away from our visit.”



Common questions from patients, and how to answer

Am I required to consent? What if I say no?

“Your consent is entirely voluntary, and you can withdraw it at any time. This lets me focus more on you during our visit rather than on taking notes. If you’d prefer I not use it, that’s completely fine, and it won’t affect your care.”

Are the audio recordings saved?

“The audio is stored securely only until the notes are finalized and checked, and then it’s automatically deleted.”

Is my information safe?

“Yes. Your information is protected by HIPAA and secured with encryption to keep it confidential.”

Where is my data stored?

“All data is stored securely on servers located within the United States.”

Who has access to my data?

“Your information is only used for your treatment, payment, and the operation of our practice, as permitted by HIPAA, unless you ask me to share it with someone else, like a family member.”

How accurate is this technology?

“It uses advanced AI to create accurate transcriptions and summaries, and I still review everything myself to make sure it’s complete and correct.”

Tips for a smooth conversation

- **Keep it brief and confident.** A calm one-liner reassures more than a long explanation.
- **Frame it around the patient.** The benefit they care about is your attention: less time on the keyboard, more time on them.
- **Make “no” easy.** Reassure them that declining won’t affect their care, so saying yes feels genuinely optional.