

Beta Program Overview

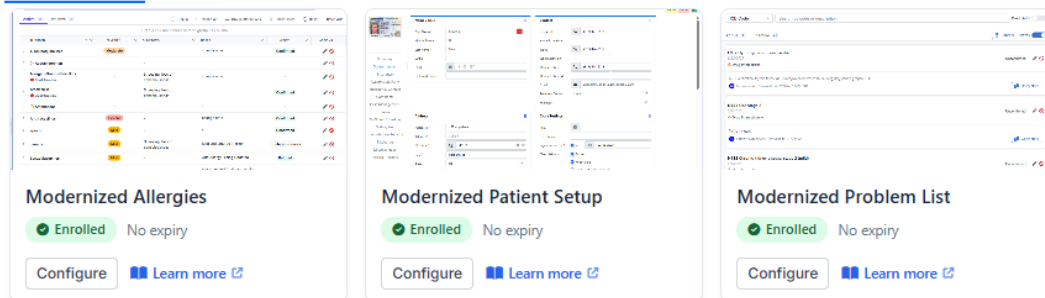
Last Modified on 08/03/2026 8:54 pm EDT

How we bring new features to your practice: safely, on your timeline, and with your input along the way.

Client Beta Catalog  Search beta features... Enrolled 

- Browse beta features as cards. Click a card to read the full write-up, view screenshots, and configure enrollment.
- **Enroll** turns a feature on for all users, all bang (!) users, or specific users/groups.
- **Now standard** means the beta has graduated — every user has it and the legacy version is retired.
- **Show prompt** asks each user, every time they open the feature, whether to use the beta or the standard version.
- If a beta's feedback form includes a **Beta Opt-Out** control, a user submitting it removes this client from that beta automatically and records their reason. The change is logged in the Audit tab.

Beta Catalog Audit



Why we have a Beta Program

OfficeEMR is always improving, but in a busy clinic, change shouldn't come as a surprise. A new screen in the middle of a patient visit is the last thing anyone wants, so we don't simply switch features on and hope they work for you.

Instead, the Beta Program gives you a way to try new features early and on your own terms. You turn them on for the right people, learn them at your own pace, tell us what you think, and step back if the timing isn't right.

The three parts, and how they work together

The Beta Program is one connected process made of three pieces:

1. Beta Options: You choose *what to try* and *who gets it*

New features we're testing are available as **beta options**. You decide whether your practice tries one, and you can start small, such as a single provider or one department, before rolling it out to everyone. Nothing changes for staff who aren't included.

2. Guided Tours: You learn *how to use it*

When a new feature is on, a built-in **guided tour** can walk your team through it one step at a time, right on the screen. There's no manual to read and no training session to schedule. The help is there when your staff need it, and they can replay it any time.

3. Beta Feedback: You tell us *what you think*

From the beta screen, anyone on your team can send **feedback**: a quick rating, a comment, or a screenshot of something that isn't working. It goes straight up to the team building the feature, and we can follow up with you. What you tell us shapes what the feature becomes.

It's a loop: you switch a feature on for a few people, a tour helps them use it, they send feedback, and we make improvements. When it's ready, it becomes a standard part of OfficeEMR for everyone.

What this means for your practice

- **Change on your schedule.** You opt in when the timing is right for your clinic, not when a release happens to

Modernized Allergies

Enrolled X

Modernized EMR > Allergies that allow for multiple user & practice defaults and experiences when entering patient allergies and associated reactions.

[Learn more](#)

Enrollment [Leave this beta](#)

☒ Your practice is enrolled. Use [Leave this beta](#) to unenroll everyone and return to the standard version.

☒ Enroll all users ☒ Enroll all bang (!) users

[Assign users & groups...](#) [Validate a user](#)

Allergies [Drug Interactions \(4\)](#)

Welcome to Allergies

This is the patient's allergy chart tab. We'll take a quick lap around the key actions. You can leave anytime with Esc.

1 of 10 [Previous](#) [Next](#)

SEVERITY [Filter](#) SY

> [Acetaminophen](#) [Moderate](#)

Beta Feedback X

[Feedback](#) [Attachments](#)

Feedback Type *

[Bug](#) [Feature Request](#) [Usability](#) [Performance](#) [Other](#)

Overall Experience *

1 2 3 4 5

1 - Poor 2 - It's Ok 3 - Could be better 4 - I like it 5 - Fantastic

What did you like?

Tell us what worked well...

What could be improved?

Tell us what needs work...

Additional Comments

Anything else you want to share...

[Cancel](#) [Submit](#)

land.

- **No surprises.** Try a feature with a small group first. The rest of your staff keep working the way they do today until you're ready.
- **Learn as you go.** Guided tours let your team pick up a new feature without stepping away from their work.
- **A say in the product.** The features you use are shaped by feedback from practices like yours.
- **Reversible.** If a beta isn't working for you, you can go back to the standard version and tell us why.

How it works, start to finish

1. **A feature becomes available as a beta.** We let you know what's ready to try via Release Notes and by introducing a new item to the Client Beta Catalog
2. **Your practice opts in.** Work with your iSalus representative to turn it on, either for everyone or just the people you choose.
3. **Your team learns it.** A guided tour introduces the feature, and the help button (the ) is always there for a refresher.
4. **You share your experience.** Use the Beta Feedback button to tell us what's working and what isn't.
5. **We make improvements.** Your feedback drives the changes.
6. **The feature graduates.** Once it's proven, it becomes a standard part of OfficeEMR, with no action needed on your end.

At any point, you can adjust who's included or go back to the standard version.

Your privacy, protected throughout

Safe with your data: Everything in the Beta Program works within the same security and privacy protections as the rest of OfficeEMR. Beta features work on your real data the same way the standard versions do. If you attach a screenshot or recording to feedback, we'll ask whether it contains patient information so it's handled correctly, and it's stored securely like the rest of your data.

Getting started

Interested in trying something, or want to know what's available for your practice? See the **Setup > Client Beta screen** article or **reach out to your iSalus representative or support team**. They'll walk you through what's ready, help you decide who should get it, and make sure your team has what they need.
