

Client Beta

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

Try new OfficeEMR features before they're released to everyone. Beta Options are optional, reversible, and set up with help from iSalus.

What are Beta Options?

Beta Options let your practice try new OfficeEMR features **before** they're released to everyone. Each feature we're testing is a **beta option** that can be turned on for your organization and, once on, given to specific staff.

Trying a beta is optional. If your practice isn't signed up, you keep using the current, standard version of the feature.

Why try a beta feature?

- **Get new features early** and help shape them before they're released to everyone.
- **Roll out gradually.** Start with a few experienced users, then expand once you're comfortable.
- **Give feedback that matters.** Many betas include a Beta Feedback button that sends your input straight to our product team.

How your practice gets a beta feature

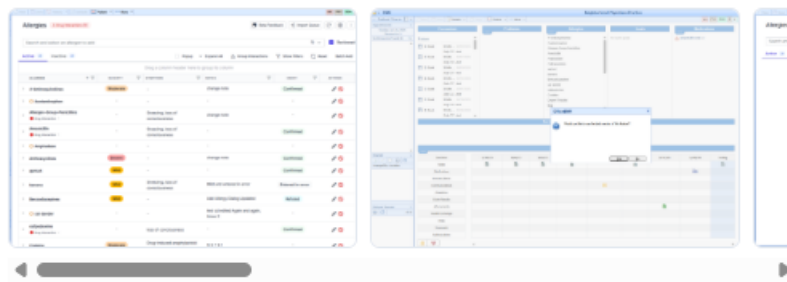
Making an option available to your practice via the **Setup > Client Beta** screen is handled by iSalus. Enabling an option that's in beta will be up to your practice admin or assisted by your iSalus Representative:

1. **Navigate to Setup > Client Beta** to see the options available for your practice. If you are missing a given option, **contact your iSalus representative or support** and let them know which feature you are unable to enroll in.
2. **Enroll** in a given Beta for your practice by choosing which user(s) or group(s) you'd like to have try the new feature.

You choose who gets it: everyone, or just the specific users or groups you name, so you can start with a small team first.

Modernized Allergies

Enrolled



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.

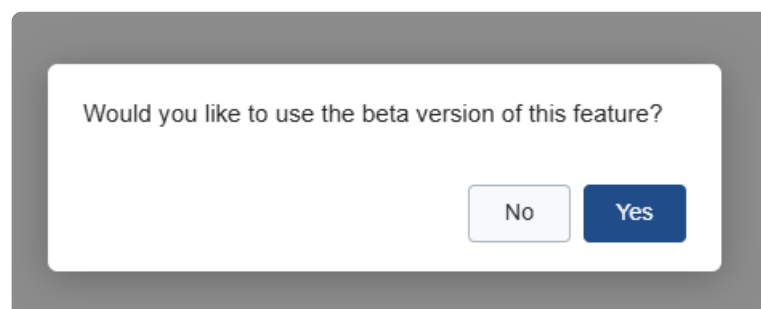
☒ Enroll all users ☒ Enroll all bang (!) users

[Assign users & groups...](#)

[Validate a user](#)

The opt-in prompt

For some features, once your practice is signed up, users see a short **prompt** the first time they open the beta screen, asking whether they'd like to try the new version. Accepting shows the new version; declining keeps the standard one. It's an easy way to introduce a change without forcing it. You may also choose not to allow the user to choose, which is controlled via the same Client Beta screen within the given Beta Option.



Using a beta feature

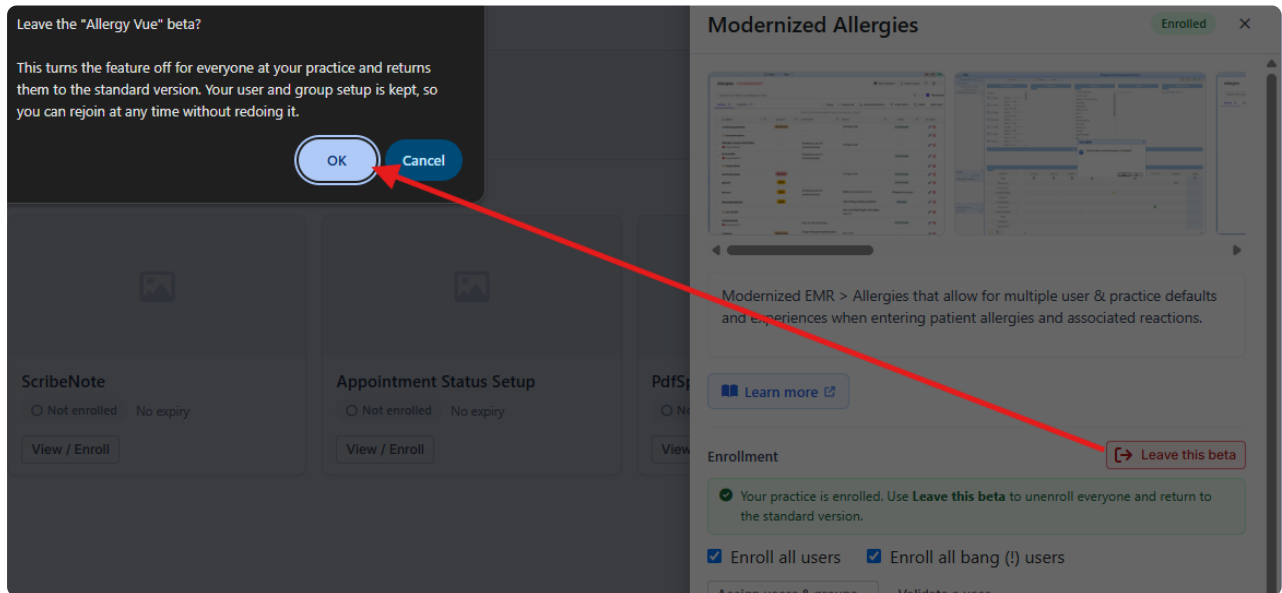
Once your practice is signed up (and, if prompted, after accepting), the staff who have it will see the new version of the feature in place of the old one. Betas work on your real data the same way the standard version does. In most cases, a beta is a new look or a new way of doing something you already do.

Turning a feature off

You have two ways to leave a beta:

- **Use the Beta Opt-Out control** on the feature's Beta Feedback form, where it's available. This removes your whole organization from that beta and returns you to the standard version. You can also tell us why you're leaving, which helps us improve.
- **Contact your iSalus representative or support** and ask to have your practice removed, or to remove specific users.

Either way, the affected staff return to the standard version.



Frequently asked questions

Will trying a beta affect my data?

Yes. Beta features work on your real data the same way the standard version does. As always, if you have any concerns, reach out to support before rolling a beta out widely or if you notice an issue while using the new version.

What happens when a beta feature is finished?

When a feature graduates, it's released to everyone automatically, and the beta goes away. You don't need to do anything.

Can I try a feature I've heard about but don't have?

Some betas are limited to specific practices. Contact your iSalus representative, who can tell you what's available for your practice.