

Introduction

Thanks for choosing Samantha as your personal EHR assistant! With Samantha, you are going to save time on filling out patient EHR information during exams and be able to focus more on patient care. This document will walk you through implementing your Samantha software and ensuring it is connected to your EHR system so that training will be smooth and easy for your providers.

Some information you will need for this implementation

Samantha Install Wizard Link: [Samantha w/ Allscripts Installer](#)

Allscripts Unity URL:

Service User Name Prefix:

Help, Troubleshooting, or Questions During Implementation

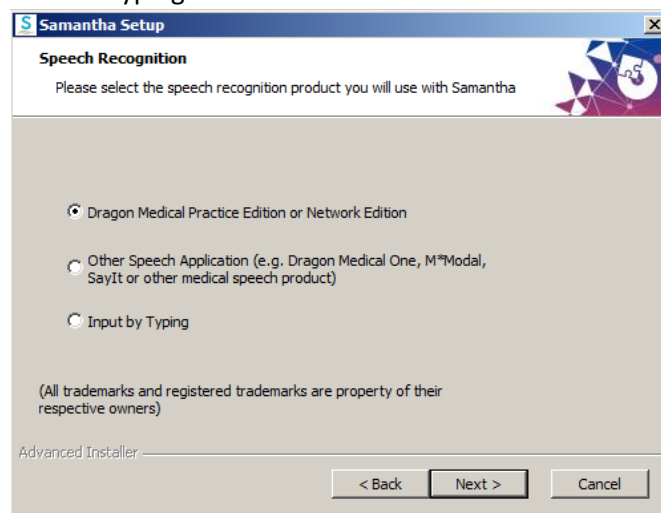
If you get stuck during implementation and need assistance, you can email or call Implementation Manager, Brendon White at the below contacts

Email: bwhite@noteswift.com

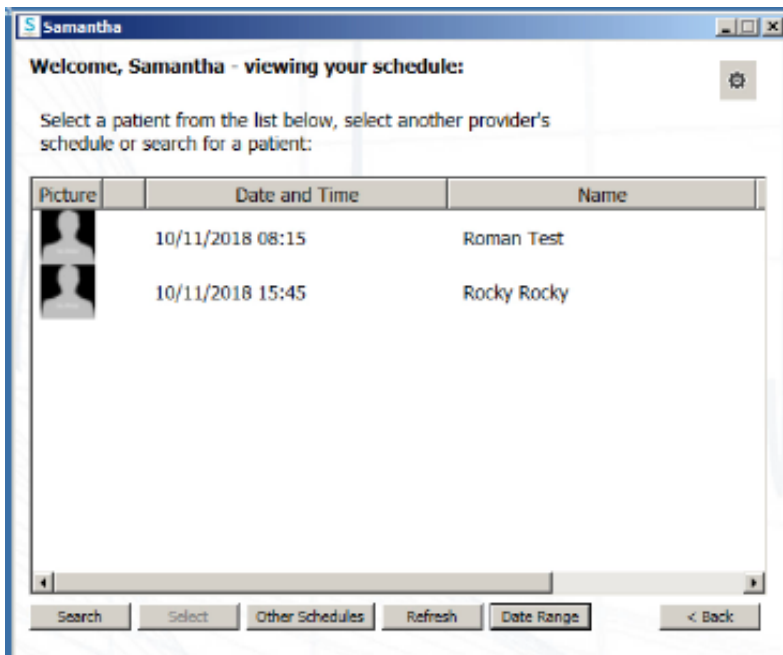
Phone: 1-800-727-1483

Process


- 1.) Click the link above to begin downloading the Samantha software install wizard. When the download completes, run the install wizard.
 - a. Accept the End-User License Agreement
 - b. Select the location you would like to install the software if different from default location
 - c. Select your speech recognition software (This can be adjusted later from the Options Menu)
 - i. If you use Dragon Medical Practice Edition or Dragon Medical Network Edition select the “Dragon Medical Practice Edition or Network Edition”
 - ii. If you are using Dragon Medical One, M Modal, SayIt, or another speech product, select “Other Speech Application”
 - iii. In the rare situation where you will not be using speech recognition, select “Input by Typing”



- d. Select if you would like to be involved in the User Experience Program to help improve/enhance our software. This will not store any personal information, but rather log the way the software is working and help us identify issues, tendencies, and logging how the product is being used so that we can improve functionality over time.
 - e. From there Click "Install"
 - f. Once the install completes, you can leave the box checked for "Launch Samantha", and click "Finish"
- 2.) The next box that will pop up will be the Activation. Copy and paste your Samantha License from the email you received, and select "Activate"
 - 3.) Once the key is validated, you will see Samantha Open and you will be prompted to create a new user for Samantha.
 - a. **Display Name:** This will be what Samantha shows in the software for this user, generally something like Dr. Smith or Jane Doe.
 - b. **EHR Unity URL:** This is supplied by Allscripts and will associate your instance of Allscripts with Samantha. Copy and paste the URL from the email or the beginning of this guide.
 - 4.) Once you input the EHR Unity URL, if you click "More", you will see the other fields automatically populate.
 - 5.) If you have a Service User Name Prefix listed in the email you received, you must enter that in front of the information in that field before selecting "OK". Be sure to include all characters and the colon (:) to ensure the correct setup.
 - 6.) Once your user is created, the user's login for Samantha will be the same login used for Allscripts EHR. Before logging in, make sure:
 - a. You have your microphone connected and Dragon (or your other speech recognition software) is up and running
 - 7.) When you login to Samantha, the initial screen will show your patients that are checked into Athena. You can double click to open the note window and begin dictating, or highlight the patient and click "Select"



- a. From this page you can also:

- i. **Search**- Find a patient by name
- ii. **Date Range**- Change the date range to view other days' patients
- iii. **Other Schedules**- Select another provider to view their checked in patients
- iv. **Back**- Log out of Samantha and go back to the login screen
- v.  – This will give you the options menu; will be reviewed in training

8.) Now that Samantha is implemented, we will need to validate it is communicating with Allscripts Professional

- a. Before validating, ensure you are logged into the user profile of the person who will be using Samantha daily

9.) Open Allscripts Professional and login to the EHR

10.) Open Samantha software and login

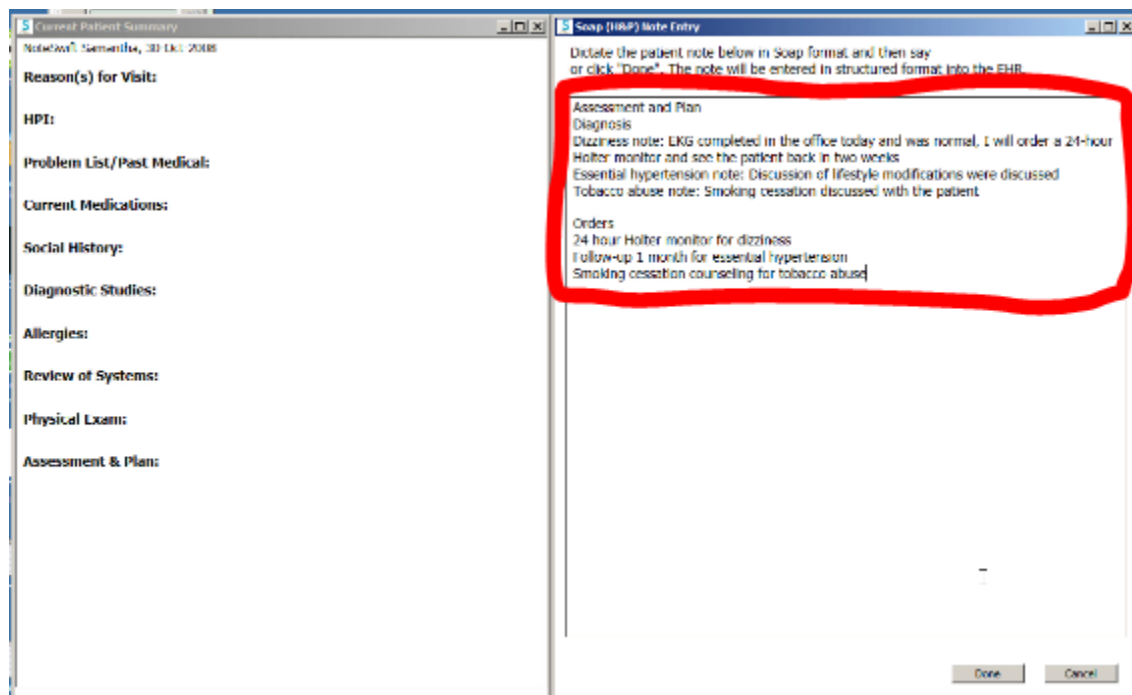
11.) Add a test patient to the schedule in Allscripts and check them in

12.) In Samantha, hit the refresh button and your test patient will be listed

13.) Select your test patient; Samantha will open a Summary and SOAP Note Entry Window for the patient

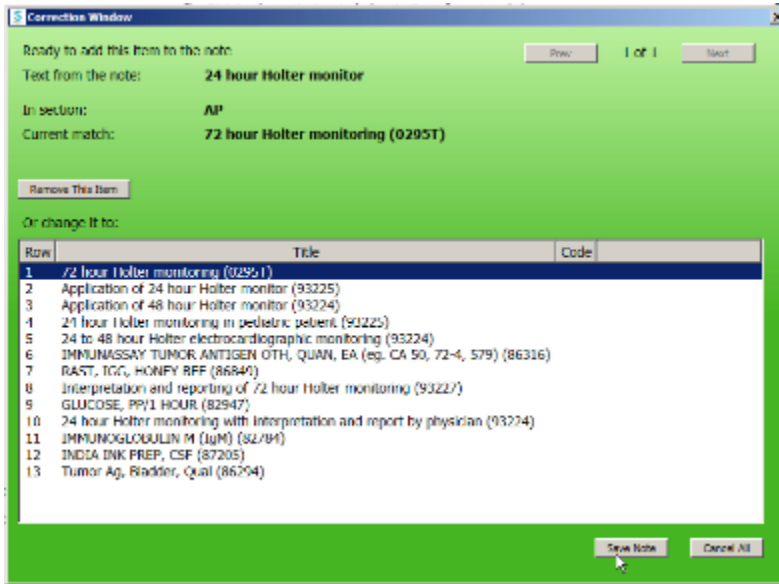
14.) Once the Summary and SOAP Note Entry window load, speak into your microphone and you should see your words populate into the SOAP Note Entry Window

15.) Clear out the dictated words, then, copy and paste the Samantha Validation Test Note into the SOAP Note Entry window (This should be attached to your Implementation email).

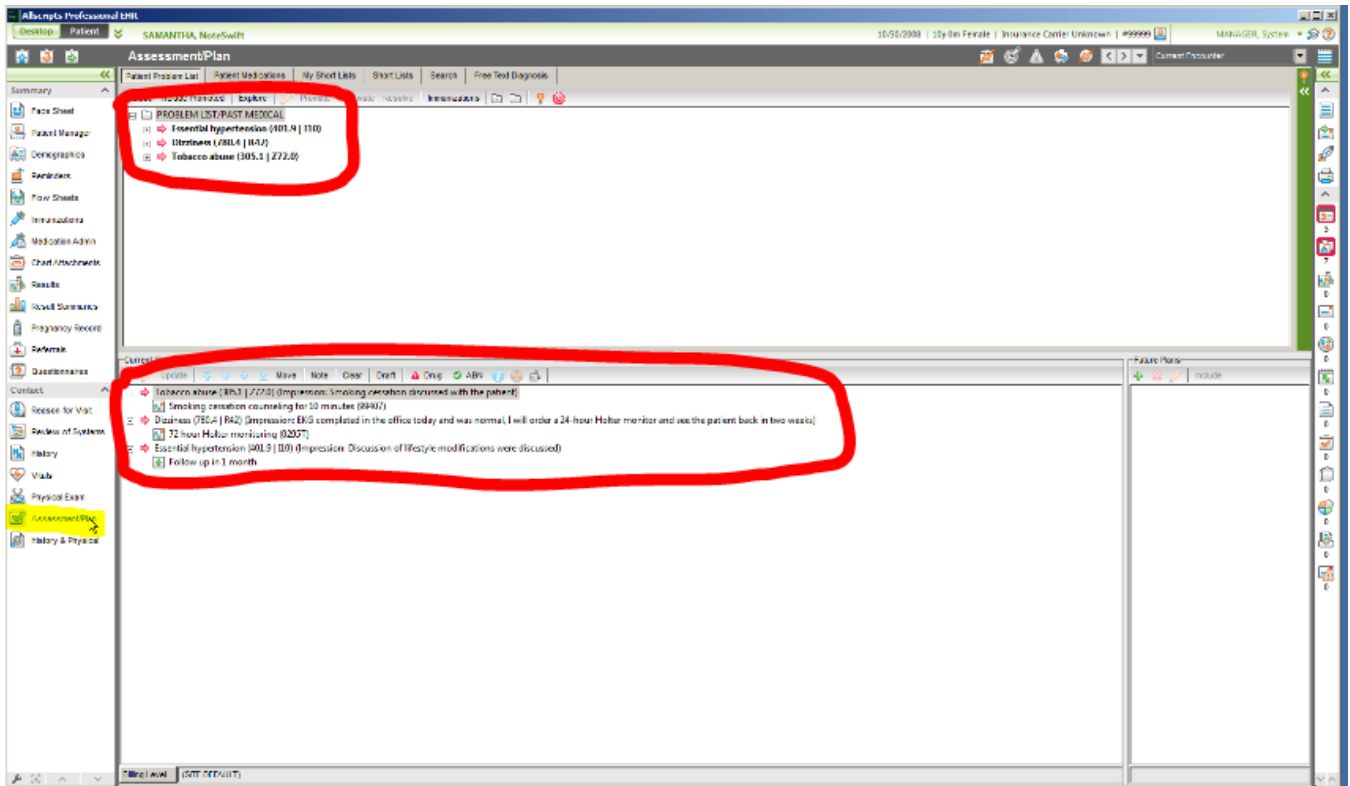


16.) Click Done

- 17.) A correction window will pop up to fully validate that Samantha is communicating with Allscripts Pro.
Select the top option from the list and click Save Note



- 18.) You will be prompted that the Note Entry is complete and asked if you want to continue editing; select No
19.) Go back to Allscripts Professional EHR, pull up the patient encounter and screenshot the Assessment and Plan section notes that were entered



- 20.) Go back to Samantha, and pull up a patient other than the test patient; the SOAP Note window and Summary window should populate and bring any notes already in that days encounter into the Summary Window
- 21.) Send the screenshot(s) to both emails below:
 - a. Training- redwards@noteswift.com
 - b. Implementation- bwhite@noteswift.com
- 22.) Once we receive the screenshot(s) we will contact the user(s) and/or Training contact at your practice to schedule training sessions