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/ Athena Installer

Athena Practice ID:

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
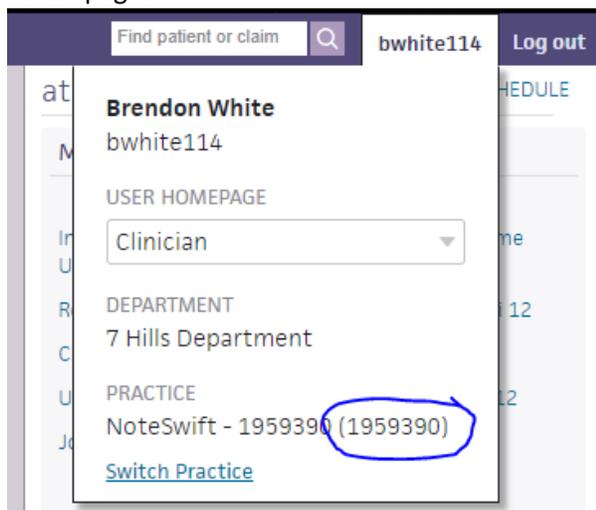
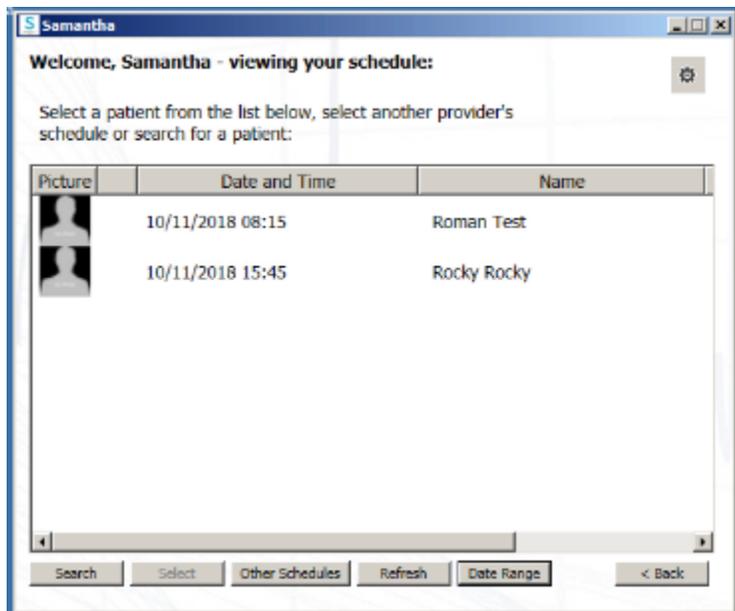Email: bwhite@noteswift.com

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 are not using any third-party speech software, select "Samantha Speech"
      ii. If you use Dragon Medical Practice Edition or Dragon Medical Network Edition select the "Dragon Medical Practice Edition or Network Edition"
      iii. If you are using Dragon Medical One, M Modal, SayIt, or another speech product, select "Other Speech Application"
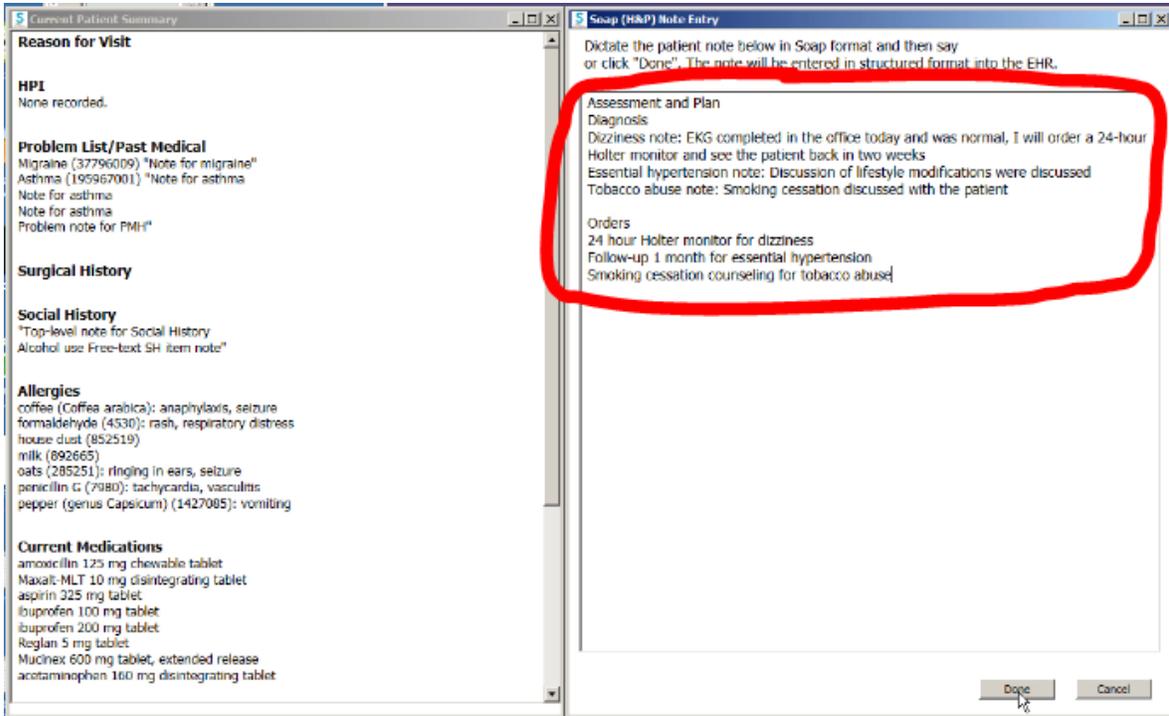   iv. In the rare situation where you will not be using speech recognition, select "Input by Typing"

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. **Practice ID**: This will be your practice ID from Athena. It is noted on this guide on page 1 and can also be found in your Athena EHR when you click on your user name in the top right corner of the page.

c. **Provider**: Once your practice ID is put in, the provider list will populate. Select the provider from the list associated with this user.

d. **Email/Confirm Email**: Enter your preferred email address to be associated with this user

e. **User Name**: Enter the user name you would like to login to Samantha. You can make this the same as your Athena User Name if you would like, but it is not required

f. **Password/Confirm Password**: Enter the password you would like to use to login to Samantha. Again, this can be the same as your Athena Password if desired but is not required.

4.) Once your user is created, you can use the information to login to Samantha. Before logging in, you will want to make sure

a. You have your microphone connected and create the speech profile if using Samantha Speech - OR- Dragon (or your other speech recognition software) is up and running

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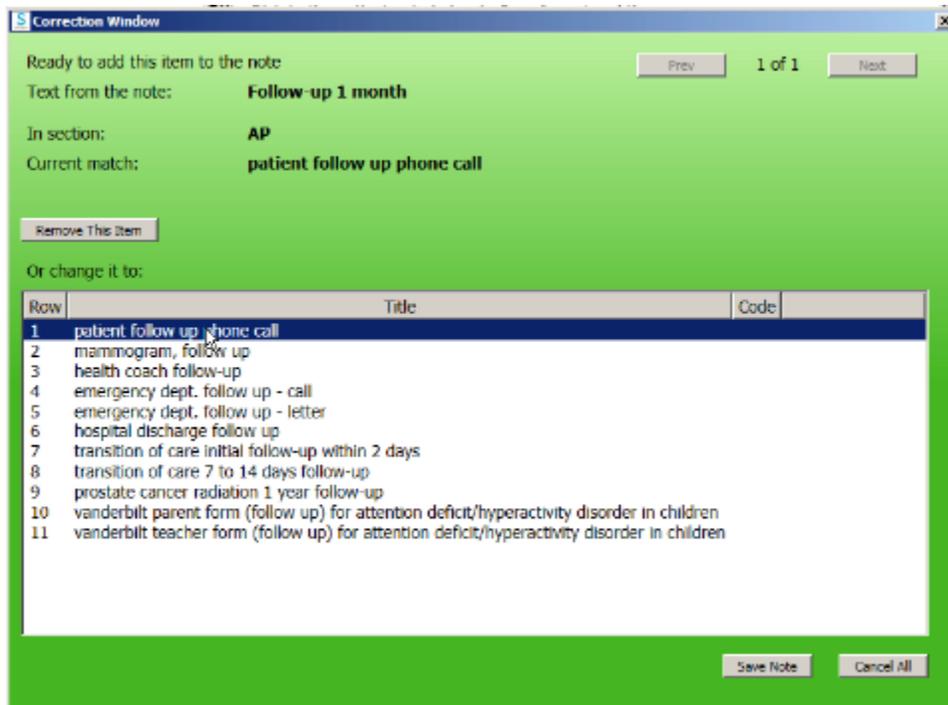
a. From this page you can also:
   i. **Search**- Find a patient by name
   ii. **Date Range**- Change the date range to view other days' patients
   iii. **Other Schedules**- Select another provider to view their checked in patients
   iv. **Back**- Log out of Samantha and go back to the login screen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

6.) Now that Samantha is implemented, we will validate that the software is communicating appropriately with athenaClinicals EHR
   a. <u>Before validating, ensure you are logged into the computer under the user profile of the person who will be using Samantha daily</u>
7.) Login to athenaClinicals EHR and ensure Samantha is open and the user is logged in
8.) Add a test patient to the schedule and check the patient in on athenaClinicals EHR
9.) Once the patient is checked in, go back to Samantha and Refresh the schedule
10.) Select the test patient from the list
11.) Once the Summary and SOAP Note Entry window load, speak into your microphone and you should see your words populate in the SOAP Note Entry Window
12.) 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).
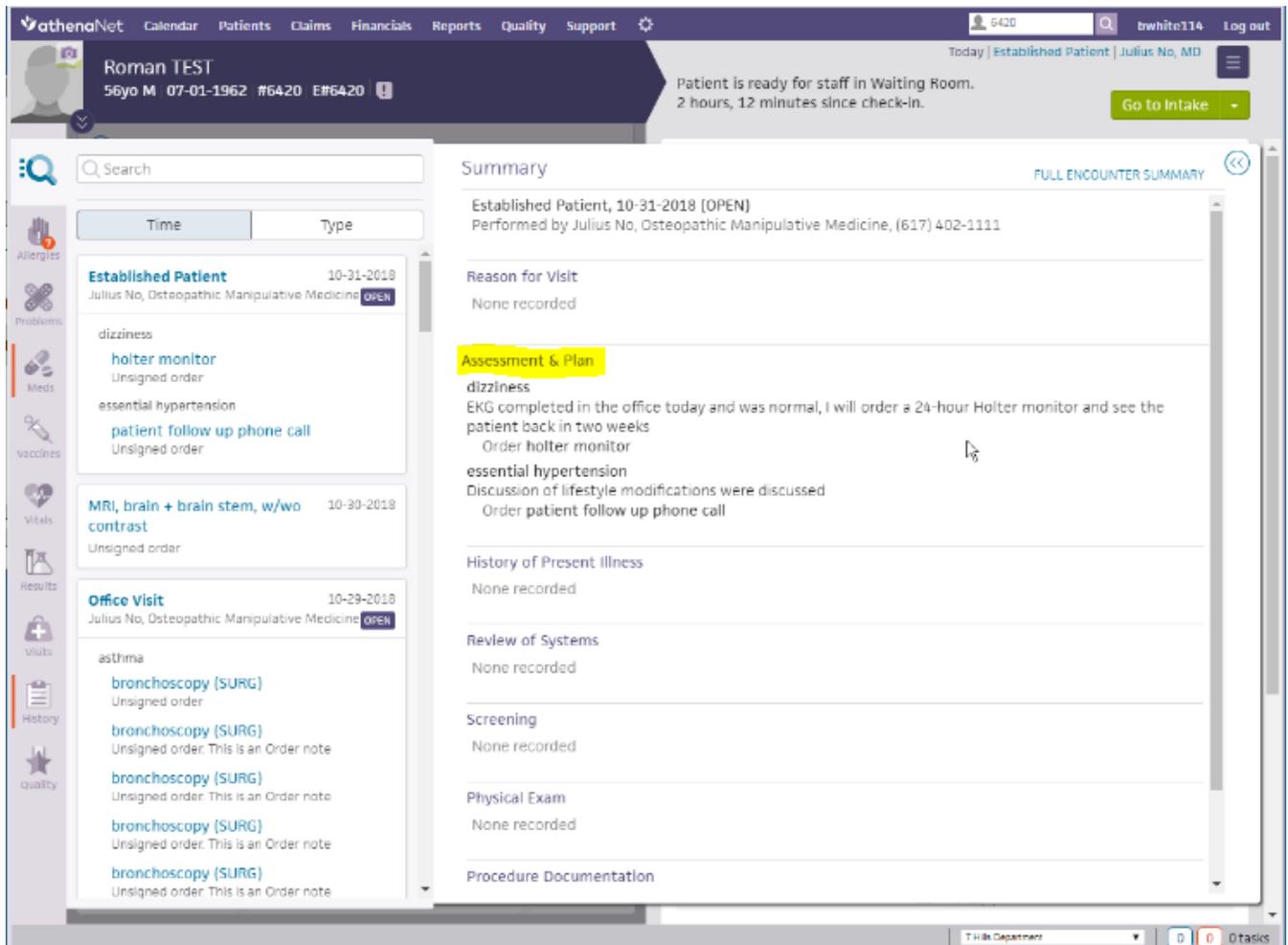
13.) Click Done

14.) A correction window will pop up to fully validate that Samantha is communicating with athenaClinicals, select the top option from the list, and click Save Note

15.) You will be prompted that the Note Entry is complete and asked if you want to continue editing; select No

16.) Go back into athenaClinicals, pull up the patient encounter and screenshot the Assessment and Plan section notes that were entered

17.) 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

18.) Send the screenshot(s) to both emails below:
   a.   Training- redwards@noteswift.com
   b.   Implementation- bwhite@noteswift.com

19.) Once we receive the screenshot(s) we will contact the user(s) and/or Training contact at your practice to schedule training sessions