Customize Your Clinical Note Templates using EverHealth Scribe

Last modified on 05/04/2026 12:13 pm EDT

What you can customize | **Template sections** | **AI-Driven sections** | **Attestations** | **Inline instructions** | **Best practices** | **Support**

Additional resources

- Getting Started with EverhHealth Scribe (Installation)
- Using EverHealth Scribe During Patient Visits
- Reviewing and Editing a Clinical Note using EverHealth Scribe
- Sending Your Note to DrChrono using EverHealth Scribe
- Best Practices using EverHealth Scribe
- Template Customization Guide for Clinic Administrators (EverHealth Scribe)
- EverHealth Scribe – Managing Note Templates (Quick Guide)
- Using EverHealth Scribe in DrChrono (Video)
- Using EverHealth Scribe with the Mobile App
- Using EverHealth Scribe with the Mobile App (Video)
- EverHealth Scribe Frequently Asked Questions (FAQ)

Quick summary

Feature	What it does	Best used for
Exceptions-based Sections	Pre-fill normal findings; only document exceptions	Physical Exam, Review of Systems
"Learn Format" for AI - Driven sections	AI learns your writing style over time	HPI, Assessment, Plan
Attestations	Auto-append standard phrases to notes	Legal disclaimers, consent language
Inline instructions	Conditional logic based on what you say	Specialty workflows, edge cases

What you can customize

Every note is made up of sections (like HPI, Physical Exam, and Assessment & Plan). For each section, you can choose how it behaves:

- Let the AI generate it based on your conversation (great for narrative sections like HPI or Plan)
- Use a fixed template where normal findings are pre-filled and you only update what has changed (ideal for Physical Exam or Review of Systems)
- Mix and match — some sections on templates, others AI-driven

Setting up exceptions-based template sections (PE or ROS)

Template sections are best for parts of your note that follow a predictable pattern — where most findings are

normal and you only need to call out exceptions.

How it works

You define what "normal" looks like once. During a visit, the AI fills in those defaults, and you (or the AI) only update the findings that are different from normal.

Good candidates for templates
- Review of Systems (ROS)
- Physical Exam
- Vitals or standard screenings

> ℹ️ You only need to configure "normal" once. After that, just correct what's changed — saving you significant editing time.

Using "Learn Format" for AI-Driven sections

For sections that need more narrative and clinical judgment — like your HPI or Assessment & Plan — the AI can write these for you based on what was said during the visit. The AI gets better the more you use it. After several notes, output quality improves noticeably as it learns your style.

How it works

When you enable Learn Format Mode, the AI studies your notes over time and adapts to your personal style: how much detail you include, the terminology you prefer, and how you structure your thinking.

What you control

- How much detail to include (brief summaries vs. thorough narratives)
- Terminology and clinical language preferences
- Whether to include prior visit context
- Focus areas like risk factors, goals of care, or follow-up plans

Learn Format Feature

EverHealth Scribe doesn't just generate your notes — it learns how *you* like to write them. The **Learn Format** feature allows EverHealth Scribe to recognize your unique documentation style, including custom headings, bullet points, and phrasing. By teaching EverHealth Scribe your preferred structure, your future notes will automatically follow the same consistent and professional format.

How to Use the Learn Format Feature

1. Open a note you've created from within EverHealth Scribe.

2. Make sure the note sections are formatted exactly how you'd like EverHealth Scribe to replicate them.

3. Click **Learn Format or the "Sparkle" button next to the note section**.

4. EverHealth Scribe will take a "snapshot" of your note's layout and analyze your formatting — including

section order, headings, spacing, and phrasing.

From now on, EverHealth Scribe will automatically apply your learned format to similar note types, keeping your documentation consistent across encounters.

Tip: You'll see the best results after using the **Learn Format** feature 3–5 times. Each use helps EverHealth Scribe refine its understanding of your style, just like a medical assistant improving over time as they learn from your examples.

What the Learn Format Feature Does

The **Learn Format** button helps EverHealth Scribe adapt to your specific way of writing notes.

Whether you use unique section titles, custom paragraph spacing, or distinct language patterns, this feature "trains" EverHealth Scribe to reproduce your preferred format.

Think of it as teaching EverHealth Scribe to *write like you*.

Once learned, your format will be applied automatically to future notes, so your documentation always maintains your personal style — without extra editing.

When to Use It

Use the Learn Format feature when:

- You have a specific way of organizing your notes (for example, custom headings or bullet points).

- You want to ensure all future notes use your consistent format automatically.

- You've updated your note structure and want CarePilot to follow your new layout.

Attestations (auto-adding standard language)

Attestations are standard phrases or disclaimers that automatically appear at the end of your notes. You configure them once and they are added consistently every time.

Examples of attestations
- "This note was generated with AI assistance and reviewed by the treating provider."
- Consent or counseling language (e.g., for pregnancy visits)
- Billing-required phrases

How to set them up

- You can add attestations that apply to all notes (global).
- Or set them to apply only to specific note types or clinical scenarios.
- Attestations can be turned on or off at any time.

Inline instructions

Inline instructions let you set up rules inside your templates: "If I say X, then do Y." This is the most advanced customization feature and is best set up after you have the basics in place.

Examples
- "If I say 'elevated glucose,' add an A1c review block."
- "If the patient is a minor, insert guardian consent language."
- "If I mention fall risk, add the standard fall prevention plan."

Best practices

Once you have configured your templates, the best approach is to test them in real clinical scenarios and adjust from there.

Recommended process
- Run your first few notes with the new settings in actual visits.
- Note anything that needs to be longer, shorter, or phrased differently.
- Adjust the section model, instructions, or normal values as needed.
- Revisit your template setup every few months as your workflow evolves.

Support

- Access DrChrono Support