

EverHealth Scribe – Managing Note Templates (Quick Guide)

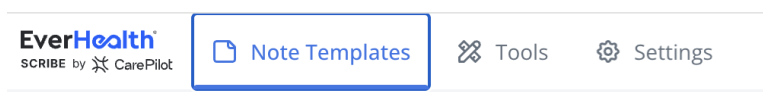
Last modified on 05/04/2026 12:11 pm EDT

Accessing Settings | Templates Tab Overview

Additional resources

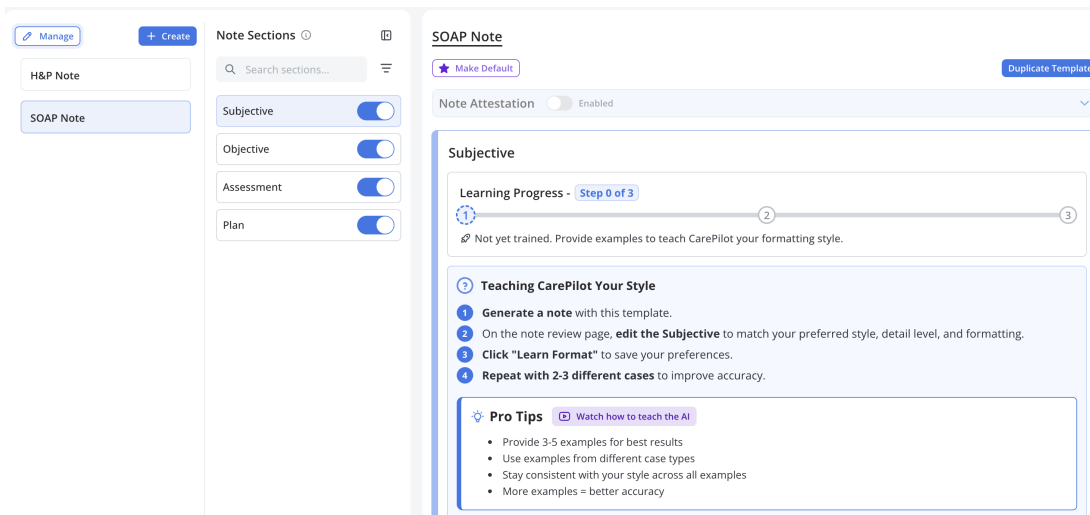
Getting Started with EverHealth Scribe (Installation)	Using EverHealth Scribe During Patient Visits	Customize Your Clinical Note Templates using EverHealth Scribe	Reviewing and Editing a Clinical Note using EverHealth Scribe	Sending Your Note to DrChrono using EverHealth Scribe
Best Practices using EverHealth Scribe	Template Customization Guide for Clinic Administrators (EverHealth Scribe)	Using EverHealth Scribe with the Mobile App	Using EverHealth Scribe in DrChrono (Video)	Using EverHealth Scribe with the Mobile App (Video)

Accessing Settings



1. From the **Schedule View**, click your **initials**
2. Select **Settings**
3. A browser page will open (web or mobile)
4. Click **Note Templates** in the top navigation bar

Templates Tab Overview



Manage Button

- Delete or update existing templates
- Adjust content, structure, or preferences

Create Button

- Build a new template from scratch
- Customize it to fit your workflow

Section Toggle Switches

- Turn specific sections **on or off**
- Control what appears in your notes

Additional Instructions

- Add extra guidance or preferences
 - Helps tailor how notes are generated
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