

EverHealth Scribe Rules: Create and Manage Documentation Rules

Last modified on 10/27/2026 1:06 pm EDT

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A rule is an instruction EverHealth Scribe applies every time it generates a note, whichever note template the provider uses. You state a documentation requirement once, and EverHealth Scribe follows it on every visit after that. You review every note before you send it, and you are responsible for the content you send to DrChrono.

Requirements

Change settings on a computer or iPad; the settings page is harder to use on a phone.

A rule you create applies to your own account. To create rules that apply to other providers in your practice, you need an organization administrator for the account.

 To have an organization administrator defined for your account, use the [DrChrono Support form](#).

Decide whether you need a rule

Rules are not the only way to change how a note reads. Choose the smallest change that covers the situation.

Situation	Use This
One section of one template should be written differently	Additional instructions on that section. See Customize Your Clinical Note Templates using EverHealth Scribe .
Physical Exam, Review of Systems, or Objective should start from your normal findings and change only what you discussed	Exceptions-based charting. See Customize Your Clinical Note Templates using EverHealth Scribe .
A requirement applies no matter which template is used	A rule
The requirement is about which codes EverHealth Scribe suggests	A rule

Choose where the rule applies

Before you create a rule, settle two things: which workflows it applies to, and who it applies to.

Which workflows?

Each rule needs at least one workflow target. The targets you turn on determine what the rule can change.

Workflow Target	Turn It On When the Requirement Is About
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Workflow Target	Turn It On When the Requirement Is About
Note Generation	What appears in the clinical note, and in which section
Diagnoses	Which ICD-10 diagnosis codes EverHealth Scribe suggests, or which it never suggests
Billing	Which CPT and HCPCS codes and modifiers EverHealth Scribe suggests

One rule can apply to more than one workflow. Turn on every target the requirement covers instead of creating a separate rule for each.

Who does it apply to?

Every rule is assigned to users. Only an organization administrator can assign a rule to anyone other than themselves.

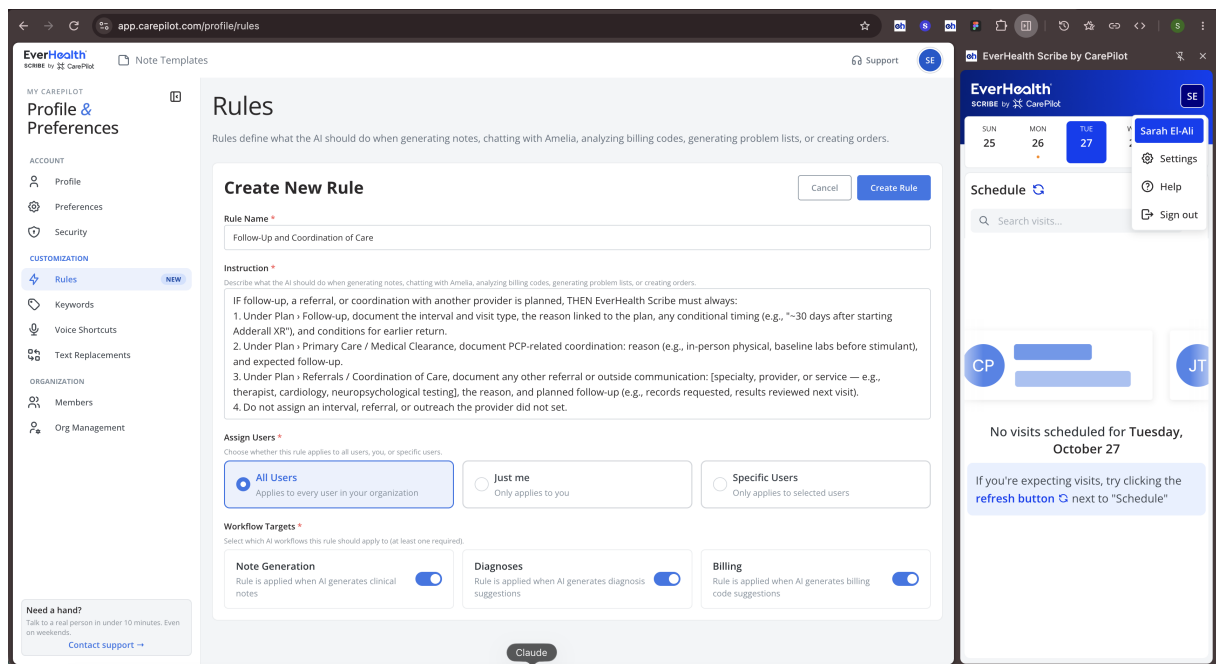
Assign Users	The Rule Applies To	Who Can Assign It
Just me	Your account only	Any user
All Users	Every user in your organization	Organization administrators
Specific Users	Only the users you select	Organization administrators



When you assign a rule to other users, tell them what it does, so they are not left accounting for content they did not ask for.

Create a rule

1. In EverHealth Scribe, select your initials in the top-right corner of the panel. A menu opens with **Settings**, **Help**, and **Sign out**.
2. Select **Settings**. The **Profile & Preferences** page opens in a new browser tab.
3. Under **Customization**, select **Rules**. The page lists your rules and shows whether each one is active or inactive.
4. Select **+ Create**, and then enter a **Rule Name**. Use a name your practice will recognize later, so the rule can be found and turned off without opening it.
5. Enter the **Instruction**. Write it as a condition and a requirement: what has to be true, and what EverHealth Scribe must do when it is. Name the section and the templates it applies to. Where a requirement has several parts, number them.
 - State what EverHealth Scribe must not do as well as what it must. For example, end a rule that documents follow-up plans with an instruction not to assign an interval the provider did not set.
 - Add formatting expectations only if the format matters.
6. Under **Assign Users**, select **Just me**, **All Users**, or **Specific Users**. Under **Workflow Targets**, turn on a switch for each workflow the rule applies to. At least one is required.



7. Select **Create Rule**, and then set the rule to **Active**. A new rule is inactive until you do this, and an inactive rule does nothing.

The rule appears in the table on the **Rules** page and shows as active. If it shows as inactive, EverHealth Scribe is not applying it.

More detail gives a more predictable result, but a rule written too tightly can force content into notes where it does not belong. Write a short rule, generate a test note, and add detail based on what you see.

Rule examples

Every rule follows the same shape: one condition that fires it, then a numbered list of what EverHealth Scribe must do when it does. The three examples below build on each other. Start with the first pattern and move on when a requirement needs more than it can carry.

Basic: one condition, one action

A standing requirement with nothing that varies. Write these as a single sentence.

Rule Name: H&P — Plan Structure

Instruction: IF generating a note, THEN EverHealth Scribe must always organize the Plan section using these subsections, in this order when applicable: Medications; Requirements prior to medication start; Required vitals / monitoring; Pharmacy; Patient education / side effects; Referrals / Coordination of Care; Administrative; Follow-up

Workflow Targets: Note Generation

Intermediate: several actions and a limit

One condition, several things to document, and a line stating what EverHealth Scribe must not do. Add that last line

whenever a rule could tempt EverHealth Scribe to supply a detail the provider never gave. Number the actions so you can edit one without rewriting the rule.

Rule Name: Follow-up and coordination of care

Instruction: IF follow-up, a referral, or coordination with another provider is planned, THEN EverHealth Scribe must always:

1. In the Plan section under Follow-Up, document the follow-up interval and visit type, the reason for it, any conditional timing, and the conditions for returning sooner.
2. In the Plan section under Referrals & Coordination of Care, document any referral or outside coordination: the specialty, provider, or service, the reason, and the planned follow-up.
3. Do not assign an interval, referral, or outreach the provider did not set.

Workflow Targets: Note Generation

Name sections as they appear in your own note template. If your template divides the Plan section into subsections, name the subsection instead, so EverHealth Scribe puts each piece where you expect it.

Advanced: a value that changes every encounter

Some values are different at every visit, so there is no single correct answer to write into the rule.

Rule Name: H&P Vital Signs

Instruction: IF any vital sign is obtained, entered, or reported for this encounter, THEN EverHealth Scribe must always:

1. Document each vital sign under Physical Exam › Vitals with its value and unit (BP, HR, RR, temperature, SpO2, weight, height, BMI), for each one obtained.
2. If vitals are patient-reported (telehealth), note this in HPI › Monitoring (e.g., "Patient-reported home vitals today") and label the Physical Exam › Vitals line "Patient-reported."
3. If a vital sign was not obtained, omit it. Do not estimate a value or write "WNL."

Workflow Targets: Note Generation

Test a rule

Test a rule before you use it in a live visit, and test it before you assign it to other users.

Test in two passes, because they answer two different questions:

- **Pass 1, with your other rules turned off** — what does this rule do on its own?
- **Pass 2, with your other rules turned back on** — does it still behave that way alongside everything else in the account?

Running both passes at once is what makes a result hard to read. If several rules apply to the same workflow and you change more than one thing between notes, you cannot tell which rule or which edit produced what you see. Change one thing, generate one note, then look.

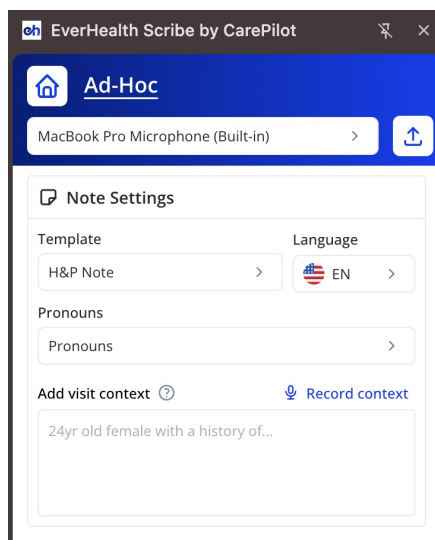
You need a sample transcript for both passes. Ask the AI tool of your choice to write a sample transcript of a patient encounter in your specialty, then paste it in instead of recording a visit. That is faster than speaking a mock visit aloud, and it lets you use the same transcript for every test, so the transcript is not one of the things changing.



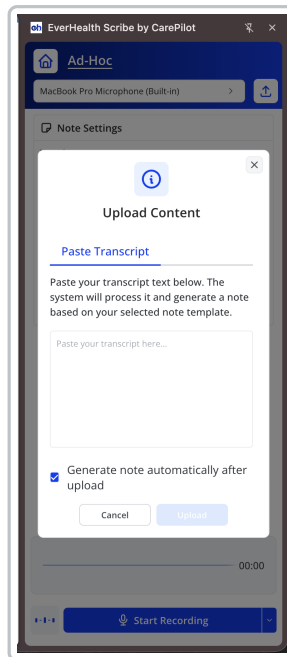
Use a sample encounter the AI tool invents. Do not enter protected health information, or details from a real patient's visit, into a tool your practice has not approved for it.

Pass 1: what the rule does on its own

1. On the **Rules** page, write down which active rules share a workflow target with the new rule. You turn these back on in Pass 2.
2. Set those rules to inactive, and make sure the new rule is set to **Active**. It should now be the only active rule on its targets.
3. In EverHealth Scribe, check that **Template** under **Note Settings** is the template the rule names, and then select the upload transcript icon in the top bar, to the right of the microphone.



4. On the **Paste Transcript** tab of the **Upload Content** dialog, paste your sample transcript. Leave **Generate note automatically after upload** selected.



5. Select **Upload**. EverHealth Scribe generates the note from the transcript.
6. Open the generated note and check three things: the content is there, it is in the section you named, and it is formatted the way you expect. If any of the three is wrong, edit the rule, generate another note from the same transcript, and check again. Change one thing per note. See [What if something doesn't work?](#)

Pass 2: how the rule behaves with your other rules

Run this pass only after Pass 1 gives you the result you want.

1. Set the rules from step 1 of Pass 1 back to active.
2. Generate one more note from the same transcript.
3. Check the same three things. If the result changed from Pass 1, two rules on the same workflow are competing. See [Two rules produce conflicting content](#).

How rules work

Does a rule override my template instructions?

Yes. A rule states what EverHealth Scribe must do. Additional instructions shape how one section of one template reads within that. When the two conflict, the rule wins.

Can one rule apply to more than one workflow?

Yes. Turn on a switch for each workflow target the rule applies to. At least one is required.

What happens when two rules affect the same thing?

EverHealth Scribe applies both. Rules on the same workflow target can compete, which is why you test a new rule

in two passes.

Does editing a rule change notes I already generated?

No. Editing a rule changes future notes. Notes already generated keep the content they were created with.

What if something doesn't work?

Change one thing at a time and generate a new note from the same transcript after each change, so you can tell which change worked.

Nothing in the note changed

On the **Rules** page, check that the rule is set to **Active**. A rule you created but never activated does nothing.

The change is in the note, but not where you expected

Check that the rule has the right workflow target switched on, and name the section and the templates in the rule's instruction.

Content appears when it should not

Narrow the rule to the condition that should trigger it, instead of stating it as a requirement for every note.

The content is right but the formatting is wrong

Add the formatting expectation to the rule's instruction.

Two rules produce conflicting content

EverHealth Scribe applies every active rule, so two rules on the same workflow target can compete. Set one to inactive, generate a note, and then set it back to active and generate another. Comparing the two notes tells you which rule is producing the content you don't want.

Content appears that none of your rules explain

An administrator may have assigned a rule to your account. You cannot see rules assigned to you, so ask your organization administrator.

A rule works for you but not for a colleague

Check that the colleague is one of the users assigned to the rule.

The rule still does not produce what you expected

Stop adding detail to the rule and contact support.



To contact us, use the [DrChrono Support](#) form.

Edit, turn off, or delete a rule

Manage rules from the table on the [Rules](#) page.



A deleted rule cannot be restored. To stop a rule without losing it, set it to inactive instead. An inactive rule keeps its name, instruction, workflow targets, and assigned users, and you can set it back to active at any time.

- **Edit** — change the name, instruction, workflow targets, or assigned users of a rule.
- **Set to inactive** — keep the rule but stop applying it.
- **Delete** — remove the rule permanently.

Editing or deleting a rule assigned to other users changes it for every user it covers.
