

AI4DOCS.AI

Smart EMR

Complete Help Guide

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ai4docs.ai/smart-emr/docs

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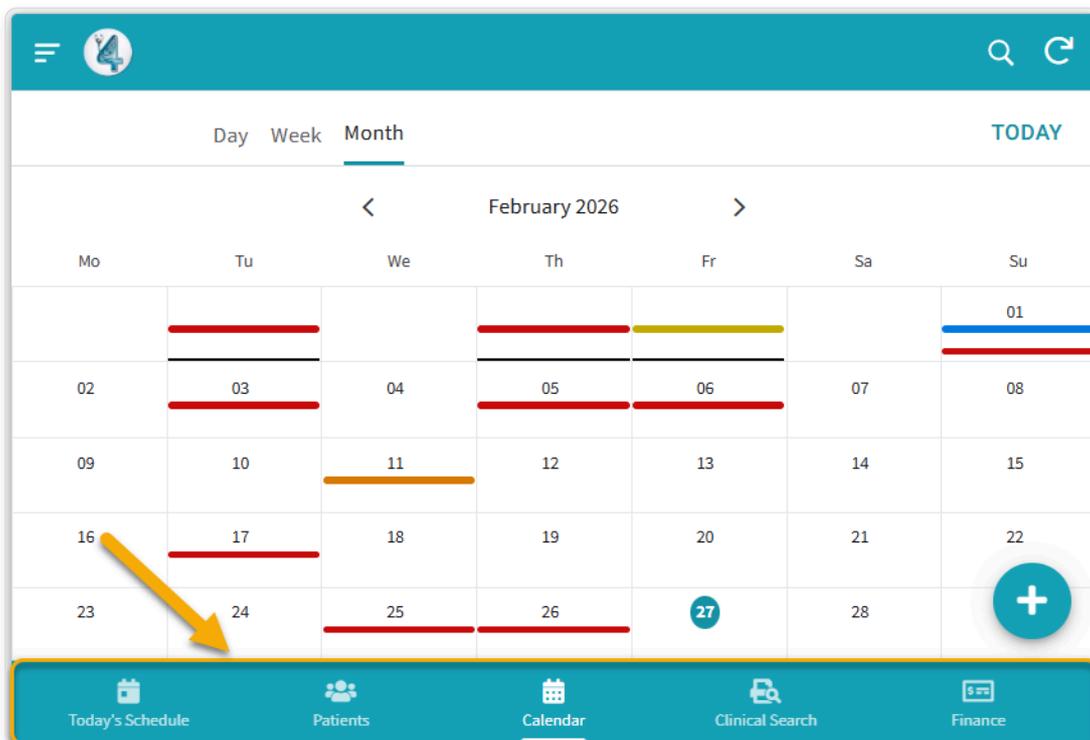
Smart EMR - Complete Help Guide

Welcome to Smart EMR

Smart EMR is a simple, secure Electronic Medical Records system built specifically for private practice clinics. It helps you:

- Manage patient files and demographics
- Schedule and track appointments
- Write clinical notes automatically using AI (the AI4Docs.AI Clinical Documentation Assistant)
- Print prescriptions, medical reports, referral letters, and lab/imaging orders as PDF files
- Track your clinic's income and generate financial reports
- Control exactly what each staff member can see and do

Your data belongs to you. Smart EMR runs entirely inside your own Google account. Your patient records are stored in your own Google Drive, in a Google Sheets file that you own. AI4Docs.AI never has access to your patient data.



Smart EMR main navigation — access all features from the bottom menu

Installing AppSheet on Your Devices

Smart EMR runs on a platform called **AppSheet** (made by Google). Think of AppSheet as the "container" that runs your EMR. You need to install it on every device where you (or your staff) will use Smart EMR.

Recommendation: We strongly recommend doing the first-time setup (Part 2) on a computer or tablet, not on a phone. The screen is bigger and the setup steps are much easier to follow on a larger screen.

On iPhone or iPad

1. Open the **App Store** (the blue icon with a white "A" on your home screen)
2. Tap the **Search** tab at the bottom of the App Store screen
3. Type **AppSheet** in the search bar and tap Search
4. Find the app called "**AppSheet**" by Google (it has a purple/blue icon)
5. Tap **Get** (or the cloud download icon if you previously downloaded it) to install it
6. Once installed, open the AppSheet app
7. Tap **Sign In** and sign in with your **Gmail address** — this must be the **same Gmail address you used when you subscribed to AI4Docs.AI CDA** (at clinic.ai4docs.ai). Using a different email will not work

On Android Phone or Tablet

1. Open the **Google Play Store** (the colorful triangle icon on your home screen)
2. Tap the search bar at the top of the screen
3. Type **AppSheet** and tap the search icon
4. Find the app called "**AppSheet**" by Google
5. Tap **Install** and wait for the download to finish
6. Once installed, open the AppSheet app
7. Sign in with your **Gmail address** — this must be the **same Gmail address you used when you subscribed to AI4Docs.AI CDA** (at clinic.ai4docs.ai). Using a different email will not work

On a Computer (Windows or Mac)

You do not need to install anything on a computer. Smart EMR runs in your web browser.

First time (getting the app): When you subscribe to AI4Docs.AI CDA and open the Settings page, you will find a "**Get Smart EMR**" link. Clicking this link opens AppSheet in your browser and creates your

personal copy of Smart EMR. After the copy is created, you will see your app open in the browser.

Every time after that:

1. Open your web browser (Google Chrome is recommended)
2. Go to www.appsheet.com
3. Click **Sign In** at the top right corner
4. Sign in with the **same Gmail address** you used when subscribing to AI4Docs.AI CDA
5. You will see your Smart EMR app listed. Click on it to open it
6. **Tip:** Bookmark this page in your browser so you can find it easily next time

Important: Always use the **same Gmail address** everywhere — when you sign into AI4Docs.AI CDA, when you sign into AppSheet, and when you set up Smart EMR. If you use different email addresses, things will not connect properly.

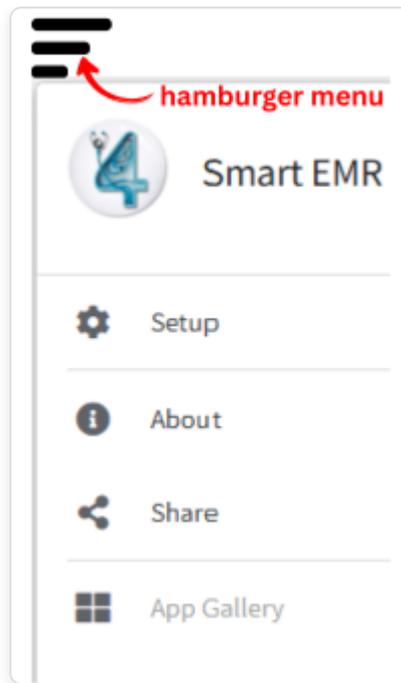
Step 1: Add Yourself as the Administrator

When you first open Smart EMR, it has a fake placeholder user. You need to replace it with your real information so the app knows who you are.

1. Open Smart EMR on your computer or tablet
2. Look at the **top left corner** of the screen. You will see a small icon with three horizontal lines (this is called the **hamburger menu** or **side menu**). Tap or click on it
3. A side panel slides open. You will see the word **Setup** with a gear icon next to it. Tap on **Setup**
4. The Setup screen opens. At the top of this screen, you will see several tabs. Tap the tab called **USERS**
5. You will see one entry with the email `SETUP_REQUIRED@clinic.com` and the name listed next to it. Tap on this entry to open it
6. Tap the **Edit** button (it looks like a pencil icon or it may say "Edit")
7. **Delete** the fake email address and type in **your real Gmail address**. This must be:
 - The same Gmail address you use to sign into the AppSheet app
 - The same Gmail address you used to subscribe to AI4Docs.AI CDA at clinic.ai4docs.ai
 - **All three must be the same email**. If they are different, the AI integration will not work
8. Type in your **Name** (for example: "Dr. Ahmed Mohamed")
9. Under **Roles**, make sure the checkbox next to **Admin** is checked. The Admin role gives you full control of the entire system — you can see and do everything. You do not need to check any other role boxes; Admin already includes all permissions
10. Make sure **Active** is set to **Yes**
11. Tap **Save** at the bottom of the screen

After saving, you must refresh the app (this is called "syncing"):

- **On a phone or tablet:** Place your finger at the top of the screen and pull downward (like pulling down a curtain). This refreshes the app
- **On a computer:** Look at the top right corner of the screen. You will see a circular arrows icon that looks like a refresh button. Click it
- **This is called "Sync."** You will need to do this frequently in Smart EMR. The app does NOT refresh automatically — you must always sync manually after performing any action



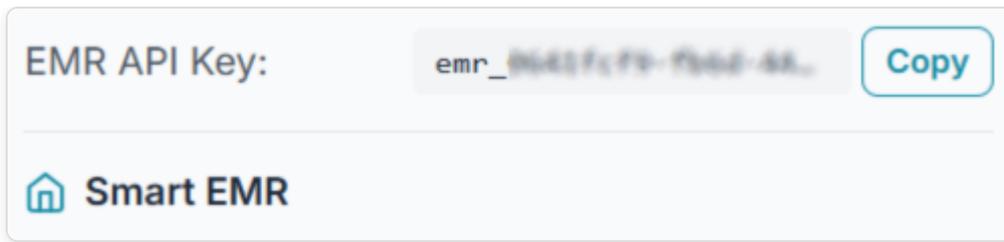
The hamburger menu — tap to access Setup, Help, and other options

Step 2: Connect the AI (CDA Integration)

This step connects your Smart EMR to the AI4Docs.AI Clinical Documentation Assistant (CDA). This is what allows the AI to write your clinical notes automatically. **You need two things: your API Key and your CDA email address.**

Part A: Get Your API Key from the CDA App

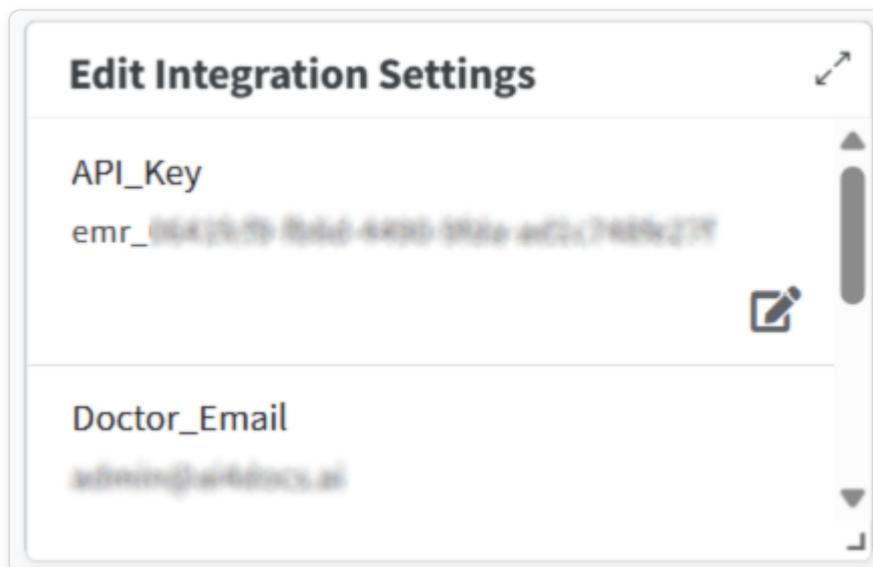
1. On your computer browser, go to clinic.ai4docs.ai
2. Sign in with your AI4Docs.AI account
3. After signing in, look for the **Settings** icon (it looks like a gear) and tap it
4. Scroll down until you see the section titled **EMR Integration**
5. You will see your API Key displayed. It looks something like this: `emr_a1b2c3d4-e5f6-7890-abcd-ef1234567890`
6. Tap the **Copy** button next to the key to copy it to your clipboard
7. Keep this browser tab open (you will need the email address too)



CDA Settings — EMR Integration section showing your API Key

Part B: Enter the API Key and Email into Smart EMR

1. Go back to your Smart EMR app
2. Tap the **hamburger menu** (three horizontal lines at the top left)
3. Tap **Setup** (gear icon)
4. Tap the **Edit Integration Settings** tab at the top of the Setup screen (you may need to swipe the tabs to the left to find it)
5. You will see two fields: **API_Key** and **Doctor_Email**
6. Tap the **Edit** button (pencil icon)
7. In the **API_Key** field: paste the API key you copied from the CDA app in Part A
8. In the **Doctor_Email** field: type the **exact same email address** that you use to sign into the CDA app at clinic.ai4docs.ai. **This email must match your CDA account exactly.** If you type a different email, the AI will not be able to send notes back to your EMR
9. Tap **Save**



Smart EMR Setup — Edit Integration Settings with API Key and Doctor Email fields

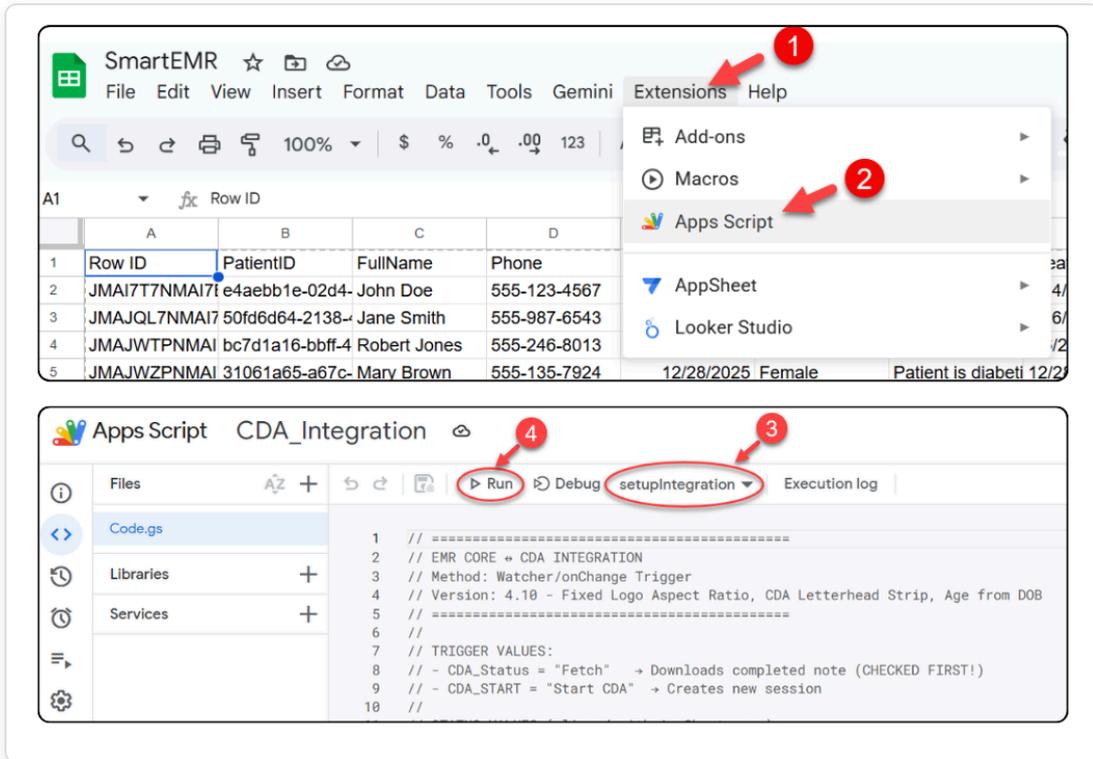
Part C: Authorize Google Permissions (One Time Only)

Your Smart EMR uses a background program (called "Apps Script") that automatically communicates between the app and the AI. You need to give Google permission to run this program. **You only need to do this once — after that, it works forever.**

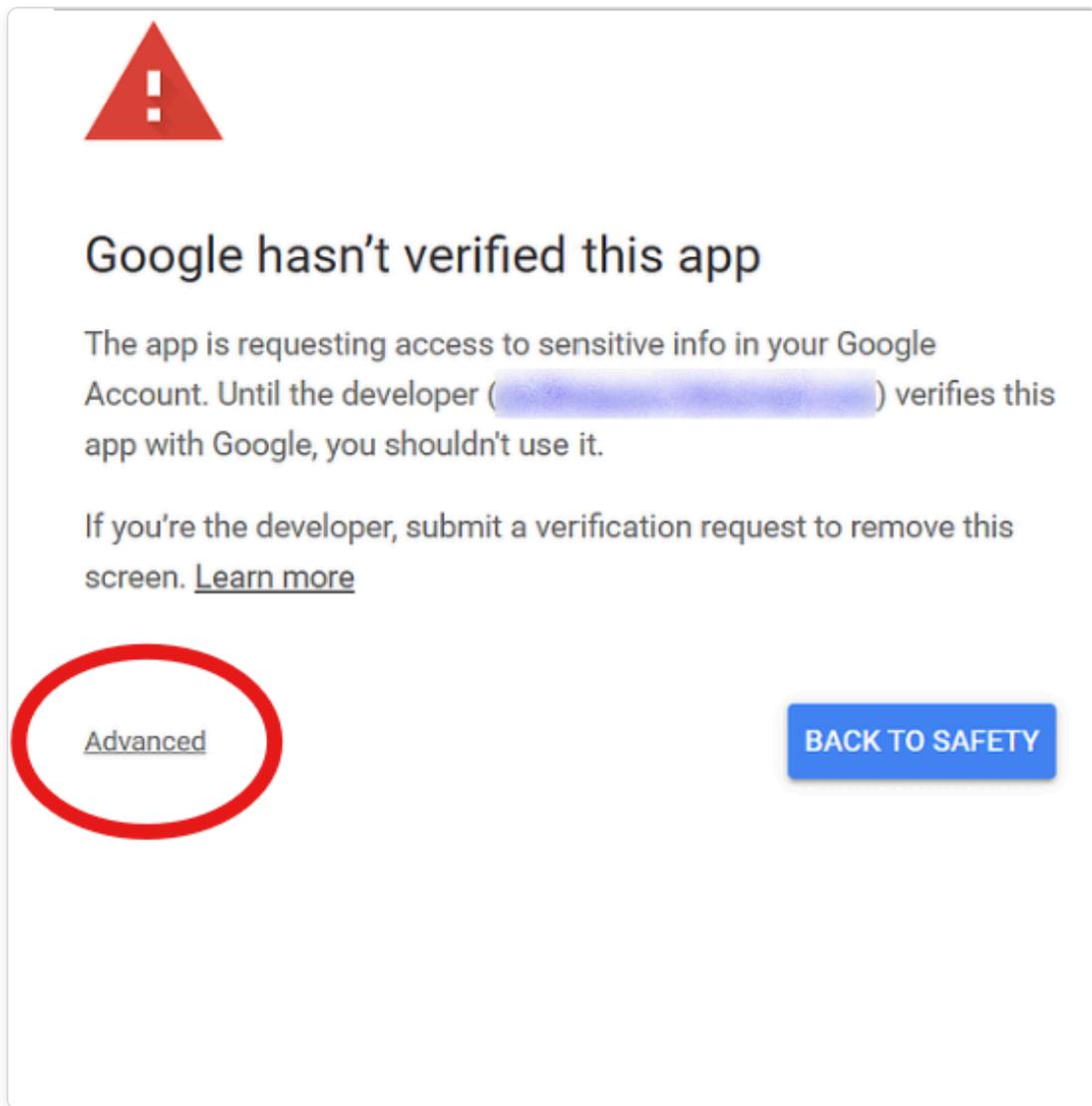
You must do this step on a computer. Follow these steps exactly.

1. Open **Google Drive** on your computer. Go to drive.google.com in your browser and sign in with your Gmail account
2. Find the folder where your Smart EMR data lives. It is usually at: **My Drive > appsheet > data > SmartEMR**
3. Inside that folder, find the Google Sheets file. It may be called **SmartEMR** or **Visits** (it has a green spreadsheet icon). **Double-click** on it to open the spreadsheet
4. Once the spreadsheet is open, look at the **menu bar at the very top** of the screen. You will see a row of words: File, Edit, View, Insert, Format, Data, **Extensions**, Tools, Help
5. Click on the word **Extensions** in this menu bar
6. A dropdown menu appears. Click on **Apps Script**
7. A new browser tab will open. This is the Apps Script editor. You will see code on the screen (programming text) — **do NOT change, delete, or type anything in this code**
8. Look near the **top of this page**. You will see a small dropdown menu (it might show a name like `myFunction` or `setupIntegration` or something else). Click on this dropdown arrow to open it
9. From the list that appears, select `setupIntegration`
10. Now look right next to this dropdown. You will see a small button that looks like a **play button** (a triangle pointing to the right). This is the **Run** button. Click it
11. **A popup window will appear** saying "Authorization required" or "This project requires your permission." Click the button that says **Review Permissions**
12. Google will ask you to choose which Google account to use. **Click on the same Gmail account** you use for Smart EMR
13. You may see a scary-looking warning that says "**Google hasn't verified this app.**" This is completely normal and safe — this is YOUR OWN script running in YOUR OWN Google account. It is not a third-party app. Click the small text at the bottom left that says "**Advanced**"
14. After clicking Advanced, you will see a new link that says "**Go to [project name] (unsafe)**". Click on it. Despite the word "unsafe," this is perfectly fine — Google shows this message for all custom scripts
15. A permission screen appears listing what the script needs access to (your spreadsheets, your Drive, etc.). Click **Allow**

16. Wait a few seconds. You should see a message appear on the screen (in the "Execution log" area at the bottom) that says: **"CDA Integration Active!"**



Google Apps Script editor — select `setupIntegration` from the function dropdown and click Run



Google permission warning — click Advanced, then "Go to [project name]" to continue

To verify everything is working:

1. On the same Apps Script page, click the function dropdown again (the same one from step 8) and change it to `checkStatus`
2. Click the **Run** button again
3. Look at the execution log at the bottom. You should see: **"ACTIVE!"**

If you see "ACTIVE!" then your AI integration is fully connected and will work automatically from now on. You never need to come back to this Apps Script page again.

Step 3: Create Your Doctor Profile

Your profile information appears on every printed document — prescriptions, medical reports, referral letters, and lab orders. Fill this in carefully.

1. Tap the **hamburger menu** at the top left > tap **Setup**
2. Tap the **Profile** tab at the top of the Setup screen
3. Tap the **Add** button (the + icon)
4. Fill in the following fields:

Field	What to Enter	Example
Name	Your full name as you want it printed on documents	Dr. Ahmed Mohamed
Title	Your professional title	Prof. Dr. / Dr. / Consultant
Specialty	Your medical specialty	Urology / Cardiology / Pediatrics
Institution	Your hospital or clinic name (optional)	Cairo University Hospital
LicenseNumber	Your medical syndicate or license number (optional)	12345
Logo	Tap this field to upload your clinic logo image from your phone gallery or computer files	(your clinic logo image)
Signature	Tap to upload a signature image, or use the built-in drawing tool to draw your signature on screen	(your signature)

Name*
Dr. Alaa Meahref

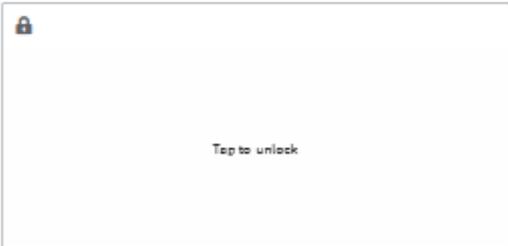
Title
Professor

Specialty
Urology

Institution
Cairo University

Logo


LicenseNumber

Signature


PrintMode_Rx
Full Letterhead

PrintMode_Orders
Full Letterhead

Letterhead

Doctor Profile form — fill in your name, title, specialty, logo, and signature

Setting Up Print Mode (Read This Carefully)

Scroll down in the Profile form. You will find two important settings:

PrintMode_Rx (controls how your printed prescriptions look):

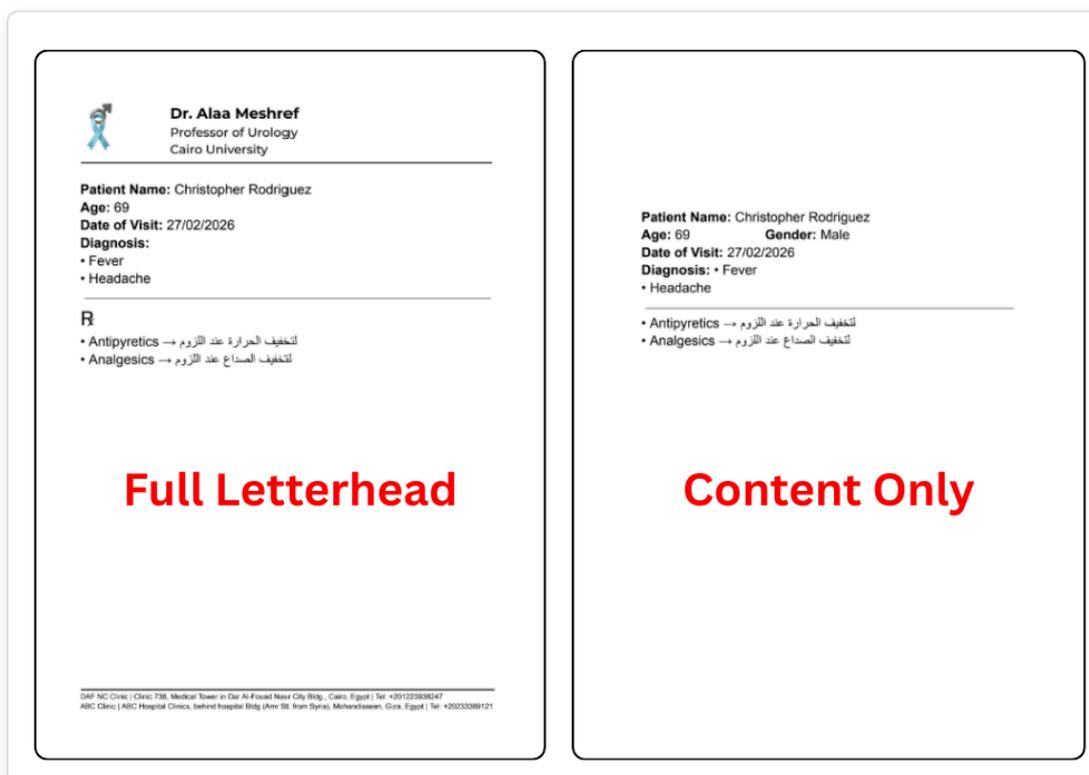
- Choose "**Full Letterhead**" if you print prescriptions on **blank white paper** (plain paper with nothing printed on it). When you choose this, the app will automatically add your clinic logo at the top, your name and credentials, the patient information, the prescription content, and your clinic address at the bottom. Everything the patient needs to see is printed by the app onto the blank paper.
- Choose "**Content Only**" if you print prescriptions on **your own custom pre-printed prescription paper** — the kind that already has your clinic name, logo, and address printed on it by a printing

shop. When you choose this, the app will ONLY print the patient name, date, diagnosis, and medication list. It will NOT print your logo or clinic details because those are already on the paper.

PrintMode_Orders (controls how your printed lab/imaging orders look):

- Same choice as above. Choose **"Full Letterhead"** if you use blank paper, or **"Content Only"** if your order paper already has your clinic branding printed on it.

Not sure which to pick? If you buy regular plain white A5 paper (half the size of a normal A4 page) and put it in your printer, choose **"Full Letterhead"** for both. This is the most common choice and gives you a complete, professional-looking document.



Print Mode comparison — Full Letterhead (left) vs Content Only (right)

5. Tap **Save**

Step 4: Add Your Clinic Locations

If you work at more than one location (for example, a private clinic on Mondays and a hospital on Wednesdays), you need to tell the app about each location. **Even if you work at only one place, you still need to add it here** — otherwise the app will not know your clinic's address and phone number for printed documents.

1. Tap the **hamburger menu** at the top left > tap **Setup**

2. Tap the **Manage Workplaces** tab at the top
3. Tap the **Add** button (+ icon)
4. Fill in:

Field	What to Enter	Example
Name	The name of this clinic or hospital	Dr. Ahmed Clinic - Maadi
Type	Choose one: Clinic , Center , or Hospital	Clinic
Address	The full street address of this location	15 Road 9, Maadi, Cairo
Phone	The clinic's phone number	02-2345-6789
Email	The clinic's email address (optional)	info@drahmed.com
ShowInFooter	See explanation below	Yes or No

What does ShowInFooter mean?

When you print a document (a medical report, a referral letter, a prescription on plain paper, or lab orders on plain paper), the bottom of the document (the "footer") shows your clinic's contact information — the clinic name, address, and phone number.

- Set ShowInFooter to **Yes** if you want this clinic's details to appear at the bottom of your printed documents
- Set ShowInFooter to **No** if you do NOT want this location shown in the footer

If you work at only one location, set it to **Yes**.

If you work at multiple locations and want ALL of them listed in the document footer, set ShowInFooter to **Yes** for each one. If you only want certain locations to appear, set the others to **No**.

5. Tap **Save**
6. **Repeat** steps 3-5 for every location where you see patients

Step 5: Set Your Service Prices

This step lets the app automatically fill in the consultation fee when you create a visit. If you skip this, you can always type the fee manually each time.

1. Tap the **hamburger menu** > tap **Setup**
2. Tap the **Manage Prices** tab at the top
3. Tap the **Add** button (+ icon)

4. Fill in:

Field	What to Enter	Example
Category	Choose one: Consultation, Follow-up, Procedure, Surgery, or Investigation	Consultation
ServiceName	A name for this service	First Visit
DefaultFee	The price you charge for this service	500
WorkplaceID	If this price is ONLY for one specific clinic, tap and select that clinic from the list. If you charge the same price at all your clinics, leave this field completely empty — the app will treat it as a "Global" price that applies everywhere	(leave empty for same price everywhere)

5. Tap **Save**

6. **Repeat** for all your services (e.g., Follow-up, Ultrasound, Minor Procedure, etc.)

Step 6: Print Templates Folder

Smart EMR uses Google Docs template files to generate your printed prescriptions, reports, referral letters, and lab orders. These template files should be in a folder called **Templates** inside the same Google Drive folder as your SmartEMR spreadsheet.

Check if the Templates folder was copied automatically:

1. Open **Google Drive** on your computer (drive.google.com)
2. Navigate to the folder where your SmartEMR data lives (usually: **My Drive > appsheet > data > SmartEMR**)
3. Look for a folder called **Templates** inside that folder

If you see the Templates folder with 6 files inside it — you are all set! Skip to Step 7.

If the Templates folder is NOT there, or it is empty:

1. Inside the same folder where your SmartEMR spreadsheet is, click the **+ New** button (top left of Google Drive) and choose **New folder**
2. Name the folder exactly: **Templates** (capital T)
3. Open the Templates folder you just created
4. Go to the AI4Docs.AI website to download the template files: ai4docs.ai/smart-emr/templates
5. Download all 6 files from that page
6. Upload all 6 downloaded files into your new Templates folder in Google Drive

The 6 template files you need:

File Name	What It Is Used For	Paper Size
Medical_Report_Template	Printing full medical reports	A4 (full page)
Referral_Letter_Template	Printing referral letters to other doctors	A4 (full page)
Prescription_Full_Template	Printing prescriptions on blank paper	A5 (half page)
Prescription_Content_Template	Printing prescriptions on pre-printed paper	A5 (half page)
Orders_Full_Template	Printing lab/imaging orders on blank paper	A5 (half page)
Orders_Content_Template	Printing lab/imaging orders on pre-printed paper	A5 (half page)

Your Google Drive folder should look like this:

My Drive/

 appsheet/

 data/

 SmartEMR/

 SmartEMR (the green spreadsheet icon - this is your database)

 Templates/ (folder with 6 files)

 Medical_Report_Template

 Referral_Letter_Template

 Prescription_Full_Template

 Prescription_Content_Template

 Orders_Full_Template

 Orders_Content_Template

Step 7: Add Your Staff Members

If you are a solo doctor with no staff, you can skip this step for now and come back to it later.

Adding a staff member has TWO parts: (1) adding them in the Users table, and (2) inviting them through AppSheet sharing. Both are required.

Part A: Add Staff in the Users Table

1. Tap the **hamburger menu** > tap **Setup**
2. Tap the **USERS** tab at the top
3. Tap the **Add** button (+ icon)

4. Fill in:

- **Email:** Your staff member's Gmail address. **This must be the exact Gmail address they will use to sign into the AppSheet app on their phone or computer.** If they use a different email, they will not be able to see any data
- **Name:** Their full name (e.g., "Sara Ahmed")
- **Roles:** Check the box(es) that match their job. See the "Understanding Roles" section below to know which role to choose
- **Active:** Make sure this is set to **Yes**

5. Tap **Save**

6. Repeat for every staff member

Part B: Invite Staff Through AppSheet Sharing

Adding someone to the Users table alone is NOT enough. You must also invite them through AppSheet's sharing system. **This step must be done on a computer:**

1. Open your Smart EMR app in the **AppSheet Editor** on your computer (go to www.appsheet.com, sign in, and click on your app)
2. In the top right corner of the AppSheet editor, click the **Share** icon (it looks like a person with a + sign, or it may say "Share")
3. In the **Email Address** field, type the Gmail address of the staff member you want to invite
4. Set their permission to **"Use app"** (this means they can use the app but cannot change the app's design or code)
5. Make sure the checkbox **"Notify users"** is checked — this sends them an email with instructions on how to install and open the app
6. Click **Add** or **Send**
7. Repeat for each staff member

What Staff Members Do After Receiving the Invitation

Your staff will receive an email from AppSheet with a link. Here is what they need to do:

On an Android phone:

1. Tap the link in the invitation email
2. They will be asked to install the **AppSheet** app from the Google Play Store (if they do not already have it)
3. After installing, open AppSheet and sign in with the **same Gmail address** you used when inviting them

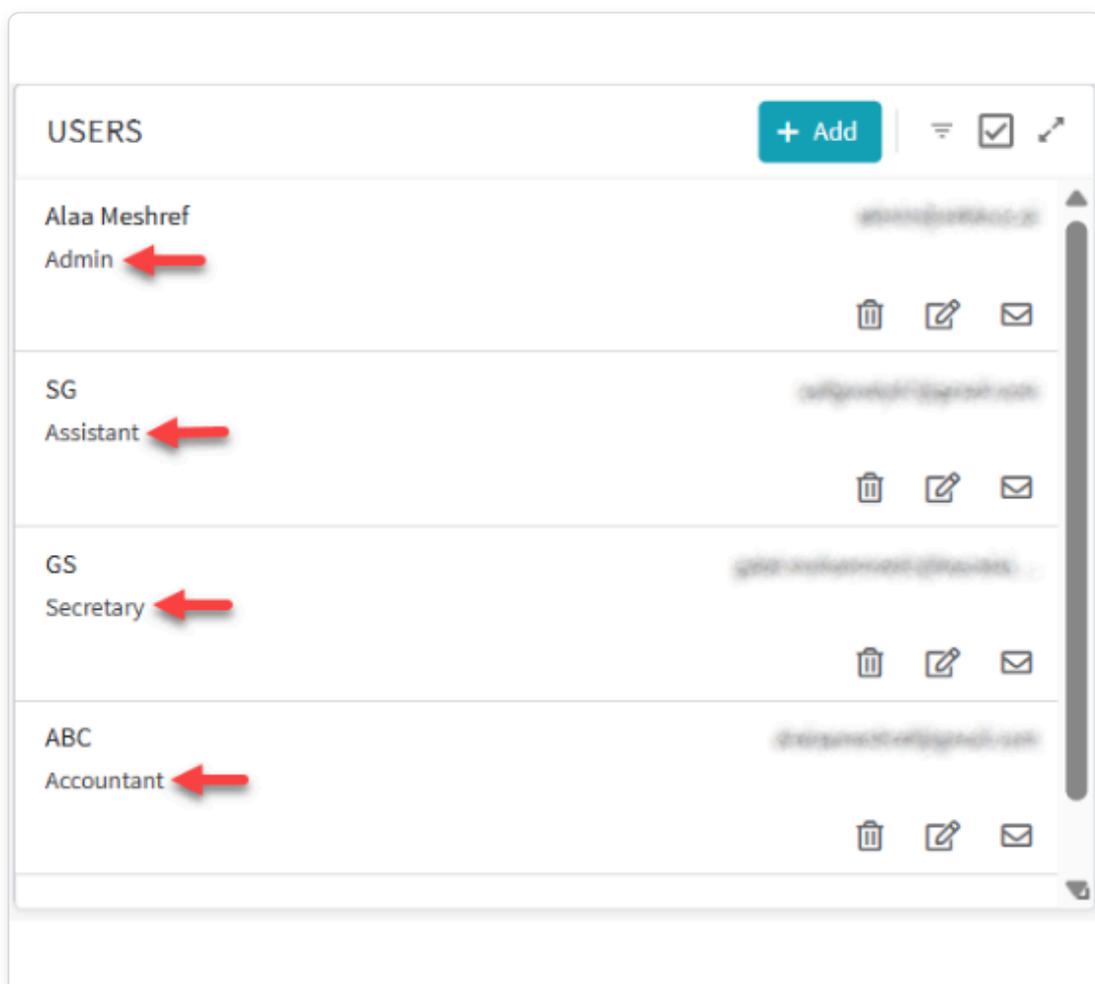
4. Your Smart EMR app will appear in their app list
5. To add a shortcut to their home screen: in the app, tap the hamburger menu and look for "**Add Shortcut**"

On an iPhone or iPad:

1. Tap the link in the invitation email (in Safari browser)
2. They will be directed to install the **AppSheet** app from the Apple App Store
3. After installing, open AppSheet and sign in with the **same Gmail address** you used when inviting them
4. Your Smart EMR app will appear in their app list

On a computer:

1. Click the link in the invitation email
2. The app opens in the web browser. No installation needed
3. They can bookmark the page for easy access next time



User Management — add staff and assign roles from Setup > Users

The 7 Roles Explained

Each role controls exactly what that person can see and do in the app. **The Admin role has full access to everything — if you are the clinic owner with the Admin role, you do not need any additional roles.**

Admin

For the clinic owner or manager only. An Admin can see and do absolutely everything: view all patient data, clinical notes, financial records, change settings, add or remove users, and delete records. **Only give this role to 1-2 people you fully trust.**

Assistant

For doctors and physicians who are NOT the clinic owner. An Assistant can view patients, create visits, write clinical notes, view prescriptions, use the AI assistant, and print documents. **Cannot** see visit fees, payment status, or financial reports, and **cannot** change settings or manage users.

Secretary

For your receptionist or front desk staff. A Secretary can add new patients, edit patient information (like fixing a phone number or correcting a name), and create, edit, or delete appointments. **Cannot** see clinical notes, prescriptions, lab orders, or any financial data.

Accountant

For whoever handles billing. An Accountant can see visit fees, mark visits as paid, choose payment method (cash, card, bank transfer), and view financial reports. **Cannot** see clinical notes, prescriptions, or lab orders.

Nurse

For nurses and medical assistants. A Nurse can view patient records, read clinical notes, see prescriptions and lab orders (but cannot edit any of these), and book appointments. **Cannot** see financial data and **cannot** edit or delete clinical information.

Pharmacist

For pharmacists, typically in specialized centers like oncology clinics. A Pharmacist can view patient names, allergies, prescriptions, and diagnosis. **Cannot** see full clinical notes, lab orders, or financial data, and cannot edit prescriptions.

Lab_Tech

For laboratory technicians or radiology staff. A Lab_Tech can view the list of lab orders and imaging requests. **Cannot** see prescriptions, clinical notes, or financial data.

When One Person Does Multiple Jobs

In small clinics, one person often wears multiple hats. You can give any user more than one role by checking multiple boxes. When someone has multiple roles, they get the combined permissions of all their roles. Here are common examples:

Example 1: Your secretary also collects cash payments from patients.

Open her user record in Setup > Users and check BOTH the **Secretary** box AND the **Accountant** box. Now she can book appointments (from the Secretary role) AND also mark visits as paid and see financial data (from the Accountant role). She still cannot see clinical notes because neither Secretary nor Accountant roles allow that.

Example 2: Your secretary needs to view prescriptions to send them to patients via WhatsApp.

By default, a Secretary cannot see prescriptions. Check both the **Secretary** box AND the **Pharmacist** box. Now she can book appointments AND view prescriptions (but she still cannot edit prescriptions or see full clinical notes).

Example 3: You have a doctor working in your clinic who is an employee (not the owner).

Give them the **Assistant** role only. They can see patients, create visits, write clinical notes, and use the AI — but they cannot see how much money the clinic makes or change any settings.

Example 4: Your employee doctor also handles billing for their own patients.

Give them **Assistant** AND **Accountant** roles. Now they can do clinical work AND see financial data.

Complete Permissions Table

This table shows exactly what each role can and cannot do:

What Can They Do?	Admin	Assistant	Secretary	Accountant	Nurse	Pharmacist	Lab_Tech
View patient names	Yes	Yes	Yes	Yes*	Yes	Yes*	Yes*
Add new patients	Yes	Yes	Yes	No	No	No	No
Edit patient info	Yes	Yes	Yes	No	No	No	No
Delete patients	Yes	No	No	No	No	No	No
Create visits	Yes	Yes	No	No	No	No	No
Edit clinical notes	Yes	Yes	No	No	No	No	No
View clinical notes	Yes	Yes	No	No	Yes	No	No
View prescriptions	Yes	Yes	No	No	Yes	Yes	No
View lab orders	Yes	Yes	No	No	Yes	No	Yes
Print prescriptions	Yes	Yes	No	No	No	Yes	No
Print lab orders	Yes	Yes	No	No	No	No	Yes
Print reports/referrals	Yes	Yes	No	No	No	No	No
Create appointments	Yes	Yes	Yes	No	Yes	No	No
Delete appointments	Yes	No	Yes	No	No	No	No
View/edit visit fees	Yes	No	No	Yes	No	No	No
Mark visits as paid	Yes	No	No	Yes	No	No	No
View financial reports	Yes	No	No	Yes	No	No	No
Export financial data	Yes	No	No	Yes	No	No	No
View price list	Yes	Yes	Yes	Yes	No	No	No
Edit price list	Yes	No	No	No	No	No	No
Manage users	Yes	No	No	No	No	No	No
Change settings	Yes	No	No	No	No	No	No

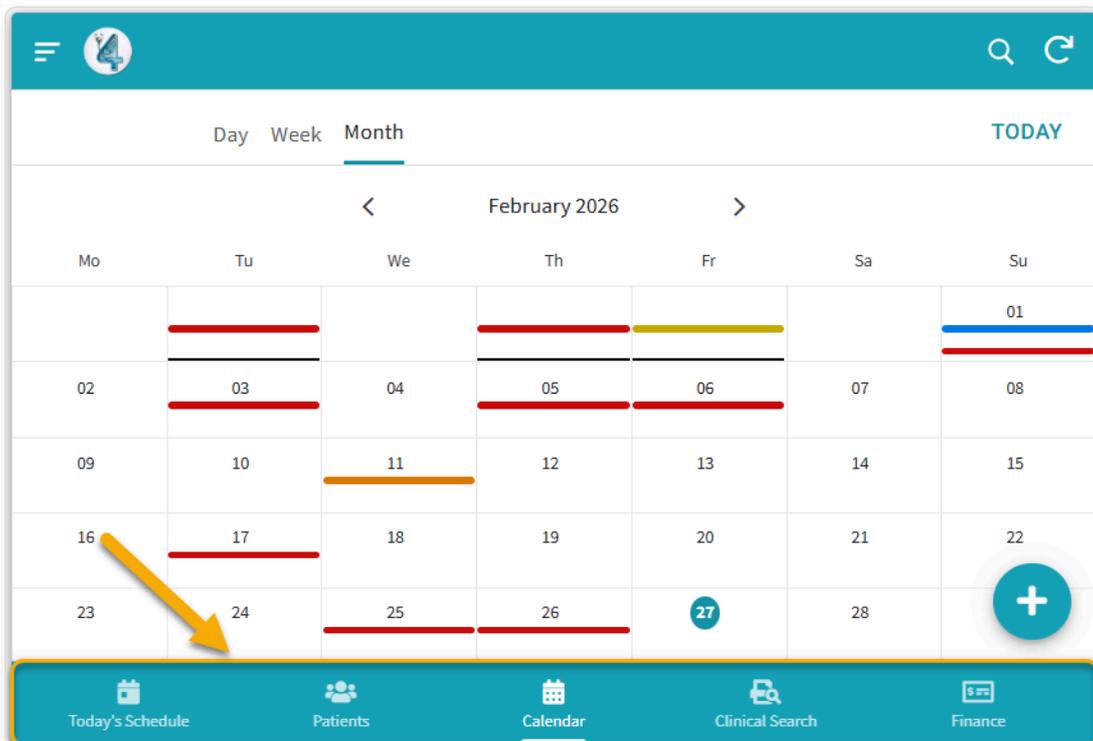
* **Privacy Mode note:** By default, everyone who has access to patient data can see patient names. If your clinic needs to comply with GDPR (Europe) or HIPAA (USA) privacy laws, you can enable Privacy Mode. When Privacy Mode is turned on, Accountants will only see Visit IDs instead of patient names, and Lab_Techs will only see coded Patient IDs instead of names. To enable it, go to Setup > Edit Integration Settings and change `Privacy_Mode` from **Off** to **On**. Privacy Mode is OFF by default (suitable for Egyptian and Middle Eastern clinics).

How to Navigate the App

Bottom Menu (Main Navigation)

Look at the **bottom of your screen** on a phone or tablet (or the left side on a computer). You will see **5 main buttons**:

Button	Icon	What It Does
Today's Schedule	Calendar icon	Your daily dashboard. Shows "Today's Queue" — the list of patients who have appointments today. From here you can check patients in and start visits
Patients	People icon	Your complete patient directory. Every patient you have ever added is listed here. Tap on any patient to see their full file, call them, WhatsApp them, or email them
Calendar	Calendar grid icon	A visual calendar showing all your past and future appointments. Tap any day to see what appointments are scheduled
Clinical Search	Magnifying glass icon	A powerful search tool. Type any keyword (like a drug name, a diagnosis, or a symptom) and a date range to search through all your past clinical notes
Finance	Money/report icon	Your financial dashboard. Set date ranges and filters to see your income. Only visible to users with the Admin or Accountant role

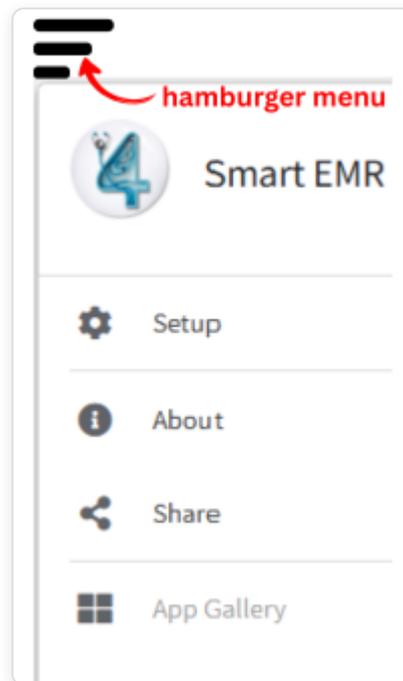


Bottom navigation bar — your 5 main sections

Hamburger Menu (Side Menu)

Tap the **three horizontal lines** at the **top left** of the screen to open the side menu. Here you will find:

- **Setup** — Where you configure users, profile, workplaces, prices, and integration settings (all the things from the First-Time Setup)
- **About** — Information about the app
- **Share** — Sharing options
- Your account email and a **Log Out** option



Hamburger menu — access Setup, Help, and account options

Adding a New Patient

1. Tap **Patients** in the bottom menu
2. Tap the **Add** button (the + icon, usually at the bottom right corner of the screen)
3. Fill in the patient's information:
 - **FullName** — Their complete name
 - **DateOfBirth** — Tap the field to open a date picker and select their birth date
 - **Gender** — Male or Female
 - **Phone** — Their phone number (this enables the Call and WhatsApp buttons on their file)
 - **Email** — Their email address (optional)
4. Tap **Save**

The patient is now in your system permanently. You can find them anytime in the Patients list.

Patients Form

Cancel Save

Name* ABC XYZ

Gender Male

DOB 12/12/1960

Age 65

Phone +201000033333

Email abc@xyz.com

Patient Photo

Notes lorem ipsum

Add Patient form — enter the patient's basic information

Booking an Appointment

1. Tap **Patients** in the bottom menu and find the patient. Tap on their name to open their file
2. Look for the **Book Appointment** action button (it has a calendar icon). Tap it
3. Fill in:
 - **Start** — The date and time of the appointment
 - **End** — When the appointment ends
 - **Type** — Choose one: New Consultation, Follow-up, Procedure, Emergency, or WhatsApp
 - **Visit Site** — Select which of your workplaces (clinics/hospitals) this appointment is at
4. Tap **Save**

The appointment now appears in the **Calendar** and in **Today's Schedule** on the day of the appointment.

✕ Appointments Form Cancel Save

Start
27/02/2026 14:30

End
27/02/2026 15:00

Patient Name
John Doe

Type
New Consultation

Visit Site
ABC Clinic

Status
Scheduled

Notes

Appointment booking — set date, time, type, and clinic location

Patient Check-In

1. Tap **Today's Schedule** in the bottom menu
2. In **Today's Queue**, find the patient. Their status shows "Scheduled"
3. Tap the **Check-In** button next to their name
4. Their status changes to "Checked-In" so you know they are in the waiting room

AI Clinical Notes — Complete Workflow

This is the most important workflow in Smart EMR. Follow every step carefully.

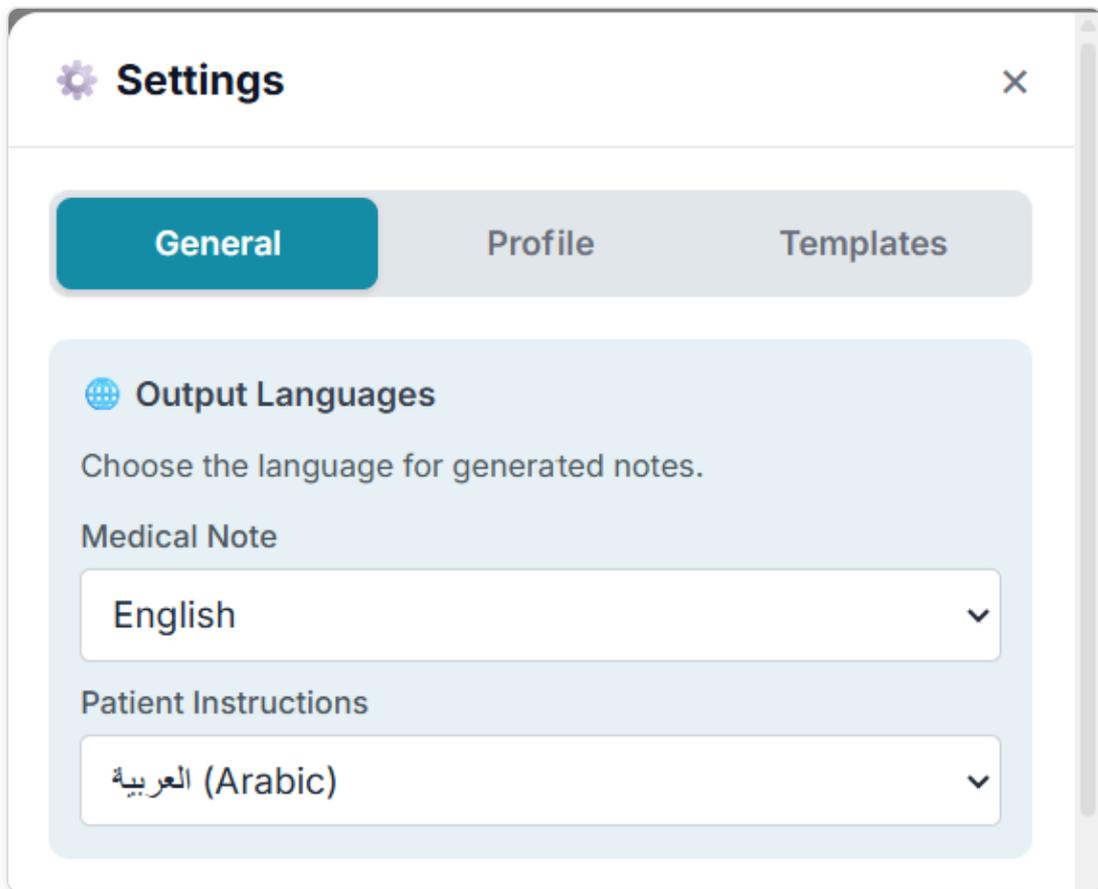
Important: Set Up CDA Settings First (One Time)

Before you use the AI for the first time, you need to configure the CDA app settings. Open the CDA app at clinic.ai4docs.ai, sign in, and look for the **Settings** icon (gear).

A. Set Your Language Preferences (Settings → General Tab)

1. Open **Settings** (gear) and go to the **General** tab
2. Set the **Primary Language** (e.g., English) — this controls the language of the clinical note output (the medical documentation)
3. Set the **Patient Instructions Language** (e.g., Arabic) — this controls the language of prescription instructions and investigation preparation instructions that your patients will read

Example: Many doctors keep English as the primary language for medical documentation, and set Arabic as the patient instructions language so patients can read their own medication directions and lab preparation instructions in their native language.



CDA Settings — set Primary Language and Patient Instructions Language

B. Enable EMR Export Options (Settings → EMR Export Options)

4. In the same Settings, find the section called **EMR Export Options**

5. Make sure both of these checkboxes are checked:

- **Include Prescription** — check this box so that medications are included when the note is sent to Smart EMR (if this is not checked, the "Print Prescription" button will have nothing to print)
- **Include Orders/Investigations** — check this box so that lab tests and imaging orders are included (if this is not checked, the "Print Orders" button will have nothing to print)

6. Save the settings

You only need to do this once. The settings will be remembered.

 **EMR Export Options**

Include these sections when exporting to EMR.

- Include Prescription
- Include Orders/Investigations

CDA Settings — enable Include Prescription and Include Orders checkboxes

Starting the Visit

1. Tap **Today's Schedule** in the bottom menu. Find the checked-in patient in Today's Queue
2. Tap the **Start Visit** button next to their name
3. A form will open with three tabs at the top: **Administrative**, **Clinical Notes**, and **Images & Docs**

Filling in the Administrative Tab

4. You are now on the **Administrative** tab (the first tab). You will see:
 - **Visit Date** — Already filled with today's date
 - Right below the Visit Date, you will see an instruction line that says: "*Click Start CDA to start AI Documentation (after saving) and then click Open CDA*"
 - Below this instruction, there are two options: **Ready** and **Start CDA**
5. **This step is critical:** Tap on "**Start CDA**" to select it. This tells the app to create an AI session for this patient
6. Below this, select your **Visit Site** (which clinic you are at today)
7. Fill in any other fields on this tab as needed (Service Type, etc.)

Visit form — select "Start CDA" to create an AI session for this patient

Saving the Visit

8. Tap **Next** at the bottom to go to the **Clinical Notes** tab
9. **Skip the Clinical Notes tab completely** — do NOT type anything here. The AI will fill in these fields automatically later
10. Tap **Next** at the bottom to go to the **Images & Docs** tab
11. If you have photos or documents to attach to this visit, add them here. If not, skip this tab
12. Tap **Save** at the bottom of the screen

Opening the AI Assistant

13. After saving, you will be back on the visit detail screen. Look for a button that says "**Open CDA**"
14. **If you do not see the "Open CDA" button:** You need to sync. Pull down on the screen with your finger (on phone/tablet) or tap the refresh icon at the top right. Try syncing 2-3 times with a few seconds between each one. The button will appear after syncing
15. Tap "**Open CDA**". The AI4Docs.AI Clinical Documentation Assistant will open in a new browser tab or window

Christopher Rodriguez

Follow-up

27/02/2026





Mark Paid Fetch Note Reset CDA

Service Type

Follow-up

FOLLOW-UP DATE:

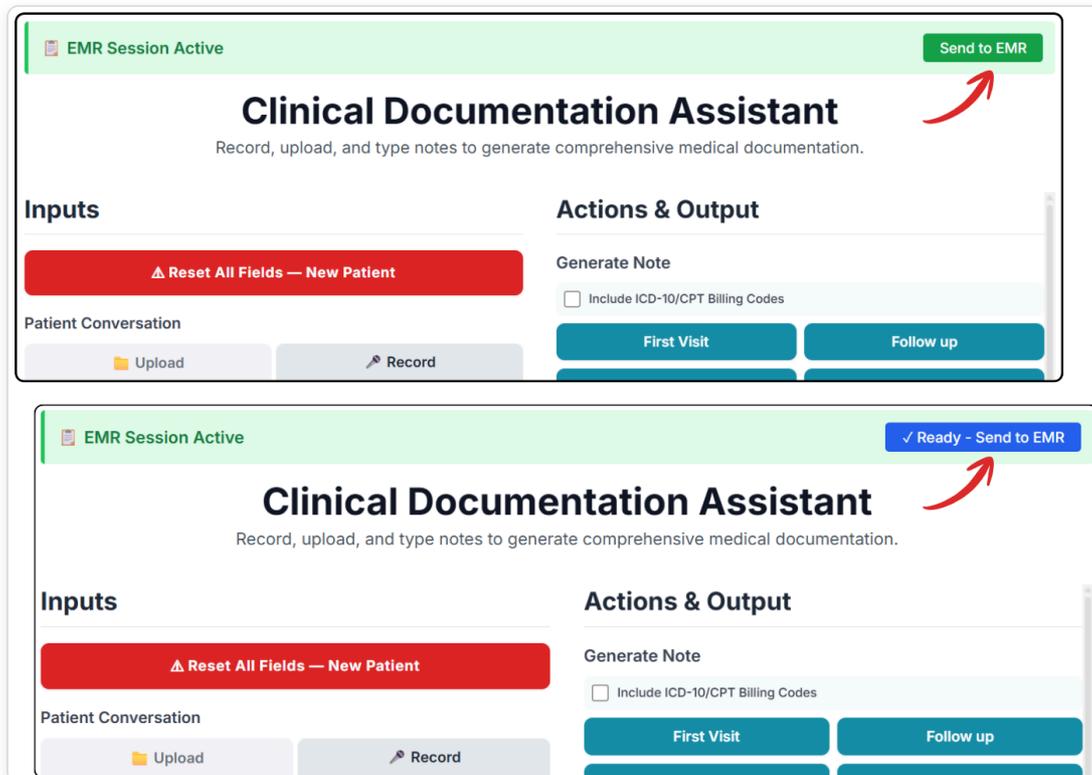
02/27/2026

After saving, the "Open CDA" button appears — tap it to launch the AI assistant

Using the AI to Create Your Clinical Note

16. In the CDA app, speak or type your clinical note. Talk naturally as if you are dictating to a colleague.
The AI will understand and organize everything
17. When you are finished, the AI will generate a formatted clinical note
18. **Pay attention to the "Send to EMR" button.** This is critical:
 - **Green button** = The AI session is still active, the note is NOT ready yet
 - **Blue button** = The note has been auto-saved and is READY to be sent to Smart EMR
 - **Do NOT go back to Smart EMR until the button is BLUE**

Tip for best results: If you want to print a medical report from this visit, it is best to generate the note as a "Medical Report" in CDA. If you want a referral letter, generate it as a "Referral Letter." You can choose the output format in CDA before generating the note.



The Send to EMR button — wait for BLUE before switching back to Smart EMR

Fetching the Note Back into Smart EMR

19. Once the "Send to EMR" button is **BLUE**, switch back to your Smart EMR app (switch browser tabs or reopen the app on your phone)
20. **Sync** the app: pull down on the screen (phone/tablet) or tap the refresh icon at the top right
21. Look for the **"Fetch Note"** button on the visit record. Tap it
22. **If you do not see the "Fetch Note" button:** Sync again. Pull down on the screen or tap the refresh icon. Sometimes you need to sync 2-3 times. The button appears only after the app refreshes and detects that a CDA session exists
23. After tapping "Fetch Note", **wait about 5-10 seconds**
24. **Sync one more time** (pull down or tap the refresh icon)
25. Your AI-generated clinical note will now appear in the visit record, automatically organized into sections: Chief Complaint, History of Present Illness, Examination, Diagnosis, Prescription, and Orders

You will see a green message: "Note saved successfully!" This means the note was fetched and saved correctly. The "Fetch Note" button will disappear (this is normal — it means the job is done).

Christopher Rodriguez
Follow-up
27/02/2026

Mark Paid Fetch Note Reset CDA

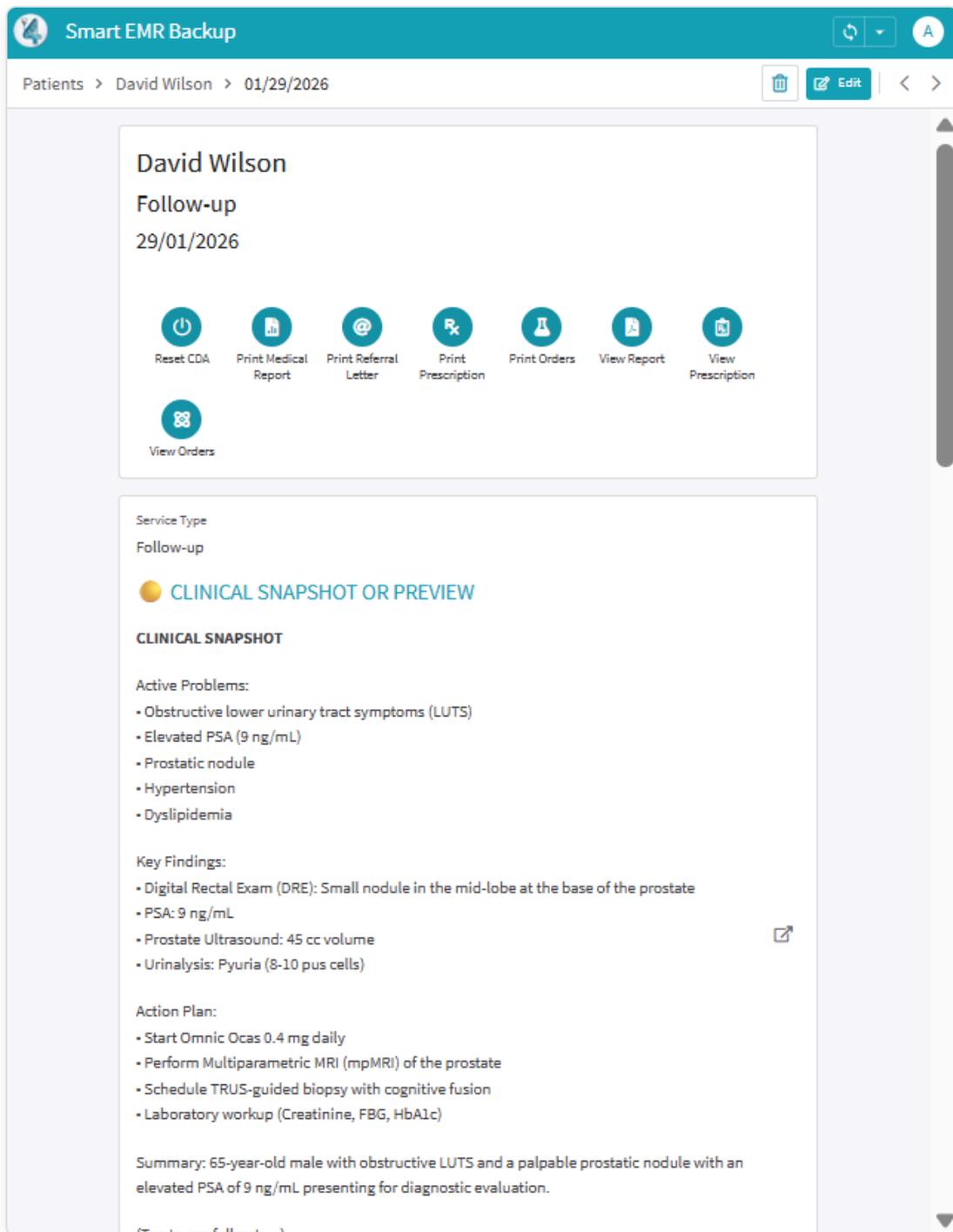
Service Type
Follow-up
CDA_Sync_Reminder
Tap Fetch Note button to get your note

Christopher Rodriguez
Follow-up
27/02/2026

Mark Paid Reset CDA Print Medical Report Print Referral Letter Print Prescription Print Orders

Service Type
Follow-up
CDA_Sync_Reminder
Note saved successfully!
CLINICAL SNAPSHOT OR PREVIEW
CLINICAL SNAPSHOT
Active Problems:
• Fever
• Headache
Key Findings:

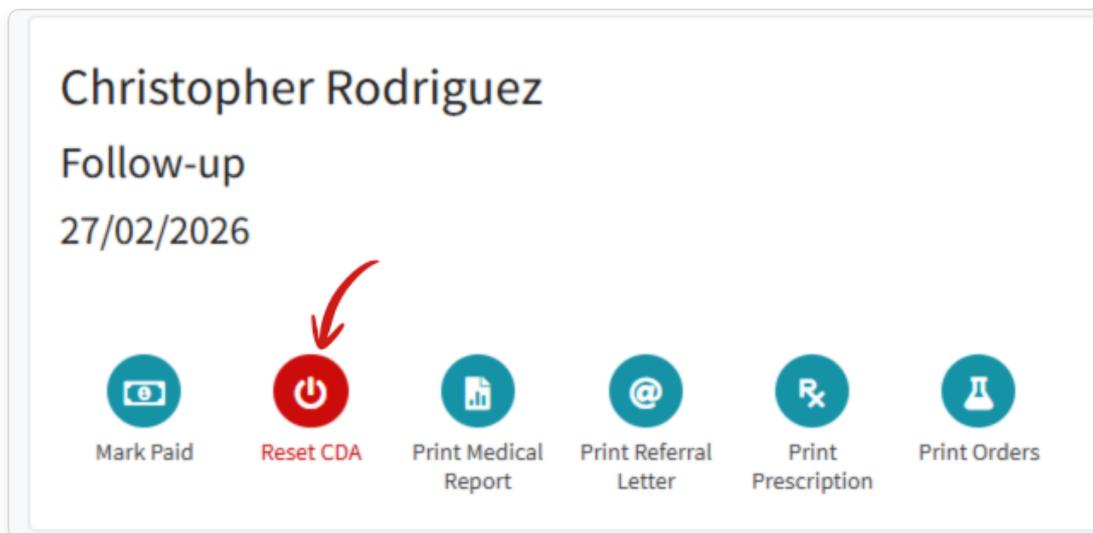
Tap "Fetch Note" to pull the AI-generated note into your visit record



Clinical notes automatically filled by the AI — organized into sections

Always Reset After Fetching

26. After the note is fetched successfully, tap the **"Reset CDA"** button. This clears the AI session and prepares the system for your next patient. **Always do this after every visit, even if the fetch was successful.** This keeps things clean and prevents confusion on your next visit.



Always tap "Reset CDA" after a successful fetch to prepare for the next patient

Alternative Method: If the AI Integration Is Not Working

If for any reason the Fetch Note process does not work (the button does not appear, or the note does not come through), you can manually copy the note:

1. In the CDA app, after generating your note, look for the **"MD"** button (this copies the note in a format that Smart EMR can read)
2. Tap the **"MD"** button. The note is now copied to your clipboard
3. Go back to Smart EMR, open the visit, tap Edit
4. Go to the **Clinical Notes** tab
5. Tap on the **ClinicalNotes** field and paste the note (long-press and tap Paste, or Ctrl+V on a computer)
6. Tap **Save**

This is a manual workaround. The automatic Fetch Note method is preferred when it works.

Review and Copy Note

Record

Ask your medical note... e.g., 'What was the blood pressure?'  **Ask**

 **Edit Mode**  **Voice Update**

CLINICAL SNAPSHOT Copy **MD**

Active Problems:

- Elevated PSA (9 ng/mL)
- Prostatic nodule (DRE finding)
- Obstructive Lower Urinary Tract Symptoms (LUTS)
- Nocturia
- Hypertension
- Hyperlipidemia

Key Findings:

- PSA: 9 ng/mL
- Prostate volume: 45 cc (on ultrasound)
- DRE: Small nodule in the mid-lobe at the base of the prostate
- Urine Analysis: Pus cells 8-10/hpf

Camera

Drop files (e.g., PDF, MP3, or ZIP files)

 **Audio**

The MD button in CDA — tap to copy the note for manual pasting into Smart EMR

Printing Documents

After a visit has clinical notes, you can print professional PDF documents.

Available Documents

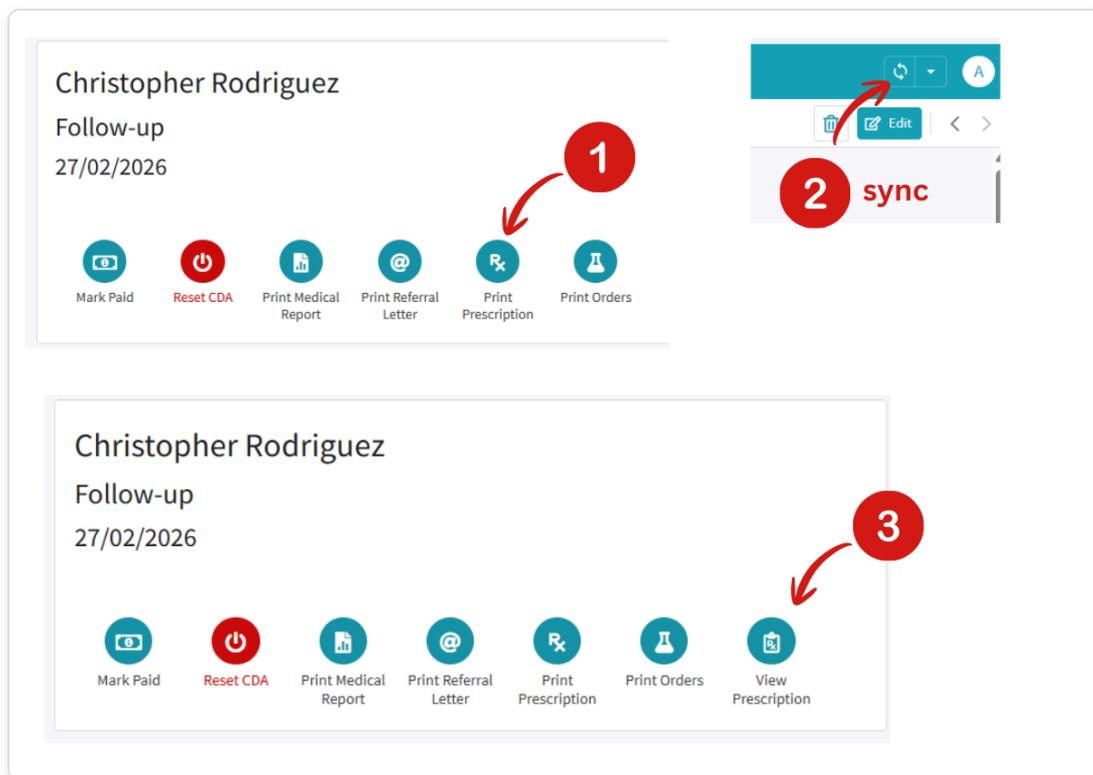
Document	Button Name	Paper Size	When Is It Available?	Who Can Print?
Prescription	Print Prescription	A5 (half page)	When the note includes medications (you must have "Include Prescription" checked in CDA Export Options)	Admin, Assistant, Pharmacist
Lab/Imaging Orders	Print Orders	A5 (half page)	When the note includes lab tests or imaging requests (you must have "Include Orders/Investigations" checked in CDA Export Options)	Admin, Assistant, Lab_Tech
Medical Report	Print Medical Report	A4 (full page)	When clinical notes exist in the visit	Admin, Assistant
Referral Letter	Print Referral Letter	A4 (full page)	When clinical notes exist in the visit	Admin, Assistant

How to Print (Step by Step)

1. Open the visit record (tap on the visit from the patient's file or from Today's Schedule)
2. Find the print button you need (for example, "**Print Prescription**") and tap it
3. The app will ask for confirmation. Tap **Yes**
4. **Now you must wait and sync.** The app is creating a PDF file in the background. This takes a few seconds
5. **Sync the app:** pull down on the screen (phone/tablet) or tap the refresh icon at the top right
6. After syncing, a new button will appear. For example, if you tapped "Print Prescription," you will now see a button called "**View Prescription**"
7. **If the "View" button does not appear yet:** The PDF is still being generated. Wait 5-10 more seconds and sync again. You may need to sync 2-3 times. Be patient — the PDF needs a moment to be created
8. Tap the "**View**" button (e.g., "View Prescription"). The PDF will open in your browser or PDF viewer
9. From there you can print it on your printer, share it via WhatsApp, email it, or save it to your files

This same process applies to all four document types:

- Tap **Print Prescription** → wait → sync → tap **View Prescription**
- Tap **Print Orders** → wait → sync → tap **View Orders**
- Tap **Print Medical Report** → wait → sync → tap **View Medical Report**
- Tap **Print Referral Letter** → wait → sync → tap **View Referral Letter**



Print workflow — tap Print Prescription, wait, sync, then tap View Prescription

Reminder About Print Modes

Your prescriptions and orders will look different depending on the PrintMode setting in your Profile (Step 3):

- **"Full Letterhead"** prints everything on the page: your logo, clinic name, doctor credentials at the top, the prescription/order content in the middle, and your clinic address at the bottom. **Use this with blank white paper.**
- **"Content Only"** prints ONLY the patient name, date, and content (medications or orders). No logo, no header, no footer. **Use this with your own custom pre-printed paper** that already has your clinic branding on it.

To change your print mode: go to the hamburger menu > **Setup** > **Profile** > tap on your profile > tap Edit > scroll down to **PrintMode_Rx** and **PrintMode_Orders** > change the setting > Save.

Managing Payments

1. Open any visit record
2. The **VisitFee** field automatically shows the fee based on the service you selected (from your Price List). You can also type a different amount manually
3. After the patient pays, tap the "**Mark Paid**" button
4. The payment status immediately changes to "**Paid**"
5. To record how they paid, edit the visit and set the **Payment Type**: Cash, Credit Card, or Bank Transfer

Only Admin and Accountant roles can see and edit the fee and payment fields. If you are signed in as an Assistant (doctor role), you will not see the financial fields unless your admin has also given you the Accountant role.

Financial Reports

1. Tap **Finance** in the bottom menu (only visible to Admin and Accountant roles)
2. The Report Controls screen appears. You can filter by:
 - **Start Date** and **End Date** — define the time period
 - **Group By** — choose how to group the report results. Options:
 - **Category** (default) — groups by service type (Consultation, Follow-up, Surgery, etc.)
 - **Visit Site** — groups by specific workplace name (e.g., Cairo Clinic, Maadi Center)
 - **Workplace Type** — groups by type of workplace (Clinic, Center, or Hospital)
 - **Payment Status** — groups by Paid, Pending, Partial, or Waived
 - **Payment Type** — groups by Cash, Credit Card, or Bank Transfer
 - **Patient Type** — groups by Private Case, Hospital Case, or Contracted Case
 - **Category** — filter by service type (Consultation, Follow-up, Procedure, Surgery, Investigation)
 - **Workplace Type** — filter by type of workplace (Clinic, Center, or Hospital)
 - **Visit Site** — filter by a specific clinic or hospital
 - **Payment Status** — filter by Paid, Pending, Partial, or Waived
 - **Patient Type** — filter by Private Case, Hospital Case, or Contracted Case
 - **Payment Type** — filter by Cash, Credit Card, or Bank Transfer
 - You can combine multiple filters or leave them empty to see everything
3. Each group shows its subtotal, and the **Total Revenue** at the top updates automatically based on all your active filters
4. To **download the data as an Excel/CSV file**: scroll down to the **Report Results** section and tap the **Export** button. A CSV file will download to your device which you can open in Microsoft Excel or Google Sheets

Smart EMR Backup Search Finance

Finance Export Fine...

Filters and Details

£185,800.00

Start Date: 01/01/2026

End Date: 27/02/2026

Choose how to group the report: Visit Site

Filter by Workplace Type: []

Filter by specific Workplace: []

Filter by Category: []

Filter by Payment Status: Pending

Filter by Patient Type: []

Filter by Payment Type: []

[Scroll Down for Details](#)

Transaction Details

Date	Workplace	Amount	Staff	Case Type	Payment Type
ABC Clinic EGP800.00					
26/02/2026	ABC Clinic	EGP800.00	Robert Jones	Pend... Private Case	Cash
Cleopatra Hospital EGP40,000.00					
29/01/2026	Cleopatra Hospital	EGP15,000.00	Christopher Rodrigue	Pend... Hospital Case	Credit Card
29/01/2026	Cleopatra Hospital	EGP15,000.00	aa4915e	Pend... Contracted Case	Cash
06/02/2026	Cleopatra Hospital	EGP10,000.00	Elizabeth Martinez	Pend... Hospital Case	Cash
DAF NC Clinic EGP5,000.00					
15/01/2026	DAF NC Clinic	EGP1,200.00	Linda Garcia	Pend... Private Case	Cash
27/01/2026	DAF NC Clinic	EGP200.00	Ahmed Hassan Mohar	Pend... Private Case	Cash
01/02/2026	DAF NC Clinic	EGP200.00	Michael Davis	Pend... Private Case	Cash
17/02/2026	DAF NC Clinic	EGP2,000.00	Essam AbdelWahab	Pend... Hospital Case	Credit Card
25/02/2026	DAF NC Clinic	EGP1,000.00	Robert Jones	Pend... Private Case	Credit Card
26/02/2026	DAF NC Clinic	EGP200.00	Michael Davis	Pend... Contracted Case	Cash
27/02/2026	DAF NC Clinic	EGP200.00	Christopher Rodrigue	Pend... Private Case	Cash
El Kabib hospital EGP30,000.00					
18/01/2026	El Kabib hospital	EGP30,000.00	Robert Jones	Pend... Private Case	Cash
El wahbe hospital EGP20,000.00					
29/01/2026	El wahbe hospital	EGP20,000.00	Christopher Rodrigue	Pend... Private Case	Cash
El-Safe Hospital EGP80,000.00					
29/01/2026	El-Safe Hospital	EGP40,000.00	David Wilson	Pend...	Cash
29/01/2026	El-Safe Hospital	EGP40,000.00	David Wilson	Pend... Private Case	Cash
Welcare Hospital EGP10,000.00					
15/01/2026	Welcare Hospital	EGP10,000.00	Michael Davis	Pend... Contracted Case	Bank Transfer

Finance dashboard — filter and group your revenue data

Frequently Asked Questions

Q: Do I have to run the Apps Script authorization every time I use the app?

No. You only run `setupIntegration` once during your initial setup (Step 2C). After that, it works automatically forever. You never need to touch Apps Script again.

Q: I tapped "Fetch Note" but it says "Note not ready yet." What do I do?

Go back to the CDA app (clinic.ai4docs.ai) and check the "Send to EMR" button. It must be **BLUE**, not green. Green means the AI is still processing. Wait for it to turn blue, then return to Smart EMR, sync the app, and try fetching again.

Q: The "Fetch Note" button disappeared after I tapped it. Is my note lost?

No! If the button disappeared and you see the green message **"Note saved successfully!"**, that means the note was fetched correctly and is saved in your visit record. Scroll to the Clinical Notes section to see it. The button disappears on purpose after a successful fetch. Remember to tap "Reset CDA" after every successful fetch.

Q: Buttons are not appearing (Open CDA, Fetch Note, View Prescription, etc.) — what do I do?

This is the most common point of confusion. Smart EMR does NOT refresh automatically. After every action (Start CDA, Fetch Note, Print Prescription, etc.), you **must sync the app manually**:

- **On a phone or tablet:** Pull down on the screen with your finger (like pulling down a curtain)
- **On a computer or tablet:** Tap the circular arrows icon at the top right of the screen

If the button still does not appear after one sync, wait a few seconds and sync again. Sometimes you need to sync 2-3 times.

Q: I tapped "Print Prescription" (or Print Report, Print Orders, Print Referral) but the "View" button does not appear.

The app needs time to create the PDF file. After tapping any print button, wait 5-10 seconds, then sync the app (pull down or tap the refresh icon). The "View" button will appear after syncing. If it still does not appear, wait a few more seconds and sync again.

Q: The Open CDA or Fetch Note buttons appear but do not seem to work properly.

Check that your API Key and Doctor Email are correct:

1. Go to the hamburger menu > Setup > Edit Integration Settings
2. Verify that the **API_Key** matches the key shown in your CDA app settings (at clinic.ai4docs.ai > Settings > EMR Integration)
3. Verify that the **Doctor_Email** is the exact same email you use to sign into CDA
4. If either is wrong, tap Edit, correct it, and Save
5. Also verify that you completed the Apps Script authorization (Step 2C). Open your SmartEMR spreadsheet in Google Sheets > Extensions > Apps Script > select `checkStatus` > Run. It should say "ACTIVE!"

Q: I made a mistake with the AI note. Can I redo it?

Yes. Tap the "**Reset CDA**" button on the visit. This clears the AI session completely and lets you start fresh. After resetting, select "Start CDA" again and repeat the process.

Q: Can I restrict what my staff members see?

Yes. Go to the hamburger menu > Setup > Users. Assign each staff member the role that matches their job. See the [Complete Permissions Table](#) for what each role can and cannot do.

Q: I work at multiple clinics. How does the app handle that?

Go to Setup > Manage Workplaces and add all your clinic locations. When you book an appointment or start a visit, you select which workplace the visit is at. The correct clinic address and phone number will automatically appear on printed documents.

Q: How do I export financial data to Excel?

Tap **Finance** in the bottom menu, set your date range, choose a grouping option (e.g., by Category, Visit Site, or Payment Type), and apply any filters you want. Scroll to Report Results and tap the **Export** button. A CSV file (which opens in Excel) will download to your device. Only Admin and Accountant roles can do this.

Q: Can I see revenue broken down by clinic or hospital?

Yes. In the Finance screen, use the **Group By** dropdown and select "**Visit Site**" to see revenue grouped by each workplace. You can also select "**Workplace Type**" to see totals for all Clinics vs. Centers vs. Hospitals. You can further narrow the results using the **Workplace Type** filter (e.g., show only Clinics) or the **Visit Site** filter (e.g., show only a specific clinic).

Q: A staff member left the clinic. How do I remove their access?

Go to Setup > Users, find their entry, tap Edit, and set **Active** to **No**. This immediately blocks their access. You can also delete their user record entirely.

Q: What is the difference between "Full Letterhead" and "Content Only" for printing?

- **Full Letterhead** = The app prints everything on the page: your logo, clinic name, credentials, patient info, the prescription/order content, and clinic address at the bottom. Use this when you print on **blank white paper**
- **Content Only** = The app prints ONLY the patient name, date, and prescription/order content. No logo, no header, no footer. Use this when you print on **your own custom pre-printed paper** that already has your clinic branding on it from the print shop

Q: Where do I change my Print Mode settings?

Go to the hamburger menu > Setup > Profile. Tap on your profile entry, then tap Edit. Scroll down to **PrintMode_Rx** (for prescriptions) and **PrintMode_Orders** (for lab/imaging orders). Change your selection and Save.

Q: Can I copy the AI note manually if the automatic fetch does not work?

Yes. In the CDA app (clinic.ai4docs.ai), after the AI generates your note, look for the **"MD"** button and tap it. This copies the note. Then go to Smart EMR, open the visit, tap Edit, go to the Clinical Notes tab, tap the ClinicalNotes field, and paste (long-press > Paste on phone, or Ctrl+V on computer). Tap Save.

Quick Reference

I want to...	Where do I go?
Add a new patient	Patients (bottom menu) > tap the + button
Book an appointment	Open the patient's file > tap Book Appointment
Check in a patient who arrived	Today's Schedule (bottom menu) > tap Check-In
Start a visit and use AI	Today's Schedule > tap Start Visit > select Start CDA > Save > Open CDA
Fetch the AI note	Visit record > sync > tap Fetch Note > wait > sync again
Print a prescription	Visit record > tap Print Prescription > wait > sync > tap View Prescription
Print a medical report	Visit record > tap Print Medical Report > wait > sync > tap View Medical Report
Print lab/imaging orders	Visit record > tap Print Orders > wait > sync > tap View Orders
Print a referral letter	Visit record > tap Print Referral Letter > wait > sync > tap View Referral Letter
Record a payment	Open visit > tap Mark Paid
See my revenue	Finance (bottom menu) > set date range and filters
Export revenue to Excel	Finance > set filters > scroll to Report Results > tap Export
Add a staff member	Hamburger menu > Setup > Users > tap +
Change print settings	Hamburger menu > Setup > Profile > Edit > scroll to PrintMode
Change clinic details	Hamburger menu > Setup > Manage Workplaces > tap workplace > Edit
Change prices	Hamburger menu > Setup > Manage Prices > tap service > Edit
Change API key or email	Hamburger menu > Setup > Edit Integration Settings > Edit

Getting Help

Self-Service Resources (Available 24/7):

- **This Help Guide** is always available inside the app: hamburger menu > Setup > Help
- **Smart EMR Documentation:** Visit ai4docs.ai/smart-emr/docs for the complete documentation
- **Smart EMR FAQ:** Visit ai4docs.ai/smart-emr/faq for frequently asked questions and answers

- **Tutorials:** Visit ai4docs.ai/smart-emr/tutorials for step-by-step visual tutorials
- **AI Chat Assistant:** Look for the chat widget (chat bubble icon) on any AI4Docs.AI webpage. Our AI assistant can answer most questions instantly

Community Support:

- Join the **AI4Docs.AI Doctors WhatsApp Group** for tips, questions, and peer support from other doctors using Smart EMR. Find the group link on our website.

Important Note: Smart EMR is provided **free of charge** as part of your AI4Docs.AI CDA subscription. Support is delivered through the self-service resources listed above, visual tutorials, and the community WhatsApp group. We are continuously adding new tutorials, guides, and FAQ answers to help you get the most out of your Smart EMR.

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