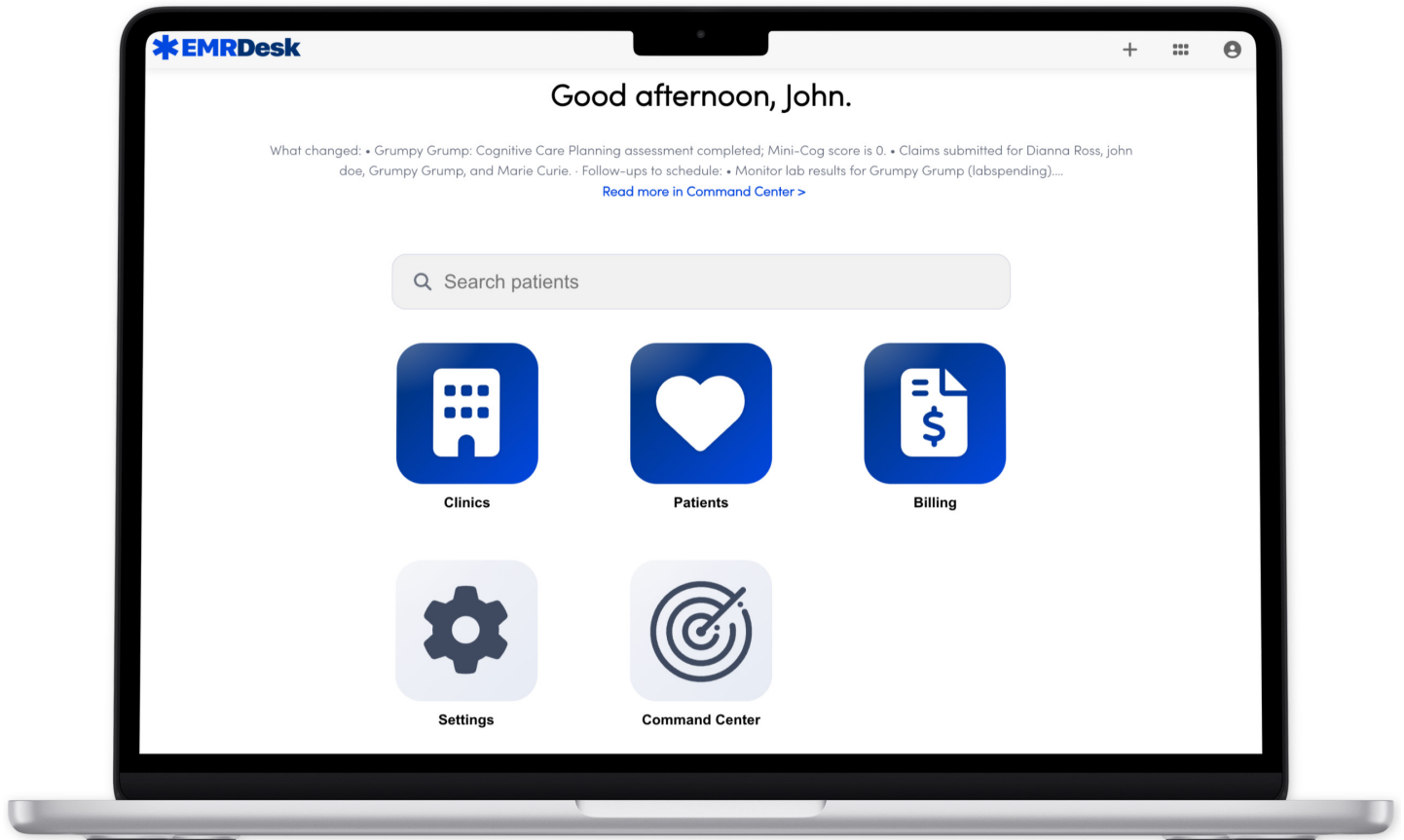




Quick Start Guide



In this guide

Set up your account

Add a clinic

Add patients

Create a note

Create an encounter

Custom forms

Claims Cart

Billing

Command Center

Settings

Set up your account

1. Sign up at emrdesk.com/signup
2. Choose Provider type.
3. Click Continue to finish setup.

1 Sign Up

Create an Account

Full Name:


Email:


Password:

Confirm Password:

Sign Up

OR

 Continue with Google

 Continue with Apple




















2 Choose your workspace

STEP 1 OF 6 • PROVIDER TYPE

Onboarding

Quick setup to personalize your workspace.

Provider Type

 Provider/Clinic Click to select	 Hospital/Health System Click to select	 Laboratory Click to select
 Imaging Center Click to select	 Pharmacy Click to select	 Billing Company / RCM Click to select
 IPA / MSO Click to select	 Payer / Health Plan Click to select	 Software Vendor / Integrator Click to select
 Student Clinic / Simulation Lab Click to select	 Academic Program / Teaching Clinic Click to select	 Medical/Nursing Student Click to select
 Research / Academic Click to select	 Behavioral Health Click to select	 Dental Click to select
 Home Health / Hospice Click to select	 DME Click to select	 Urgent Care Click to select
 Other Click to select		

You can change this later in Settings.

Skip **Continue**

Next: EMRDesk can guide you through creating a provider, clinic, and consent form — all optional. A test patient is created automatically.



Add a clinic

Clinics organize patients by location and enable intake forms, appointments, and consent.

1. Open Clinics.
2. Click Add Clinic.
3. Select a Clinic Type.
4. Enter Name + Location, then Next.

1 Clinic Type — 2 Clinic Details — 3 Permissions — 4 Required Fields — 5 Custom Intake Form — 6 Appointments — 7 Save

Select Your Clinic Type

Choose the type that best describes your healthcare facility

- Public Clinic**
Open to the general public. Offers intake forms and appointments.
- Private Practice**
Only for specific patients or groups. No intake form or appointments.
- Nursing Home**
Care for the elderly, often with long-term health care.
- Veterinary**
Animal health care services, including appointments and treatments.
- Specialty Clinic**
Specialized medical care for specific health issues.
- Urgent Care**
For non-emergency medical conditions that need immediate care.
- Mental Health**
Focus on mental health services, therapy, and counseling.
- Assisted Living Facility**
Residential care with daily living support and health monitoring.
- Dental Practice**
Oral health services, including checkups, treatments, and procedures.

BACK NEXT

1 Select Clinic Type

- Choose the type that matches your workflow.
- Private Practice disables public intake.

1 Clinic Type — 2 Clinic Details — 3 Permissions — 4 Required Fields — 5 Custom Intake Form — 6 Appointments — 7 Save

Clinic Information

Provide the basic details for your clinic

Clinic Name
BrooklynMD

Patient Intake URL
emrdesk.com/intake/brooklynmd
This is where patients will access your intake form ✓ Your URL is available

Clinic Location
436 3rd ave
436 3rd Avenue, Plattsmouth, NE, USA
436 3rd Avenue, Council Bluffs, IA, USA
436 3rd Avenue, Brooklyn, NY, USA
436 3rd Avenue, San Francisco, CA, USA
436 3rd Ave N, New Rockford, ND, USA

Address Details
Street
Street 2 (Apt, Suite, etc.)
Apartment, suite, unit, etc.
City

BACK NEXT

2 Add Clinic Information

- Set your Clinic Name and Location.
- EMRDesk generates an intake link automatically.

Next: Permissions, Intake Form, and Appointments are optional. Click Save when you're done.



Add patients

1. Open Patients.
2. Click Add Patient.
3. Enter patient details, then Save.

1 Patients list

[+](#) Add Patient

Patients

John Doe

2 Add Patient

Add Patient

Need to add in bulk? Visit [Import / Export](#).

Clinic (optional)

[All Patients](#)

First Name Middle Name (optional)

Last Name

Patient DOB
MM DD YYYY

Pick Date

3 Review Chart

Edit Flag Download

John Doe

01/01/1980 (46) Male

[Encounters](#) [Notes](#) [Assessments](#) [Contact](#) [Files](#)

AETNA
Member ID: 123123
[Run Eligibility](#)

Name: John doe
Date of Birth: 01/01/1980 (46 years old)
Gender: Male
Address: 123 asd, city, wa 11214
Medical Record Number: 438064192
Clinic Name: BoweryMD [Move Clinic >](#)
[Edit Patient Demographics >](#)

[Invite to Patient Portal](#)

Consent Form: [On file](#)

[Add Medical History](#)

Encounters [View all](#)

- 01/05/2026 – Home Health Visit
CPT G0438 • DX R509 • TOTAL \$300.00 [\\$](#)
- 12/10/2025 – Home Health Visit
CPT 95250 • DX E063313 • TOTAL \$300.00 [\\$](#)

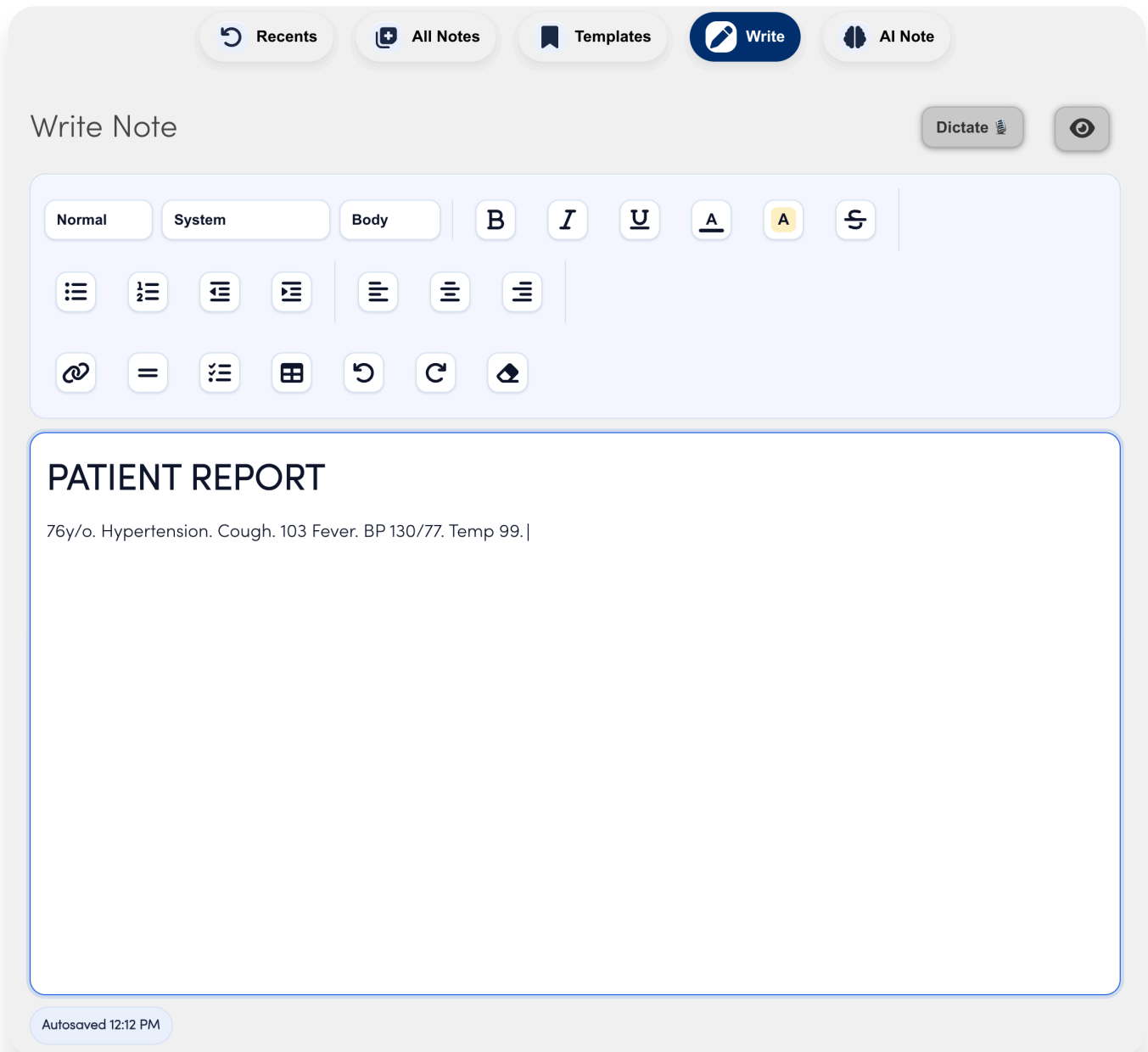
Other ways to add patients

- Public intake form: Share your clinic’s intake link so patients can submit their info.
- API: Create patients via the EMRDesk API (if enabled).
- Batch upload: Use Import / Export.



Create a note

1. Search for a patient and open their chart.
2. Click Notes.
3. Choose Write, Templates, or AI Note.
4. Review your note, then Sign and Save.



Tip: Always review AI-generated notes before signing.





Anatomy of an Encounter


The critical documentation at the heart of any healthcare operation. Proof of a procedure, performed by a provider, for a diagnosis. Encounters are automatically prepared into claims for one-click batch billing.

1 Visit Setup

Visit Details

Date of Service:  Encounter Type: 

Service Provider

 GRUMPYFACE ORG [Change](#)

WINCHENZO GRUMPY • NPI 1231231234
123 GRUMPY ST, MANHATTAN, NY 100010000 • (310) 999-1123

2 Codes




Codes 1 CPT • 1 Dx

Diagnosis and Procedure Codes:




Bundles

[+ Add bundle](#)




ANNUAL WELLNESS

G0438 • Z20810 \$300.00 [Remove](#)   

FLU PANEL


90666 • J1181 \$30.00 [+ Apply](#)   

AWS


M1417 • I69123 Z20822 [+ Apply](#)   

\$22.00


Diagnosis Codes (ICD-10)

Favorites 6 [Show](#) 

Selected 1


Z20.810 Contact with and (suspected) exposure to anthrax 

Procedures



Favorites 4 [Show](#) 

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Selected

G0438 Ppps, initial visit \$ 300 

Annual wellness visit; includes a personalized prevention plan of service (pps), initial visit




 Z20810  [+ Add modifier](#)

3 Forms + Automation + ePrescription

Clinical Form

Select a Form Layout: (optional)

Custom Form

Last updated: 2/9/2026 [Use](#)   

Fields: 3

[+ Add a Custom Form](#)
Create a new layout for this encounter.

Automation / Callback

Select a destination for the encounter via API (optional):

QLabs

Review & Submit

[Save Encounter](#)

Encounter ID: QGZR

Custom forms

Attach custom forms to encounters as you create them to document the visit. Optional e-Prescribing and lab/API automations are available when enabled.

Choose a form

Custom Form
Last updated: 2/1/2026 Fields: 4

Custom Form
Last updated: 2/21/2026 Fields: 3

+ Add a Custom Form
Create a new layout for this encounter.

Create or Edit a form

Preview

Symptoms List

Select All

Fever

Cough

Headache

Preview

Signature

Clear Signature

Name

Address

Email

Phone

Date

Text Input

Text Area

Choice

Symptoms

Header

Paragraph

Medical Hi...

Signature


Line

Spacer

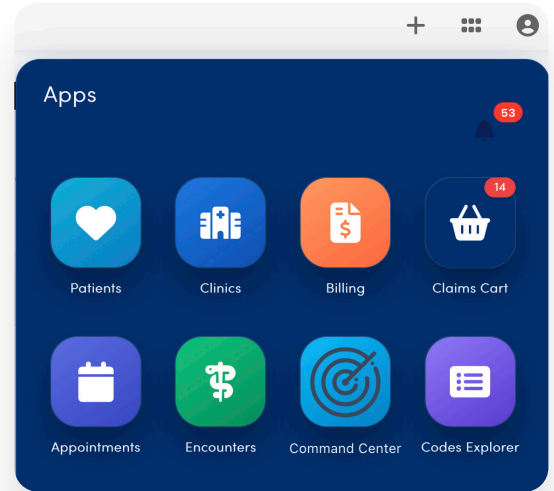
Save



Claims Cart

1. Open Apps (top bar). → 
2. Select Claims Cart.
3. Review encounters in the cart — click one to edit codes, diagnoses, or details.
4. Update the Billing Provider and Transmission Method.
5. When ready, click Submit claims.

1 Open Apps



2 Claims Cart

1 Encounters [Change](#)

Review the encounters in this cart before building claims.

Encounters 14 Procedures 29 Diagnoses 28 Total \$4,640.00

DOS 2026-02-24 · Top POS POS 11 · 14

2 Billing Provider [Change](#)

Choose the billing provider that receives payer checks and remittance mail.

Billing REGIONAL PPO NETWORK · JOHNTWO DOETWO · NPI 1760854442

Service providers on encounters: 1

3 Claim Transmission [Change](#)

Select how these claims are sent: EDI, CMS-1500 print, or data export.

Method Electronic (EDI 837) (Default)

4 Review

Items	Procedures	Diagnoses	Order total
14	29	28	\$4,640.00

Dates of service
2026-02-24

Place of Service (POS)
POS 11 · 14

Payers

AETNA CPID 6400 · PayerID 60054	\$3,960.00 12 items
2020 EYECARE CPID 8215 · PayerID 2020E	\$680.00 2 items

[Show details \(14\)](#)

Submit claims · 14

Order total: \$4,640.00
Clearinghouse fees (\$0.40/claim): \$5.60

By submitting, you certify the information is accurate and agree to your clearinghouse terms.

Review what's in the cart (DOS, POS, totals)."

Confirm who receives remits and checks.

Choose how claims are sent or exported.

Submit.

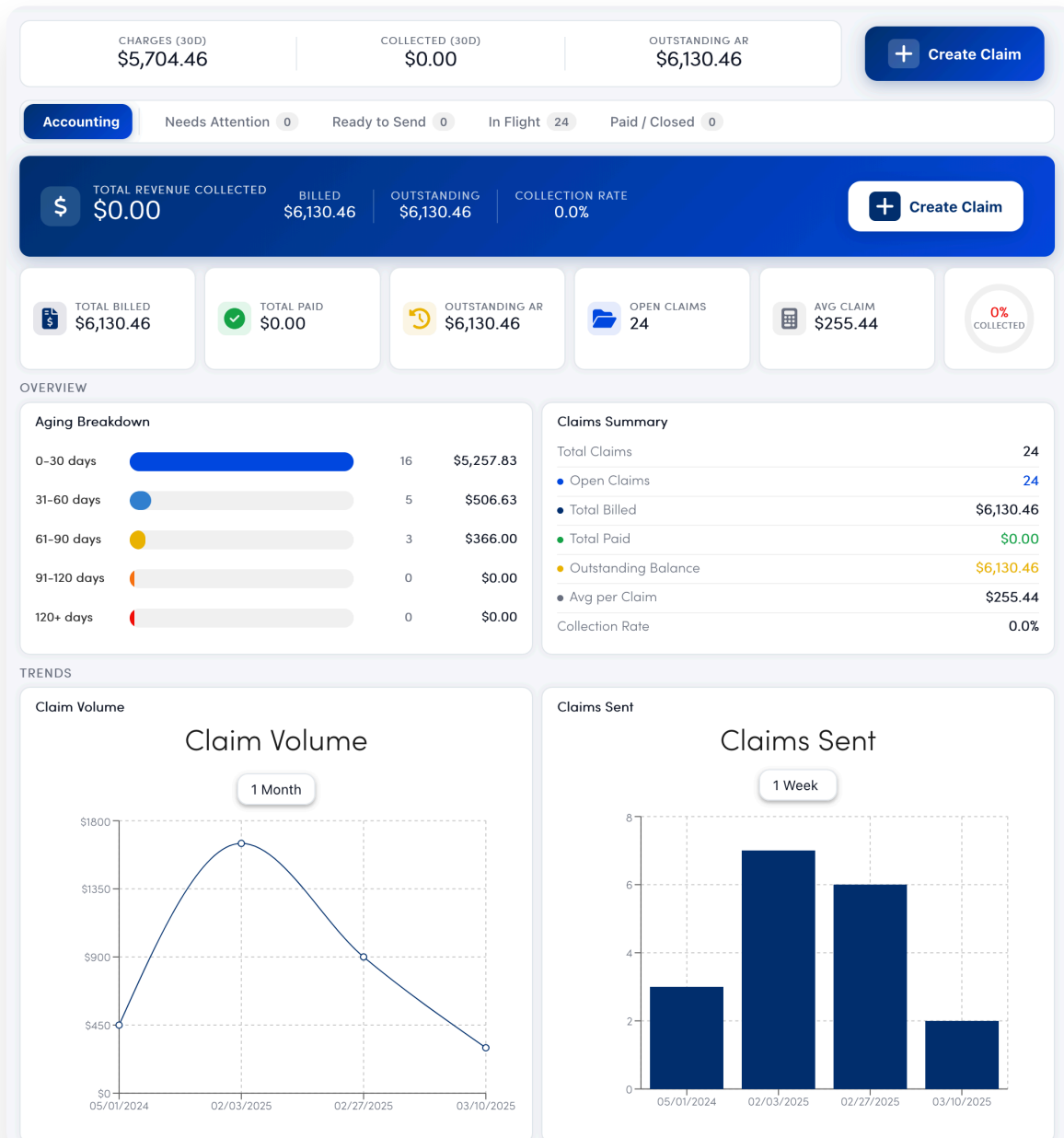


Billing

Track claims, collections, and what needs attention from the billing dashboard.

1. Open Apps (top bar).
2. Select Billing.
3. Use tabs like Needs Attention, Ready to Send, and In Flight to track claims.
4. Click Create Claim to start a new claim (optional).

Billing Dashboard



Command Center

A system-wide overview of updates, follow-ups, billing issues, notifications, and security activity — all in one place.

Includes

- What changed + follow-ups
- Claims to fix
- Notifications
- Recent activity (notes, encounters, assessments)
- Recommended codes (when available)
- Login / security activity map

The screenshot displays the EMRDesk Command Center interface. On the left, a 'HealthCheck' panel for 'John Doe' shows 'What Changed' (hypertension, cough, fever), 'Follow-ups to Schedule', 'Claims to Fix', and 'FYI' (urgent due to symptoms). Below this is a 'Notifications' section with tasks like 'Set up clinics and bundles' and 'Finish your account setup'. On the right, a 'Recent Activity' list shows new encounters and notes for Winston Churchill and Jahshshs Jehhehe. Below that is an 'Activity' chart for the last 7 days, showing a peak in activity on Feb 21. Summary statistics at the bottom right indicate: Patients: 1, Encounters: 6, Notes: 4, Claims: 0, Files: 0, Other: 1, Total: 12.



Settings

Manage your account, clinic configuration, users, and integrations from Settings.

Adding Users

1. Open **Settings > Users**.
2. Click **Add User**.

The screenshot shows the 'Users' tab in the settings menu. At the top, there are tabs for 'General', 'Users', and 'Billing'. Below the tabs, the user's name 'Testing Tester' and tier 'Tier: Student Starter' are displayed. The main section is titled 'USERS' and contains two options: 'Add Sub-User' and 'Student invite'. The 'Add Sub-User' section has a description 'Invite a new staff member to your clinic account.' and an 'Add User' button. The 'Student invite' section has a description 'Requires a .edu email address. Up to 200 invites per student account.' and includes two input fields with the text 'Test', an email input field with 'test@mit.edu', and 'Send student invite' and 'Cancel' buttons.

Branding & organization

1. Open **Settings > General**.
2. Upload a logo and update organization info.

The screenshot shows the 'General' tab in the settings menu. At the top, there are tabs for 'General', 'Users', and 'Billing'. Below the tabs, the user's name 'John Doe' and tier 'Tier: Starter' are displayed. The main section is titled 'ORGANIZATION' and contains two sections: 'Logo' and 'Organization Info'. The 'Logo' section has a description 'Upload or replace your organization logo.' and a file type specification 'PNG/JPG · 1-2 MB'. It includes an upload icon and instructions: 'Click to upload or drag a PNG logo' and 'Transparent background and a wider rectangle look best in the EMRDesk header.' The 'Organization Info' section has a description 'Name and contact number used on forms.'



You're Ready

Complimentary records migration included.
Most clinics go live in days.

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Everything included.

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emrdesk.com/demo →
hello@emrdesk.com

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