

Cleo Health is an AI powered documentation and workflow platform designed for acute care, emergency medicine, and urgent care providers.

Education

Hospital *employed* Emergency Department providers can click [here](#) for additional step by step workflow instructions.

Quick overview of Cleo Health Click [here](#).

How to click [here](#)

NOTE: Microsoft Intune Company Portal is a required download for the use of Cleo Health Click [here](#) for download steps.

App Access: ONE TIME SET-UP for Personal Mobile Devices

STEP 1: Personal Device – Go to the App Store or Google Play.

STEP 2: Search for Cleo Health.

STEP 3: Install the Cleo Health App on your device.

STEP 4: Once in the app click Sign in.

NOTE: If you are new to Cleo and have never signed in before, click the [Sign-up link below the continue button](#)

STEP 5: Sign up – Register for a Cleo Health account using your NLH email.

STEP 6: Sign into Cleo Health with your NLH email and password.

- Allow Cleo to record Audio.

STEP 7: A Northern Light Health window will appear.

- Username: NLH email
- Password: network password

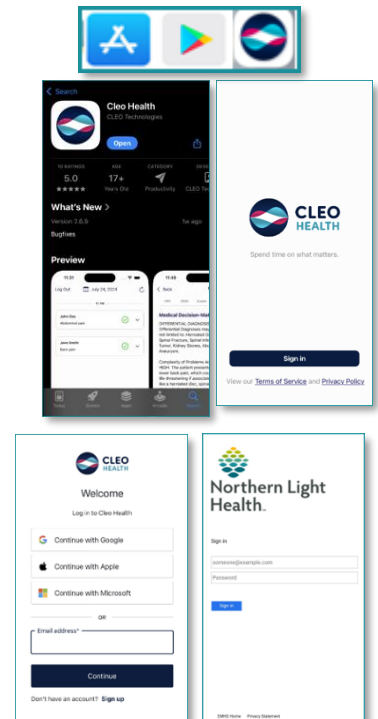
Start Recording a Patient Encounter using the Cleo Mobile App

NOTE: Obtain verbal consent prior to using AI scribe.

- This setting inserts a statement: “The content of this note was generated using the assistance of Artificial Intelligence (AI) technology.” The statement will show at the bottom of the first pasted section.

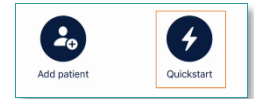
There are two ways to initiate a new patient note:

1. Click the ADD Patient button (Structured Start)



- If you know the patient’s name and chief complaint ahead of time, you can enter these details manually using the “Add Patient” option.

2. Click on the **QuickStart** button (**One-Click Start**)



- Using QuickStart immediately begins recording without requiring manual data entry,
- After recording, Cleo will automatically extract Chief complaint, room number, age, and sex from your speech for patient identification.

STEP 1: Press “Add Patient” or “QuickStart” to begin a new patient encounter.

- **Add Patient** – The prompt for the patient’s name, chief complaint, age, and sex will pop up, once that is filled out click add.

STEP 2: Select **Begin Encounter** next to the patient’s name.

STEP 3: Enable Microphone Permissions

- If prompted, grant microphone access so Cleo can function properly.

STEP 4: Introduce the Patient

- Provide any available basic information such as room number, age, and sex.

STEP 5: Beginning the encounter.

- Conduct your conversation with the patient, Cleo will do the documentation in the background. Providers are able to pause by clicking the red pause button and resume by clicking the microphone button.

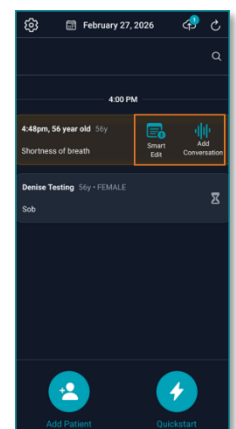
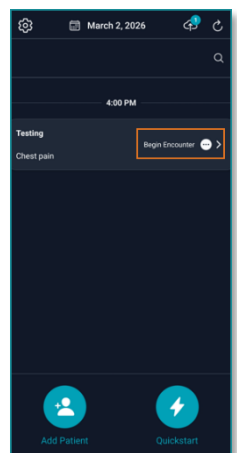
STEP 6: End the Encounter

- When finished, press the red Pause button and then click Create Chart to save your notes.
 - **Add Conversation** this option allows providers to insert re-evaluations.
 - **Smart Edit** this option allows the provider to view the documentation in the components.



STEP 7: Sync the chart.

- Wait 15-20 seconds, then pull down to refresh the app or click the refresh icon in the top right corner.



NOTE: Clinical Notes and Documents within Cleo Health will be deleted after 14 days.

Review and Finalize Documentation in the Cleo Web App

STEP 1: Log into the Cleo Web App (for desktop use)

- Click [here](#) to log into the Cleo Web App on your workstation.

STEP 2: Select the patient.

- From the patient dashboard, click on your most recent encounter.

STEP 3: Click the Generate MDM button.

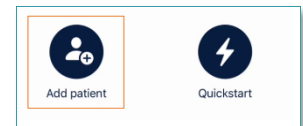
STEP 4: Review Cleo’s generated note for accuracy.

STEP 5: Copy the finalized note and paste it into the appropriate sections within the patient’s chart in FirstNet.

Note: The QuickStart option is useful for EMS arrivals or unresponsive patients, where gathering details in advance may not be possible.

Add Patient

STEP 1: From the home screen, tap the **Add patient** button on the lower left-hand side of the screen.



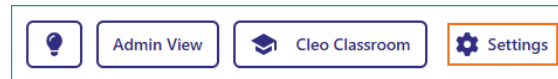
STEP 2: A prompt will pop up to fill in the

- Patient’s name or Room number
- Chief Complaint
- Sex (Optional)
- Age (Optional)

STEP 3: Click Add

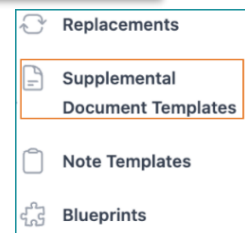
Access Supplemental Documents via the Chart Dashboard

STEP 1: Log in to your Cleo chart dashboard.



STEP 2: Click on **Settings**.

STEP 3: In the left-hand menu, select **Supplemental Document Templates**.

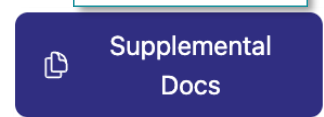


STEP 4: Click the “Add Template” button to create a new document template.

Access Supplemental Documents Within a Patient Chart

STEP 1: Select a patient chart from your dashboard.

STEP 2: In the upper right-hand corner, Click the **Supplemental Docs** button.



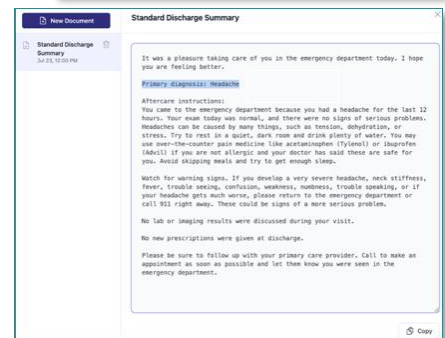
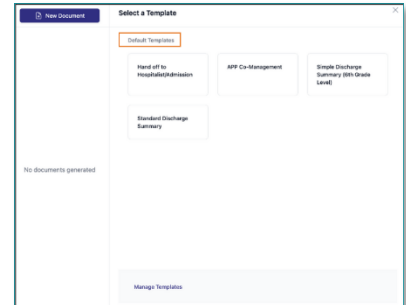
STEP 3: From the dropdown:

- Select any one of the default templates listed.
- Then Click “Generate Document.”

STEP 4: You can now:

- Directly Edit the generated document to add/remove information as needed.
 - Choose “New Document” to start from scratch.
 - Choose “Manage Templates” to access the template settings.

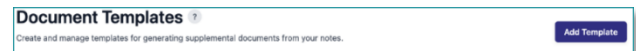
NOTE: The Manage Templates option brings you back to the Supplemental Document Templates page in your settings, where you can customize any templates, you have created.



Creating a New Supplemental Document Template

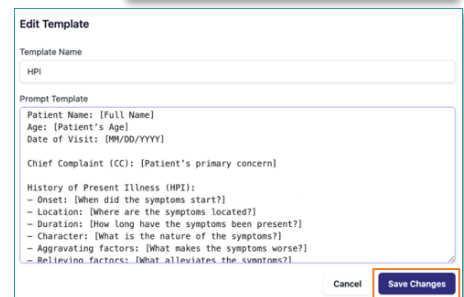
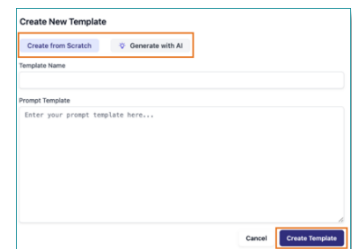
To Create a custom template:

STEP 1: From either path above, click “Add Template”.

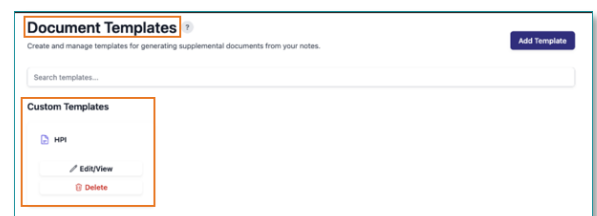


STEP 2: There will be two options:

- First Option: **Generate with AI** – ask Cleo to help.
 - Click **Generate with AI** (e.g., “Aftercare instructions in Spanish”)
 - Next Click “Generate” (for AI-created content, if applicable).
 - Then click “Create Template” to save it.
- Second Option: **Create from Scratch** – manually input your template text. (copy and paste previously saved templates)
 - Click “Create from Scratch”
 - Next click “Save Changes” to save it.



- Once saved, your template will show in Custom Templates under your Document Templates.



Cleo Health FAQs

Q: Support help.

A: Call/Text 1-567-364-6870 or email Support@cleo-ai.co.

Q: Can AI scribes be used when the patient is unable to consent due to condition?

A: Except in an emergency, a patient with Capacity or their Authorized Representative must be advised of the presence of a Scribe (including AI scribes) prior to the start of the encounter and may decline its use. For clinical areas where AI Scribes may be in use, signage approved by Marketing and Communications will be required.

Q: Does Cleo support Bluetooth devices?

A: The device you are using needs to offer recording modes to generate complete notes.

Q: Can Cleo capture audio in trauma situations?

A: Cleo is designed with trauma environments in mind to perform.

Q: Is it possible to be logged into multiple sessions of Cleo?

A: Yes, clinicians can be logged into multiple Cleo desktop web sessions simultaneously.

Q: Does Cleo support other languages?

A: Yes, currently there are 15 languages.

Q: How does Cleo listen to my conversations?

A: Cleo uses the phone microphone to stream audio to a secure transcription service. No audio is stored on the phone or retained by the servers.

Q: Can I use PowerMic with Cleo on my desktop?

A: Yes, click on **Smart Edit** and use the microphone without pressing or holding any buttons on the PowerMic.

Q: Will Cleo drain the phone battery?

A: No, all processing is performed on the secure servers, ensuring minimal impact on the phone's battery.

Q: What is Cleo's note deletion configuration?

A: Note deletion settings are determined by each user's organization or group and viewed on the **Chart Dashboard**.

Q: What are Supplemental Documents?

A: **Supplemental Documents** are clinician-generated, optional documents created in addition to the primary patient encounter note. They are used when additional, non-EHE-based communication is needed to support care, workflow coordination, or patient instructions.

Q: Why use Supplemental Documents?

A: Using Supplemental Documents can bring key benefits to your documentation and workflow.