athenahealth

Guidance on how to refer to athenaOne's AI assistant, Sage™

Sage is our AI assistant and multi-agent orchestrator across athenaOne®, except for patient-facing/athenaPatient use cases.

Each athenaOne feature or capability should retain its own distinct, descriptive name that clearly communicates its benefit to customers, even when Sage is embedded in its functionality. Sage is the name of our AI assistant; its presence in a feature does not replace the need for a feature name. Feature names are still necessary to help communicate what users can ask of Sage in that specific context.

It's also important to make clear in messaging that Sage is used to assist clinicians and other athenaOne users, it should not be positioned as taking away human control.

Overall usage guidance

- Always capitalize the "S" in Sage: "Sage"
- In messaging and support documentation outside of the product use a TM symbol ("™") on first reference and refer to it as "athenaOne's AI assistant."
- Assistant is the preferred term to use when referring to what Sage is, an AI assistant. Do not refer to it as a bot or agent.
- Within athenaOne, refer to the AI assistant simply as "Sage".
- Additional guidance on how to apply Sage within the UI of athenaOne can be found on the Forge Guidelines.

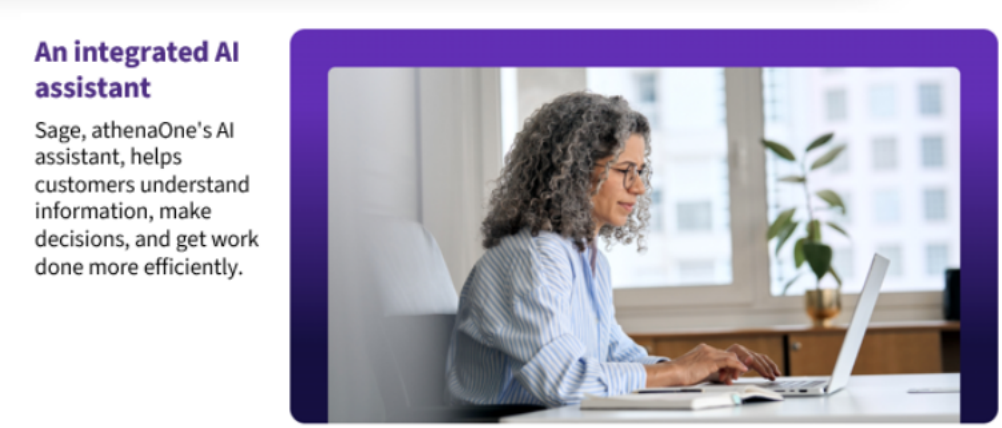
Referring to Sage in different contexts

Context is critical to determine how to refer to Sage in copy. Remember that Sage is not a synonym for all AI capabilities of athenaOne, rather it is the assistant experience that is made possible from the Advanced Intelligence Layer.

How to refer to Sage when discussing the overall conversational AI capabilities of athenaOne

When communicating at a high-level about athenaOne's overall AI capabilities and not referring to any one specific capability, use "Sage", or "Sage, athenaOne's AI assistant".

In-situ (for illustrative purposes only):



- **DO:** "Sage, athenaOne's AI assistant, helps customers understand information, make decisions, and get work done more efficiently."
- **DO:** “Sage helps customers get more from athenaOne by bringing intelligence and assistance directly into the moments where work happens."
- **DO:** "Sage, athenaOne's AI assistant is currently available in the AI-native encounter, Chart, and the Clinical Inbox, with additional feature capabilities coming soon."
- **DON’T:** "athenaOne's Sage bot/agent helps customers..."

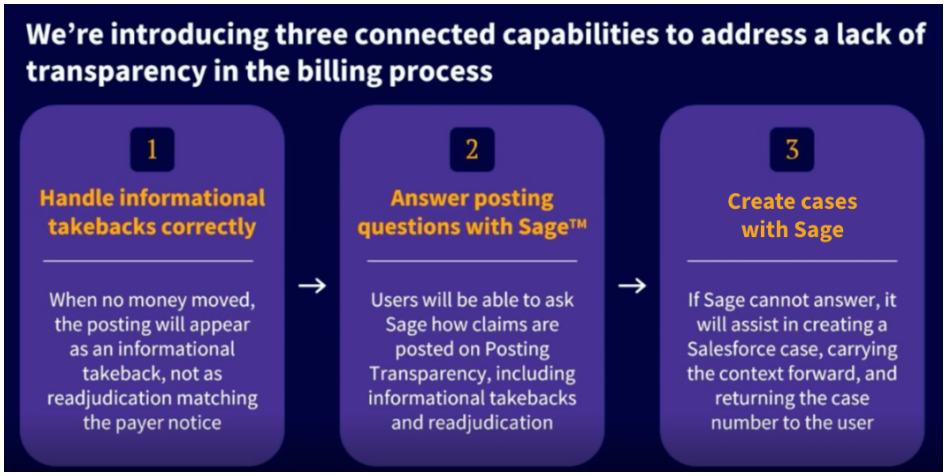
How to refer to a specific capability or feature that uses Sage in marketing, sales or training collateral

In capability or feature messaging or when describing a task or workflow where Sage is an embedded, meaningful part of the customer experience, lead with the capability or feature name followed by "with Sage". Using the descriptive name of the capability leads with the benefit to the customer and helps identify the capability or area of athenaOne being referred to. This does not mean Sage always has to be mentioned when discussing the feature.

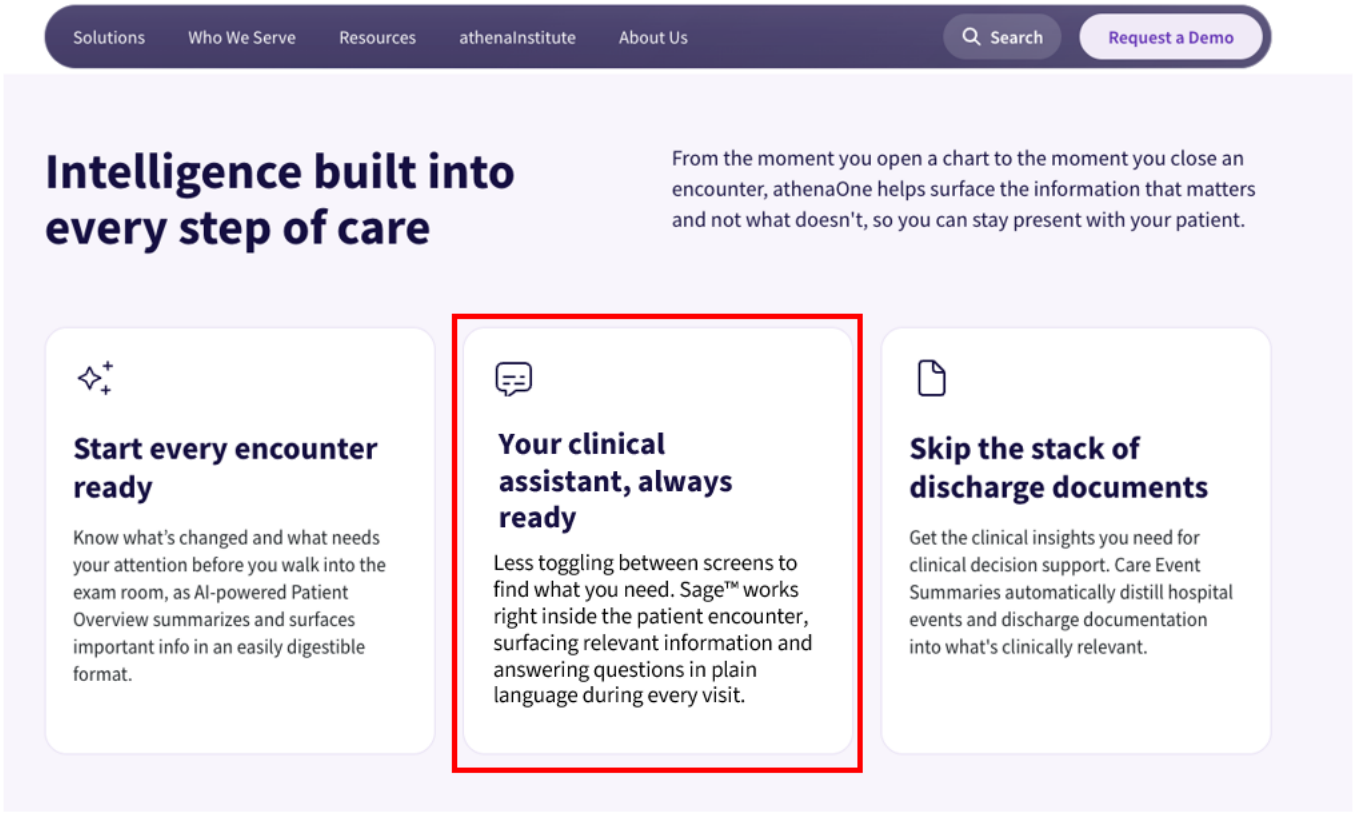
- **DO:** "[Feature Name] with Sage."
- **DO:** "[Feature Name] now includes Sage, athenaOne's AI assistant"
- **DO:** "Users can ask Sage how claims data was posted in [Feature Name]."
- **DO:** "With the AI-native Clinical Inbox you can summarize the most time sensitive...Simply navigate to the chat box and ask Sage to..."
- **DON'T:** Use other words to connect the feature name to Sage: "[Feature name] powered by Sage"
- **DON’T:** Create new names for different Sage assistants/agents across the athenaOne experience. Sage is the only name for our AI assistants.
- **DON'T:** Precede the feature name with Sage: "Sage Chart", "Sage, Inbox Assistant", "Sage - Analytics Assistant"

In-situ (for illustrative purposes only):





In-situ web page copy (for illustrative purposes only):



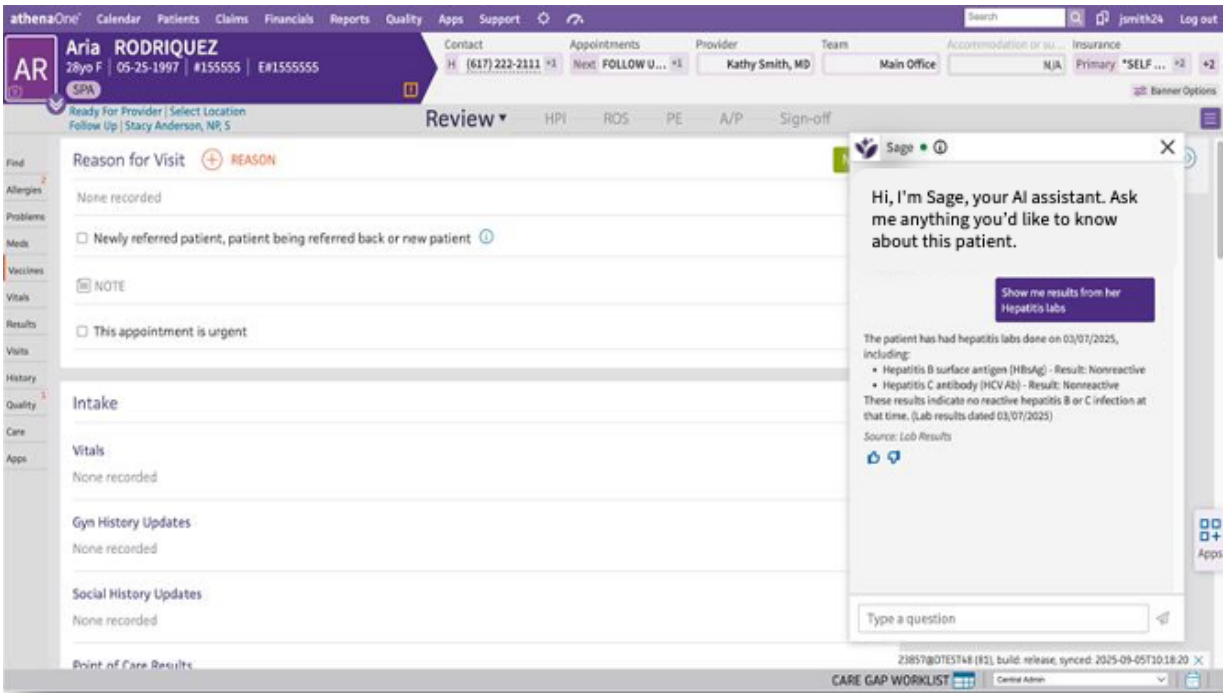
How to refer to Sage within the product experience

When a user interacts with an assistant in the product, the assistant should be labelled as Sage, and tasks (and their corresponding responses or results) that a user can ask it to perform, should be labelled as being surfaced from Sage.

Avoid generic prompts such as “Chat with Sage.” While this communicates that Sage is conversational, it does not tell the user what they can do or why they should engage. Instead, use specific, action-oriented language that describes the task, question, or outcome Sage can help with. This is especially important since Sage does not currently have the full product context (i.e. Sage in the AI-native encounter cannot perform the same tasks as the Sage in the clinical inbox).

- **DO:** "Ask Sage about this patient."
- **DO:** "Sage drafted a note for your review."
- **DO:** "Sage identified five claims that need your attention."
- **DON'T:** "Chat with Sage."

In-situ (for illustrative purposes only):



Referring to Sage within customer support experiences

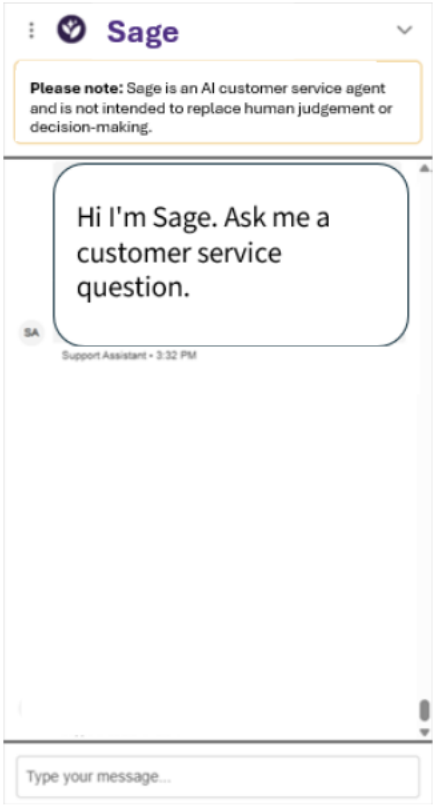
In addition to serving as the single name for all AI assistants across athenaOne, Sage is also used as the name for conversational AI experiences across customer support experiences. Using the same name helps build credibility, consistency, and clarity for customers.

How to use Sage in context of the Success Community

Within the Success Community, customers can ask Sage questions in natural language and receive immediate answers based on trusted athenahealth content sources. In this context, we will describe Sage’s skill as a customer

service assistant to clarify that this experience helps customers act toward a goal (as opposed to a chatbot that simply answers questions).

- **When describing the customer benefit lead with the feature name**
    - **DO:** "The Success Community now includes a customer service assistant, Sage that enables immediate, self-guided support."
    - **DO:** “Sage is a customer service assistant that allows customers to ask questions and open support tickets."
- **When building trust and credibility in Sage as the persona associated with this capability, lead with Sage**
    - **DO:** "Hi I’m Sage, an AI-powered customer service assistant."
    - **DO:** "Sage is powered by generative AI and is not intended to replace human judgement or decision-making.”



- **Within the product experience, label the assistant as Sage**
    - **DO:**

