

# AI Scribe System - Standard Operating Procedure (SOP)

**Effective Date:** January 27, 2026

**Department:** Clinical Operations - All Locations

**Purpose:** Provider guide for AI-assisted clinical documentation using the NOW Scribe system

## OVERVIEW

The AI Scribe System automates clinical documentation by:

- **Recording** visit audio via iOS Shortcut
- **Transcribing** conversation using AWS Medical Transcribe
- **Generating** SOAP notes, work excuses, discharge instructions, and prescriptions
- **Reviewing** via Telegram for provider approval
- **Injecting** approved documents directly into Healthie EHR

## Key Benefits

Feature	Benefit
Hands-free recording	Focus on patient, not typing
AI-generated SOAP	Consistent, comprehensive notes
Telegram approval	Review/edit anywhere
One-tap injection	Documents in chart instantly

## PROVIDER SETUP

### Step 1: iOS Shortcut Installation

Each provider has a unique iOS Shortcut. Install yours:

Provider	Healthie ID	Shortcut
Phil Schafer NP	12088269	NOW Scribe - Phil
Dr. Aaron Whitten	12093125	NOW Scribe - Aaron

#### To Install:

1. Open the **Shortcuts** app on your iPhone
2. Create a new shortcut named **NOW Scribe - [Your Name]**
3. Add **Record Audio** action (set quality to "Very High")
4. Add **Get Contents of URL** action:
  - o URL: <https://nowoptimal.com/upload>
  - o Method: **PUT**
  - o Headers: Content-Type: audio/x-m4a and X-Provider-Id: **YOUR\_ID**
  - o Body: Recorded Audio from Step 1

### Step 2: Telegram Setup

Your Telegram account must be linked to receive approval requests. Contact admin if you're not receiving Telegram messages.

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## RECORDING A VISIT

### Starting the Recording

1. Tap your **Scribe shortcut** on iPhone (home screen or Shortcuts app)
2. **Begin recording** - speak naturally with the patient
3. Recording captures: symptoms, history, complaints, your exam findings, and plan

### Best Practices

Do	Don't
State patient's full name clearly	Rely on pronouns alone
Verbalize your exam findings	Skip describing what you observe
Speak your assessment out loud	Assume AI can read your mind
Mention any work/school notes needed	Forget to mention documentation needs
State prescription details if applicable	Use abbreviations for medications

### Stopping the Recording

1. Tap "Stop" on the recording interface
  2. Audio automatically uploads to secure server
  3. You'll receive a **Telegram notification** within 2-3 minutes
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## TELEGRAM APPROVAL WORKFLOW

### Understanding the Approval Message

When your Telegram notification arrives, you'll see:

NEW SOAP NOTE READY FOR REVIEW

Patient: John Doe (ID: 12345678)  
Visit Type: Follow-up  
Confidence: 92%

SOAP NOTE PREVIEW:  
[Abbreviated preview...]

Quick Actions:  
[ Confirm & Send] [ Reject]  
[ View Full SOAP] [ Change Patient]  
[ Work Note] [ Discharge]

### Action Buttons Explained

Button	What It Does

<b>Confirm &amp; Send</b>	Approve and inject all selected documents to Healthie
<b>Reject</b>	Discard documents (saved to S3 for later if needed)
<b>View Full SOAP</b>	See complete SOAP note before approving
<b>Change Patient</b>	Search and select different patient
<b>Work Note</b>	Add work excuse to documents (must tap BEFORE confirming)
<b>Discharge</b>	Add discharge instructions (must tap BEFORE confirming)

## Correct Workflow Order

**IMPORTANT:** Add documents BEFORE confirming!

1. **Review** the SOAP preview
2. **Change Patient** if needed (tap , type name, select)
3. **Add Documents** if needed (tap Work Note or Discharge)
4. **Confirm & Send** once everything looks correct

Once you confirm, the session ends and documents are injected.

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## CHANGING PATIENT

If the AI identified the wrong patient:

1. Tap **Change Patient**
2. **Type the patient's name** in your reply
3. Select from the search results
4. Message updates with correct patient
5. Proceed with confirmation

## New Patients

Patients recently added to Healthie are automatically searchable. The system checks:

1. Snowflake database (synced every 6 hours)
  2. Healthie API directly (real-time fallback for new patients)
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## ADDING WORK/SCHOOL NOTES

### Work Excuse (Off-Work Note)

1. Tap **Work Note** button
2. System extracts relevant info from SOAP note
3. PDF preview is attached
4. Document is queued for injection
5. Then tap **Confirm & Send**

### Discharge Instructions

1. Tap **Discharge** button
2. System generates patient-friendly instructions from PLAN
3. PDF preview is attached

4. Document is queued for injection

5. Then tap **Confirm & Send**

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## WHAT GETS INJECTED

Upon approval, documents are injected to Healthie:

Document	Location in Healthie
SOAP Note	Chart Notes   Private Note
Work Excuse	Documents (as PDF)
Discharge Instructions	Documents (as PDF)
School Excuse	Documents (as PDF)

## Verification

After confirmation, you receive a message with:

- Status: `approved_and_injected`
  - Links to injected documents in Healthie
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## TROUBLESHOOTING

### "No patients found" Error

**Cause:** Patient not in Snowflake or Healthie **Solution:**

- Try alternate spelling
- For brand new patients, wait 1 minute and retry (real-time API lookup)
- Contact admin if patient exists in Healthie but isn't found

### Telegram Message Not Received

**Cause:** Bot not linked, server issue, or wrong chat ID **Solution:**

- Verify bot is active in your Telegram
- Check that you've messaged the bot at least once
- Contact admin to verify chat ID configuration

### Wrong Visit Type Classification

**Cause:** AI misinterpreted the conversation **Solution:**

- Review and approve - classification doesn't affect SOAP content
- For recurring issues, report to admin for prompt tuning

### Documents Not Appearing in Healthie

**Cause:** Healthie API issue or network timeout **Solution:**

- Check Healthie directly for the chart note
- Review S3 bucket for saved documents
- Contact admin with the scribe job ID

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## SAFETY & DATA

### All Documents Are Preserved

Even if approval fails:

- Audio saved to S3
- Transcript saved to S3
- Generated documents saved to S3
- Nothing injected until YOU approve

### Timeout Behavior

Timeout	Result
1 hour no response	Session expires, documents saved to S3
Telegram offline	Documents saved, can reprocess later
Network failure	Documents saved, retry available

### Recovery

If you need to recover documents from a failed session:

1. Contact admin with approximate time of recording
  2. Documents can be retrieved from S3
  3. Manual injection is available if needed
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## SUPPORT

Issue	Contact
Shortcut not working	IT/Admin
Telegram not receiving	IT/Admin
Patient not found	Front desk staff first, then IT
Clinical question about AI output	Review manually, flag for prompt improvement

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## RELATED DOCUMENTS

- [iOS Shortcut Setup Guide](#)
  - [Safety & Recovery Guide](#)
  - [Staff Onboarding SOP](#)
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