

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:
 - URL: `https://nowoptimal.com/upload`
 - Method: `PUT`
 - Headers: `Content-Type: audio/x-m4a` and `X-Provider-Id: YOUR_ID`
 - 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.

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

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 |
|--------|--------------|
|--------|--------------|

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

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**

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
-

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

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

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 |

RELATED DOCUMENTS

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

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