

Before Your First Appointment: Quick IT & Browser Setup (Manage)

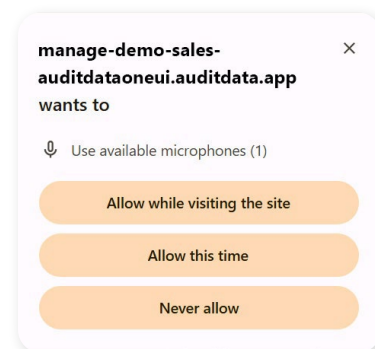
AI Notes Assistant works best when your browser and clinic PC are set up to support reliable audio capture.

Browser

- Use **Google Chrome** or **Microsoft Edge**.
- Keep your browser **up to date** (automatic updates turned on is best).

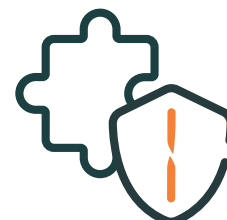
On Your Clinic's Manage Site (Your Auditdata URL), Allow:

- **Microphone: Allow**
So AI Notes can capture speech clearly.
- **Notifications: Allow**
So you don't miss timeout or recording alerts.
- **Pop-ups & redirects: Allow**
So all AI Notes windows and steps open correctly.
- **Cookies & local storage: Allow**
Avoid auto-clearing cookies/local storage when the browser closes.



Privacy, Security Tools & Extensions

- Add your **Auditdata domain** to your organization's **trusted / allowed sites** list.
- Make sure the Auditdata domain is **not blocked** by:
 - Ad blockers
 - Script blockers
 - “Tab sleeping / tab suspender” extensions

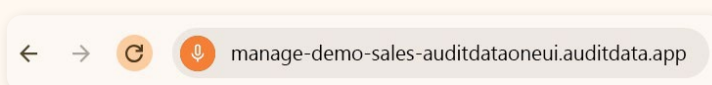


Clinic PC Power Settings

- On clinic workstations used for AI Notes, **while plugged in during working hours**:
 - Turn off **automatic sleep**
(Sleep can interrupt browser audio and stop transcription.)

Important (During Transcription)

- Do **not** refresh the page.
- Do **not** close the browser window.



Tip: If you ever see an error right after starting, begin with a short greeting or your consent question — it helps confirm the system is “hearing” speech.

During Your Appointment: Best Practices for Using AI Notes Assistant

STEP 1: Remember to Start the Transcription

If you're used to taking notes manually, it can take time to build a new habit.

- **Set a visual or verbal reminder** — for example, include a consent question like:
“Before we start, is it okay if I use our digital note-taking tool to capture our conversation? It's not a recording — it just helps me take more complete notes.”
- Consider adding this as a **standard step in your appointment checklist** or initial questions.

START TRANSCRIBING

STEP 2: Ease Into Consent Conversations

Asking for consent can feel uncomfortable at first, but it's easier when you focus on transparency and patient understanding.

- Use **friendly, clear language** such as:
“I use an online note-taking tool that helps me capture our discussion word-for-word, so I don't miss anything important. It's not an audio or video recording.”
- Avoid technical jargon like “transcription” or “speech recognition” if it feels intimidating, phrases like **“digital note capture”** or **“AI-assisted notes”** sound more natural and reassuring.



STEP 3: Clarify What Is (and Isn't) Captured

Patients may wonder what's being stored. Reassure them that:

- Only **spoken words relevant to documentation** (e.g. for GP letters, management plans, journal notes) are captured.
- The AI **does not record sound** or store raw audio.
- “Filler” speech like “test, test, test” or small talk is **not included** in the final documentation.

STEP 4: Guide the Conversation Toward the Desired Output

Think about what documentation you want AI to generate afterward:

- **For GP letters:** Emphasize the key points and conclusions of the consultation.
- **For management plans:** Verbally summarize decisions and next steps.
- **For journal notes:** Include relevant clinical observations aloud.

Tip: Say things like, “Let me summarize that for your GP...” or “So your management plan will include...” — this helps the AI structure the output, **and reinforces understanding for the client** at the same time.

Select documents for generation

Journal Notes

Document outputs

GP Referral Letter

Individual Management Plan

CANCEL

SAVE

STEP 5: Speak Key Observations Out Loud

If you normally make notes of certain observations privately (e.g. otoscopy results or audiogram findings), remember to **verbalize them** for the transcription.

- Example: “I can see a clear ear canal and healthy eardrum on the right side.”
This not only helps the AI generate accurate reports, but also keeps the **client informed and engaged**.

STEP 6: Handle Silent Starts Gracefully

If no speech is detected right after starting, you might get an **error message**.
To avoid this:

- Begin with your consent question or a short greeting (e.g. “Let’s get started — I’ll just begin my note capture tool now.”)
- Make sure the transcription is active before diving into the clinical conversation.



STEP 7: Ensure Clear Audio Quality

Accurate AI transcription depends on sound quality.

- Use a **good quality microphone**, ideally an external omni-directional mic rather than a laptop mic.
- **Position the mic** so that both you and the patient are within range.
- Minimize background noise — e.g. avoid typing, rustling papers, or talking over each other.

A laptop mic is fine when first trying AI Notes Assistant before investing in an external mic.

STEP 8: Build Confidence Over Time

Using AI transcription effectively is a skill that improves with experience.

- Try it first in **non-critical sessions** or **mock appointments**.
- Review the AI-generated notes afterward to understand how your speech patterns influence the output.
- Adjust your phrasing, pace, or clarity as needed — you’ll quickly learn how to “speak for the system.”



STEP 9: Think of AI as Your Clinical Partner

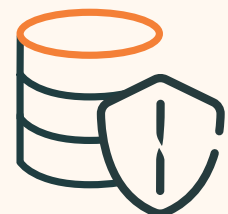
Instead of replacing manual note-taking, transcription **enhances your focus on the client**.

- You can maintain eye contact and active listening instead of typing.
- The AI becomes your **assistant for accuracy and completeness**, not an observer.
- Over time, this can **reduce administrative load** and improve the quality of clinical documentation.
- AI supports your documentation, but the final note still depends on your review and approval.

STEP 10: Stay Mindful of Privacy and Trust

Transparency builds confidence.

- Always confirm that **transcription is consent-based and secure**.
- Be ready to explain how the system protects patient data.
- Follow your clinic’s **data governance guidelines** and **GDPR compliance standards**.



After Your Appointment: Safe Use and Review of AI-Generated Notes

AI Notes Assistant helps you create a strong first draft, but the final note still depends on your clinical review, judgement, and approval.

STEP 1: Treat AI Notes Assistant as a Documentation Support Tool

It helps capture and structure what was said during the appointment, but it does not make clinical decisions, diagnoses, or treatment recommendations. The final note must always reflect your clinical assessment and judgement.



STEP 2: Always Review Before Approving

Think of the AI output as a draft. Read it through in full, correct anything that is unclear or incomplete, and only approve it when you would be comfortable signing it as your own.

STEP 3: Double-check High-Risk Details

Pay special attention to medications, allergies, diagnoses, referrals, measurements, dates, and consent-related statements. High risk details deserve an extra check before approval.



STEP 4: Use AI as Support – Not as the Source of Truth

Accurate documentation still depends on your recollection of the appointment, the patient record, and your usual clinical workflow. If something looks unfamiliar, unsupported, or out of place, correct it or remove it.

STEP 5: Keep the Wording Objective and Clinically Appropriate

If the wording feels subjective, judgmental, or doesn't reflect what was actually said or observed, rewrite it in clear, objective clinical language before approving.