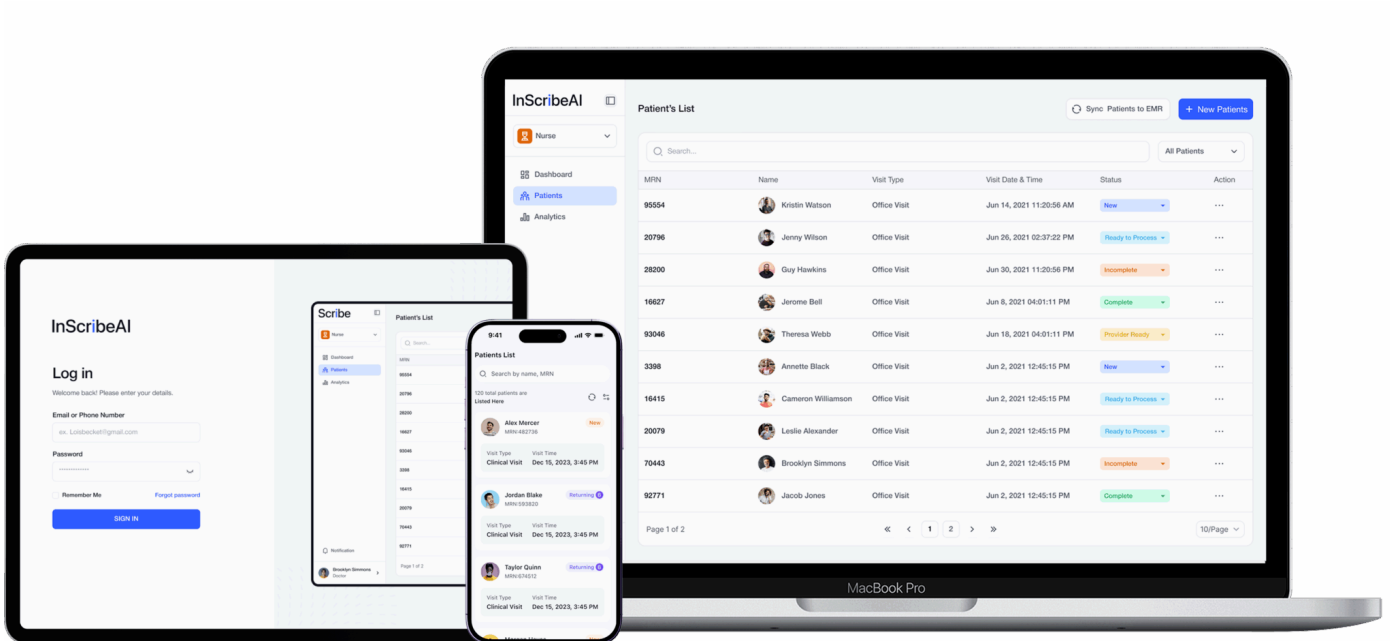


SureScribe

B2B SaaS GenAI platform with multi-stage AI pipelines and human-in-the-loop workflows.



Role & Responsibility

Complete System Design

Led end-to-end UX research, design, development and usability testing.

Overview

SureScribe is a B2B GenAI SaaS platform that automates the manual clinical documentation workflow performed by nurses and general practitioners (GPs) in EHR systems such as Athena and CharmHealth.

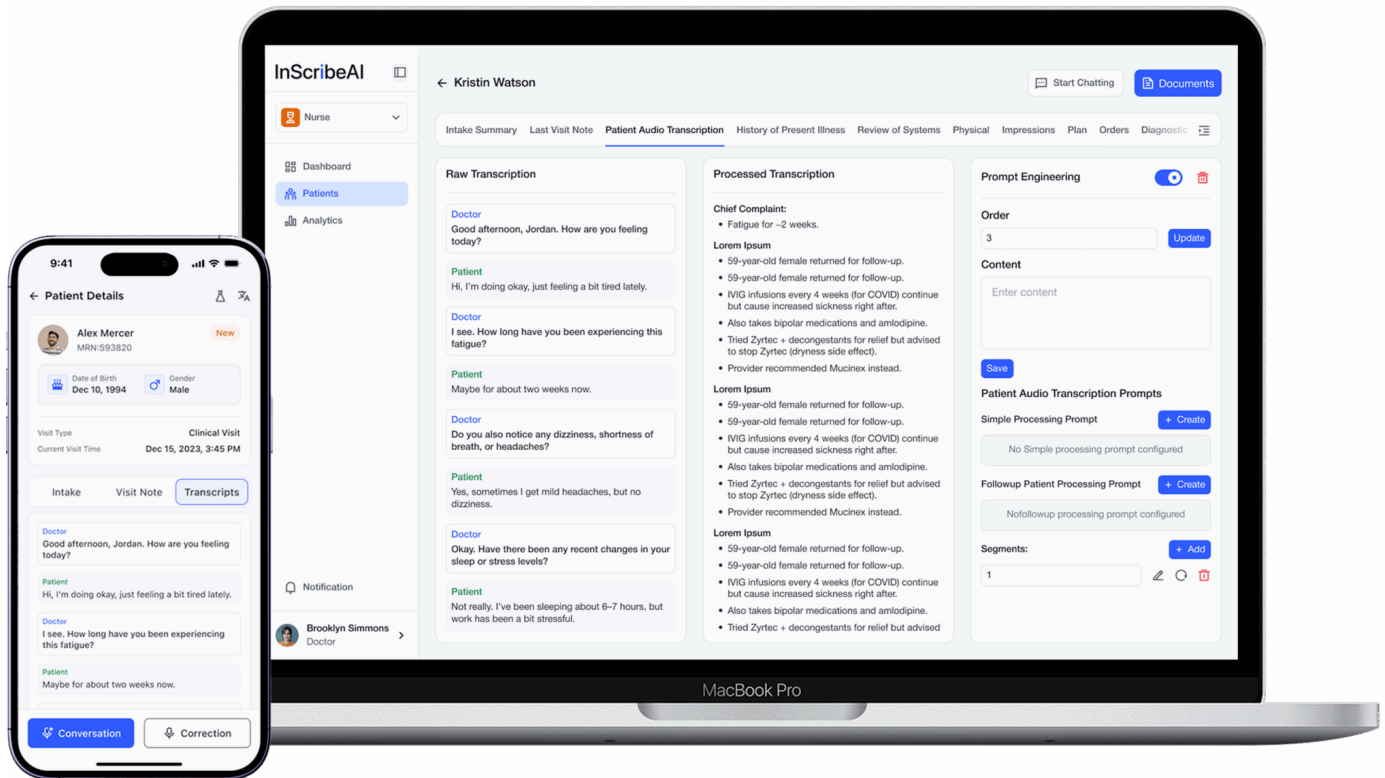
By combining **Whisper**, **AWS Transcribe**, **AssemblyAI** for speech-to-text, **LangChain** and **ChatGPT** for multi-stage prompt-engineered refinement, and a carefully designed human-in-the-loop UX, we reduced clinical documentation time from over an hour to under 20 minutes while maintaining HIPAA compliance and clinician control.

Key Challenges

- Conversational context: handling overlapping speech, medical jargon, and speaker differentiation.
- Multi-stage AI design: defining safe, accurate LLM prompt pipelines for clinical documentation.
- Human oversight & trust: building side-by-side raw vs. refined views and voice-driven corrections.
- Token efficiency: reducing LLM token usage for both multi-stage note refinement and RAG queries.
- HIPAA compliance: encryption, BAA agreements, and automated PHI deletion.

Main Objective

SureScribe is a HIPAA-compliant conversational AI platform that automates end-to-end clinical documentation directly into EHRs like Athena and CharmHealth. It combines real-time speech-to-text, multi-stage prompt-engineered LLM pipelines, and human-in-the-loop controls to capture encounters, generate structured notes, and support voice corrections. A Retrieval-Augmented Generation (RAG) chat feature lets clinicians query patient records with minimal token usage, cutting documentation from hours to minutes while improving accuracy and freeing clinicians to focus on care.



Understanding The Market

To shape SureScribe, we analyzed the rapidly growing clinical documentation and conversational AI landscape. I conducted competitive research on EHR-integrated AI tools and interviewed clinicians, administrators, and IT stakeholders to uncover pain points—manual data entry, high costs, and trust in AI output. This research guided our hypotheses, validated user needs, and informed the product strategy for a HIPAA-compliant, real-time documentation platform.

User Persona

Based on interviews with clinicians and doctors, we developed a representative persona to guide design decisions and ensure the platform meets the needs of healthcare professionals who handle patient documentation daily.



My job is to synthesize patient data and make decisions—not to spend my evenings typing notes into an EHR

Dr. James Carter, 38

General Practitioner (GP)

Dr. James Carter is a 42-year-old primary care physician with 15 years of experience in internal medicine. Known for his patient-centered approach and strong diagnostic skills, he values evidence-based care and preventive medicine. Although tech-savvy, he's frustrated by time-consuming EHR documentation and seeks tools like InScribeAI to streamline charting so he can focus on synthesizing data and delivering quality care.

MOTIVATION

- Focus on diagnosing and synthesizing data, not clerical work.
- Improve documentation accuracy and reduce after-hours charting.
- Enhance patient experience through more engaged, eye-contact care.

PAIN POINTS

- Loses hours each week typing encounter notes into EHRs.
- Finds manual data entry distracting during patient conversations.
- Experiences burnout from late-night charting and repetitive documentation tasks.

INDUSTRY VIEW



Micro (personal and practice oriented)

TECHNOLOGY VIEW



Moderate-High (uses EHRs daily, familiar with mobile apps)

INTERACTION STYLE



Long and short (quick visits, less data entry)

Goals

- Synthesize patient data to make informed clinical decisions.
- Complete documentation efficiently without sacrificing face-to-face patient time.
- Access labs, medications, and past visits in seconds.

Needs

- HIPAA-compliant, high-accuracy speech-to-text for medical terminology.
- Automated, structured note generation across multiple tabs (HPI, Orders, etc.).
- Voice-based corrections and final approval before syncing to Athena/CharmHealth.
- Seamless access to lab reports and patient documents during consultations.

AI Capabilities & Research

Research into machine learning, conversational AI, and multi-stage prompt engineering informed the development of AI-driven clinical documentation tools, enhancing the InScribeAI platform's capabilities and seamless integration with EHR systems.

Driving Innovation Through Clinical Conversational AI

AI Strategy & Research

I led research into large language models (LLMs), speech-to-text technology, and retrieval-augmented generation RAG to design an AI pipeline capable of real-time clinical documentation and EHR integration.

```
1 import assemblyai as aai
2
3 transcriber = aai.Transcriber()
4 transcript =
5 transcriber.transcribe(URL, config)

print(transcript)

{
  "id": "6rLr37h8f4-e310-4e23-bbf3-
ea5f347dc684",
  "language_code": "en_us",
  "status": "completed",
  "text": "Runner's knee is a condition
characterized by pain behind or around the
```

Research & Technical Exploration:

Evaluated STT engines and selected AssemblyAI for accurate medical transcription with speaker diarization, studied LLM capabilities (ChatGPT + LangChain) to design multi-stage prompt-engineering pipelines for clinical tabs while optimizing token usage, and implemented retrieval-augmented generation to enable fast, grounded Q&A on patient records within the SaaS portal.

>93.3%

Accuracy*

23.2s

Latency on 30 min audio file

12.5M

Hours of multilingual training data

Industry's lowest Word Error Rate (WER)

See how Universal performs against other automatic speech recognition providers.

Read our research

Provider	WER (approx.)
AssemblyAI	~10%
Amazon	~15%
Google	~18%
Microsoft	~22%
Deepgram	~28%
OpenAI	~35%

See it in action

▶ [View demo](#)

Away. First time. Good start from. From Bolt. Bulk lead in the moment and going away. Gay trying to go with him. And he's going. Being dragged through to second place, but he's going to win it by 2 meters. 9.58. The world record's gone. That's more like it. Sub nine six.

Try our playground

HIPAA Compliance

Enterprise Security

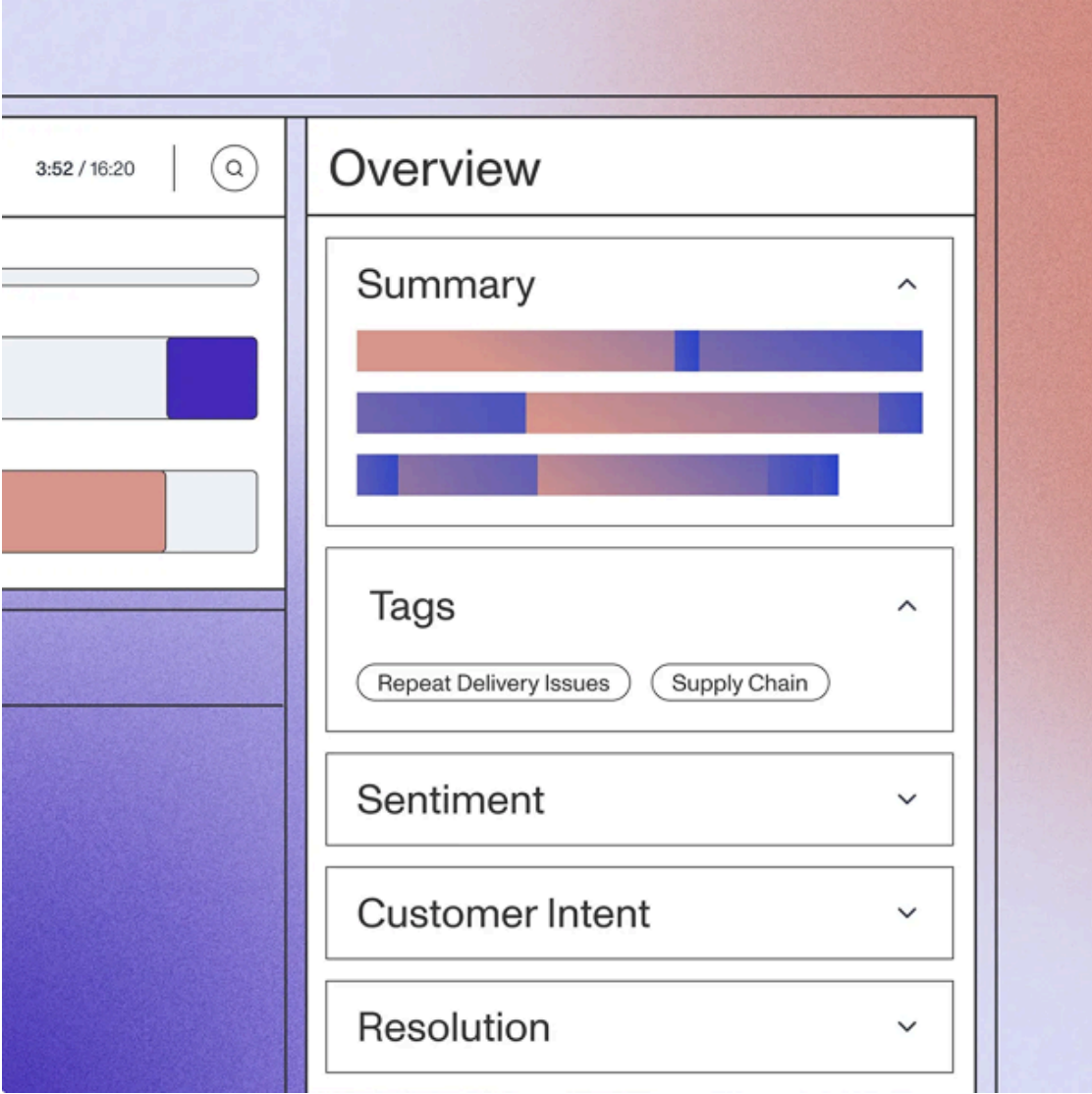
Data Protection

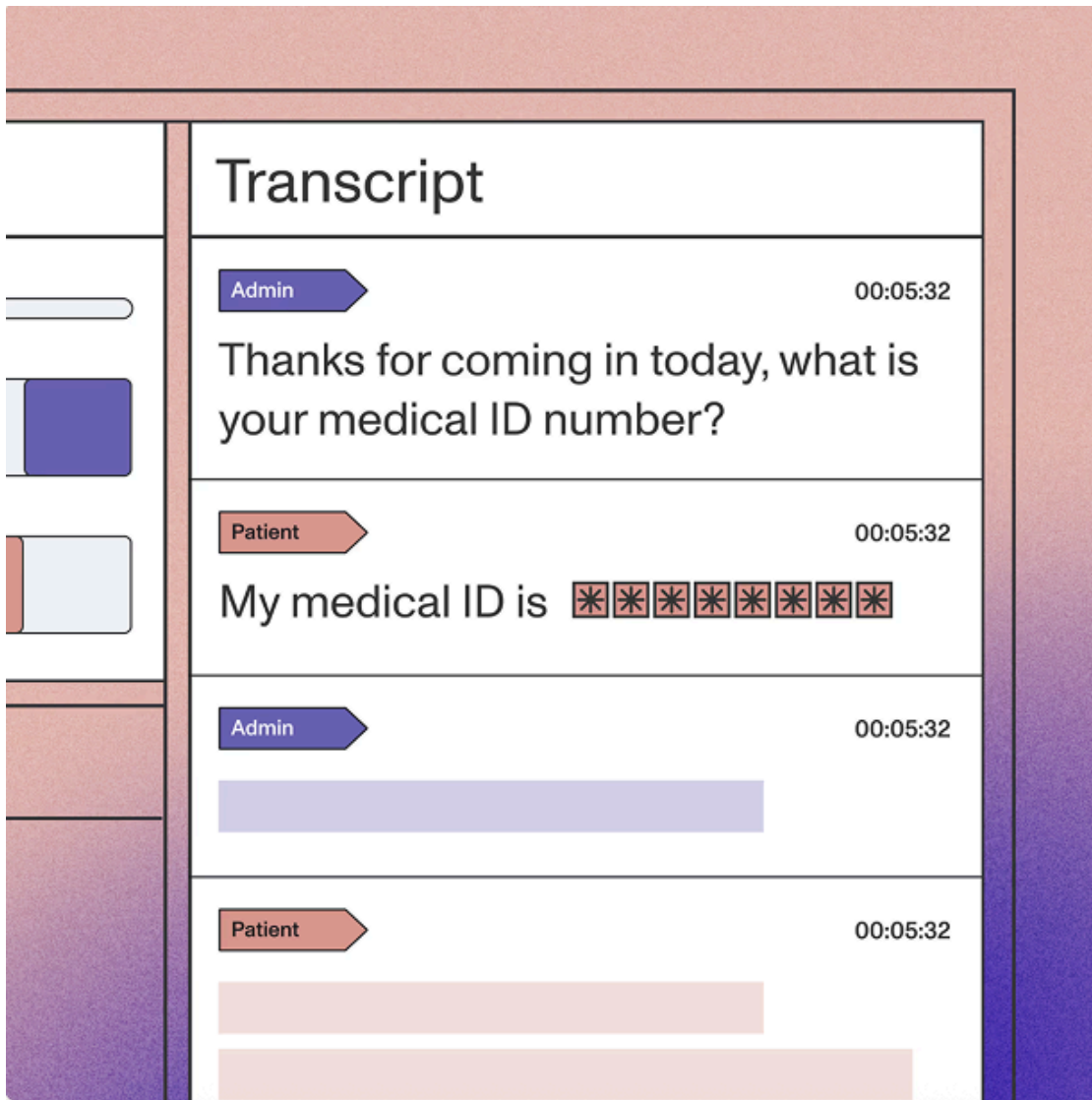
Conversational AI & Voice Interaction Design:

Designed speech-driven correction flows allowing nurses and doctors to edit transcripts and structured fields by voice while ensuring HIPAA compliance, and accounted for overlapping speech, medical jargon, and noisy clinical environments to preserve natural dialogue flow and minimize cognitive load.

Prompt Engineering & Token Optimization:

Built a multi-stage refinement architecture using concise prompts and selective context injection to minimize token usage while improving accuracy, and applied token-efficient retrieval for RAG queries, passing only relevant document chunks to ChatGPT to reduce costs during dashboard Q&A.

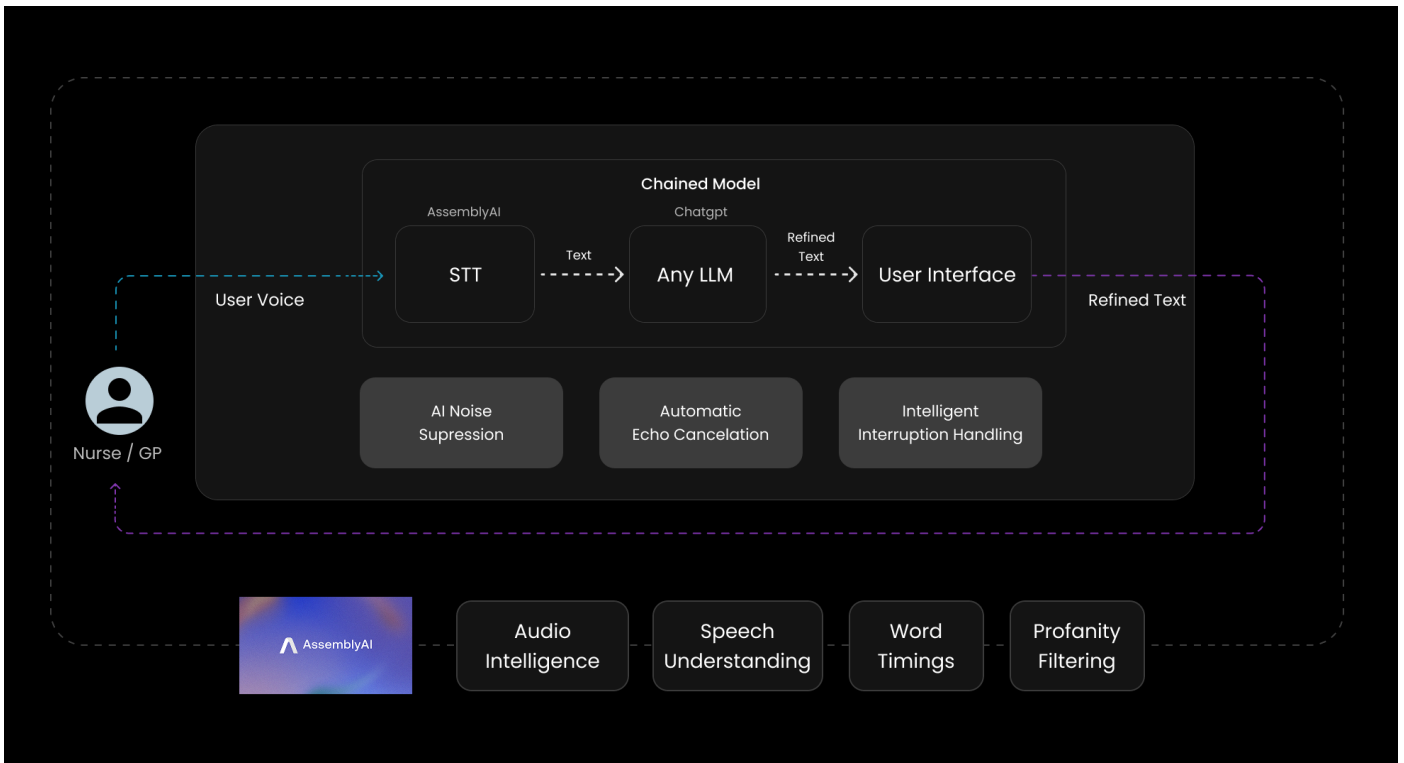




Human-Centered AI Principles:

Embedded transparency and trust through dual-view interfaces showing raw and refined transcripts, with explicit confirmation checkpoints, while ensuring human-in-the-loop control by giving clinicians final approval before data syncs to Athena or CharmHealth.

Architecture Diagram



Low-Fidelity Design

Conversation [Sean Lefever]

Active

Order

Content

Save

Sample Procedure

Followup

Segments

Patient

Processed Transcription

Active

Order

Content

Save

Sample Procedure

Followup

Segments

Conversation [Sean Lefever]

Active

Order

Content

Save

Sample Procedure

Followup

Segments

Patient

Doctor

Kelli F/60

VISIT NOTES

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Kelli F/60

VISIT NOTES TRANSCRIPT **INTAKE**

INTAKE Summary

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Provider

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INS VISIT NOTES

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Conversation [Sean Lefever]

History Of Present Illness

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Active

Order

Content

Save

Segments Add

HPI

HPI Provider

HPI Intake

HPI Foundation

Dashboard

Document Name	Type	Size	Updated Date	Action
MedicalReport.pdf	PDF	55.7 KB	08/07/2025	
MedicalReport.pdf	PDF	55.7 KB	08/07/2025	

Brooklyn Doctor

Dashboard

MRN	Name	Start Time	End Time	Processing Time	Total Processing Time
1	Sean Lefever	Jun 14, 2025 11:20AM	Jun 14, 2025 11:20AM	3.0029 Sec	19 min 38 sec
2	Sean Lefever	Jun 14, 2025 11:20AM	Jun 14, 2025 11:20AM	3.0029 Sec	19 min 38 sec
3	Sean Lefever	Jun 14, 2025 11:20AM	Jun 14, 2025 11:20AM	3.0029 Sec	19 min 38 sec

Brooklyn Doctor

Conversation [Sean Lefever]

History Of Present Illness

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Add Prompt

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Active

Order

Content

Save

Segments Add

HPI

HPI Provider

HPI Intake

HPI Foundation

Conversation [Sean Lefever]

History Of Present Illness

Orders Content

Medic: Lorem ipsum dolor dolor

Missing: Lorem ipsum dolor

Order Medications

Active

Order

Content

Save

Segments Add

HPI

Dashboard

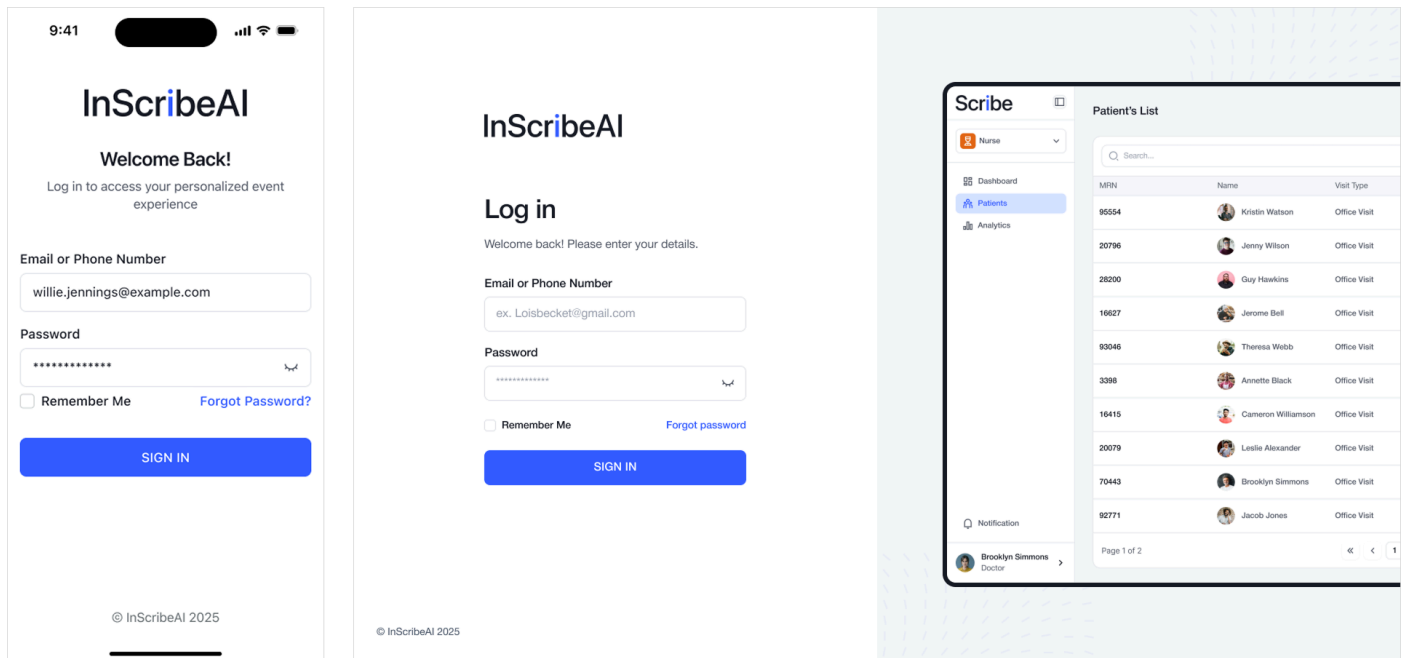
Patients

MRN	Name	Visit Type	Visit Time	Status	Actions
1	Sean Lefever	Office visit	08/07/2025	New v	:
2	Sean Lefever	Office visit	08/07/2025		:
3	Sean Lefever	Office visit	08/07/2025		:
4	Sean Lefever	Office visit	08/07/2025	Incomplete v	:
5	Sean Lefever	Office visit	08/07/2025	Complete v	:
6	Sean Lefever	Office visit	08/07/2025	Ready v	:
7	Sean Lefever	Office visit	08/07/2025	New v	:

High Fidelity Design

Role Based Login & Access Control

Secure authentication for nurses and GPs across the mobile app and SaaS portal, ensuring each user sees only the workflows and data relevant to their role..



Nurse Intake Workflow

New patient registrations from Athena appear instantly in the app. Nurses record the visit, sending audio to AssemblyAI for transcription and then to ChatGPT, which generates an editable Intake Summary with structured fields.

InScribeAI | Nurse | Patient's List | Sync Patients to EMR | + New Patients

MRN	Name	Visit Type	Visit Date & Time	Status	Action
95554	Kristin Watson	Office Visit	Jun 14, 2021 11:20:56 AM	New	...
20796	Jenny Wilson	Office Visit	Jun 26, 2021 02:37:22 PM	Ready to Process	...
28200	Guy Hawkins	Office Visit	Jun 30, 2021 11:20:56 PM	Incomplete	...
16627	Jerome Bell	Office Visit	Jun 8, 2021 04:01:11 PM	Complete	...
93046	Theresa Webb	Office Visit	Jun 18, 2021 04:01:11 PM	Provider Ready	...
3398	Annette Black	Office Visit	Jun 2, 2021 12:45:15 PM	New	...
16415	Cameron Williamson	Office Visit	Jun 2, 2021 12:45:15 PM	Ready to Process	...
20079	Leslie Alexander	Office Visit	Jun 2, 2021 12:45:15 PM	Ready to Process	...
70443	Brooklyn Simmons	Office Visit	Jun 2, 2021 12:45:15 PM	Incomplete	...
92771	Jacob Jones	Office Visit	Jun 2, 2021 12:45:15 PM	Complete	...

Page 1 of 2 | 10/Page

9:41 | Patient Details | Alex Mercer | MRN:593820

Date of Birth: Dec 10, 1994 | Gender: Male

Visit Type: Clinical Visit | Current Visit Time: Dec 15, 2023, 3:45 PM

Visit Note

Follow-Up Visit - Dr. Donald McNeil
Date: Nov 21, 2024 | Type: In-Person

Subjective
Chief Complaints

Since October visit:
 • New symptoms: facial fullness, head tingling, diarrhea, worsening fatigue.
 • IVIG continues for CVID but seems to worsen symptoms after infusion.
 • No medication changes otherwise.

History of Present Illness

Conversation | Correction

9:41 | Patient Details | Jordan Blake | MRN:593820

Date of Birth: Dec 10, 1994 | Gender: Male

Visit Type: Clinical Visit | Current Visit Time: Dec 15, 2023, 3:45 PM | Last Visit Date: Dec 10, 2023

Intake Summary

Overview

- Patient: Male, Age 31.
- Last Seen: December 17, 2024 (approximately 10 months ago)
- Primary Diagnoses at Last Visit: Hereditary Angioedema (HAE), elevated tryptase, Non-Hodgkin's Lymphoma.

Prior Plan

- Continue HAE management with Takzyro and Ruconest.
- Monitor liver cysts and Non-Hodgkin's Lymphoma.
- Adjustments were made from Allegra to Zyrtec for tryptase management.
- Follow-up visits every three to six months.

Vitals

Height	Weight
5 ft 2 in	222 lbs
BP (Systolic)	BP (Diastolic)
132	132

Conversation | Correction

9:41 | Patient Details | Jordan Blake | MRN:593820

Date of Birth: Dec 10, 1994 | Gender: Male

Visit Type: Clinical Visit | Current Visit Time: Dec 15, 2023, 3:45 PM | Last Visit Date: Dec 10, 2023

Follow-Up Visit - Dr. Donald McNeil
Date: Nov 21, 2024 | Type: In-Person

Subjective
Chief Complaints

Since October visit:
 • New symptoms: facial fullness, head tingling, diarrhea, worsening fatigue.
 • IVIG continues for CVID but seems to worsen symptoms after infusion.
 • No medication changes otherwise.

Conversation | Correction

InScribeAI | Nurse | Patient's List | Sync Patients to EMR | + New Patients

MRN	Name	Visit Type	Visit Date & Time	Status	Action
95554	Kristin Watson	Office Visit	Jun 14, 2021 11:20:56 AM	New	...
20796	Jenny Wilson	Office Visit	Jun 26, 2021 02:37:22 PM	Ready to Process	...
28200	Guy Hawkins	Office Visit	Jun 30, 2021 11:20:56 PM	Incomplete	...
16627	Jerome Bell	Office Visit	Jun 8, 2021 04:01:11 PM	Complete	...
93046	Theresa Webb	Office Visit	Jun 18, 2021 04:01:11 PM	Provider Ready	...
3398	Annette Black	Office Visit	Jun 2, 2021 12:45:15 PM	Ready to Process	...
16415	Cameron Williamson	Office Visit	Jun 2, 2021 12:45:15 PM	Ready to Process	...
20079	Leslie Alexander	Office Visit	Jun 2, 2021 12:45:15 PM	Ready to Process	...
70443	Brooklyn Simmons	Office Visit	Jun 2, 2021 12:45:15 PM	Incomplete	...
92771	Jacob Jones	Office Visit	Jun 2, 2021 12:45:15 PM	Complete	...

Page 1 of 2 | 10/Page

9:41 | Patients List | 120 total patients are Listed Here

Search by name, MRN

- Alex Mercer** | MRN:482736 | New | Clinical Visit | Dec 15, 2023, 3:45 PM
- Jordan Blake** | MRN:593820 | Returning | Clinical Visit | Dec 15, 2023, 3:45 PM
- Taylor Quinn** | MRN:674512 | Returning | Clinical Visit | Dec 15, 2023, 3:45 PM
- Morgan Hayes** | MRN:674512 | New

InScribeAI | Nurse | Kristin Watson | Start Chatting | Documents

Intake Summary | Last Visit Note

Overview

- Patient: Male, 31 years old.
- Last Seen: December 17, 2024 (about 10 months ago)
- Primary Diagnoses at Last Visit: Hereditary Angioedema (HAE), high tryptase, Non-Hodgkin's Lymphoma.

Previous Plan

- Keep managing HAE with Takzyro and Ruconest.
- Keep an eye on liver cysts and Non-Hodgkin's Lymphoma.
- Switched from Allegra to Zyrtec for tryptase management.
- Follow-up visits every 3 to 6 months.

Old Strategy

- Continue using Takzyro and Ruconest to manage HAE.
- Monitor liver cysts and keep an eye on Non-Hodgkin's Lymphoma.
- Monitor liver cysts and Non-Hodgkin's Lymphoma closely.
- Transitioned from Allegra to Zyrtec for managing tryptase levels.
- Schedule follow-up visits every 3 to 6 months.

Earlier Strategy

- Continue treatment for HAE using Takzyro and Ruconest.
- Keep an eye on liver cysts and monitor Non-Hodgkin's Lymphoma.
- Switched from Allegra to Zyrtec for improved tryptase management.
- Plan follow-up visits every 3 to 6 months.

Revised Approach

- Continue HAE treatment with Takzyro and Ruconest.
- Keep an eye on liver cysts and monitor Non-Hodgkin's Lymphoma.
- Switched from Allegra to Zyrtec for improved tryptase management.
- Plan follow-up visits every 3 to 6 months.

Previous Plan

- Keep managing HAE with Takzyro and Ruconest.
- Keep an eye on liver cysts and Non-Hodgkin's Lymphoma.
- Switched from Allegra to Zyrtec for tryptase management.
- Follow-up visits every 3 to 6 months.

Notification | Brooklyn Simmons Doctor

InScribeAI | Nurse | Kristin Watson | Start Chatting | Documents

Follow-Up Visit - Dr. Donald McNeil
Date: Nov 21, 2024 | Type: In-Person

Subjective details.
Main Concerns

Since the visit in October:

- New symptoms include a feeling of fullness in the face, tingling in the head, diarrhea, and increased fatigue.
- IVIG continues, but symptoms appear to worsen after each infusion.
- No changes in medication otherwise.

Current Health History

- A 59-year-old woman returned for a follow-up appointment.
- She reports:
 - Facial fullness and tingling: Pain moves around different parts of her face.
 - Diarrhea: Severe for about two weeks, has improved but still occurs occasionally.
 - Fatigue: Has worsened since the last visit.
- IVIG infusions every four weeks (for COVID) continue but lead to increased illness immediately afterward.
- She also takes medications for bipolar disorder and antidepressants.
- She tried Zyrtec and decongestants for relief but was advised to stop Zyrtec due to dryness.
- The provider suggested using Mucinex instead.

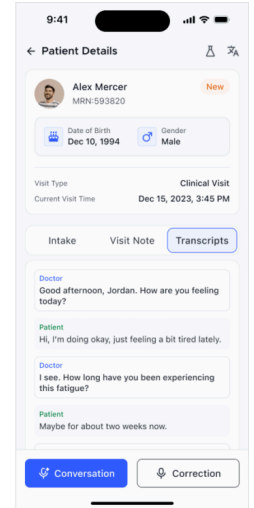
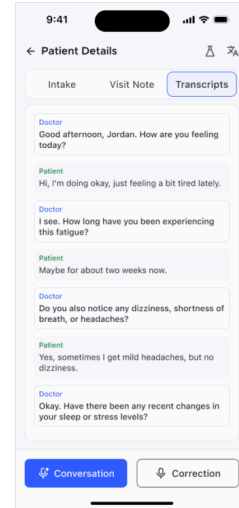
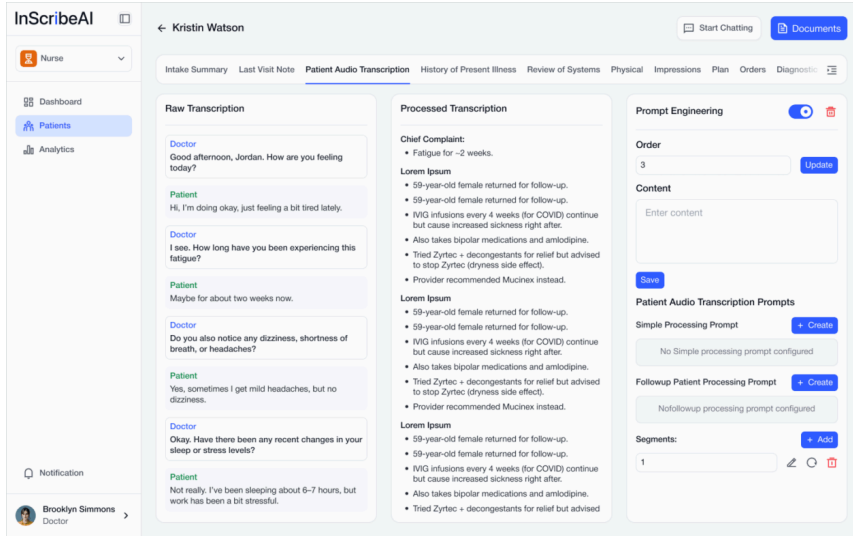
Current Health History

- A 59-year-old woman returned for a follow-up appointment.
- She reports:
 - Facial fullness and tingling: Pain moves around different parts of her face.
 - Diarrhea: Severe for about two weeks, has improved but still occurs occasionally.
 - Fatigue: Has worsened since the last visit.
- IVIG infusions every four weeks (for COVID) continue but lead to increased illness immediately afterward.
- She also takes medications for bipolar disorder and antidepressants.
- She tried Zyrtec and decongestants for relief but was advised to stop Zyrtec due to dryness.

Notification | Brooklyn Simmons Doctor

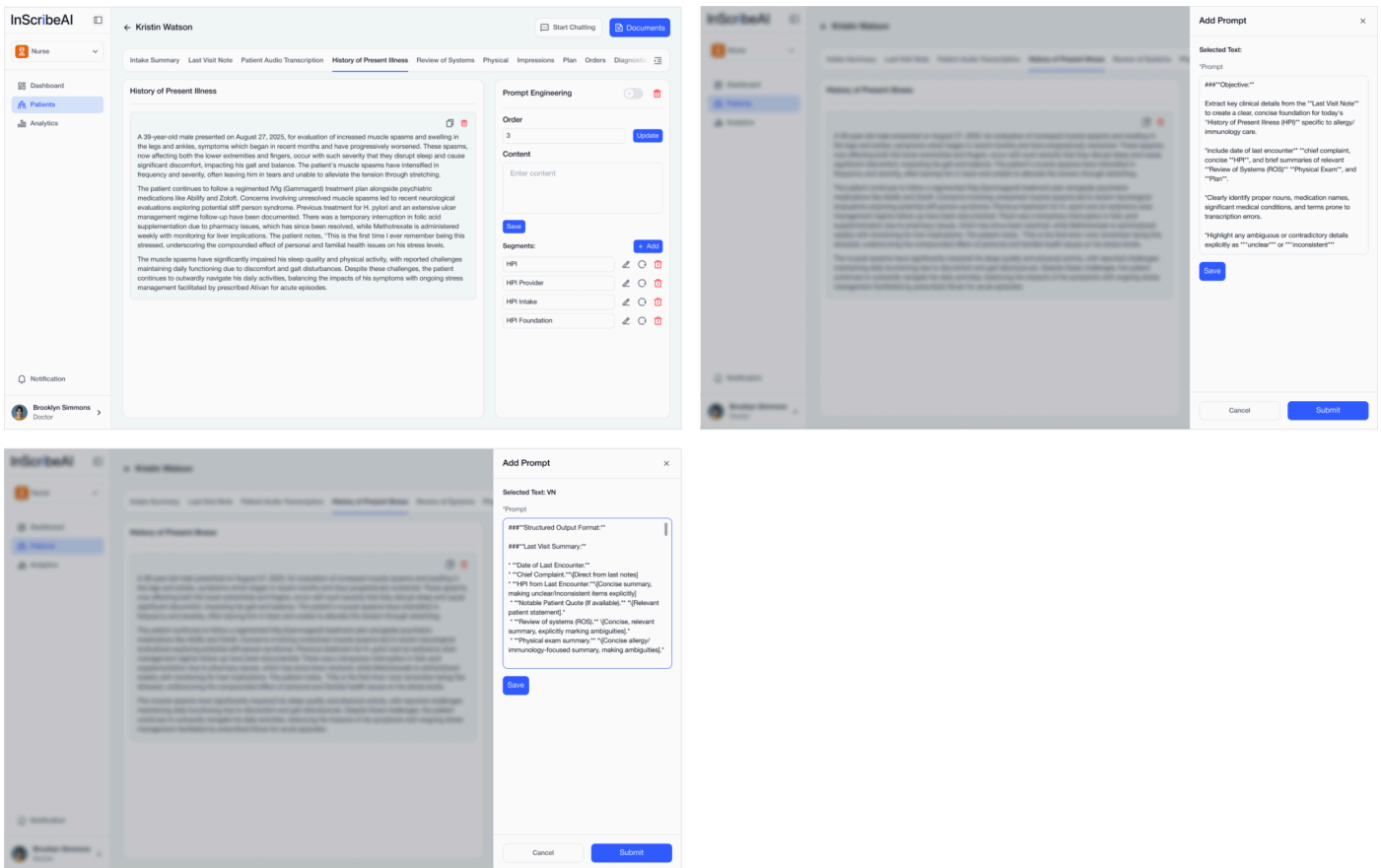
Doctor Intake Workflow

After the nurse approves the intake summary, the data flows to the doctor's app and Scribe Portal. The doctor records the patient visit, and the audio is transcribed by AssemblyAI, then refined by ChatGPT.



Automated Tab Completion

The doctor's interface contains multiple structured tabs such as HPI, Orders, and more. Each tab is populated through dedicated prompt-engineering pipelines that send the AssemblyAI transcript with tab-specific prompts to ChatGPT, which returns refined text to fill each section automatically.



Tab-Specific Prompt Engineering

Each clinical tab was crafted with carefully tuned prompts, iterated and refined based on ChatGPT's recommendations, to ensure the most accurate and context-aware output for every section.

Orders Tab Automation

A dedicated prompt pipeline extracts medications, labs, and procedures from the AssemblyAI transcript. ChatGPT then returns a clinician-ready Orders list, displayed alongside the raw-to-refined prompt stages in the UI.

InScribeAI | Nurse | Kristin Watson | Start Chatting | Documents

Intake Summary | Last Visit Note | Patient Audio Transcription | History of Present Illness | Review of Systems | Physical | Impressions | Plan | **Orders** | Diagnostic

Orders Content

Meds:

- lorazepam 1 mg PO bid x30d

Missing:

- No missing details

Order Medications | Save Changes

Raw Text	Dose	Route	Frequency	Duration	Refills	Athena M
lorazepam	1 mg	PO	Bid	30 days	2	No match

Prompt Engineering

Order: 3 | Update

Content: Enter content

Save

Segments: + Add

Orders

Brooklyn Simmons | Doctor

Lab Reports & Documents Access

The app and SaaS portal fetch medical reports and lab results directly from the EHR. A lab icon in the mobile app and a dedicated Documents tab in the portal let clinicians quickly view all patient reports.

InScribeAI | Admin | Back to Overview

Search... Refresh

Document Name	Type	Size	Upload Date	Action
MedicalRecord.do.pdf	PDF	55.7 KB	Jun 14, 2021	View Details
CCDA_37227_18743.xml	CCDA	181.7 KB	Jun 14, 2021	View Details

Page 1 of 2 | 10/Page

Brooklyn Simmons | Doctor

InScribeAI | Admin | Back to Documents

MedicalRecord.do.pdf | 55.7 kb | Uploaded: Jun 14, 2021 | Delete Document

Practices | Providers | Patients | Encounters | Problems | Medications | Allergies | Vitals | Label | HPI | ROS | Physical | Plans | Care Team

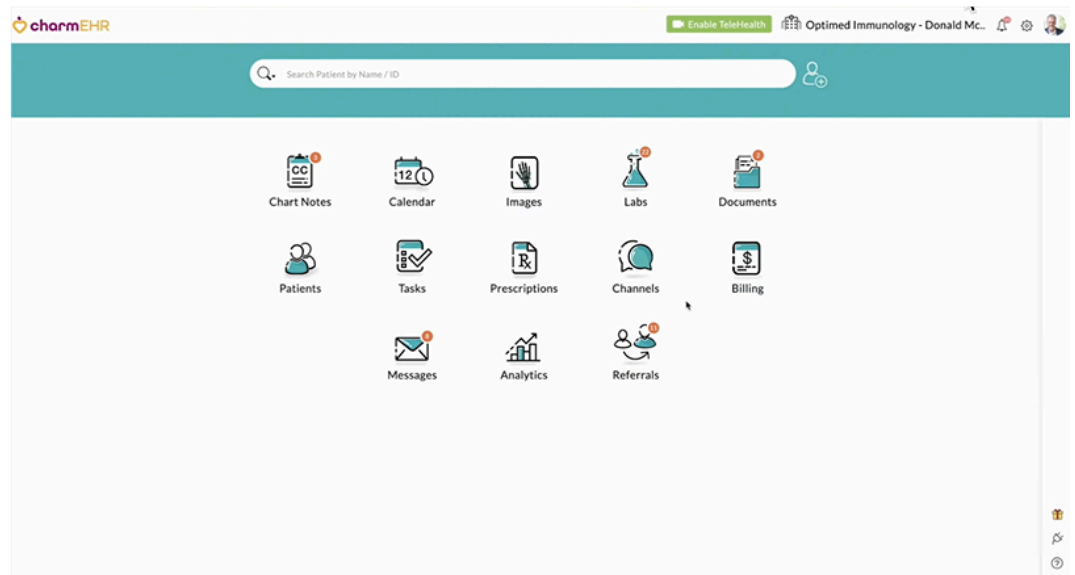
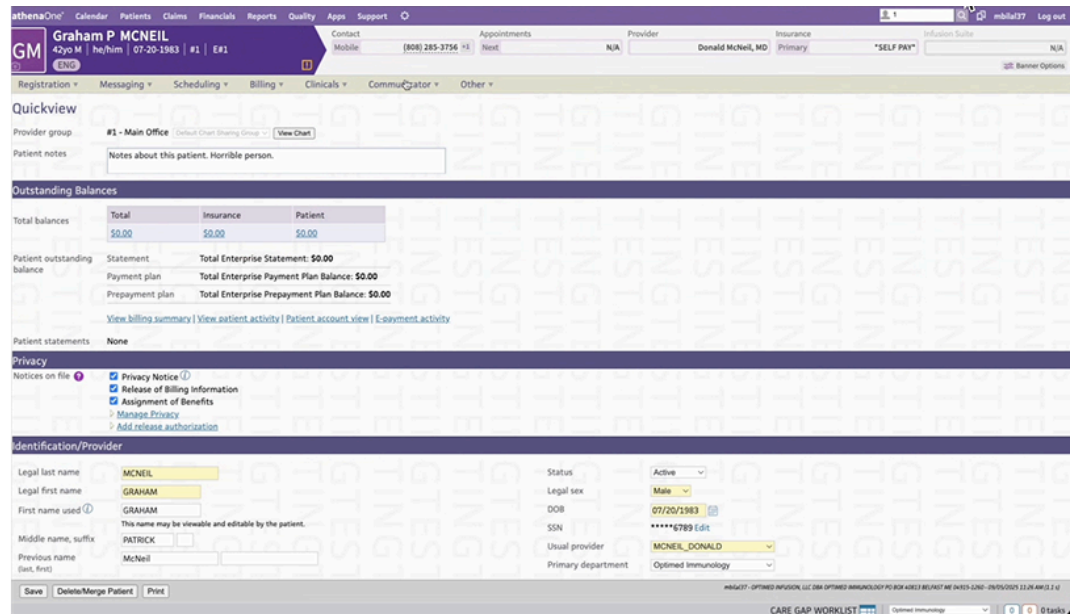
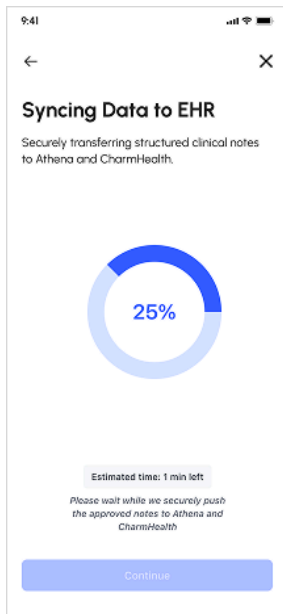
Search...

Practice Name	Address	City	State	Specialty
Optimed Immunology - Donald McNeil, MD	3070 Essington Dr, Dublin, OH, 43017	Dublin, OH 43017	OH	General Practice

Brooklyn Simmons | Doctor

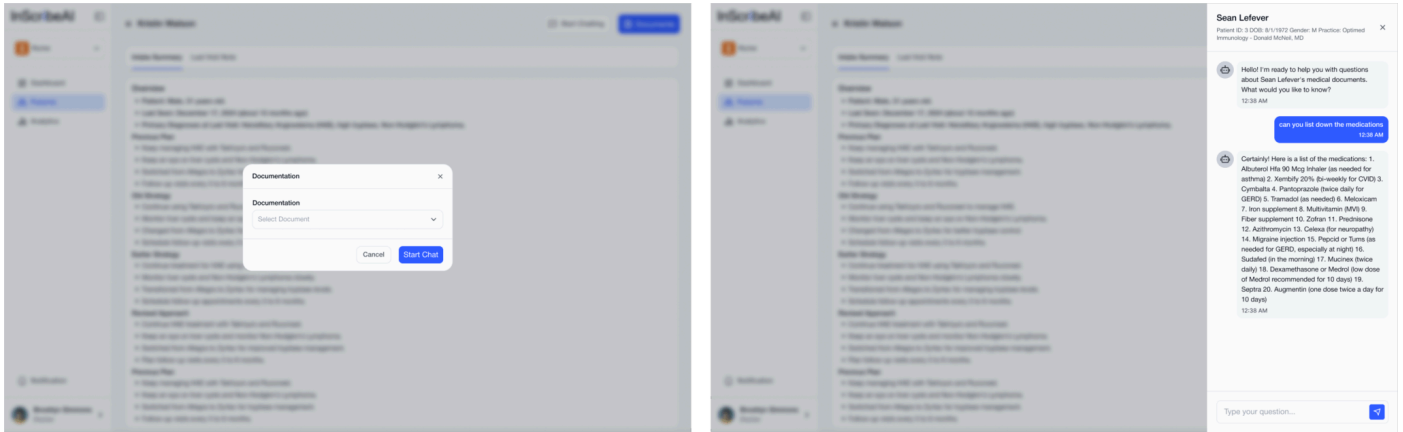
Final Approval & EHR Sync

After the refined data is populated in both the SaaS dashboard and the mobile app, the doctor reviews and confirms it. Once confirmed, all structured and AI-refined information is automatically pushed to Athena and CharmHealth, ensuring the entire consultation is securely stored in the patient's official EHR.



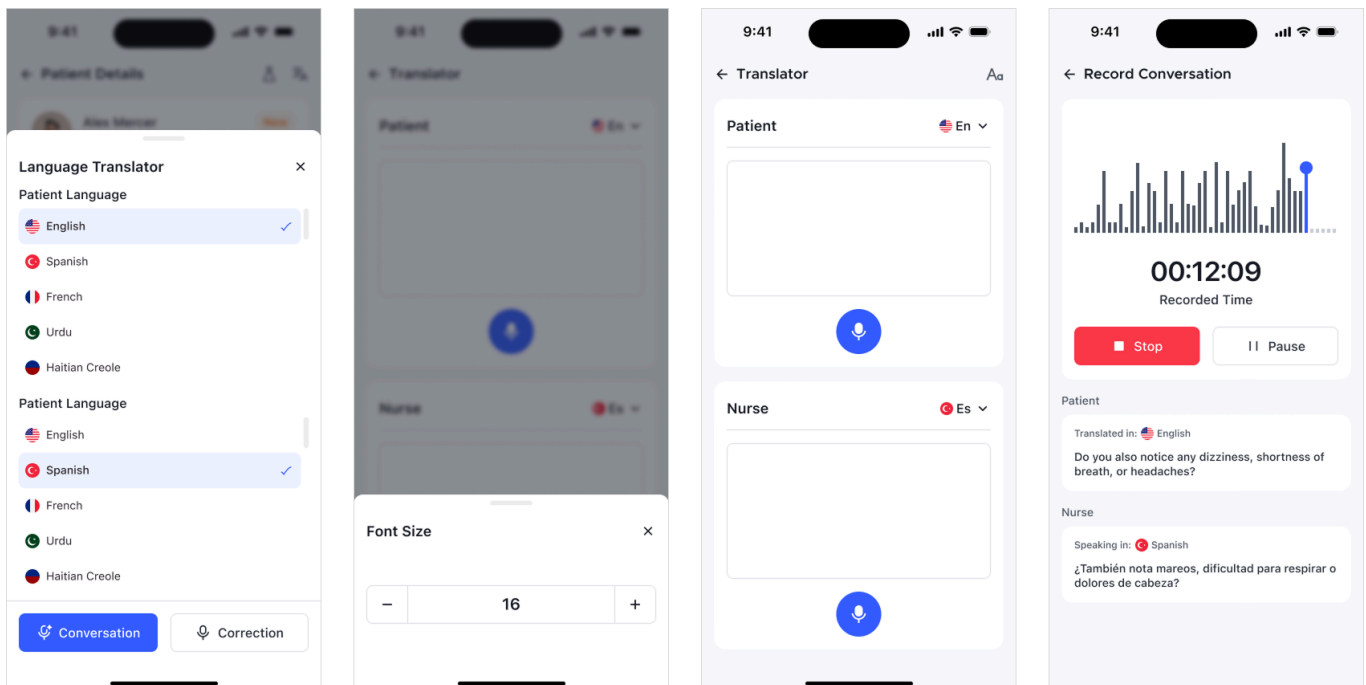
Chat with Patient Records

Within the Scribe Portal, clinicians can open a patient's medical report, select a document, and start an AI-powered chat. Using Retrieval-Augmented Generation (RAG), ChatGPT searches the chosen report to answer natural-language questions instantly surfacing medications, lab results, or other key details and saving valuable review time.



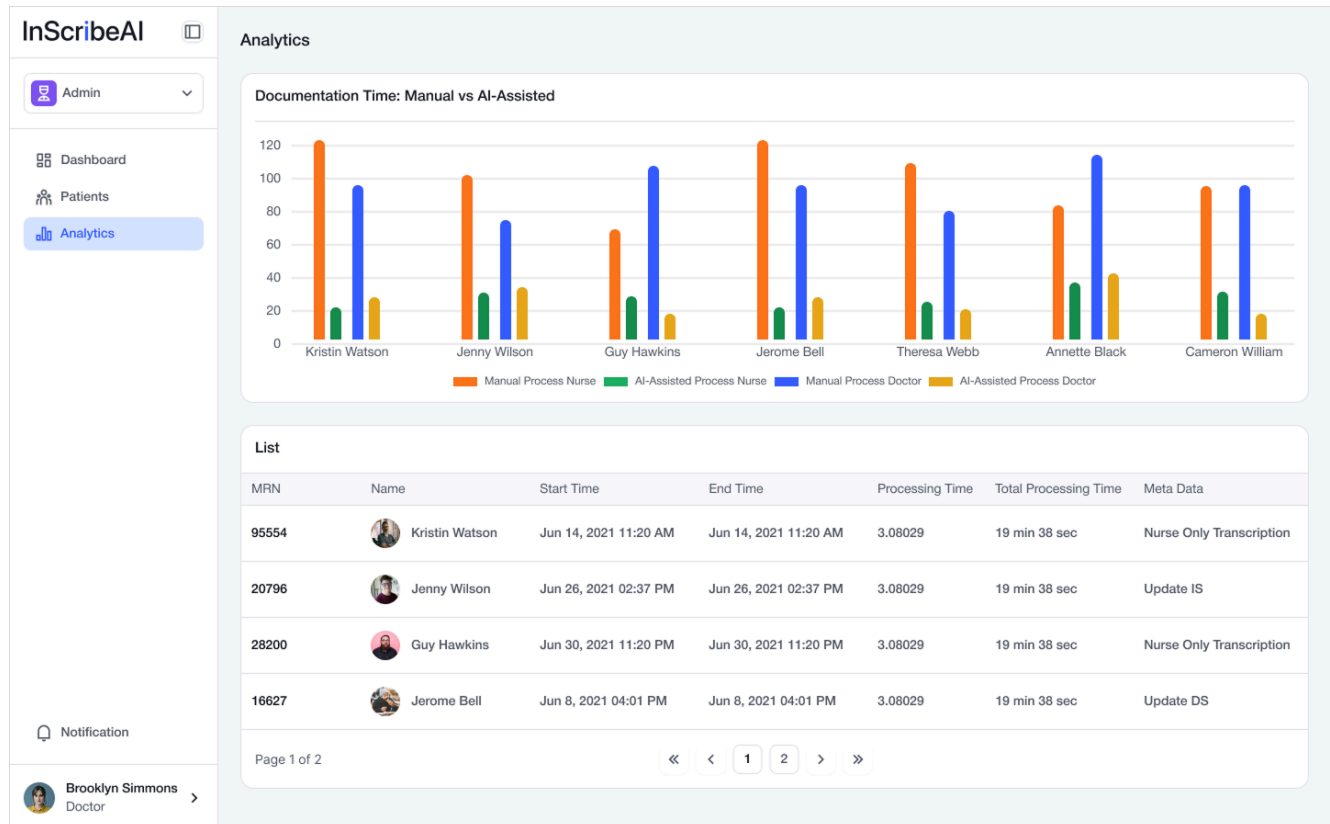
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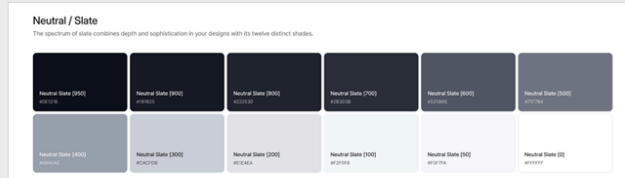
Time Efficiency Gains

AI automation cuts clinical documentation from hours to about 20 minutes per patient. Nurse and doctor conversations are transcribed by AssemblyAI, refined by ChatGPT, and stored in the app/portal—reducing errors, ensuring consistency, and freeing clinicians to focus on care.



Design System

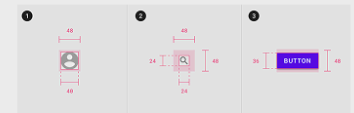
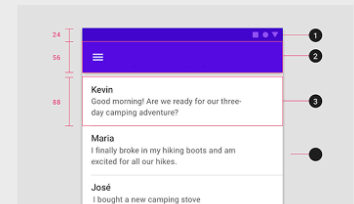
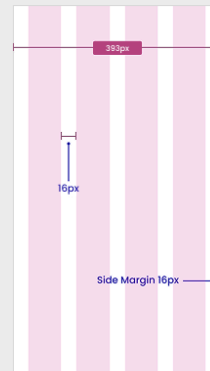
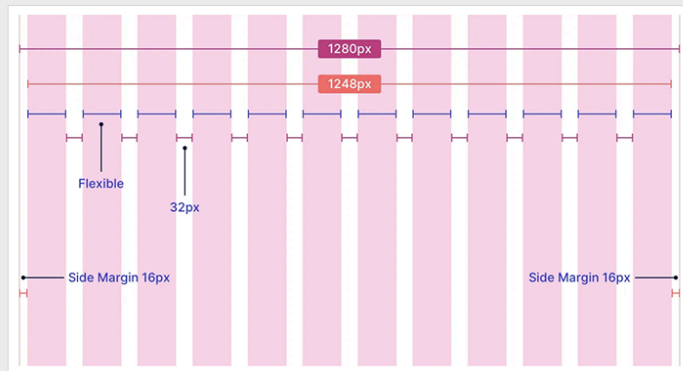
The design system was refined from existing guidelines and shaped by doctor feedback, favoring a clean white-and-blue interface that ensures clarity and ease of use in clinical settings.



Typography System

Font Web: Helvetica Neue, Mobile: SF Pro (iOS default) Scale Ratio: 1.25

Role	Size	Notes
Caption / Small Text	12px	Labels, helper text
Body / Paragraph	16px	Default reading size
H6	20px	Section labels
H5	25px	Small headers
H4	31px	Content titles
H3	39px	Page subtitles
H2	49px	Page headers
H1	61px	Hero / main headings



Future & Ongoing Work

Technical / AI Enhancements

- **Agentic AI Automation:** Transitioning the system from guided prompts to fully agentic workflows that proactively manage clinical documentation and follow-up tasks.
- **Advanced Context Awareness:** Training the model to handle multi-visit patient history and cross-patient context for richer, longitudinal insights.
- **Predictive Suggestions:** Real-time AI recommendations for diagnoses, orders, or follow-up tests based on conversation cues and historical data.
- **Multilingual Support:** Expanding speech recognition and clinical terminology coverage for non-English consultations.
- **Edge Processing & Offline Mode:** Local processing options for clinics with limited connectivity while maintaining HIPAA compliance.

UI/UX & Interaction

- **AI Micro-Interactions:** Adding subtle animations, real-time confidence indicators, and smart status cues to build user trust.
- **Adaptive UI:** Interfaces that adjust based on clinician role or workflow stage, reducing cognitive load.
- **Voice-First Shortcuts:** Hands-free commands for navigation, data review, and approvals.
- **Personalized Dashboards:** Contextual insights and quick actions tailored to each user's specialty or past activity.

Say hi

