

# Clinical AI Agent (CAA)

## Preferences and Tips for Inpatient Providers – Personal Device

June 18, 2026

Clinical AI Agent (CAA) is an Ambient Scribe technology that improves documentation efficiency. CAA uses generative AI voice recognition, listens to a conversation between a Provider and Patient, and generates a *draft* note for providers to review and edit.

### Education Requirement

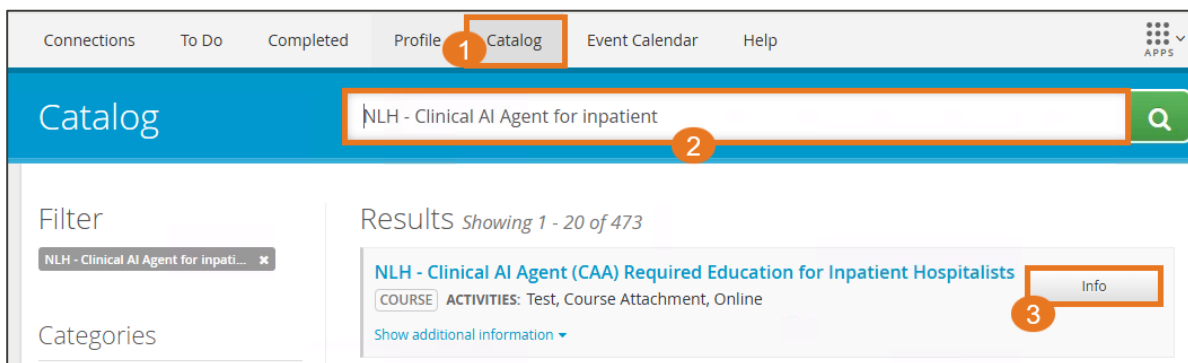
Providers can **gain access** to **Clinical AI Agent (CAA)** by completing **NLH – Clinical AI Agent (CAA)** within HealthStream. This course encompasses Information Security education and policies. **Once completed, the organizational code to access CAA will be provided within the course.**


**NOTE:** TeamHealth providers will not have access to CAA.

1. Log into [HealthStream](#) with username and password, then navigate to Catalog.
2. Search for the course “NLH – Clinical AI Agent (CAA ) Required Education for Inpatient Hospitalists”

**NOTE:** This course is intended for hospitalist and inpatient specialty providers.

3. Click the Info button.



4. Click Enroll.   
The course will be found in **To Do**.

**NOTE:** The organizational code is available at the end of the course. Do not share this code.

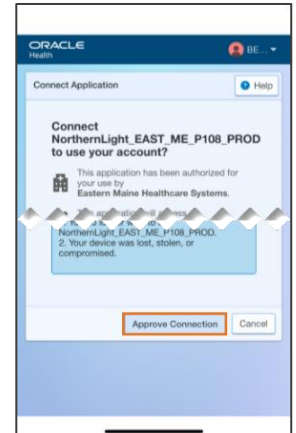
### App Access: ONE TIME SET-UP for Personal Mobile Devices

**NOTE:** Microsoft Intune Company Portal is a required download for the use of Clinical AI Agent (CAA). Click [here](#) for download steps.



1. *Personal Device* – Go to the App Store or Google Play.

2. Search for Clinical AI Agent.
3. Accept the Legal Agreement.
4. Enter the ORG code.
5. Proceed to the Oracle Cerner Login.
6. Tap Log in to Eastern Maine Healthcare Systems.
7. Enter Oracle Cerner username and password.
8. Tap Approve Connection.



**NOTE:** Devices must meet the following minimum operating system requirements for CAA. **APPLE iOS 16.2 or later/Google Android 10 or later.**

## App Settings

1. From the home screen, tap the **ellipsis (...)** button.
2. Tap **Settings**.

**NOTE:** It is recommended to place phone on **Do Not Disturb** to prevent recordings from being interrupted.

**NOTE:** If a call is picked up during a recording or if Apple iOS Live Voicemail feature is turned on during a session, the recording may be paused.

3. **AI Disclaimer:** select **Top of HPI**.

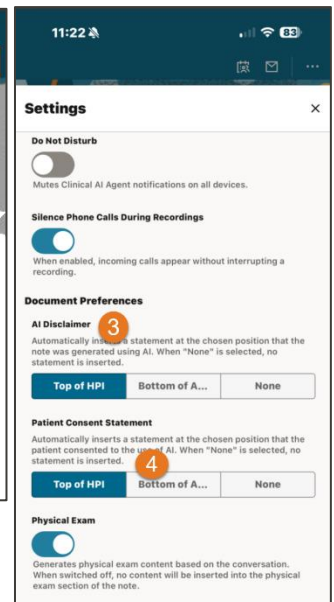
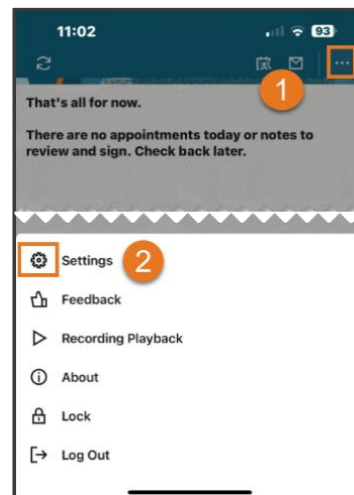
This setting inserts a statement: ***“The content of this note was generated with the assistance of artificial intelligence (AI) technology”*** at the chosen position.

**NOTE:** The **Do Not Disturb** setting within the app is for CAA notifications only. Turning this off will stop CAA notifications from appearing on the device.

4. Patient **Consent** Statement: select **Top of HPI**.

**NOTE:** The **Consent** is a required setting.

**NOTE:** “**Do Not Disturb**” setting applies to CAA push notifications **ONLY**. Turning this off will stop CAA notifications from appearing on the device (e.g., note generation is completed).



## Viewing Patient Lists

The patient list will mirror Oracle Cerner's PowerChart patient list. To select a specific list, complete the following steps:

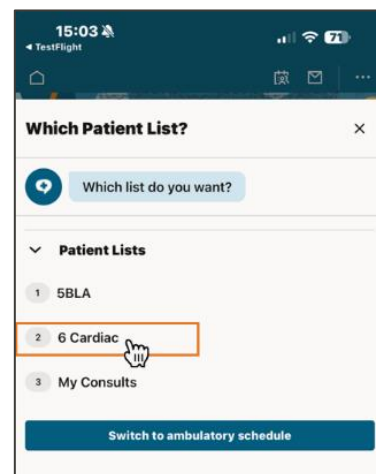
1. Within the Clinical AI Agent (CAA) app, tap the **Calendar** icon.



2. Tap the preferred patient list as shown.

The list populates patients associated with the specified list.

**NOTE:** Patient lists cannot be created within the CAA application.



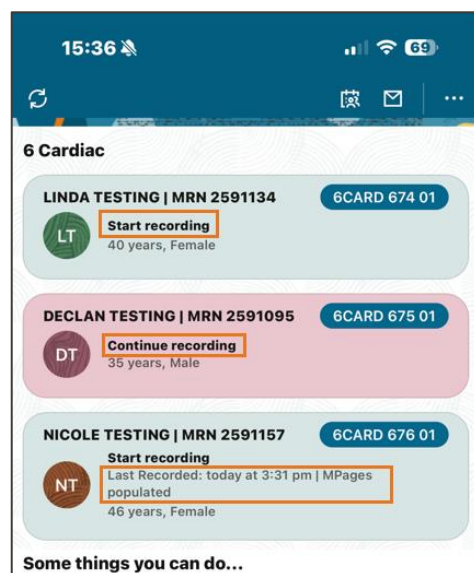
## Viewing Patient Encounter Tiles

### Recording Statuses

**Start Recording:** when a patient has not had a previous recording.

- **Continue Recording:** when a patient recording has been paused, the patient encounter tile displays red and is updated to reflect the Paused Status.
- When the note is in the process of generating, the patient encounter tile will display **Last Recorded:** date, time, and Generating Note.
- **Last Recording:** A generated recording will display the last recorded date, time and MPages populated.

**NOTE:** If a recording is paused for longer than six hours, the recording is automatically sent for note generation. An alert notification will appear on the device when this happens.

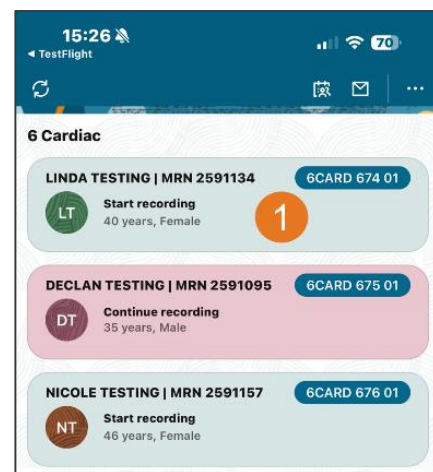


## Record Session and Note Generation

**NOTE:** Obtain verbal consent prior to using AI scribe.

1. Tap the **Patient Encounter Tile** to begin a recording.

**NOTE:** Statuses display for last recorded and paused recordings.

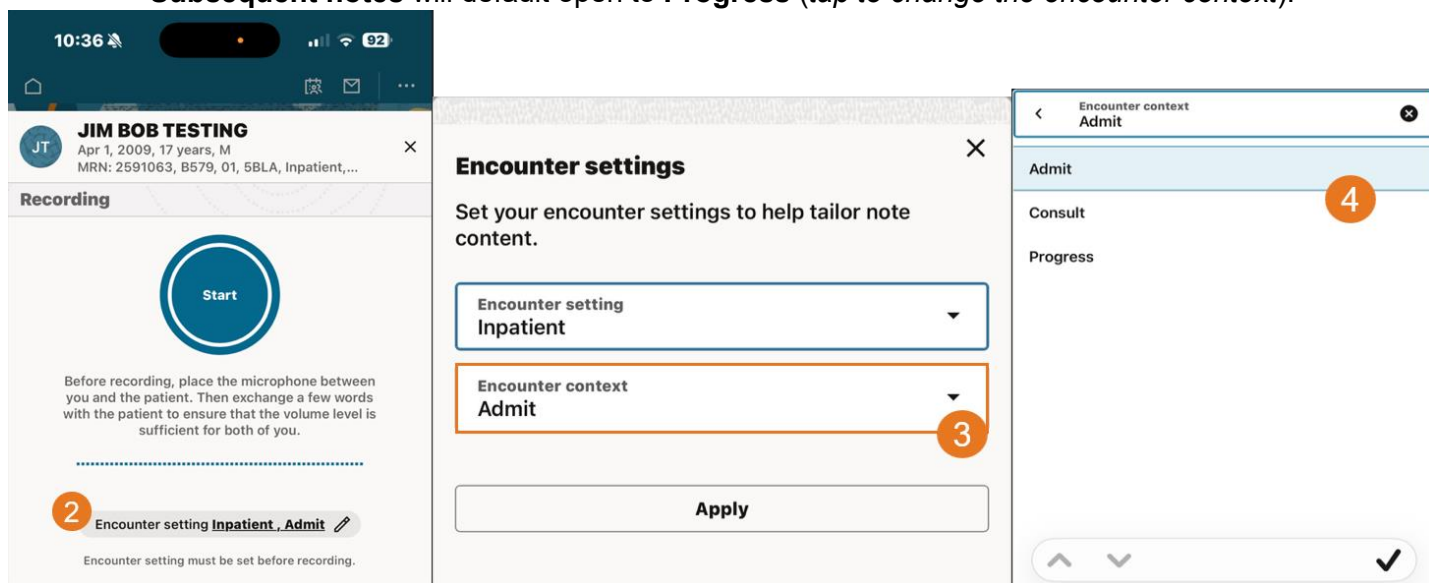


2. Tap Encounter Setting to Select the Note Type.
3. If this is the initial note for the patient, the Encounter context will default to Admit.

**NOTE:** CAA is not available for Discharge notes. This functionality will be added in a future release.

4. Tap the dropdown to select a new Note Type.

**Subsequent notes** will default open to **Progress** (tap to change the encounter context).



5. Tap the **Start** button. Recording is now in progress.

**NOTE:** Ensure the microphone is placed between you and the patient and details are verbalized.

6. To pause, tap the Pause button.

7. To **Resume**, tap the **Resume** button.

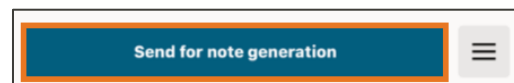
**NOTE:** There are no limitations on how many times the recording is paused.

**NOTE:** A recording can be paused for up to six hours by tapping the *Resume later* button. After six hours, recording is sent for automatic note generation.

8. Select the **Problems to be addressed** during the visit **before** generating note within PowerChart. Problems can be entered prior to starting the recording, if preferred.

**NOTE:** This sequence is important because it ensures HCC specific Problems are captured and improves the flow of the note and content alignment of the Problems within the **Assessment & Plan**.

9. Tap **Send for note generation** (bottom of screen) to send the session for transcription and generation of a **draft** note within the **Inpatient MPage**.



## Note Generation

1. After the status card has been updated to **MPages populated**, review the **generated note** within the patient’s MPage.
2. Review, edit and add additional information *before* generating the note.





**NOTE:** All draft notes must be reviewed for accuracy before the note is signed (e.g., errors of omission, inclusion, or fabrication.) AI Scribe is a tool. Final accountability for content of note is purview of the clinician.

## Recording an Offline Session

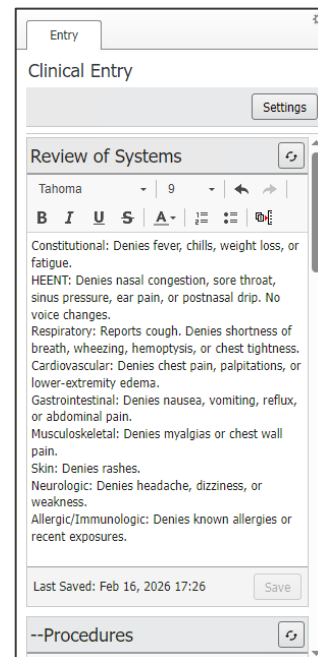
You can record an encounter that is not displayed on the patient list when Oracle Health Clinical AI Agent Mobile is offline.

**NOTE:** To begin recording, you must enter a temporary identifier to identify the patient later. Before you send for note generation additional information, including the MRN and FIN, is required.

1. From the Home screen, Select Record for a patient not listed.
2. Enter any applicable patient identifiers and select Continue.
3. Select the Start  button, the recording is now in progress.
4. When you are finished recording, select the Pause button .
5. Select Sending for note generation. The recording will be sent for note generation when the app is back online.

If you did not enter the patient's MRN and FIN at the start of the recording, select the recording card from your schedule view or patient list.

When prompted enter the MRN and FIN then select **Submit**.



## Inpatient Note Generation Capabilities

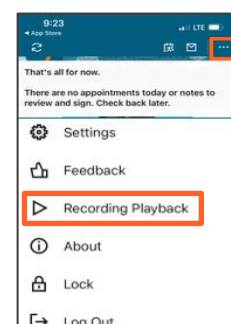
Area	Capability
Voice Capture	High accuracy of multiple voices, even with background noise and device alerts.
Documentation	Ability to generate multiple notes per encounter (i.e., Admission H&P, Progress Note)

<b>Admit</b>	<p><b>HPI:</b> Narrative style that captures the full patient journey and ED Course, rather than grouping information strictly by problem.</p> <p><b>A/P:</b> The Assessment and Plan section has been enhanced to reflect comprehensive management of the patient’s health conditions, rather than focusing solely on visit-specific issues and documented problems as in the previous model. CAA leverages the prioritized problems list for Assessment and Plan creation.</p>
<b>Progress</b>	<p><b>HPI:</b> captures pertinent clinical updates in a concise, clinically relevant manner and the patient’s symptom evolution over the last 24 hours, such as overnight events, or improvement of existing symptoms.</p> <p><b>A/P:</b> formatted to group and prioritize the patient’s acute needs and reflects continued management and medical decision making. The A/P carries forward relevant clinical information from previous progress notes for the patient while updating outdated information to represent the treatment plan for the patient. CAA leverages the prioritized problem list, prior day’s note and conversation for A/P creation.</p>
<b>Consult</b>	<p>The “consult” option utilizes the existing ambulatory note model.</p> <p><b>HPI:</b> Narrative style that captures the patient’s journey and groups by related systems and is problem focused based on the conversation between the patient and provider.</p> <p><b>A/P:</b> The assessment and plan (A/P) section leverages the encounter problem list in addition to the conversation or provider monologues to incorporate a clinically relevant plan of care.</p>

## Clinical AI Agent (CAA) Tips

- **Connect to Wi-Fi:** Select local organization’s Wi-Fi network. Using a cellular connection is permitted but not recommended.
  - **Patient Lists:** Ensure patient lists are set up on the desktop before using CAA.
  - **Pausing the Recording:** There is no limitation to how many times a recording can be paused.
  - **Document Problem before Note Generation:** Include relevant problems *before* starting recording. Update problems *before* generating note.
  - **Preview the Chart:** Review the patient’s chart and begin the recording by speaking to CAA with any relevant information for the note (e.g., Reason for Visit, a summary of pertinent info, etc.)
  - **During the Visit:** Add any additional diagnoses or orders *before* sending for note generation.
  - **Auto text Compatibility:** Auto text is meant to be used for **pre- or post-recording** submission to allow for a more robust document.
  - **After the Visit:** If additional information needs to be added *after* the visit, it can be added to the recording before clicking “Send for note generation.”
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- **Reviewing and Editing the Note:** Editing and adding auto text can be done at any time before or after the recording.
- **Phone Calls:** If using own device, set it to *Do Not Disturb* to avoid phone call interruptions during the recording. If phone calls are answered, the recording will automatically pause.
- **For iPhone users:** the iPhone feature ‘Live Voicemail’ can cause interruptions to recordings. It is recommended to turn this feature off.
- **Speak Clearly and with structured sentences.** This will provide context and improve quality of the generated notes.
- **Use Repetition and Emphasis.** If a particular point is important, repeat it. CAA can recognize and prioritize repeated information. This is helpful for capturing the assessment and plan.
- **Pause for Processing.** Allow brief pauses between topics to give CAA time to process and categorize information correctly.
- **Edit & Engage Normally.** CAA will parse out irrelevant information and omit things like: How are the kids? Did you see the game on Sunday? Remember to always **proofread** the note before signing.
- **Use key wording:** This helps CAA know where to put certain information (e.g., Let us talk about your complaint today.) Avoid using terms such as “suspicious, suspected or ruled out” when recording.
- **Time limit for Paused Recording:** Users have **6 hours** from the time a recording has been started to complete and submit for note generation. If a recording is paused, it can be resumed within the 6-hour window, and the time will reset. After 6 hours, the system will automatically send the note for generation.
- **Recording Time Limit:** CAA is best suited for appointments 120 minutes or less.
- **Recording Playbacks:** Recordings are *not* saved to the mobile device. **MPage** recording playback is available for **7 days**.
  1. In the rare instance needed, from the Home screen, select the ellipsis (...).
  2. Select Recording Playback.
  3. Select a recording from the list.
  4. Tap the **play** button to begin the recording playback.



## FAQ's

**Q: What is the recommended workflow for capturing problems?**

**A:** The ideal workflow is to include Problems assessed during the visit *before* note generation.

**Q: The App does not open, or it gives an error message.**

**A:** Close out the App completely and log back in. If the app is still not working, be sure the application has the newest update.

**Q: The app is processing slowly after sending for note generation.**

**A:** Check to see you are connected to a specific organization Wi-Fi.

**Q: I do not like the way the PE looks with AI generated documentation.**

**A:** Turn off this option within the CAA settings and use auto text. (See screenshots on Page 2.)

**Q: I erased a recording, is this permanent?**

**A:** Yes. Once a recording is erased, it cannot be retrieved.

**Q: Where do I access unsigned notes?**

**A:** Unsigned notes will be generated within the workflow MPage. Unsigned notes can also be accessed within the mobile application by tapping **Unsigned Notes** at the bottom of the patient list.

**Q: I forgot to record the session during the patient visit. Can I go back and record after the patient has been discharged?**

**A:** Yes, the MRN and FIN number is needed for the note to generate within the patient chart.

**Q: Will my Microphone work with another application as well as CAA?**

**A:** No, not simultaneously. If another application is currently using your microphone, you will need to close or stop that application before starting a recording in CAA. Only one application can access the microphone at a time.

**Q: Why do diagnoses split vs group under Assessment and Plan?**

**A:** This behavior is due to the use of an AI-assisted documentation tool. The tool is designed to track and document all issues discussed during the encounter, which can result in a greater number of individual problems being listed under the Assessment and Plan section.

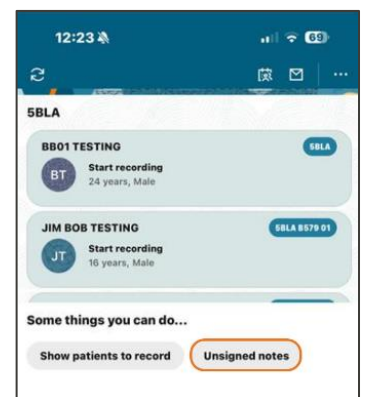
For example, a primary diagnosis like constipation may also lead to related concerns—such as reduced appetite, bowel changes, and family history—being documented as separate entries. This ensures comprehensive tracking and visibility of all relevant clinical issues.

**Q: Why is my note not appearing within the MPage?**

**A:** After you finish recording and sending the note for generation, there is a **short delay** before it appears within the MPage. You will receive a message from the CAA app once the note has been successfully generated and is available.

Please note:

- Under normal conditions, the delay is typically just a few minutes.
- However, if you are experiencing inconsistent Wi-Fi, the delay can extend up to an hour.



**Q: How do I provide feedback to Oracle within the CAA application?**

**A:** To provide feedback, follow these steps:

1. From the Home screen, select the ellipsis (...).
2. Select **Feedback**.
3. Select **Which Type?**
4. Complete questions.
5. Select **Submit**.

**Q: How do I get the code again if I get a new phone or need to re-install?**

**A:** Place a ticket through [Self-Service Portal](#) or call the Help Desk at 207-973-7728.

