From the Office of Health Informatics

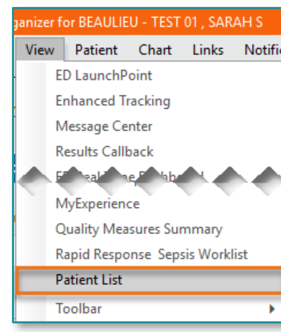
Clinical AI Agent (CAA)
Preferences and Tips for Emergency & WIC Providers – Personal Device

April 17, 2026

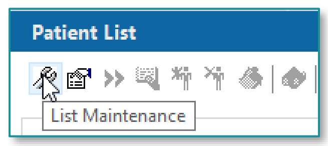
Clinical AI Agent (CAA) is an Ambient Scribe technology that improves documentation efficiency. CAA uses generative AI voice recognition, listens to a conversation between a Provider and Patient, and generates a *draft* note for providers to review and edit.

FirstNet Patient List Setup (one-time setup)

Emergency Department and Walk-In Care providers must set up a patient list in FirstNet, as CAA will identify these active patients to populate within the CAA application.

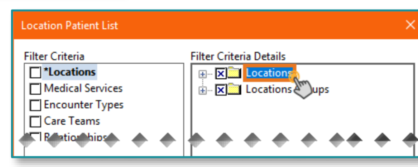


STEP 1: Click the **Patient List** button in the **upper toolbar**. Alternatively, the Patient List can be accessed in **View → Patient List**.



STEP 2: Click **List Maintenance** (wrench icon).

STEP 3: Click **New** at the bottom right of the window.



STEP 4: From the Patient List Type Window, select **Location**, then **Next**.

STEP 5: Double-click **Locations**.

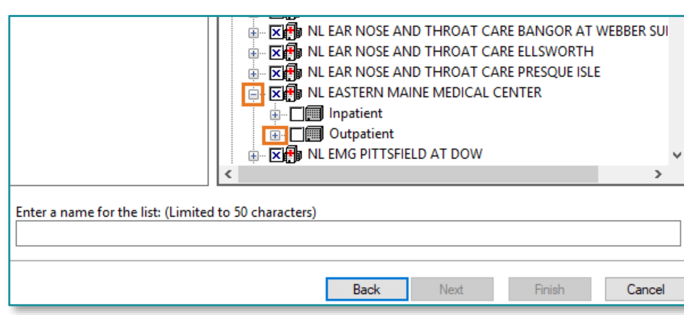
STEP 6: If searching for **Walk-In Care** locations, scroll to the following locations:

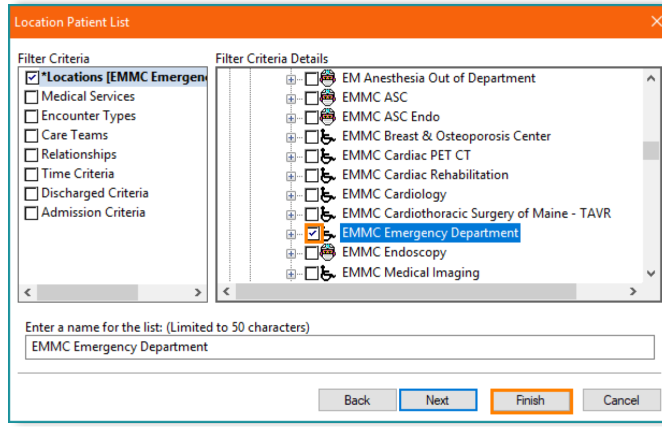
- NL MERCY WALK-IN CARE
- NL WALK-IN CARE

STEP 7: If searching for **Emergency Department** locations:

- Locate the hospital facility; then click the + next to the facility name.

STEP 8: Click the + next to **Outpatient**.





NOTE: **Do not place a check within the box next to Outpatient, or all patients in an outpatient encounter will appear within the patient list.**

STEP 9: Click the box next to the facility's **Emergency department** patient list.

STEP 10: Click **Finish**.

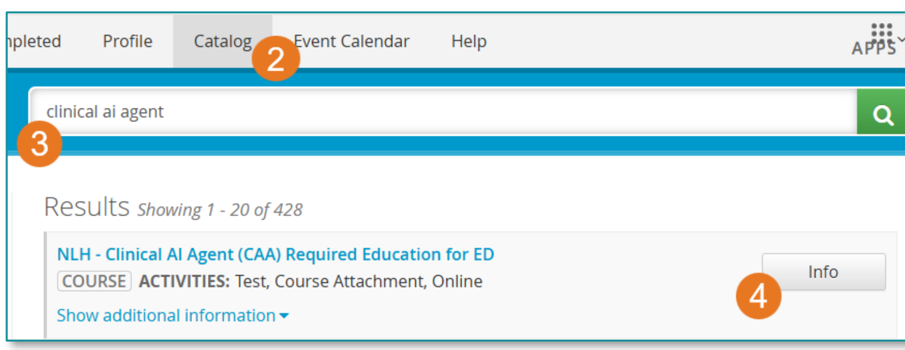
STEP 11: Under **Available Lists**, select the **patient list** to move as an **Active List**, then click **Add**, then **OK**.

Completing Education

Hospital ***employed*** Emergency Department and Walk-In Care providers can **gain access** to **Clinical AI Agent (CAA)** by completing **NLH – Clinical AI Agent (CAA)** within HealthStream. This self-enrollment 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.**

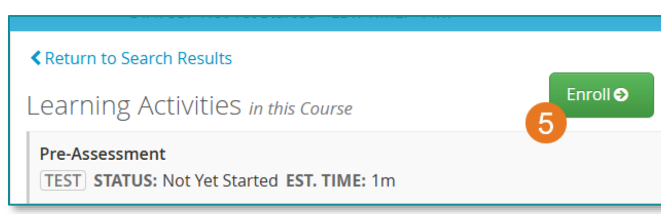
STEP 1: Log into HealthStream with username and password.



STEP 2: Click **Catalog** in upper toolbar.

STEP 3: Type **Clinical AI agent** (not case-sensitive) within the **search bar.**

STEP 4: Click **Info** button next to the course **"NLH – Clinical AI Agent (CAA) Required Education for ED."**



STEP 5: Click the **Enroll** button.

- The course will be available within **My To Do List.**

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.**

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

STEP 2: Search for **Clinical AI Agent**.

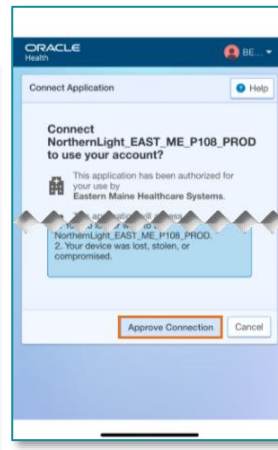
STEP 3: Accept the **Legal Agreement**.

STEP 4: Enter the **ORG code**.

STEP 5: Proceed to the **Oracle Cerner Login**.

STEP 6: Tap **Log in to Eastern Maine Healthcare Systems.**

STEP 7: Enter **Oracle Cerner username** and **password**.



STEP 8: Tap **Approve Connection.**

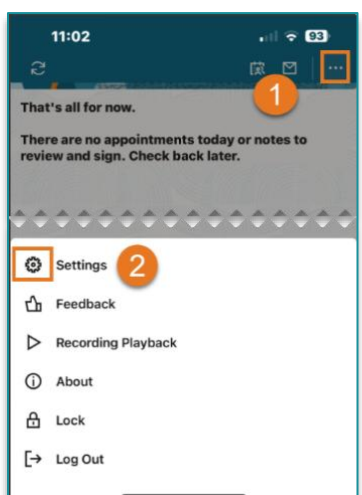
NOTE: **Devices must meet the following minimum operating system requirements for CAA. APPLE iOS 16.2 or later/Google Android 10 or later.**

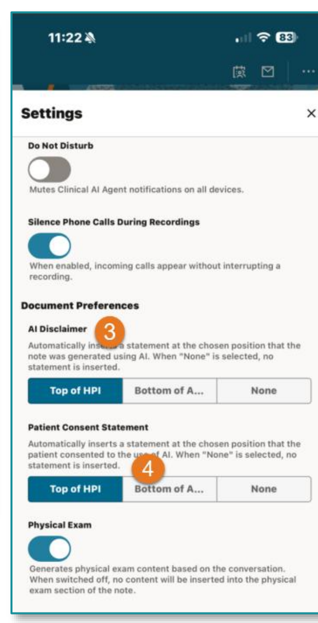
App Settings

STEP 1: From the home screen, tap the **ellipsis (…)** button.

STEP 2: Tap **Settings.**

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





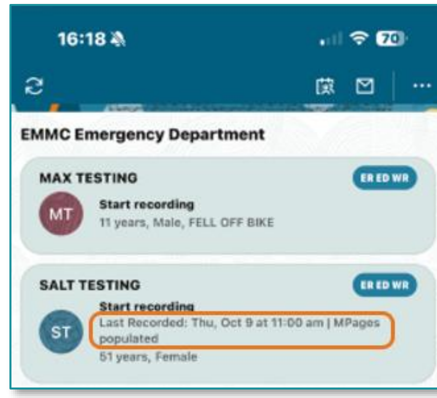
STEP 3: **AI Disclaimer:** select **Top of HPI.**

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

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

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

- This setting inserts a statement: "*The content of this note was generated using the assistance of Artificial Intelligence (AI) technology*" at the chosen position.



<u>NOTE</u>: **"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).**

<u>Managing ED Document Preferences</u>

<u>STEP 1</u>: From the Home screen, select the the ellipsis **(…)** button.

<u>STEP 2</u>: From the list of available options, select **Settings**. The document preferences are displayed.

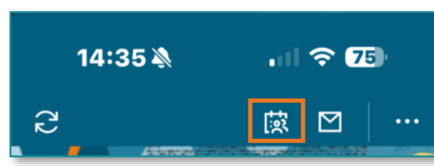
<u>STEP 3:</u> Access the Emergency Document Settings section and select the **arrow** button (>) to expand.

<u>STEP 4</u>: Manage your selections for the following ED document settings:

- **History of Present Illness Format:** Select **Narrative** or **Bulleted list.**
- **Assessment and Plan:** Turn on or off generated Assessment and Plan content.
- **Assessment and Plan Topic Sentence:** Turn on or off a topic sentence at the start of the Assessment and Plan section.

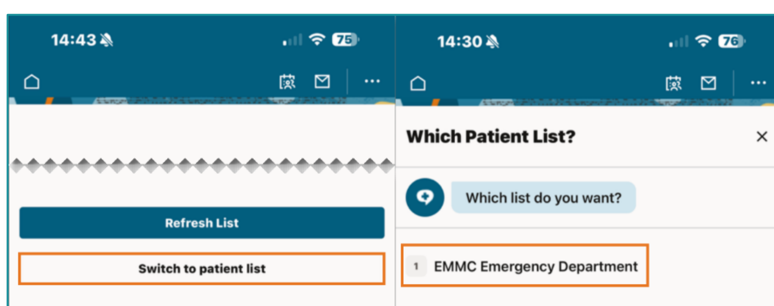
<u>STEP 5</u>: Select **Apply**. All changes are saved.

<u>Viewing Patient Lists</u>



<u>STEP 1</u>: From the Home screen, select the **calendar** button.

<u>STEP 2</u>: Select **Switch to patient list** located at the bottom of the screen.



<u>NOTE:</u> **A patient list must be generated in FirstNet prior to opening the CAA application (see FirstNet Patient List Setup).**

<u>STEP 3</u>: Select the patient list for your facility.

- If a different patient list needs to be accessed, select a patient list from the available options.

<u>Viewing Patients in LaunchPoint</u>

STEP 1: From the Home screen, select the **calendar** button.

STEP 2: Select **Switch to patient list** located at the bottom of the screen.

STEP 3: Click on **My Assigned Patients** located under the **Tracking Boards** header.

NOTE: **Provider will need to be assigned to the patient for the patient to populate.**

STEP 4: Select the appropriate patient.

Record Session and Note Generation

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

STEP 1: Select the **Patient Encounter Tile** to begin a recording.

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

STEP 2: Select the **patient** to **record.**

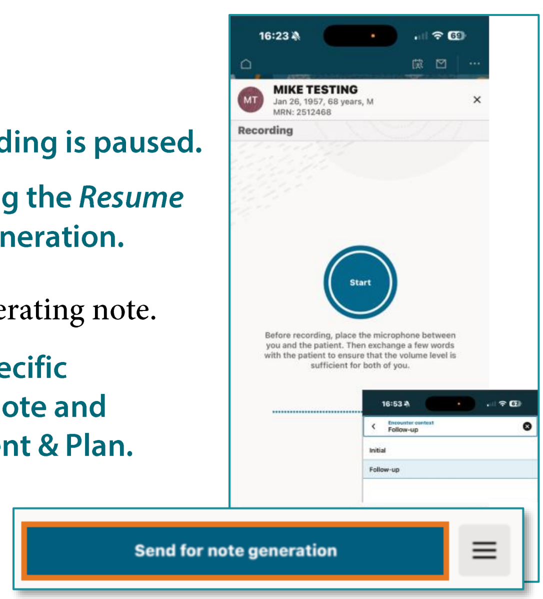
STEP 3: If this is the initial note for the patient, the Encounter context will default to **Initial.**

- A future update will allow for **subsequent notes** to default open to **Follow-Up** (*tap to change the encounter context*).

STEP 4: Select the **Start**  button. Recording is now in progress.

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

STEP 5: **To pause, tap the Pause**  **button.**



STEP 6: To **Resume**, tap the **Resume** button.

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

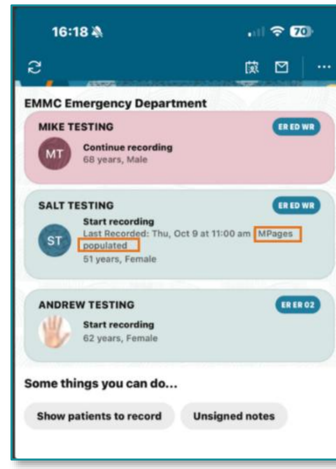
NOTE: **A recording can be paused for up to <u>6 hours</u> by tapping the *Resume later* button. After 6 hours, the note will be sent for generation.**

STEP 7: Select the Problems addressed during the visit ***<u>before</u>*** generating note.

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

STEP 8: Select **Send for note generation** (bottom of screen) to send the session for transcription and generation of a **draft** note within the MPage.

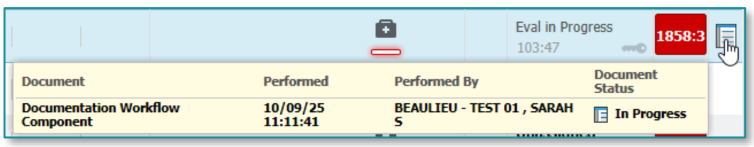
NOTE: **Initial assessment will populate HPI, ROS, PE, and Assessment & Plan. All re-evaluations will default to Follow Up and update the Assessment and Plan only. Timestamps must be verbalized in all subsequent re-evaluations.**



Note Generation within FirstNet

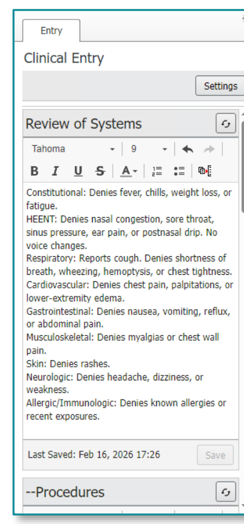
STEP 1: Review the generated note within FirstNet when the patient's status card has updated to the Workflow MPage.

STEP 2: Click the **In Progress** note from the **My Documents** column from ED or WIC Workflow.



- Alternatively, the note can be retrieved from opening the patient's chart directly to view the note draft directly from the ED Provider or WIC Workflow MPage.

STEP 3: 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 and Offline Session

- **You can record an encounter that is not displayed on your schedule view or 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.**

STEP1: From the Home screen, Select **Record for a patient not listed.**

STEP 2: Enter any applicable patient identifiers and select **Continue.**

STEP 3: Select the **Start** button, the recording is now in progress.

STEP 4: When you are finished recording, select the **Pause** button.

STEP 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**.

Record a Session for an Unlisted Patient

- **From your patient list, you can record a session with a patient that is not available in Oracle Health Clinical AI Agent Mobile.**

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.**

STEP 1: From your patient list, select **Record for a patient not listed.**

STEP 2: Enter any applicable patient identifiers and select **Continue.**

STEP 3: Select the **Start** button, the recording is now in progress.

STEP 4: When you are finished recording, select the **Pause** button.

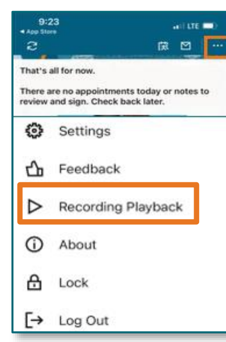
STEP 5: Select **Send for note generation**.

- 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**.

Clinical AI Agent (CAA) Tips

- **Connect to Wi-Fi:** Select local organization's Wi-Fi network.
- **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 brief 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 **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."
- **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**.
  - In the rare instance needed, from the Home screen, select the ellipsis (…).
  - Select **Recording Playback**.
  - Select a recording from the list.
  - 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.

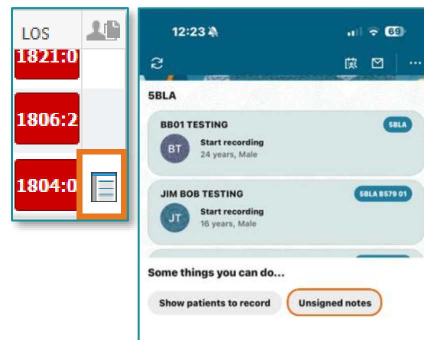
A: Turn off this option within the CAA settings and use auto text. (See screenshots on Page 1.)

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. To see unsigned notes briefly, the **My Documents** column will show **In Progress** notes. 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: No, if the patient has been discharged from the hospital, CAA cannot be used to document the patient visit.

Q: Can I view only my patients I have an established relationship with?

A: Yes, a relationship-based patient list will need to be created vs. pulling in the Emergency Department patient list.

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.

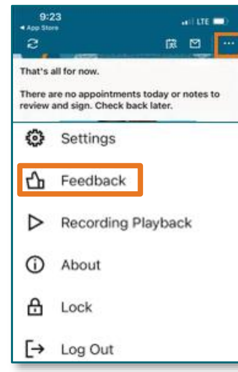
Q: Why is my note not showing up right away in the MPage?

A: After you finish recording and send the note for generation, there is a short delay before it appears in 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.