Northern Light Health | Optum

From the Office of Health Informatics

Clinical AI Agent (CAA) Preferences and Tips – Personal Device

July 22, 2025

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 provider review and edit.

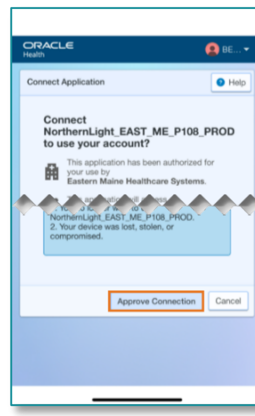
App Access: ONE TIME SET UP for Personal Mobile Devices

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 Digital Assistant**.

NOTE: **The Clinical Digital Assistant is the same as Clinical AI Agent (CAA). The name has not been updated in the App Store or Google Play.**



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.**

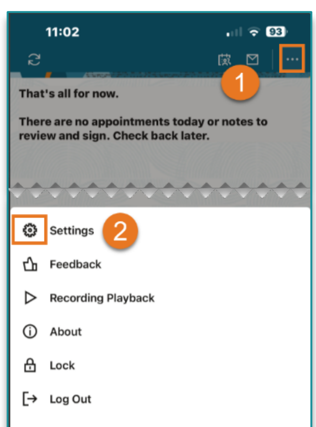
App Settings

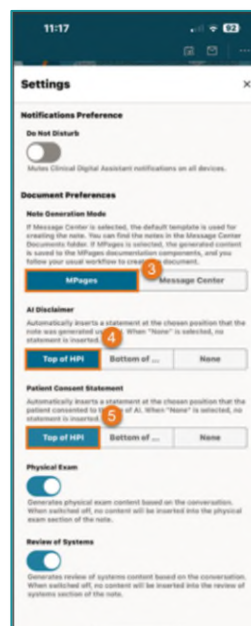
STEP 1: From the home screen, tap the **ellipsis** (**…**) button.

STEP 2: Tap **Settings**.

STEP 3: **Note Generation Mode: MPages** is preselected and will route content of Note to MPage components. **Message Center**, if selected, will route to Message Center.

NOTE: **Annual Wellness visits are only compatible with MPage option. Start with one approach and change setting, if desired.**





- Providers can apply a specific office template when note content flows to the **MPage** (e.g., Subjective/HPI, Review of Systems).
- Draft notes created in **Message Center** will have a default generic Office Visit template.

STEP 4: **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.

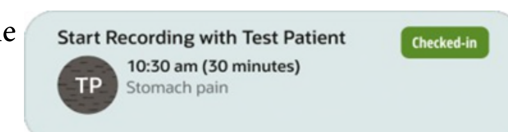
STEP 5: Patient **Consent** Statement: select **Top of HPI**.

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

- This setting inserts a statement: "Patient consented to the use of artificial intelligence (AI) scribe technology" at the chosen position.

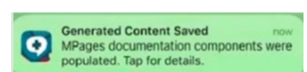
NOTE: **"Do Not Disturb" setting applies to CAA push notifications ONLY. Turning this off will stop CAA notifications from appearing on the device (e.g., note generation is completed).**

Viewing, Managing and Recording with CAA



STEP 1: Access the schedule from the app home screen by pressing the Home button.

- When a patient is ready to be seen, the appointment card status updates from **Arrived** or **Checked-In**.

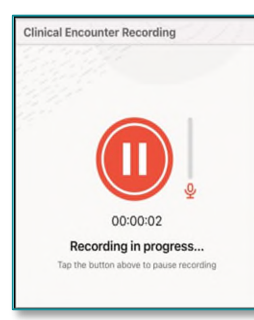


STEP 2: **Obtain verbal consent from patient to use AI scribe.**

STEP 3: Select the **patient appointment** to **record**. The Clinical Encounter Recording page displays.

STEP 4: **Inform the patient the recording has started.**

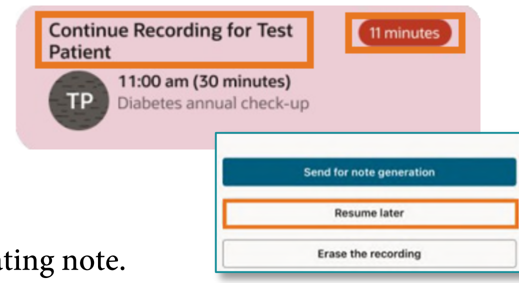
NOTE: **If seeing more than one patient at a time, reference and record the first patient, then stop or pause the recording, and begin the next visit.**



STEP 5: Select the **Start** or **Start Recording** button. Recording is now in progress.

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

STEP 6: To **end** or **pause**, select the **Pause** button.

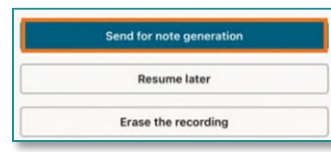


NOTE: **When a patient recording is paused, the appointment card status is updated to reflect the *paused status,* and the *number of minutes* recorded.**

NOTE: **A recording can be paused for up to 6 hours by tapping the *Resume later* button.**

STEP 7: Select the Problems addressed during the visit ***before*** 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.**

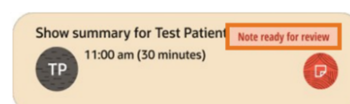


STEP 8: Select **Send for note generation** to send the session for transcription and generation of a **draft** note.

NOTE: **After a session has been recorded, the appointment status of "Recorded" displays. When a draft note is generated, the status is updates to "Note ready for review."**

Note Generation

STEP 1: Review the generated note within PowerChart when the patient's status card has updated to **Note ready for review**.



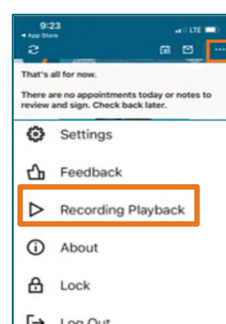
STEP 2: The draft note from the visit will appear within the Workflow MPage or the "Forwarded Documents" folder in Message Center (see App Settings, Page 1, Step 3).

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.**

Clinical AI Agent (CAA) Tips

- **Connect to Wi-Fi:** Select local organization's Wi-Fi network.
- **Patient Arrivals:** The patient must be marked as **Arrived** or **Checked-in** before a recording can be started.
- **Do not forget to include HCCs:** Include relevant problems ***before*** starting recording. Update problems ***before*** generating note – do not forget the HCCs!
- **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 are 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 90 minutes or less.
- **Recording Playbacks:** Recordings are ***not*** saved to the mobile device. **MPage** recording playback is available for **7 days**; **Message Center** playback is available for **7 days** or until the generated note is signed (whichever comes first).
    - 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 including HCCs?

A: The ideal flow is to include anticipated problems ***before*** starting the recording. Then, include *additional* Problems assessed during the visit ***before*** note generation. Ensure selection of HCCs.

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

A: Close out the App completely and log back in. Still not working, be sure the application has newest update.

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

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

Q: I do not like the way the ROS or 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: Depending on personal settings, notes will be generated within the Forwarded Documents folder within Message Center or within the workflow MPage.

Q: I forgot to record the session during the patient visit. Can I go back and record after the patient has checked out?

A: No, when the patient falls off the schedule, there is not a way to record with CAA.

Q: Why can't I see a shared book (i.e., Covering Provider or Specialty Clinic: Concussion?)

A: To view the shared book in PowerChart, make sure the appropriate shared book is added to your Ambulatory Organizer (Home). Follow these steps:

1. Open **PowerChart**.
2. Navigate to the **Ambulatory Organizer (Home)**.
3. Click on the **Organize** button or right-click in the organizer area.
4. Select **Add Shared Book**.
5. Search for and select the relevant shared book (e.g., Covering Provider or Specialty Clinic: Concussion).
6. Click OK or Apply to save your changes.

Once added, patients will appear in the CAA app as:

- Checked in, or
- Visible for chart review under the Show Schedule or Show Tomorrow's Schedule buttons.

Q: Why am I seeing more patients than just my own?

A: Check your Ambulatory Organizer (Home) in PowerChart to ensure that you have not added any additional shared books. If other books (e.g., covering providers or specialty clinics) are pulled into view, you may see patients not assigned to you.

To verify:

1. Open **PowerChart**.
2. Go to the **Ambulatory Organizer (Home)**.
3. Click **Organize** or right-click in the organizer area.
4. Review the list of books currently displayed.
5. Remove any that are not relevant to your 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'll 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.

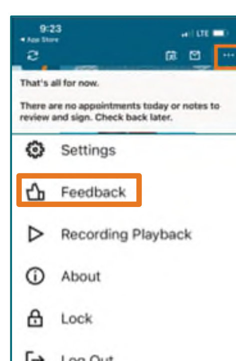
For example, a primary diagnosis like constipation may also lead to related concerns—such as reduced appetite, bowel changes, and family history—being documented as separate entries. This ensures comprehensive tracking and visibility of all relevant clinical issues.

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.