Created Date: October 2024

Review Date: October 2025

Approved by: Ashleigh Wheildon

AI-Assisted Note-Taking

Policy

Purpose

To establish guidelines and procedures for using AI-assisted technology in the note-taking process within the general practice setting, enhancing efficiency and accuracy while maintaining patient privacy, data security, and compliance with regulatory standards.

Scope

This policy applies to all healthcare providers, administrative staff, and any personnel involved in documenting patient interactions using AI technology in the general practice setting.

Policy Statement

The use of AI-assisted note-taking is permitted under this policy to support clinical documentation, streamline workflows, and improve record accuracy. All personnel must ensure AI usage aligns with ethical, legal, and professional standards, prioritising patient confidentiality and data security.

Definitions

- **AI-Assisted Note-Taking**: The use of artificial intelligence tools to transcribe, summarise, and organise clinical notes based on provider-patient interactions.

- **Protected Health Information (PHI)**: Any information about health status, provision of healthcare, or payment for healthcare that can be linked to an individual.

Procedure

Setting Up AI-Assisted Note-Taking

1. **Training**: Staff must complete mandatory training on using AI technology for note-taking, including data privacy, security protocols, and correct use procedures.

2. **Tool Selection**: Approved AI tools are selected based on compliance with healthcare regulations and must undergo regular evaluations for data security and accuracy.

3. **Access Controls**: Only authorised personnel may access AI tools for note-taking. Access rights should align with job roles and responsibilities.

Usage During Patient Interactions

1. **Patient Consent**: Prior to using AI-assisted note-taking during a patient interaction, healthcare providers must:

   - Inform the patient about the use of AI technology for documentation purposes.

   - Obtain verbal or written consent as per practice protocol.

- Document Consent: Record the patient's consent in their medical file, noting that consent may be withdrawn at any time without affecting the quality or availability of care.

2. **Active Monitoring**: Providers should actively monitor the AI's output during or immediately after the interaction to ensure accuracy and correct any inaccuracies promptly.

3. **Error Checking**: All AI-generated notes must be reviewed and validated by the healthcare provider before they are included in the patient's official medical record.

Data Privacy and Security

1. **PHI Protection**: AI tools must adhere to data encryption and other security measures to protect PHI. Unauthorised access, storage, or sharing of PHI is strictly prohibited.

2. **Storage and Retention**: AI-generated notes should be stored in accordance with the practice's data retention policies and applicable regulations.

3. **Audit Logs**: Maintain audit logs of AI-assisted documentation to track usage, access, and modifications.

Addressing Errors and Limitations

1. **Error Reporting**: Staff must report any inaccuracies or errors identified in AI-generated notes to the designated IT or compliance officer immediately.

2. **Limitations**: Staff must acknowledge the limitations of AI tools in capturing nuanced or complex medical details and supplement AI notes with manual input where necessary.

Periodic Review and Quality Assurance

1. **Monthly Review**: Conduct monthly reviews of AI-assisted notes to assess accuracy and consistency, ensuring they meet clinical and regulatory standards.

2. **Feedback Mechanism**: Provide a feedback mechanism for healthcare providers to report issues or suggest improvements for AI note-taking tools.

Compliance and Consequences

Non-compliance with this policy may lead to disciplinary action, up to and including termination of access to AI tools and employment. Severe breaches of patient confidentiality or data misuse may result in legal consequences.

Review and Revision

This policy will be reviewed annually or as needed based on technological updates, changes in regulations, or practice needs.