

AI Documentation Workflow Map

Where AI fits in your working day

Laminate this sheet and place in consulting rooms

✓ AI-Assisted

- Face-to-face consultations
- Video consultations
- Meeting summaries
- Protocol drafting
- Telephone consultations *(headset or speakerphone required)*
- Referral letter drafting
- Patient information leaflets

✍ Manual / Template

- Quick follow-up calls *(e.g. normal blood results)*
- Group consultations *(family meetings, multi-professional)*
- Coding and QOF data entry
- Minor procedures *(surgery, injections, coil fittings)*
- Prescriptions

⚖ Clinician's Discretion

- Home visits
- Complex multi-problem appointments
- Sensitive consultations *(mental health, safeguarding, domestic abuse)*
- Any consultation where recording changes the dynamic

Key Reminders

- ⚠ Always inform patients when AI documentation is being used
- ⚠ AI scribe cannot observe physical examinations — narrate findings or add manually
- ⚠ For telephone: use headset or speakerphone, test audio capture before relying on it
- ⚠ Home visits: make brief notes during visit, dictate summary into AI tool in the car afterwards