ClinicalGTM

PREPARED FOR [redacted]
DOCUMENT Workflow design · v1.0
DATE October 2026
28.3° N · 80.7° W

# Custom Ambient Documentation Workflow

Designed, built and deployed by ClinicalGTM alongside your team: consent enforced by the workflow, evidence captured with every visit, and an audit trail linked to the EHR.

FORWARD-DEPLOYED BUILD · ILLUSTRATIVE WORKFLOW · SAMPLE DATA

PHASE 1 · STEPS 1–4
**Before recording**
Disclose, capture consent, create evidence

PHASE 2 · STEPS 5–7
**During the visit**
Record only with consent; pause when someone joins

PHASE 3 · STEP 8
**After the visit**
Proof written to the EHR and audit registry

## PHASE 1 Before recording

Nothing is recorded until consent evidence exists.

### 1 Open patient encounter

Find the patient in the EHR and start the ambient visit.

**Patient encounter**

| | |
|---|---|
| Patient | Jane Smith (sample) |
| Visit ID | VST-0000-001234 |
| Appt | Office visit |

Start ambient visit

→

### 2 Present approved disclosure

Show the practice's standard, approved AI documentation disclosure.

**AI documentation consent**

We use an AI assistant to help document your visit. Your conversation may be recorded, securely processed and used to draft your clinical note. You can decline; it will not affect your care.

Decline | I agree

→

### 3 Capture patient consent

Patient acknowledges by signature, verbal confirmation or written consent.

**Consent method**

- (•) Signature (on screen)
- ( ) Verbal confirmation
- ( ) Written acknowledgment

→

### 4 Create consent evidence

System creates a consent record linked to this encounter.

✓ Valid consent

| | |
|---|---|
| Method | Signature |
| Disclosure | Version 2.1 |
| Timestamp | 10/17/2026 10:04 |
| Reference | CNS-000000321 |

IF THE PATIENT DECLINES AT STEP 2 OR 3
**The visit continues without ambient recording.** The decline is logged against the encounter, and the clinician documents the visit the usual way.

## PHASE 2 During the visit

Recording runs only while every voice in the room has consent on file.

### 5 Unlock recording

Recording begins only after valid consent is on file.

Recording enabled after authorization

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● Recording 00:00:08

→

### 6 Watch for new participants

The system flags a new voice where the audio supports it, or the clinician flags one with a tap.

New participant detected

Pause and capture consent

Dismiss (continue recording)

→

### 7 Capture participant consent

Collect consent from the new participant, then resume.

Role: Family member

- (•) Verbal confirmation
- ( ) Signature (on screen)

Capture consent and resume

LOOP · STEP 7 → STEP 5
**Recording resumes under the same encounter.** Each added consent joins the evidence record, so the pause and the resume are both time-stamped.

IF THE PARTICIPANT DECLINES
**Recording stays paused.** The clinician continues the visit and documents the rest manually; nothing from the new participant is captured.

## PHASE 3 After the visit

Proof of consent lives with the encounter, ready for audits and disputes.

### 8 Send proof to the EHR and audit registry

Consent evidence is written to the EHR through a supported export or integration, and linked to a searchable audit record.

**Consent evidence** CNS-000000321 → **EHR encounter** VST-0000-001234

→

### Audit and evidence record

Searchable by patient or visit ID.

| | |
|---|---|
| Reference | CNS-000000321 |
| Patient | Jane Smith (sample) |
| Date / time | 10/17/2026 10:04 |
| Status | ● Linked to EHR |

## FORWARD-DEPLOYED Who does what

We build and run it with your team; your practice keeps every decision.

### ClinicalGTM

- Maps your current visit flow with your clinicians and front desk
- Configures the disclosure and consent screens with your approved wording
- Builds the consent evidence record and the link to your EHR
- Trains clinicians and staff, on site or remote
- Monitors the workflow after launch and improves it with you

### Your practice

- Approves the disclosure wording and consent policy, with your counsel
- Chooses which visit types and clinicians start first
- Runs the visits; clinicians review and sign every note
- Owns the consent records and the EHR

## What this changes

**Consent before recording**
Recording only starts after valid authorization is on file.

**Less for clinicians to remember**
The workflow enforces each step, so clinicians follow a guided path.

**Time-stamped evidence**
Consent, pauses and resumes are recorded with timestamps.

**Handles people who join**
New voices are flagged by the system or the clinician, with pause and re-consent in real time.

**Fewer manual compliance steps**
Evidence is created as part of the visit, not afterwards.

**An encounter-level audit trail**
Records can be retrieved by patient or visit ID for audits and disputes.