

AI Scribe Pilot Program

Tips & Tricks for Health Care Providers

Building Better Notes

- Start by stating the reason for the visit:
 - *“Let’s talk about the back pain you are having...”*
 - *“What problems are you having with your shoulder?”*
- Verbally structure the encounter:
 - *“About your past medical history, I see that...”*
 - *“The next concern we need to go over is your asthma.”*
 - *“Ok, let’s discuss the plan going forward.”*
- Narrate your physical exam findings or clinical thinking, as if to a medical Resident. Tali only records what is said aloud:
 - During physical exam: *“On palpation of the abdomen... it is soft, non-tender, and non-distended.”* Or *“Let’s check your abdomen...it is soft, not distended with good bowels sounds. Does this hurt? No, ok no rebound tenderness.”*
 - State: *“Lungs are clear with bilateral auscultation. Your heart rate is regular, no murmur.”*
 - *“Let’s look into your left eye... I don’t see any discolouration or foreign object.”*
- State pertinent negatives:
 - *“No issues noted with the anterior drawer exam.”*
- Multiple family members in one appt? Try to address one patient at a time and name them aloud. If you’re going back and forth between them in one appointment, spell it out: *“so, your baby is constipated, but your son Gabe is coughing? Let’s talk about your 2-month-old’s constipation first.”* You will have to cut and paste the information into the separate charts or start a Tali encounter recording for each.
- Review the draft summary carefully, noting the speakers and what was said. You can also review the raw transcript if needed.

Entering Notes Into EMR/CHR

- ‘Copy to EHR’ is only available for these **SOAP type templates** (as of Jan 2026):
 - SOAP Comprehensive, SOAP Multi issues, SOAP Merged A&P and SOAP (basic)
 - Used to automatically separate note sections into individual EMR/CHR text fields
- If you navigate away from the encounter note (ex: checking for lab values) the ‘Copy to EHR’ button may not be available, and you will only see the ‘Copy’ option. Navigate back to the encounter and look for the ‘Copy to EHR’ button to auto populate SOAP type notes.
- Recommendation: Consider customizing SOAP-based templates to your specific needs.

Important Reminder: each patient you assess **requires consent** to be granted and documented in each patient’s Data Point widget in the EMR/CHR. *For example: A parent and child are together in a visit and you are addressing medical concerns for both. Consent must be asked for and documented for each person.*

AI Scribe Pilot Program

Tips & Tricks for Health Care Providers

Customizing Tali Templates

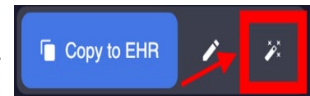
- You can change/add the headings, specific subheadings or formatting you want in your notes
- Add ICD codes or BMI calculations to your notes
- Add direct terminology by adding Macro phrases: "If I say, 'ears normal', Tali to insert: 'External ears clear, no erythema. Tympanic membranes intact.'"
- Find the detailed Tali template list in your Tali or find the template descriptions online <https://help.tali.ai/en/articles/8617487-how-to-use-templates-in-ai-scribe>

Look here for prompts and suggestions:

- <https://help.tali.ai/en/articles/9664122-customize-your-note-templates> or
- [Tali AI YouTube Video Tutorials](#)

Features to Remember


- **Smart Edit** is used when editing a single note, such as "Remove reference to knee pain" after a multi-issue appointment that requires a Referral letter to a Gastroenterologist. You can dictate the change using the mic button in The Smart Edit field <https://help.tali.ai/en/articles/9613311-edit-notes-faster-with-smart-edit>
- When using the EMR integration (aka Web App), you have access to the pdf **Form Filling** feature. Find forms at the bottom of the template list inside your Tali or get directions online <https://help.tali.ai/en/articles/forms>
- **Resume Encounter** allows you to dictate, type or copy information into a transcript after appointments.



Technical Tips (from the PEI Testing)

- Tested distance of ~8-10 ft with no audio issues, using a standard laptop
- Keep the laptop facing the patient and clinician
- Significant background noise can impact audio recording ability: bring the laptop closer and turn microphone volume up.

Hallucinations and Quality Issues

- **Hallucinations:** AI scribes may add details that weren't said, misinterpret the conversation, or insert unsupported information, though this is less common as technology advances
- If you notice a possible hallucination or quality issue in drafted notes, press the **thumbs down icon**  below the drafted note to immediately alert Tali to review the audio recording (it is automatically deleted at 48 hours). You can also review the raw transcript if needed.