PIMSY

AI Assisted Narratives Using

pAIsly
BY PIMSY EHR

Provider Portal Quick Guide

PAISLY

A note from the PIMSY team:

Welcome to the latest Provider Portal Quick Guide for our newest feature:
***PAISLY* AI – PIMSY's AI assisted narrative generation tool for client Q&A and clinical notes.**

PAISLY is designed to revolutionize the way clinicians generate narratives from their notes. With the power of artificial intelligence, we are introducing a cutting-edge tool that aims to streamline the note narrative process and much more, making it more efficient and effective than ever before.

Our new AI feature leverages state-of-the-art natural language processing and machine learning algorithms to assist you in this endeavor. By analyzing and interpreting the contents of your clinical notes, the AI generates insightful and coherent narratives that encapsulate the patient's medical history, progress, and future care considerations. Most importantly, it will never fabricate information. This allows you to focus more on providing quality care to your patients and less on the laborious process of constructing narratives manually.

With this user-friendly guide, we aim to provide you with a step-by-step walkthrough of how to utilize this feature seamlessly within your existing workflow. Whether you are a clinician or in a supportive role, you will find the guide intuitive and easy to follow, ensuring a smooth integration of PAISLY AI into your daily practice.

We are excited to embark on this transformative journey alongside you, empowering you to spend less time on administrative tasks and more time on what truly matters – delivering exceptional patient care. Let's dive into the Quick Guide and unlock the potential of our newest AI feature to enhance your clinical narratives.

Currently, PAISLY is available to simplify client-centric Q&As and note summaries across the portal.

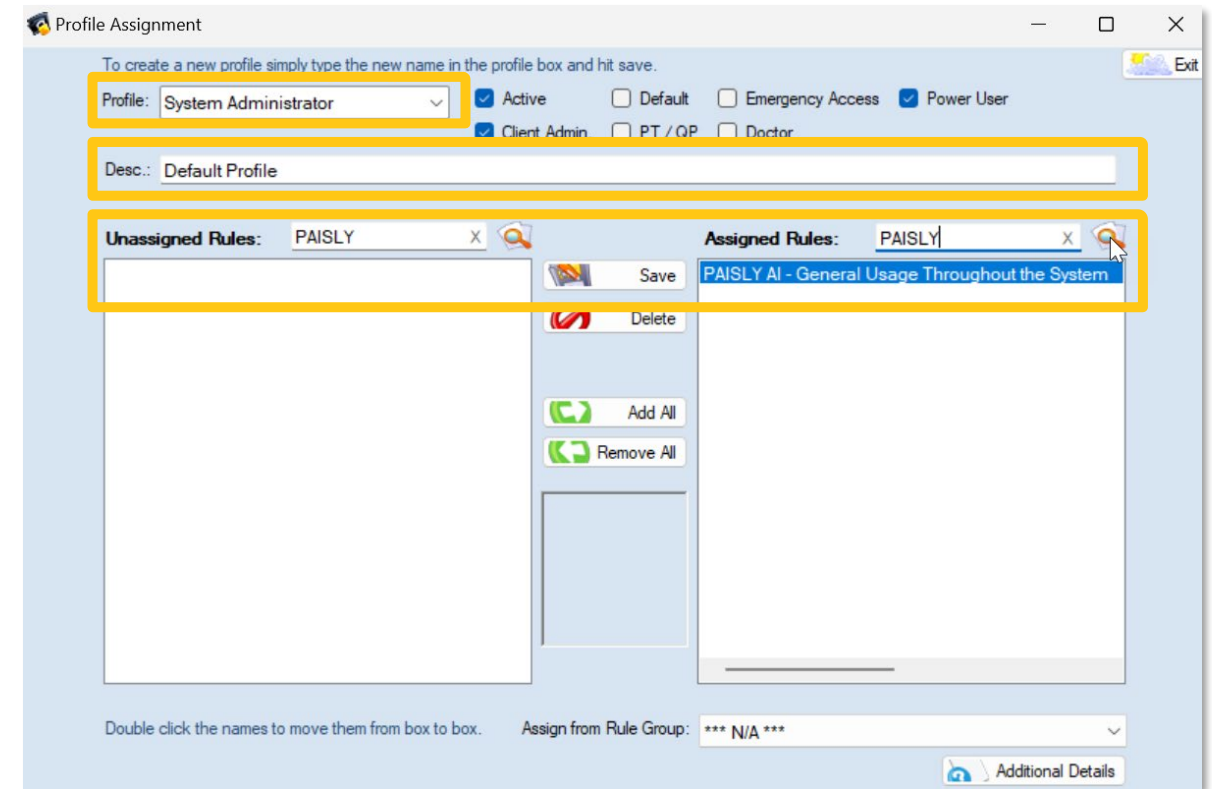## PAISLY (*PIMSY AI SIMPLIFYING LIFE for YOU*)

PAISLY

Permissions for PAISLY AI

To begin, users will need profile rules assigned in order to access PAISLY. To assign, go to *Administration > Profile Management*.

Select the appropriate *Profile* and *Desc.*, then search for "PAISLY" in the *Unassigned* and *Assigned Rules* search bar.

Double-click the *PAISLY AI – General Usage Throughout the System* rule to add it to the assigned rules panel.

By default, the rule will be assigned if the user has permissions to create an assessment note in the profile assignment

PAISLY AI Note Templates

PAISLY AI utilizes templates from *Picklist Management* to generate its narratives. Go to *Administration > Pick list Management*.

In the search bar, search for Templates. All templates related to PAISLY AI can be located via the *Template Category* column as *AI PAISLY Note Narrative*. Any template with this category will appear as a narrative option when preparing to generate a narrative with PAISLY.

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Note Q&A

PAISLY looks for a specific Q&A to generate its narratives with.

A narrative answer field can be added to any Q&A. This can be set up as a new question on the form using a free text long control and by selecting *Receives Narrative* from the *Question Indicator Name* column.

If this is not set up, narratives can be copied to the clipboard and pasted into any free text area.

Additionally, if you don't want PAISLY to pull specific Q&A questions into the narrative, make sure to check the box for *Exclude From Narrative*.

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Accessing PAISLY AI

To begin using PAISLY to generate a narrative, start by accessing any client-centric Q&A or note.

For this exercise, let's use a note as an example and select the *Forms* area.

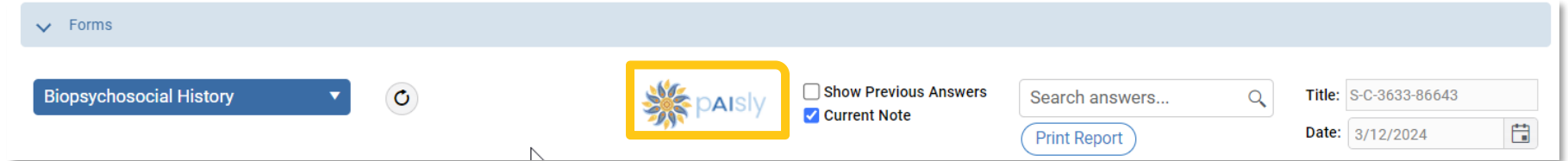Next, select a form from the *Select Forms* dropdown. Completed forms will be highlighted in green.

Next, verify that there is a narrative question within the Q&A, which can typically be found as the last question. This question will host the narrative area and will be utilized by PAISLY.
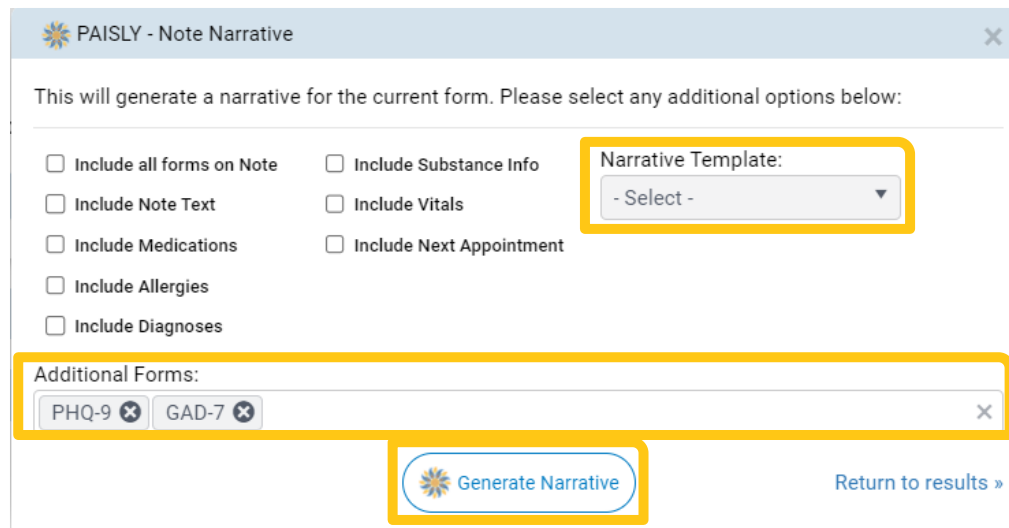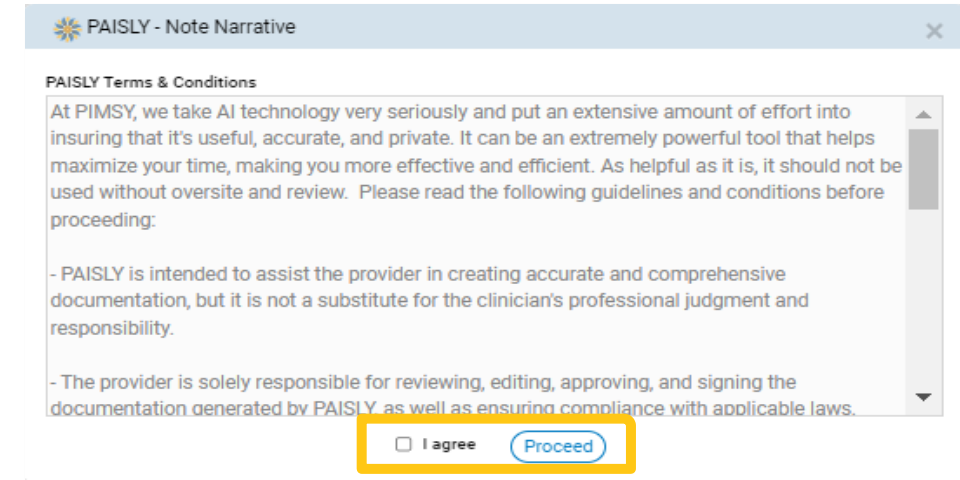
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PAISLY Icon

To begin the narrative process, scroll back to the top and click on the PAISLY icon.

Terms & Conditions

After clicking on the PAISLY AI icon, a popup will appear with *Terms & Conditions*. Once you have reviewed the contents and if agreed, check the checkbox next to *I agree*. After checking the box, click *Proceed*.

If you do not agree with the Terms & Conditions, you will not be able to proceed with using PAISLY AI to generate note narratives.
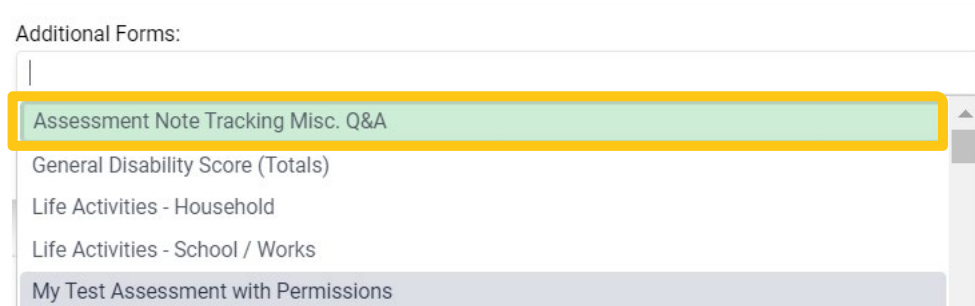

PAISLY – Note Narrative Selection

After clicking proceed, a new popup will replace the Terms & Conditions popup. Here, users can select various options to include in the note generation. Users may also select *Additional Forms,* which can include measurement tools such as the PHQ-9 and GAD-7.

The *Include all forms on Note* option will include information from other forms that have been answered and share the same title/note# on the note.

The *Include Note Text* option will include any text that has been filled out on the free text box of the note.

After selecting all appropriate items, choose a *Narrative Template* to apply to the narrative, then click *Generate Narrative*. If there is no selection for a narrative template, then PAISLY will generate a generic summary.

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Generating the Note Narrative

After clicking Generate Narrative, PAISLY will begin to develop the narrative. Here, a loading screen will appear, where it may take up to 60 seconds to generate the narrative. This will be dependent on how much information is being processed.

Generated Note Narrative

Once the note narrative is completed, the loading window will be replaced with the newly generated note narrative, which will include all the items and forms that were selected previously. PAISLY AI will have processed and structured client information into a cohesive, comprehensive note narrative through data collection, preprocessing, feature extraction, data integration, contextual analysis, and quality assurance. Be sure to review all contents for accuracy.

Changes can be made by selecting *< Make changes* to the left of the save button. If no changes are necessary and the narrative is deemed complete, click *Save* to save the narrative to the note. For the Q&A's narrative will appear in the text box for the Narrative question on the form. Users can also copy the narrative by clicking on *Copy to Clipboard* to the right of the save button.