FILLABLE CHECKLIST · VENDOR-NEUTRAL

The questions every scribe vendor *should have to answer.*

A vendor-neutral vetting checklist for ambient AI documentation tools, built from the published error research and HHS requirements, not from any vendor's product sheet.

WHAT THIS IS
Twenty-two questions across five areas: data and HIPAA, clinical accuracy, workflow fit, consent and recording, and contract terms. dX80 sells no software and takes no vendor commissions; nothing here favors any product.

HOW TO USE IT
Use one copy per vendor you evaluate. Ask the questions in writing and keep the answers; "I'll check with our team" is an answer too, and so is silence. Complete the BAA and Vendor-PHI Checklist (Stage 3) before any pilot that touches real patients.

Vendor / product: _____

Evaluated by: _____

Date: _____

1. Data and HIPAA

☐ Will you sign a BAA before any pilot begins, on our current pricing tier?

☐ Is our data used to train or improve your models? Where is that in writing?

☐ How long are audio, transcripts, and drafts retained, and can we shorten it?

☐ Which subcontractors touch our data, and under what agreements?

☐ How fast do you notify us of a breach, and in what form?

2. Clinical accuracy

Context for this section: an independent validation study found errors in 31 of 44 (70%) draft notes across two commercial ambient scribe products, with omissions the most frequent error type (Biro et al., JMIR 2025; 44 simulated encounters, two products). Ask each vendor how its own current product has been evaluated for omissions, unsupported additions, and other clinically significant errors.

☐ What published or third-party accuracy data exists for your product, specifically on omission rates?

☐ How does the product flag low-confidence sections of a draft note?

☐ Can we run our own accuracy audit during the pilot (sample of notes vs. recordings), and will you support it?

☐ What happens to a note when the recording quality was poor: silence, warning, or confident guess?

☐ Does the product ever add clinical content that was not said aloud (e.g., normal-exam boilerplate), and can that be disabled?

3. Workflow fit

☐ Does it write into our EHR directly, and into the right note sections, or does staff copy-paste?

☐ Specialty fit: show us sample notes from practices like ours, not a demo reel.

☐ What does the clinician review step look like on screen, and how long does it take per note in real use?

☐ What happens on day one for a clinician who hates it: opt-out path without penalty?

☐ Training: what do you provide, for how many hours, and is it live or a video library?

4. Consent and recording

☐ What consent workflow does the product support (verbal capture, documented opt-out, signage guidance)?

☐ How does it handle a patient who declines mid-visit?

☐ What notice, consent, opt-out, and documentation features does it provide, and can they be configured to your state's requirements?

5. Contract

☐ Term length, auto-renewal, and the exit clause: how do we leave?

☐ At termination: full export of our notes and data, and certified deletion?

☐ Price per clinician per month, all-in, including EHR integration fees?

☐ What outcome do you expect us to measure at 90 days, and will you put it in writing? (For calibration: the largest multisite study to date found adopters saved about 16 minutes of documentation time per 8 hours of patient care. Rotenstein et al., JAMA 2026. A vendor promising hours should explain why.)

Disposition

Decision (pilot / reject / revisit):

_____

If pilot: success metric and re-measure date:

_____

SOURCES · CHECK OUR WORK

Biro J, et al. Accuracy and Safety of AI-Enabled Scribe Technology. J Med Internet Res. 2025;27:e64993. jmir.org/2025/1/e64993

Rotenstein LS, et al. Changes in Clinician Time Expenditure and Visit Quantity With Adoption of AI-Powered Scribes. JAMA. 2026;335(16):1408-1417. doi:10.1001/jama.2026.2253

HHS. Sample Business Associate Agreement Provisions. hhs.gov/hipaa/for-professionals/covered-entities/sample-business-associate-agreement-provisions

AMA STEPS Forward. Governance for Augmented Intelligence. edhub.ama-assn.org/steps-forward/module/2833560