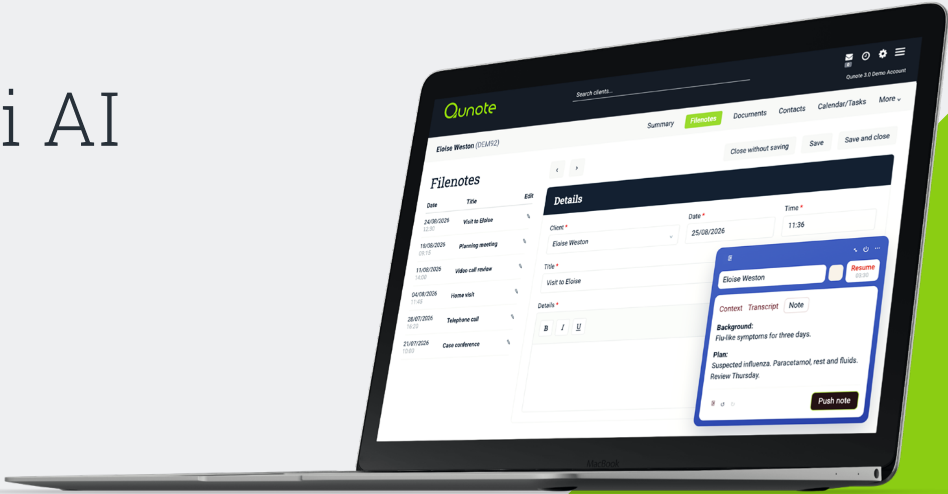
Using Heidi AI in Qunote



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NEW IN QUNOTE

Write the note by having the conversation.

An AI scribe, inside the filenote you were already writing.

POWERED BY Heidi

Contents

What does Heidi do?

HEIDI LISTENS TO THE SESSION.
YOU REVIEW THE NOTE.
QUNOTE KEEPS THE RECORD.

An AI scribe that sits inside the Qunote filenote page, so you never have to leave the client record to use it.

1. Record the session

Capture it live with the Widget, or bring in a recording from Sessions.

2. Review the draft

Heidi creates the transcript and structured note.
You check it and correct anything that's wrong.

3. Save to the filenote

The note lands in the Details field. Everything else on the filenote stays yours.

There's no additional Qunote charge for the integration.
A Heidi plan that includes integrated use is arranged directly with Heidi.

Before you start

Three things will need to be in place before you start to use Heidi in Qunote.

1 **A Heidi account**

Create one the first time you open the Widget, or sign in to an existing account.

2 **A plan that permits integration**

Integrated use is available only with certain Heidi subscription tiers.

Check your plan with Heidi first.

3 **Microphone access**

Your browser will ask for permission the first time you record.

Select **Allow**.

Always select the client first

Before you press record, check the correct client is showing at the top of the Heidi widget.

Recording without a client creates a duplicate

If you begin a session with no client selected, Heidi creates a brand new client profile for it.

Do that repeatedly and you build up duplicate records, which makes past sessions hard to find and means notes are no longer grouped against one client.

Wrong client in Heidi

Wrong client in Heidi

Nothing has reached a Qunote record yet. The recording stays in Heidi until you push a note and save.

Correct the client on the session in Heidi, or open the correct client's filenote in Qunote and push the note from there using **Sessions**.

Wrong client in Qunote

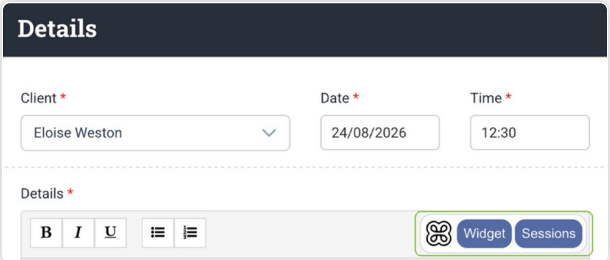
The note has been pushed into the wrong client's filenote.

If you have not saved yet, use **Close without saving**.

If you have already saved, delete that filenote and tell your organisation's data protection lead — clinical information recorded against the wrong person is reportable.

The Widget button

Use the **Widget** when you are about to record. It opens Heidi over the page so you can capture a session live.



Both buttons sit at the right of the **Details** toolbar on the filenote form.

1. Open the client's filenote — a new one, or an existing one.
2. Select the **Widget**, in the toolbar above the Details field. Heidi opens over the page.
3. Sign in to Heidi — the first time only. After that you are signed in automatically.
4. Check the client name is showing.
5. Choose a template that suits the session. Templates come from your own Heidi account.
6. Press the microphone to record. You can pause and resume — and Heidi warns you if it cannot hear anything.
7. Stop when the session ends. Heidi produces the transcript and the note.

Stay on the page while recording
Do not refresh or close the tab. Stop the recording before you navigate away.

The Sessions button

Use **Sessions** when the recording already exists.

Writing up later

For a visit you recorded earlier in the week, or when the same note is needed in more than one place.

Recorded on the mobile app

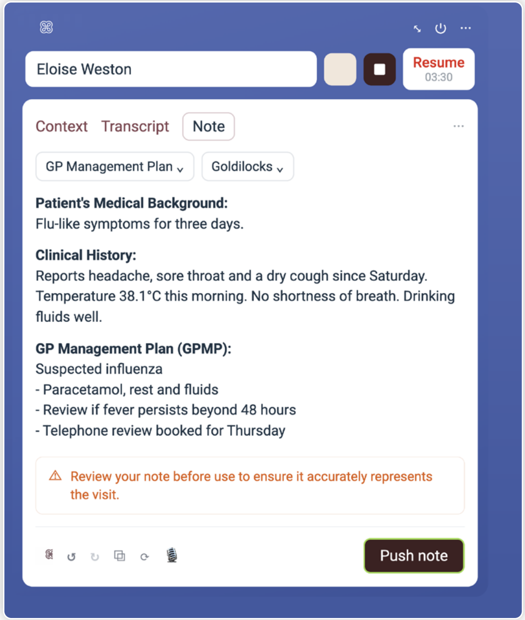
The app records offline — useful in a client's home with no signal. Sessions appear here once your phone has synced. Use the same Heidi account on your phone as in Qunote.

1. Open the filenote you want the note to go into.
2. Select **Sessions** to list your previous recordings.
3. Narrow the list by client, then pick the session you want.
4. The note opens as it did when it was generated. Read it, then add it to the filenote.

Check you have the right session
Any session can be added to any filenote. Check the client name on the session matches the filenote you have open before you push.

Adding the note to the fileneote

1. **Read the note first.** Check it against what was discussed. Look at the Transcript tab if anything reads oddly.
2. **Edit anything wrong** — in the widget, or in the Details field afterwards.
3. **Place your cursor.** The note is inserted there. Nothing you have typed is overwritten.
4. **Select Push note.** Each push adds another copy, so delete any extras.
5. **Complete and save.** Title, duration, travel, mileage, contact, person, subject and chargeable status are all still yours to fill in. Check the note has landed against the right client, then save as usual.



Push note sits at the bottom right of the widget.

Getting the best results

1. **Say things out loud.** If a decision, risk, action or follow-up needs to be in the record, say it during the session. Heidi can only write down what it hears.

2. Check the microphone is picking you up before a long session — particularly with a headset, or in a client's home.

3. Add context in the **Context** tab where it helps — medication, background, anything relevant to this session.

4. Pick a template that matches the session type rather than one general format for everything.

5. Read the transcript when a note looks wrong — it usually shows where the error came from.

Always review before you save

Heidi produces a draft. The note that goes into the client record is the one you have read and approved.

Check in particular for anything missing, anything stated that was not actually said, and negatives that may have been reversed — a note reading "reports low mood" where the client said they had none. These are the errors most easily missed on a quick read.

> **You remain responsible for the record**
>
> Heidi assists with documentation. It does not replace your professional judgement, and the accuracy of what is saved to the client file remains your responsibility. Follow your organisation's consent, confidentiality and data protection procedures before recording any client interaction.

Accounts, billing and support

Qunote does not charge for Heidi

There is no additional Qunote charge for the integration. It is included in your existing Qunote subscription.

Heidi is a separate company

To use Heidi inside Qunote you need a Heidi plan that permits integration — not all tiers do. Your Heidi subscription is arranged and paid for directly with Heidi, and questions about pricing, plans or upgrades go to them.

Note accuracy sits with Heidi
The transcript and the note are produced entirely by Heidi. Qunote passes the finished note into your filenote but has no part in writing it. If a note is inaccurate, raise it with Heidi — they are the only ones who can adjust it. This is why reviewing before saving matters.

Who to contact

It helps to know which system a problem belongs to, because that determines who can fix it.

Contact Qunote

- The Widget or Sessions buttons not appearing on the filenote page
- A note not arriving in the Details field after you push it
- Anything to do with the filenote itself — saving, fields, permissions
- Which of your users can see the integration

Contact Heidi

- Signing in, account setup or linking your email address
- Subscriptions, plans, pricing and upgrades
- The accuracy or wording of a generated note or transcript
- Templates, note formats and recording behaviour

Troubleshooting

Heidi will not open, or asks you to sign in every time

Check that your Heidi account is logged in with the correct email address.

You are prompted to upgrade

Your Heidi plan does not include integrated use. Contact Heidi about moving to a plan that does.

Heidi is not picking up any audio

Check the browser has microphone permission, that the right microphone is selected, and that recording has started.

The client name is blank in the widget

Enter it before you record. Recording without a client creates a duplicate client profile in Heidi.

You have duplicate clients in Heidi

These are created by recording without selecting a client. Client profiles are managed inside your own Heidi account, so merge or remove the duplicates there.

The note is inaccurate

Check the Transcript tab first. If the transcript is wrong the note will be too. Edit before pushing, or correct it in the Details field.

The note appears twice

Push note has been selected more than once. Delete the extra copy before saving.

You cannot find an earlier session

Select Sessions in the filenote toolbar. If it is still missing, check whether the client has been duplicated in Heidi — the session may be sitting under the duplicate. Offline recordings appear only after your phone has synced.

Still need help?

Give us a call on **01303 863816**
or email **info@qunote.com**

You can expect a swift and helpful response every working day from 09:00 – 17:30 (GMT).

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