Ambient AI Scribe for Progress Notes

Last Modified on 09/04/2026 12:28 pm EDT

> **Path: Main Menu > Treatment Planning > Sessions**

About

The NextStep **Ambient AI Scribe** is an artificial intelligence tool that passively listens to clinical conversations between a healthcare provider and a client to automatically generate Progress Notes in NextStep. It joins a session and gives you a summary of your discussion and automatically adds Chart Notes to your Progress Note.

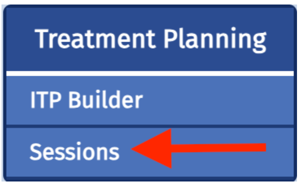
How to Use AI Scribe for Progress Notes

The NextStep Progress Note is where all NextStep users document client progress against Treatment Plan Objectives. The NextStep Ambient AI Scribe can now join a conversation with a client and generate draft Chart Note summaries, and a full summary of the discussion, which the therapist then reviews and finalizes.

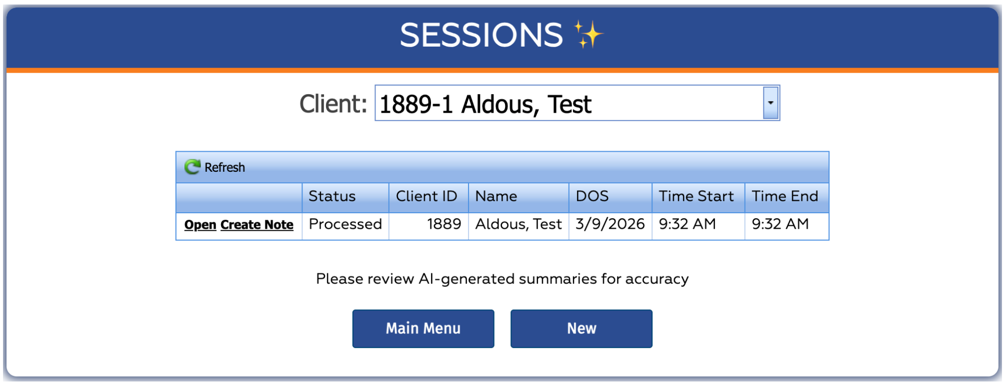
Creating a Session

A "Session" is an AI-assisted conversation between a therapist and a client.

1. Go to the Treatment Plan menu
2. Click Sessions.



3. Choose a client
4. Click New.

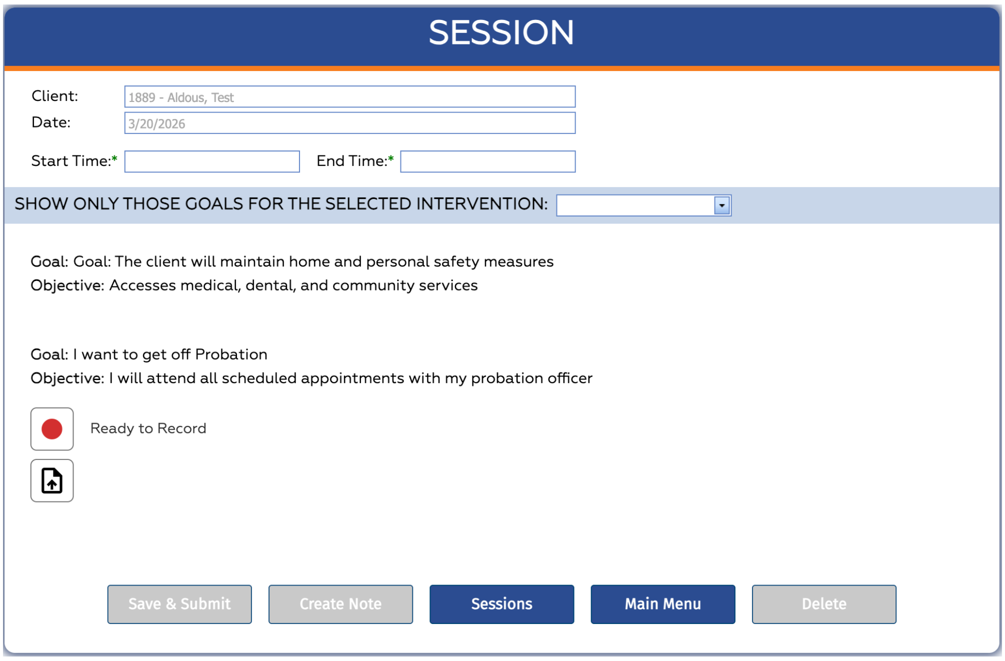


> Note: Recordings are not retained. Sessions are automatically deleted after 14 days.

Managing the Live Session

When you create a new session

- Use the Show Only Those Goals for the Selected Intervention dropdown to narrow the scope of the discussion. If left blank, all objectives will be summarized.



- Ambient AI Scribe Controls:
  - Click the  button to begin the AI Scribe session.
  - Tip: Have participants introduce themselves at the start of the conversation.
  - Use the  button to stop the AI Scribe, and click  again to resume.
- File Uploads: If you have an existing recording or video file, use  to select the recording from your local hard drive for processing instead of a live session.
- Completion: Click Save & Submit to send the conversation for AI processing.

Note that Session pages only persist for 14 days. After that they are purged from NextStep.

Creating and Reviewing Notes

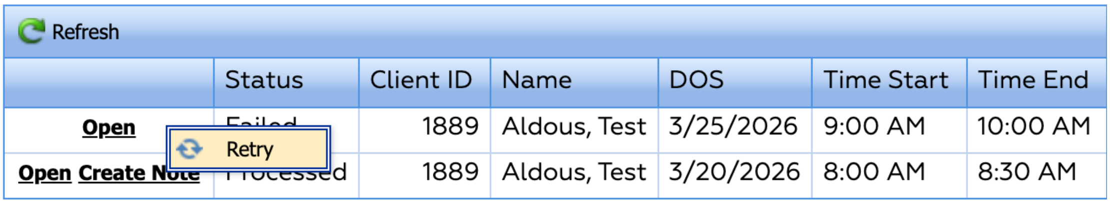
1. Return to the Sessions page and check the Status of your session.
2. If the status is Processing, click

Refresh

until the status changes to Processed or return later to check on it.

3. Click Create Note to generate a new Progress Note. NextStep will automatically populate the Chart Notes with AI-generated summaries based on the discussed objectives.
4. If your progress note includes a memo field with an alias SessionSummary, a full summary of the session will be entered. Contact NextStep support if you need assistance setting up the memo field and alias.
5. Important: Review all summaries for accuracy before finalizing the note.

Note that if an item on the Sessions grid has a status of Failed, contact NextStep support. You can also right click on the status and click Retry.



Refresh

	Status	Client ID	Name	DOS	Time Start	Time End
Open	Failed	1889	Aldous, Test	3/25/2026	9:00 AM	10:00 AM
Open Create Note	Processed	1889	Aldous, Test	3/20/2026	8:00 AM	8:30 AM

Retry

Reminders & Support

The NextStep Reminders page will display all Processed sessions. You can quickly open a session or create a new note directly from this list.

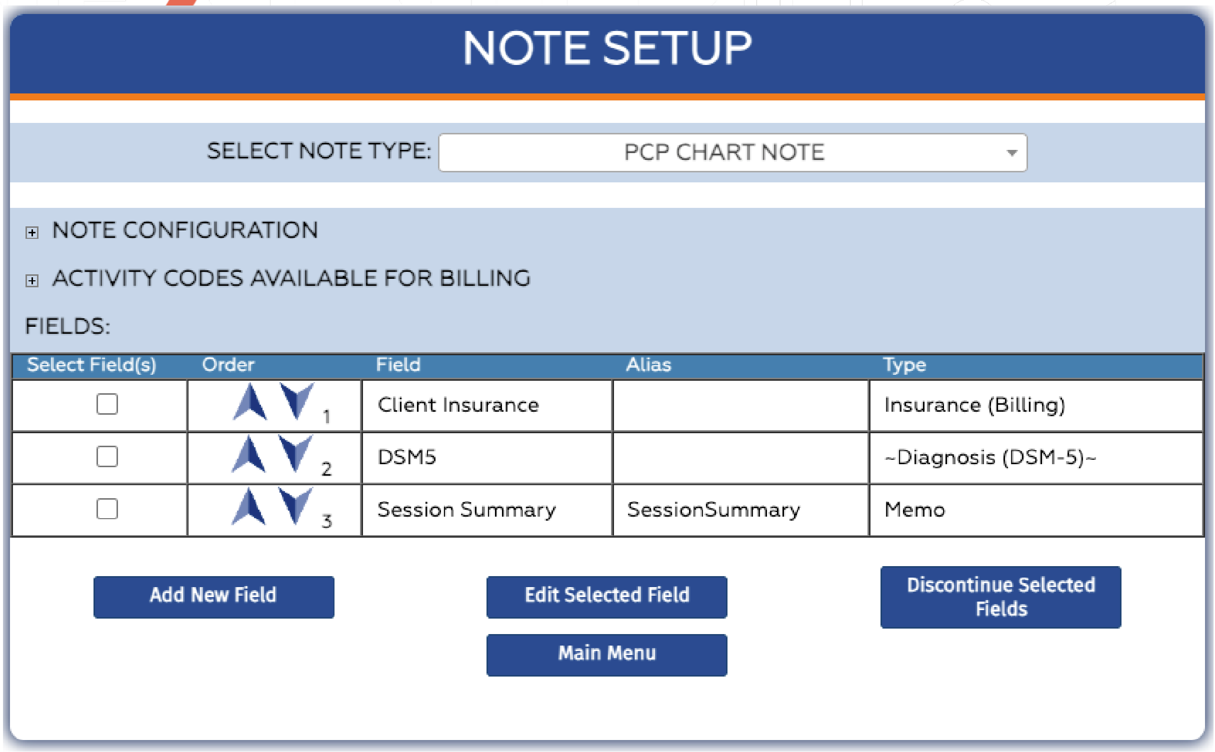
Your NextStep administrator will need to enable Session reminders in System Setup (Supplemental) > Reminders >Global Reminders Properties

Session Administration

Session Summary

If you would like a summary of an entire session to be added to each Progress Note, you need to add a memo field to the Chart Note, or assign an alias to an existing memo field.

- As an Administrator, select **Main Menu > Admin Tools > Note Setup/Builder**
- **Select Note Type**: PCP Chart Note (Progress Note)
- Add a memo field to the Chart Note, and assign an alias = SessionSummary



- If you already have a summary memo field on your PCP Chart Note, you can assign the alias to that field.

Once completed, and a user clicks Create Note for a session, not only will the Chart Notes be filled in, but the Session Summary will also be filled.

Enabling Reminders

To enable Session Reminders

- Select **Main Menu > System Setup (Supplemental)**
- Select the **Reminders** section
- Scroll down to th ProcessedSession row and turn on the checkbox

› ProcessedSessions	Processed Descriptions	25	☑	0

- Click the Save Changes button
- Click the Update button

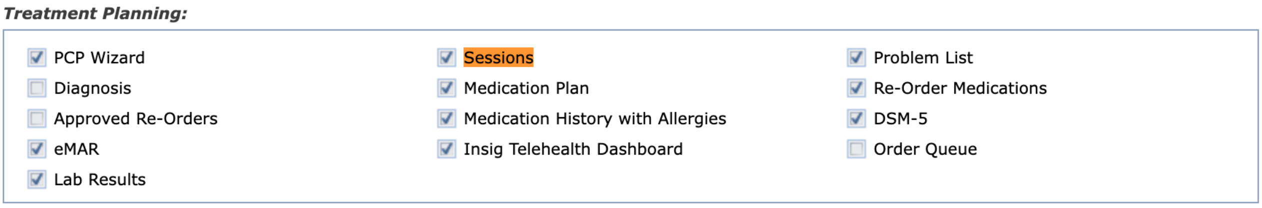
Permissions and Role Settings

You can assign up to the number of AI Scribe Licenses your agency has purchased. Contact support or a Customer Success Manager for more information.

Enabling Sessions for Users

To provide a user access to the AI Scribe

- Select **Main Menu > Maintain Users**
- Select the user you you like to enable access
- Click the Treatment Planning: Sessions permission on
- Click Update User



The Sessions item will now appear under their Main Menu > Treatment Planning menu.

Enabling Sessions for Roles

To provide a role access to the AI Scribe

- Select **Main Menu > Admin Tools Menu > System Setup (Supplemental) >User Roles**
- From the Select a Role drop-down menu, choose the role you want to manage permissions for.
- Click the Treatment Planning: Sessions permission on
- Click Save

Who has access to Sessions?

To see all users who have Sessions enabled.

- Select **Main Menu > Reports > Admin Reports > User Permissions**
- In the Permissions selector at the top of the report, select Sessions
- The list of users with Sessions enabled is displayed.