

# Clinical notes and session documentation

Automates clinical session documentation by capturing session details, generating structured notes, and updating patient records while ensuring HIPAA compliance. Reduces documentation time by 60% and improves clinical accuracy.

Download PDF

Get Your Blueprint

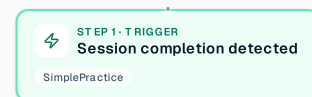


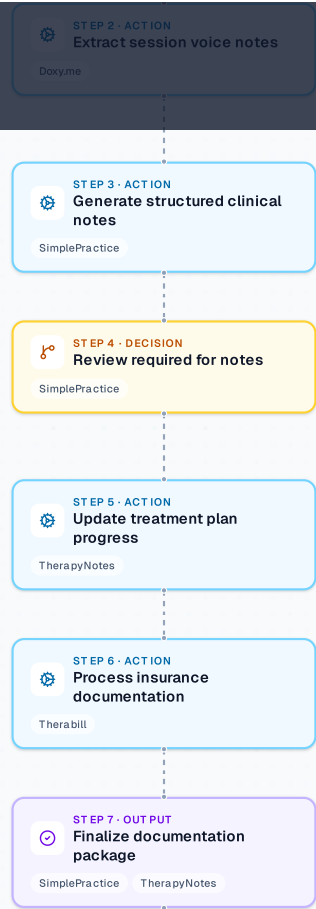
## WORKFLOW TRIGGER

Therapy session ends in SimplePractice calendar

## Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





+  
-  
↻

## Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

⚡ TRIGGER

### Session completion detected

SimplePractice triggers when a scheduled therapy session is marked as completed. The system captures session metadata including duration, patient ID, and therapist information.

2

 ACTION

### Extract session voice notes

Doxy.me integration retrieves any recorded voice notes or session summaries from the telehealth platform. Audio files are securely transferred for processing.

Doxy.me

3

 ACTION

### Generate structured clinical notes

AI processes voice recordings and session data to create standardized SOAP notes with treatment observations and recommendations. Content is formatted according to clinical documentation standards.

SimplePractice

4

 DECISION

### Review required for notes

System evaluates if notes contain sensitive content, medication changes, or risk indicators that require therapist review before finalization. Routes accordingly based on clinical protocols.

SimplePractice

5

 ACTION

### Update treatment plan progress

## AI Business OS

TherapyNotes receives session outcomes and automatically updates patient treatment goals and progress tracking. Session data is integrated into ongoing care plans.

TherapyNotes

6

 ACTION

### Process insurance documentation

Therabill automatically generates insurance claim documentation using session notes and treatment codes. Claims are prepared for submission with appropriate billing codes.

Therabill

7

 OUTPUT

### Finalize documentation package

Complete clinical record is stored in patient file with HIPAA-compliant encryption. Therapist receives notification that documentation is ready for final approval.

SimplePractice

TherapyNotes



### Outputs

- HIPAA-compliant clinical notes

- Updated treatment plan progress

## AI Business OS

- Insurance claim documentation



### Key Metrics

- Documentation completion time
- Clinical note accuracy rate
- Insurance claim approval rate



### Tools & Integrations

- SimplePractice
- Doxy.me
- TherapyNotes
- Therabill

## AI Business OS

Actionable AI implementation strategies for business leaders ready to transform their operations.

### COMPANY

[About](#)

[Industries](#)

### CONNECT

[MVP.dev](#)

[LinkedIn](#)

### RESOURCES

[Articles](#)