

# Qualified Chat Training

Unlocking the Value of  
Generative AI in Your Work



# Housekeeping

- ❖ Training will be recorded and all audience members muted
- ❖ We will save the last 15 minutes for Q&A
- ❖ If you have a question during the presentation, please wait to ask or enter it into the Q&A
- ❖ If we don't get to your question, we will follow up directly via email
- ❖ There will be a survey at the end of the presentation, please complete before signing off or shortly after

# Your Qualified Health Team | Partnering with you to advance the safe and responsible use of generative AI in healthcare



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# Supporting Qualified Chat Rollout

## What we're asking of you....



### Be Early Adopters

Dive in, explore Qualified Chat and discover innovative ways to enhance your daily work



### Share Success Stories

Document real use cases and time-saving wins to inspire your colleagues



### Become Internal Advocates

Help spread awareness of appropriate AI use and build excitement across UTHH



### Model Best Practices

Demonstrate responsible AI use and reinforce safety guidelines with your teams

## .... And why it matters

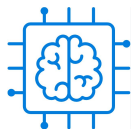


### You're Shaping The Future

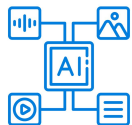
You're not just using a new tool—you're shaping the future of healthcare work at UTHH.

Your leadership will help colleagues work more efficiently, reduce administrative burden, and spend more time on what matters most: **patient care**.

# Key terms to understand AI



**AI:** Computer systems that perform tasks typically requiring human intelligence, like learning, problem solving, decision making, visual perception, and speech recognition



**Generative AI:** A type of AI that creates content, including text, images, videos, and analyses



**LLMs:** A type of generative AI trained on a vast digital library (typically scraped from the internet, including websites, books, code repos, and other public sources) that generates human-like text responses to prompts

# Now, let's talk about the Qualified Health Platform

# AI solution built for healthcare professionals' unique needs



Infrastructure for Deployment, Evaluation, and Governance

Today's focus



## Qualified Chat

Virtual assistant for every staff member



## Assistants

Conversational assistants based on your institutional data



## End-to-End Workflows

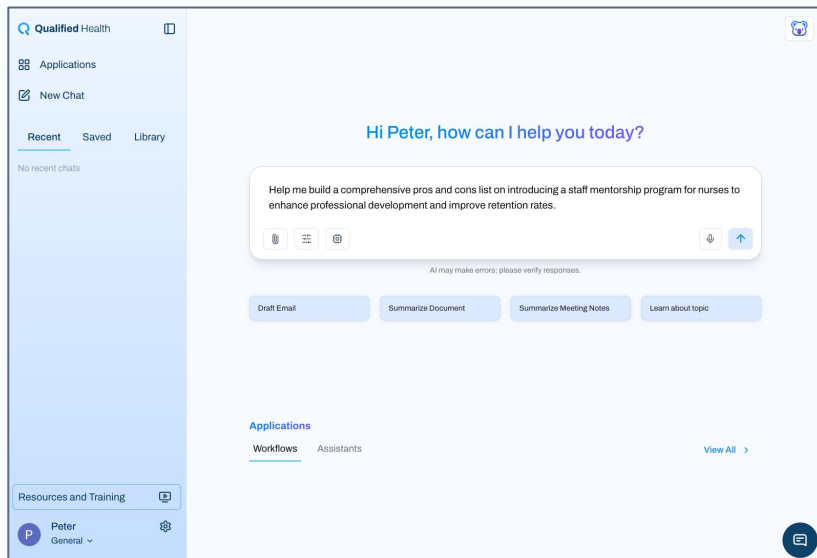
Ready-to-launch solutions for immediate ROI



Strategic Partner

From AI prioritization to workforce education

# Qualified Chat gives every employee access to industry-leading conversational AI within a secure, HIPAA compliant environment



## Popular Use Cases

- Summarize clinical notes, articles, & data
- Draft replies, referrals, project plans, & budgets
- Thought partner on case formulations, side effects, and interview templates



## What users are saying

*"It caught what I might have missed"*

*"Helps me explain complex info to families"*

*"Remarkable accuracy on complex cases"*

Login with your work email at <https://chat.qualifiedhealthai.com>

# Qualified Chat | Users are finding value in a range of applications

## Elevating Quality and Safety in Patient Care

### Thought Partner on Abnormal Labs

*A patient presented with a persistently elevated alkaline phosphatase, but normal GGT suggested a non-biliary source. Qualified Chat reminded me to consider hyperthyroidism, prompting a TSH check that confirmed the diagnosis and led to timely treatment.*

—Internal Medicine Physician

### Prepare Case Formulations

*I'm a super user. I've used Qualified Health for everything, and I've been especially impressed by how it formulates complex clinical cases. I've done case formulations my entire career without AI, and it was remarkable to see how accurately it could approach attachment- and mentalization-based formulations and suggest ways to improve them.*

—Psychiatrist

### Hypothesize Medication Side Effects

*I use Qualified Health to review patient medication lists and identify which drugs may be causing symptoms. It saves me from having to check every single medication individually, many of which have over 50 possible side effects, and helps ensure side effects aren't overlooked, improving the quality of care I can provide.*

—Primary Care Physician

## Empowering More Personalized and Thoughtful Care

### Create Personalized Interview Templates

*I work with patients who are walk-ins or short-term, so I like to have a plan before meeting them. Qualified Health helps me create customized clinical interview templates and session plans that align with documentation requirements. It helps me feel prepared and stay on track with each patient.*

—Clinician, Behavioral Health

### Assign Disability Ratings per Guidelines

*My favorite use case is having Qualified Chat assign a disability rating to a patient after feeding it the Workers Comp guidelines. I know workers comp really well, and Chat was very accurate. Most doctors don't know it that well, so it will save a lot of time!*

—Orthopedic Surgeon

### Prepare for Conversations with Patients

*Qualified Health helps me explain complex information to patients and families, double-check my understanding, and quickly look up rare conditions. It's become a daily time-saver, freeing up two to three hours each week.*

—Nurse Practitioner, Primary Care Adult Gerontology

# Qualified Chat | Users are finding value in a range of applications

## Maintaining High Standards While Maximizing Productivity

### **Respond to Patient Care Questions**

*In the infusion centers I cover, I'm constantly triaging complex cases and fielding questions from patients, families, and staff. Patients come from multiple specialty and subspecialty areas, sometimes with conditions I hadn't encountered before. Patient care questions that once took ten minutes now take only three, with the confidence that I'm providing the right responses.*

—Advanced Practice Provider, Oncology Infusion

### **Prepare Recommendation Letters**

*One org is quite particular about their letters so I took letters from last year, and individuals CVs, and asked Chat to produce a letter of recommendation with the tone and style of the uploaded content to recommend election to full membership. The letters take at least 2 hours each to write himself, with Chat it was done in 10 minutes!*

—Chair of Orthopedics

### **Support Students in Research and Clerkship**

*Qualified Health has been an amazing assistant for both my research and clerkship studies. Not only does it give me accurate explanations for diagnoses, structures and pathologies, but it has been an amazing help with my data analysis. It has greatly reduced the amount of time required to create code to accurately analyze and categorize my data.*

—Medical Student, Pathology

## Creating Powerful Results That Speak for Themselves

### **Summarize Meeting Transcripts**

*The project managers on my team are finding that QChat is performing much better than our Copilot licenses. I have to agree. I have used it multiple times in the last two weeks to create meeting notes from transcripts and it's FANTASTIC.*

—Change Management Lead

### **Create Succinct, Impactful Emails**

*I use it for all of my emails. It's incredibly helpful to streamline things. I typically write very long emails and Chat cuts out the noise so important information, that would have normally missed, now gets to people. And they've thanked me since I started using it!*

—Nurse Practitioner Manager, MedSurg

### **Draft Compliance Plans**

*A great example of Qualified Chat being extremely useful is how it turned several legislative and framework documents into spreadsheet matrices. This is what we'll be using now for our compliance prep.*

—Chief AI Officer

# List of Commonly Discussed Features of Qualified Chat

## Core Features

**Multimodal input:** Provide text, docs, Excel files, images

17 different file types are supported: csv, docx, html, jpeg, jpg, json, log, md, pdf, png, rtf, tsv, txt, xls, xlsx, yaml, yml

**Text Output:** Response are only provided in text form

For compatibility and security reasons, our models return text; currently, they will not generate images, powerpoints, Word or Excel files

**Model Control:** Uses best model for your query or select

You do not have to specify a model, the best will be chosen based on your prompt, but you are able to select between different models (GPT-5.1, Opus 4.5, etc.)

**Web Search Capabilities**

Web search is not HIPAA compliant; In Q2, we will release this feature utilizing a private web index so queries are not shared with major engines (Google, Bing, etc.)

## Secure Integration

**HIPAA compliant**

All app data is stored in an isolated, private cloud; model vendors, such as, OpenAI and Anthropic have private endpoints with zero retention or training

**Chatting over Docs in Sharepoint and OneDrive**

Authorize a module to list the files you have access to in SharePoint, then select which ones you want to interact with

**Chatting over an Epic record**

In development; extra time spent testing implications on record security and Epic server performance. We recommend copy/pasting or attaching records.

**Save your own conversations and prompts**

Click the bookmark icon to save a prompt that generated a response and click on the conversation title to save the entire conversation history

**Share read-only conversations with individuals**

Click the conversation title to share a read-only, static copy of entire conversation up until the point you shared it

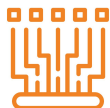
# How to Use Qualified Chat in Your Work

# Qualified Chat overview

Qualified Chat provides health system staff with access to large language models (LLMs) in a controlled environment, ensuring that sensitive data stays protected and compliant with healthcare regulations.

**Find information, generate content, and explore ideas—safely and efficiently.**

**Platform leverages  
multiple LLMs**

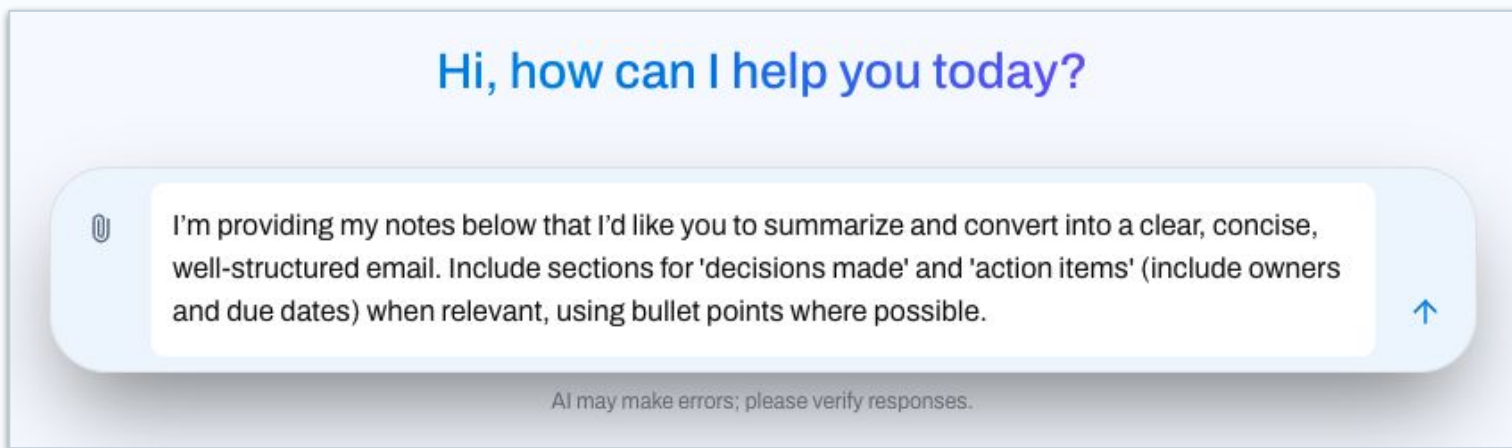


Qualified Chat uses state-of-the-art models from leading AI companies: Google (like Gemini), Anthropic (like Claude), OpenAI (like GPT-5)

It's engineered to route to the model that best answers each question. As models evolve quickly, this routing is routinely updated.

# Introduction to prompting Qualified Chat

**Prompt** = A question or command you give to Qualified Chat to get a response



# Effect prompting: The RICCE framework

## Role

**Tell the model  
who to be**

*“You are a senior  
product manager”*

## Instructions

**Say exactly  
what you want**

*“Summarize this  
document in three  
bullet points for an  
executive audience.”*

## Context

**Give the  
background  
needed to do  
the job**

*“This summary will  
be used in a board  
memo, and the  
readers are familiar  
with the project but  
not the recent  
updates.”*

## Constraints

**Define the rules  
of the output**

- *“Keep it under  
150 words.”*
- *“Use a table.”*
- *“Avoid technical  
jargon.”*

## Examples

**Show what  
“good” looks  
like**

*“Here’s a sample of  
the format I want:*

- *Insight*
- *Supporting detail*
- *Recommended  
action”*

# Prompting best practices

Prompting Principle	Guidance
<b>Clarity and Brevity</b>	Use simple, direct language. Keep prompts as short as possible while still including all required information. Avoid unnecessary detail or complex phrasing that can distract or confuse the assistant.
<b>Step-by-Step Guidance</b>	For complex tasks, break instructions into numbered or sequential steps. This helps the assistant follow the intended reasoning path and produce structured, logically ordered output.
<b>Positive Instructions</b>	Emphasize what the assistant <i>should do</i> rather than what it should avoid. For example, say “Respond in three concise sentences” instead of “Do not be verbose.” Positive framing produces more predictable results.
<b>Context and Grounding</b>	Always provide the background information required to complete the task. Include relevant constraints, assumptions, or user context so the assistant can respond precisely without guessing.
<b>Factual Grounding</b>	When using external documents or retrieval, explicitly instruct the assistant to base its answers only on the provided context. If the answer cannot be found, the assistant should say so rather than fabricate information.

# Prompting best practices

Prompting Principle	Guidance
<b>Constraints and Guardrails</b>	Define clear boundaries such as length limits, formatting rules, or content exclusions. When constraints are added to address specific issues discovered during evaluation, consider tagging them so they can be removed later to prevent prompt clutter.
<b>Use of Examples (N-Shot)</b>	Provide one or more examples that demonstrate the desired output format, structure, or reasoning pattern. Examples are one of the most effective ways to improve output quality and consistency.
<b>Use Distinct Sections or Delimiters</b>	Organize prompts into clearly labeled sections (e.g., “Context,” “Instructions,”) using headers, XML tags, or delimiters like triple quotes. This improves readability and reduces ambiguity for the model.
<b>Prompt Chaining</b>	For multi-step or complex workflows, break the task into a sequence of smaller prompts rather than a single large prompt. Prompt chaining improves accuracy, debuggability, and control over intermediate outputs.

## Guidance for appropriate use



**LLMs have inherent risks, including**

- **Bias**
- **Hallucinations**
- **Data drift**

**that can impact patient care.**

**Clinical decision-making without verification is prohibited.**

**Caregiver accountability remains absolute - providers are responsible for their use of all AI-generated content**

# Chat demonstration

## Example: Creating a SOAP note and presenting to patient

**Role:** You are an ICU physician assistant

**Task:** Review the attached ICU progress note and convert it into a SOAP note

--- prompt 2 ---

**Task:** Rewrite this at an 8th grade reading level and could be used to inform the patient or a family member.

## Example: Survey Development for Research

**Role:** You are a researcher and contributor to the scientific study of healthcare delivery.

**Task:** You are applying for a grant with the intent to study the erosion of clinical intuition in the era of Generative AI (GenAI) and "Agentic" decision support. A critical aspect of the research is to conduct a survey to measure the gap between algorithmic trust and clinical validation. Design a survey with 2-4 dimensions relevant to the research aim. Include the text for each question and the possible response choices.

## Example: Refining Assignment Rubrics (e.g., nursing care plan eval)

**Role:** You are an expert Critical Care Nurse Educator.

**Task:** Review the attached rubric for assessing a nursing student's care plan. Provide specific suggestions on areas that could be improved by adding, removing, or modifying content. For each suggestion that would modify the content, provide the existing text followed by how it could be modified.

## Example: Patient simulation to reinforce key learnings

*The following prompt can be used by students or refining your own cases for practice. You can even provide your own protocols to ensure consistency with your curriculum.*

**Role:** Act as a senior ICU nurse preceptor.

**Task:** Create a 5-minute interactive 'What Do You Do Next?' simulation for a new grad nurse regarding a sudden tension pneumothorax. Ask one question at a time, wait for their response, and provide immediate, supportive clinical feedback based on protocols.

## Next steps

- ❖ **Start using Qualified Chat**
- ❖ **Encourage colleagues to use Qualified Chat**
- ❖ **Share early success stories or use cases or product feedback**
- ❖ **Direct those who might need additional support to reach out to Qualified Health team**

# Training Feedback Survey

Please complete the survey before leaving:  
<https://uthealth.questionpro.com/t/Ac3QRZ8JLS>

Training recording and resources will be made available at: <https://aihub.uth.edu/>



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