Whadata User Guide

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1. Introduction

Welcome to **Whadata**, an AI-powered healthcare documentation platform designed specifically for physicians and healthcare professionals. Whadata streamlines your clinical workflow by providing:

- **Real-time voice transcription** during patient encounters
- **AI-powered clinical summaries** in multiple formats (SOAP notes, H&P notes, referral letters, and more)
- **Custom template creation** to match your practice's documentation requirements
- **Secure patient management** with comprehensive profile and session tracking
- **EHR integration** for seamless clinical documentation (Enterprise)
- **Patient portal** for secure patient access to their records
- **Team collaboration** for enterprise healthcare organizations

This guide will walk you through every feature of Whadata, helping you get the most out of your subscription.

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2. Getting Started

Supported Browsers

Whadata works best with modern web browsers. For the best experience, we recommend:

Browser	Desktop	Mobile
Google Chrome	☑ Recommended	☑ Supported
Microsoft Edge	☑ Supported	☑ Supported
Mozilla Firefox	☑ Supported	☑ Supported

Browser	Desktop	Mobile
Safari (macOS)	☑ Supported	-
Safari (iOS)	-	☑ Supported

> **Note:** All browsers support real-time transcription. Safari and iOS browsers use optimized audio formats automatically.

Creating Your Account

1. Navigate to https://whadata.com/subscriptions
2. Click **Sign Up** on the login page
3. Choose your sign-up method:
    - **Email/Password**: Enter your email and create a secure password
    - **Google**: Sign in with your Google account
    - **Apple**: Sign in with your Apple ID
4. Select your subscription plan (Premium, Standard, or Academic)
5. Review and accept the **Business Associate Agreement (BAA)** for HIPAA compliance
6. Complete the Stripe checkout process to activate your subscription

Logging In

1. Navigate to https://app.whadata.com
2. Enter your email and password, or click the Google/Apple sign-in button
3. If you've forgotten your password, click **Forgot Password** to receive a reset email

Navigating the Dashboard

After logging in, you'll see your main dashboard with:

Dashboard KPIs (Key Performance Indicators):

- **Session Count**: Number of sessions recorded this month
- **Total Minutes**: Total transcription time this month
- **Avg Session Time**: Average duration of your sessions
- **Patient Count**: Total number of patient profiles

Quick Actions:

- **Search Patients**: Opens the patient search panel
- **Create Profile**: Opens the new patient profile form
- **Template Library**: Browse available templates

Navigation Sidebar: The left sidebar provides access to all main features:

- **Dashboard**: Return to your main dashboard
- **Patients**: View and manage patient profiles
- **Templates**: Access the template library
- **Resources**: Help center, bug reporting, and support links

Account Panel: The right sidebar displays your account information, including:

- Your profile picture and name

- Account type (Premium, Standard, Enterprise, etc.)
- Dark mode toggle
- Logout option

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3. Subscription Plans

Individual Plans

Premium

- **Unlimited** transcription time (scribe time)
- Full access to **Media Library**
- Create **custom templates**
- Upload files to sessions
- Priority support

Standard

- **1,000 minutes/month** transcription time
- Access to **system templates** only
- No Media Library access
- No file uploads
- Basic support

Academic

- **1,000 minutes/month** transcription time
- Designed for **educational institutions**
- Access to system templates only
- No Media Library access
- No file uploads

Patient

- **120 minutes/month** transcription time
- Limited feature access
- View own patient records only

Enterprise Plans

Enterprise accounts are designed for healthcare organizations and provide:

Enterprise Admin

- **Unlimited** transcription time
- Full administrative control
- License and seat management
- User onboarding capabilities
- Profile sharing with team members
- EHR integration (if enabled)
- Access to Enterprise Portal

Enterprise User

- **Unlimited** transcription time
- Full clinical features
- Profile sharing capabilities
- EHR integration (if enabled)
- No administrative access

Enterprise Office

- **Unlimited** transcription time
- **No clinical data access**
- Cannot record sessions
- Cannot view patient data
- Designed for administrative staff

Feature Comparison

Plan	Scribe Time	Record	AI Summaries	Media Library	File Uploads	Custom Templates	Profile Sharing	EHR*	Admin Portal
Enterprise Admin	Unlimited	☑	☑	☑	☑	☑	☑	☑	☑
Enterprise User	Unlimited	☑	☑	☑	☑	☑	☑	☑	❌
Premium	Unlimited	☑	☑	☑	☑	☑	❌	❌	❌
Standard	1,000 min	☑	☑	❌	❌	❌	❌	❌	❌
Academic	1,000 min	☑	☑	❌	❌	❌	❌	❌	❌

*EHR Integration requires enterprise-level configuration

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4. Patient Management

Creating a Patient Profile

1. Click the **Create Profile** quick action on the dashboard, or click the **+** button in the patient list
2. Enter the required information:
    - **First Name** (required)
    - **Last Name** (required)
    - **Email** (optional)
    - **Phone** (optional)
    - **Date of Birth** (optional)
    - **Profile Photo** (optional)
3. Optionally expand the **EHR Integration** section to link an Athena EHR Patient ID (Enterprise only)
4. Click **Create Profile**

Viewing Patient Profiles

1. Navigate to **Patients** in the sidebar

2. Click on any patient name to open their profile
3. The profile page displays:
   - **Demographics**: Name, email, phone, birthdate
   - **Profile Photo**: If uploaded
   - **Session History**: List of all recorded sessions
   - **EHR Status**: Athena EHR link status (if configured)
   - **Action Buttons**:
     - **Edit**: Modify patient information
     - **Record Session**: Start a new recording
     - **Media Library**: View uploaded files (Premium/Enterprise)
     - **Patient Portal**: Activate portal access
     - **Share**: Share with team members (Enterprise)

Editing Patient Information

1. Open the patient's profile
2. Click the **Edit** button (pencil icon)
3. Update any fields as needed
4. Click **Save Changes**

Editable Fields:

- First Name, Last Name
- Email, Phone
- Date of Birth
- Profile Photo (upload, change, or remove)
- EHR Integration settings

Searching for Patients

1. Click **Search Patients** on the dashboard, or click the search icon in the sidebar
2. Type the patient's name in the search field
3. Results appear in real-time as you type
4. Click on a patient to open their profile

Search Tips:

- Search works on first name and last name
- Searches are case-insensitive
- Partial matches are supported (e.g., "Joh" finds "John")

Patient Profile Sharing (Enterprise)

Enterprise users can share patient profiles with team members:

1. Open the patient's profile
2. Click the **Share** button
3. Select team members to share with
4. Click **Confirm Share**

What Gets Shared:

- The patient profile is added to the team member's patient list

- All existing sessions for that patient become accessible
- New sessions created by either user are visible to both

To Remove Sharing:

1. Open the patient's profile
2. Click **Share**
3. Deselect the team member
4. Click **Confirm**

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5. Recording Sessions

Starting a Recording

1. Open the patient's profile
2. Click **Record Session**
3. Grant microphone permissions when prompted by your browser
4. The recording interface will display:
    - **Patient information** at the top
    - **Timer display** showing recording duration
    - **Audio waveform visualization**
    - **Language selection** options
    - **Live transcript** area
5. Click **Start Recording** to begin

Multi-Language Support

Whadata supports **22 languages** for real-time transcription:

English Variants:

- English (US) - Default
- English (UK)
- English (Australia)
- English (India)

Foreign Languages: To record in a foreign language:

1. Before starting, toggle **Foreign Language Mode** on
2. Select the language from the dropdown:
    - Spanish (US, Spain)
    - Chinese (Simplified, Traditional)
    - Cantonese
    - French (France, Canada)
    - German
    - Italian
    - Japanese
    - Korean
    - Portuguese
    - Russian
    - Vietnamese
    - Arabic

- Hindi
- Armenian
- Persian/Farsi

Automatic Translation:

- Foreign language recordings are automatically translated to English
- Both the original transcript and English translation are saved
- You can toggle between views when reviewing the session

During the Recording

While recording:

1. **Timer**: Shows elapsed recording time (top left)
2. **Waveform**: Visual audio level indicator
3. **Status Badge**: Shows selected language
4. **Live Transcript**: Displays transcribed text in real-time
   - New text appears at the bottom
   - The display auto-scrolls as new content arrives
   - Final transcriptions appear in normal text
   - Interim (partial) transcriptions appear slightly faded

Recording Tips:

- Speak clearly at a normal pace
- Position yourself within 3-4 feet of your device's microphone
- Minimize background noise when possible
- The AI handles medical terminology well, but speaking clearly helps

Stopping and Saving

1. When finished, click **Stop Recording**
2. The system automatically:
   - Saves the complete transcript to the session
   - Records the session duration
   - Updates your usage analytics
   - Stores the detected language
3. You'll be redirected to the session view page

Cross-Browser Compatibility

Whadata automatically optimizes audio recording for your browser:

Platform	Format	Chunk Interval
Chrome/Edge/Firefox (Desktop)	WebM/Opus	500ms
Safari (macOS)	OGG/Opus	200ms
All iOS Browsers	WAV	200ms

> **Note:** iOS users will see an "iOS" badge during recording. This is normal and indicates the system is using iOS-optimized settings.

6. Session Management

Viewing Session Details

1. Open a patient's profile
2. Click on any session in the **Session History** list
3. The session view page displays:
    - **Session Date and Duration**
    - **Recording Language**
    - **Transcript**
    - **AI Summaries** (by template)
    - **Patient Context Notes**
    - **Uploaded Files**

Working with Transcripts

Viewing the Transcript:

1. Select **Transcript** from the template dropdown
2. The full session transcript appears in the editor

Language Toggle: For foreign language sessions:

- Click **Original** to view the transcript in the recorded language
- Click **English** to view the automatic English translation

Editing Transcripts:

- Transcripts can be edited using the rich text editor
- Click **Save** to preserve your changes
- Use formatting tools for headers, bold, italics, and lists

AI-Generated Summaries

Whadata's AI automatically generates clinical documentation from your transcripts:

Available Summary Types:

Template	Description
Essay Note	Narrative clinical note
HP Note	History & Physical format
SOAP Note	Subjective, Objective, Assessment, Plan
Email Referral	Formatted referral letter
Patient Summary	Patient-friendly summary
Medical Codes	Suggested ICD-10/CPT codes
Transcript	Raw transcript

Generating a Summary:

1. Open the session view page
2. Click the template dropdown and search or scroll to find your template
3. Select a template (e.g., "SOAP Note")
4. If no summary exists, AI generation begins automatically
5. Wait 10-30 seconds for the AI to process
6. The generated summary appears in the editor

Regenerating Summaries:

- Click **Regenerate with AI** to create a new summary
- This overwrites the previous AI-generated content
- Useful if you've added context or want a fresh generation

Editing Summaries:

- All AI summaries can be edited using the rich text editor
- Click **Save** to store your changes
- Your edits are preserved even if you switch templates

Uploading Files to Sessions

Available for Premium and Enterprise users

1. Open the session view page
2. Scroll to the **Files** section
3. Click **Upload File** or drag-and-drop files
4. Supported formats: PDF, images, documents
5. Files appear in the session file list with direct download links

Patient Context Notes

Add background information that the AI uses when generating summaries:

1. Click the **Context** tab in the session view
2. Enter relevant patient history, chief complaint, or other context
3. Click **Save**
4. The AI incorporates this context when generating summaries

Context Tips:

- Include relevant medical history
- Note current medications
- Mention the purpose of the visit
- Add any specific documentation requirements

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7. Templates

System Templates

Whadata includes built-in templates for common documentation needs:

1. **Essay Note**: Narrative format clinical note
2. **HP Note**: Structured History & Physical examination

3. **SOAP Note**: Standard SOAP format documentation
4. **Email Referral**: Professional referral letter
5. **Patient Summary**: Patient-friendly visit summary
6. **Medical Codes**: ICD-10 and CPT code suggestions
7. **Transcript**: Raw session transcript

Creating Custom Templates

Available for Premium and Enterprise users

1. Navigate to **Templates** in the sidebar
2. Click **Create Template**
3. Enter template information:
   - **Template Name** (required): e.g., "Pre-Op Assessment"
   - **Description**: Brief description of the template's purpose
   - **Medical Specialty** (required): Select from 20 specialties
4. Write or paste your template content in the editor
5. Click **Create Template**

Supported Medical Specialties:

- Cardiology
- Dermatology
- Emergency Medicine
- Endocrinology
- Family Medicine
- Gastroenterology
- General Surgery
- Geriatrics
- Hematology
- Internal Medicine
- Nephrology
- Neurology
- Obstetrics and Gynecology
- Oncology
- Ophthalmology
- Orthopedics
- Pediatrics
- Psychiatry
- Pulmonology
- Urology

Uploading Templates from Files

You can upload existing document templates and Whadata's AI will convert them:

Supported File Types:

- PDF documents
- Word documents (.doc, .docx)
- CSV files
- Text files (.txt)

- Images (JPEG, PNG, TIFF)

Upload Process:

1. Click **Create Template**
2. Click **Choose File** in the Upload Template section
3. Select your document
4. Wait for AI processing (shown as "Preparing template with AI...")
5. The AI automatically:
   - Extracts text from the document
   - Converts fields to `Label: [ ]` placeholder format
   - Preserves any "Instructions:" sections
6. Review and edit the converted template
7. Save your template

Template Best Practices

Using Placeholders: For best AI results, use the `Label: [ ]` format for fields to be filled:

```
Patient Name: [ ]
Date of Visit: [ ]
Chief Complaint: [ ]
Assessment: [ ]
Plan: [ ]
```

Adding Instructions: Include an "Instructions:" section at the top of your template to guide the AI:

```
Instructions: Focus on cardiovascular findings. Include all vital signs.
Use medical terminology appropriate for specialist referral.

Patient Name: [ ]
...
```

Tips for Effective Templates:

- Use clear, descriptive labels
- Group related fields together
- Include all required sections for your practice
- Test templates with a sample session
- Iterate based on AI output quality

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8. Media Library

Available for Premium and Enterprise users

Accessing the Media Library

1. Open a patient's profile
2. Click the **Media Library** button

3. View all files uploaded for this patient, organized by session

Uploading Files

1. In the Media Library, click **Upload**
2. Select files from your computer
3. Files are automatically organized by session
4. Supported formats: PDF, images, documents, audio, video

Managing Files

Viewing Files:

- Click on any file to preview or download
- PDF and image files open in a new tab
- Other files download directly

Deleting Files:

1. Hover over the file you want to delete
2. Click the **Delete** button (trash icon)
3. Confirm the deletion
4. Files are permanently removed from storage

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9. Patient Portal

The Patient Portal allows your patients to securely access their own medical information.

Activating Patient Portal Access

1. Open the patient's profile
2. Click **Patient Portal** or **Activate Portal**
3. The system automatically:
   - Creates a secure patient account
   - Generates a strong password (12 characters, mixed case, symbols, numbers)
   - Sends login credentials to the patient's email
4. The patient receives an email with their portal access information

Requirements:

- Patient must have an email address on file
- Email must be valid and accessible

What Patients Can Access

Patient portal users have limited access:

- **Their own profile information**
- **Session transcripts** (only sessions released to portal)
- **Patient Summary** documents

Patients **cannot** access:

- Other clinical notes (SOAP, H&P, etc.)

- Medical codes
- Files or media
- Other patients' information

Releasing Sessions to Patients

By default, sessions are not visible on the patient portal. To release a session:

1. Open the session view page
2. Locate the **Release to Patient Portal** toggle
3. Turn the toggle ON
4. The session becomes visible to the patient

Note: Only the transcript and Patient Summary template are visible to patients, even when a session is released.

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10. EHR Integration

EHR Overview

Available for Enterprise accounts with EHR add-on enabled

Whadata integrates with **Athena Health EHR** systems, allowing you to send clinical documentation directly to your EHR.

Requirements:

- Enterprise subscription
- EHR integration enabled for your organization
- Athena Practice ID configured by your administrator

Sending Sessions to EHR

1. Open a session view page
2. Ensure you have generated an AI summary
3. Click the blue **Send to EHR** button
4. The system syncs your session summary to Athena
5. Status indicators show:
   - **Not Ready**: Summary not yet generated
   - **Ready**: Ready to sync
   - **Approved**: Sync initiated
   - **Synced**: Successfully sent to EHR

What Gets Synced:

- The currently selected summary/template content
- Session metadata (date, duration)
- Patient identification information

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11. Enterprise Features

Enterprise Portal

Available for Enterprise Admin users only

Access the Enterprise Portal from the **Resources** menu:

1. Click **Resources** in the sidebar
2. Click **Enterprise Portal**

Portal Dashboard:

- **License Seats**: Total seats in your enterprise license
- **Active Seats**: Currently used seats
- **Admin Seats**: Number of administrator accounts
- **Start Date**: License start date
- **Expiration Date**: License expiration date

User Management

Viewing Users: The user table displays all users in your enterprise with:

- Name and email
- License type (Admin, User, Office)
- Status

Modifying User Types:

1. Select users by checking the checkbox
2. Choose the new license type from the dropdown
3. Click **Apply Changes**

License Type Restrictions:

- Minimum 1 active Admin required
- Minimum 1 active User required
- Maximum 2 Admin accounts allowed

License Management

Onboarding New Users:

1. Scroll to the **Onboard New User** section
2. Enter the new user's:
   - First Name
   - Last Name
   - Email Address
3. Select their License Type (Admin, User, or Office)
4. Click **Create User**
5. The new user receives a welcome email with login credentials

Profile Sharing

Enterprise users can share patient profiles across their team:

Sharing a Profile:

1. Open the patient profile

2. Click **Share**
3. Select team members from the list
4. Click **Confirm Share**

Benefits:

- Team members see shared patients in their patient list
- All sessions are automatically shared
- Both users can create new sessions for shared patients
- Supports care team collaboration

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12. Account Settings

Profile Information

1. Click on your name/avatar in the sidebar
2. Click **Edit Profile**
3. Update your information:
   - First Name
   - Last Name
   - Email (display only)
4. Click **Save Changes**

Profile Picture

Uploading a Photo:

1. Go to Edit Profile
2. Click on the profile picture area or drag-and-drop an image
3. Supported formats: JPEG, PNG
4. The image uploads automatically

Removing a Photo:

1. Go to Edit Profile
2. Click **Remove Photo**
3. Your profile reverts to the default avatar

Dark Mode

Toggle dark mode for comfortable viewing in low-light environments:

1. Click on your account panel (right sidebar)
2. Find the **Dark Mode** toggle
3. Click to switch between light and dark themes
4. Your preference is saved automatically

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13. Scribe Time & Usage

Understanding Scribe Time

Scribe time is the total amount of audio transcription time available in your subscription:

Plan	Monthly Scribe Time
Premium	Unlimited
Enterprise	Unlimited
Standard	1,000 minutes
Academic	1,000 minutes
Patient	120 minutes

Checking Your Usage

Your dashboard displays current month metrics:

- **Total Minutes**: Transcription time used this month
- **Session Count**: Number of sessions recorded

Monthly Reset

- Scribe time limits reset on the **first day of each month**
- Unused minutes do **not** roll over
- Your usage counter resets to zero automatically

What Happens When You Reach Your Limit:

- You'll see a notification that you've reached your limit
- Recording is disabled until the next month
- You can still access existing sessions and summaries
- Consider upgrading to Premium for unlimited access

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14. Troubleshooting

Recording Issues

Microphone Not Working:

1. Check browser permissions:
   - Click the lock/info icon in the address bar
   - Ensure microphone permission is set to "Allow"
2. Verify your microphone is connected and working
3. Try refreshing the page
4. Select a different microphone if multiple are available

No Transcript Appearing:

1. Check your internet connection
2. Verify the connection status shows "Connected"
3. Speak louder or closer to the microphone
4. Refresh the page and try again

Recording Stops Unexpectedly:

1. Check your internet connection stability

2. Ensure you haven't exceeded your scribe time limit
3. Try using a wired internet connection instead of WiFi
4. Contact support if the issue persists

Connection Problems

"Connecting..." Status Persists:

1. Wait up to 60 seconds (initial connection may take time)
2. Check your internet connection
3. Refresh the page
4. Try a different browser

Frequent Disconnections:

1. Use a stable internet connection
2. Avoid switching networks during recording
3. Close unnecessary browser tabs
4. Disable VPN if possible

Browser-Specific Issues

Safari (iOS):

- Ensure you're using iOS 14.3 or later
- Grant microphone permissions when prompted
- Recording may show "iOS" badge - this is normal

Safari (macOS):

- Enable microphone access in System Preferences > Security & Privacy
- Ensure Safari has permission to access the microphone

Chrome/Edge/Firefox:

- Clear browser cache if experiencing issues
- Disable extensions that might block audio
- Try incognito/private mode to rule out extension conflicts

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15. Support & Resources

Getting Help

Bug Reports & Feature Requests:

1. Navigate to **Resources** in the sidebar
2. Click **Bug Report**
3. Select report type (Bug or Feature Request)
4. Describe the issue or suggestion
5. Submit your report

Help Center: Access tutorials and documentation from the Resources panel.

Video Tutorials: Step-by-step video guides are available in the Resources section.

Email Support: Contact our support team for assistance with account or technical issues.

Legal Documents

Access privacy policy, terms of service, and BAA information from the Resources panel.

Appendix: Keyboard Shortcuts

Action	Shortcut
Bold text (in editor)	Ctrl/Cmd + B
Italic text (in editor)	Ctrl/Cmd + I
Save (in editor)	Ctrl/Cmd + S

Appendix: Supported Languages

Real-Time Transcription Languages

Language	Codes
English	en-US, en-GB, en-AU, en-IN
Spanish	es-US, es-ES
Chinese (Simplified)	cmn-Hans-CN
Chinese (Traditional)	cmn-Hant-TW
Cantonese	yue-Hant-HK
French	fr-FR, fr-CA
German	de-DE
Italian	it-IT
Japanese	ja-JP
Korean	ko-KR
Portuguese	pt-BR
Russian	ru-RU
Vietnamese	vi-VN
Arabic	ar-EG
Hindi	hi-IN
Armenian	hy-AM
Persian/Farsi	fa-IR

Thank you for choosing Whadata!

We're committed to helping healthcare professionals document patient encounters efficiently and accurately. If you have feedback or suggestions, please use the Bug Report feature to let us know how we can improve.
