



WELCOME TO THE 2026 AI COHORT SERIES

RAISING AWARENESS, DRIVING CHANGE, AND COMBATING CHRONIC CONDITIONS



AI Session: AI Adoption and Readiness In Healthcare
Using the 8 Key Decision Points for AI Tool Adoption

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MICROSOFT TEAMS TIPS



Open the Chat

Please open the chat and use it liberally; we want to hear from you!

Raise your Hand or React

Attendees will have an opportunity to ask questions. Raise your hand or send reactions!

Muted on Entry

You are muted on entry.

Session Recording

Today's session is being recorded! Keep an eye out for attendee announcements when recordings are available.

THANK YOU TO OUR FUNDERS



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The work of the CTRC would not be possible without funding and support from the Health Resources and Services Administration's **Office for the Advancement of Telehealth** and the **CA State Office of Rural Health**, part of the Department of Health Care Access and Information.

MEET YOUR SPEAKERS

AI Adoption and Readiness in Healthcare Settings - Using the 8 Key Decision Points for AI Tool Adoption



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SESSION AGENDA

1

Why AI Adoption Readiness Matters

Quick framing on how AI is changing health care delivery and is an industry imperative.

2

Framework Overview: HAIP 8 Key Decision Points

Walk through the HAIP 8 Key Decision Points that guide AI adoption.

3

Apply the Framework Together (Interactive: Ask → Guide → Illustrate)

Session model to learn practical guidance for applying the framework for successful adoption.

4

Wrap Up: Key Takeaways, Resources and Discussion

Summarize the end-to-end adoption lifecycle, emphasize cross-functional readiness, share available resources, and close with an open discussion prompt.

Learning Objectives

Learn to **assess and pilot AI solutions** drive adoption in clinical and operational workflows.



WHY AI ADOPTION AND READINESS MATTERS

- **The imperative:** AI is rapidly transforming digital health. In this complex healthcare environment of pressures from an aging population and workforce shortages to higher costs and persistent disparities, **AI offers powerful opportunities** to boost efficiency, strengthen sustainability, and improve health outcomes.
- **The reality:** This change is not without friction. It is creating **real uncertainty, changing rapidly**, and shifting how we think about careers in health care.
- **The choice:** That is exactly why staying engaged in this work matters: it gives us the **chance to help co-design a future** where AI is deployed safely and responsibly and drives better outcomes for everyone.



AI ADOPTION PROCESS: 8 Key Decision Points

Procurement

Development
& Adaptation

Clinical
Integration

Lifecycle
Management

1

Identify and
prioritize a
problem

3

Develop measures of
outcomes and success of
the AI product

6

Execute change
management,
workflow
integration, and
scaling strategy

7

Monitor and
maintain the AI
product

2

Evaluate AI as
a viable
component of
the solution

4

Design a new optimal
workflow to facilitate
integration

8

Update or
decommission the
AI product

5

Evaluate pre-integration
safety and effectiveness of
the AI product

1 Identify and prioritize a problem for possible AI solution

ASK

What workflow is currently a challenge for your health center?

ILLUSTRATION

Your current chart review process

GUIDANCE

1

Identify problems across the organization.

2

Prioritize problems.

3

Determine dimensions of the problem.

4

Determine suitability of technical approaches.

5

Identify potential downstream impacts.

Your Chart Review – Today?

Time you do not have

Minutes of digging per patient, repeated across a full schedule.

Information scattered everywhere

Notes, labs, and outside records sit in different places and formats.

Easy to miss what matters

Chronic conditions and care gaps get overlooked under time pressure.





Evaluate AI as a viable component of the solution

ASK

What AI applications are available to address the challenge?

ILLUSTRATION

- CTRC or vendor website for the available AI tools
- AI Tool: Chart review AI tool
- AI Governance: Principles and practical steps

GUIDANCE

1

Define the role of AI in addressing the challenge.

2

Evaluate internal resources for adoption (i.e., AI champion, IT staff or CTRC website).

3

Assess viability of buying vs. building AI (i.e., schedule a demo for one of AI tools).

4

Assess quality of external AI product options.

5

Assess legal risks.

6

Audit investment decisions.

Health Care AI Toolkit

The rapid increase in advanced artificial intelligence (AI) systems and applications in healthcare has occurred seemingly overnight. Clinicians, operational staff, and provider leadership may not be aware that they are utilizing an AI system, may not know what questions to ask, nor know what policies, procedures, processes, and professional training should be in place to ensure that such systems drive improved health outcomes, reduce the burden on their teams, and increase overall sustainability.

This is an introductory guide to support these efforts.

AI systems can be applied to clinical care, operations, and research and may involve different AI systems and methods. As a result, the risk profile of the system may be varied. The governance should be built to account for use across the varied operations of a health care provider and the questions asked of vendors/developers will also vary as a result.



Access and review CTRC resources now from one page: [Click here](#)

Your Chart Review - Tomorrow!

One pre-visit view

Recent documentation and external data condensed into a single summary.

Coding and diagnosis support

Chronic conditions and supporting evidence surfaced for review.

Always traceable

Highlighted details link straight back to the original notes.



CORE PRINCIPLES OF AI GOVERNANCE

❑ Transparency in AI

Transparency ensures AI models are explainable, and decision processes are clear to stakeholders.

❑ Accountability Assignment

Accountability provides clear ownership for AI decisions to avoid ambiguity over responsibility.

❑ Fairness and Bias Mitigation

Fairness detects and reduces biases, ensuring AI does not perpetuate discrimination or disparities.

❑ Privacy and Security Compliance

Privacy focuses on protecting sensitive data and complying with HIPAA and other regulations.

❑ Continuous Monitoring

Continuous monitoring ensures AI systems remain compliant and effective after deployment.



PRACTICAL STEPS

AI Governance Committee

Establish a committee to oversee AI policy development, compliance and governance within your organization.

AI Policy Creation

Develop policies defining acceptable AI use cases, risk tiers and ethical guidelines.

Risk Assessment Framework

Create a framework to categorize AI applications by potential impact and associated risks.

Vendor Evaluation Checklist

Implement checklists to evaluate external AI vendors, focusing on bias testing and explainability.

Training and Education

Invest in programs to improve staff AI literacy and awareness of governance principles.



3

Develop measures of outcomes and success of the solution

ASK

What measures of success and outcomes do you want to see?

ILLUSTRATION

- KLAS research findings
- Action log or insight data
- AI tool feedback

GUIDANCE

1

Define performance targets.

2

Metrics to conduct a pre- and post-analysis

3

Define successful use.

4

Quantitative: utilization, user action log data (i.e., chart review/time in notes etc.)

5

Qualitative: feedback on provider experience

EHR SATISFACTION BY PROVIDERS

After interviewing more than 700,000 clinicians, KLAS Research has found **three things lead to improved clinician satisfaction with the EHR:**



Shared Ownership: Involvement & Voice

“I feel that I can influence the team that shapes the EHR. My voice is heard, and I see progress as we shape this into a successful solution.”

Education/Training: Initial & Ongoing

“I am confident in my ability to use the EHR effectively and efficiently.”

Meeting Unique User Needs: Personalization

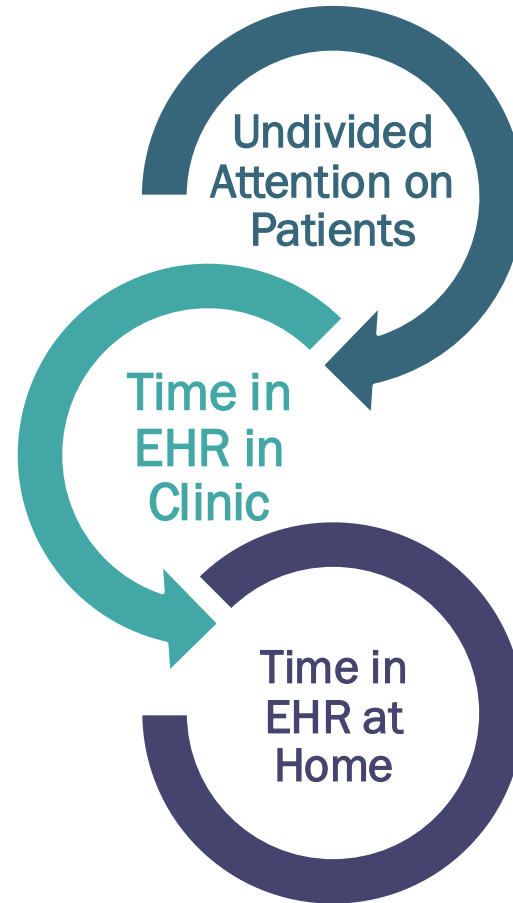
“We have gotten this EHR to a great place where it meets my specific needs. I have taken the time to make sure it works how I need it to.”

Log data can reveal clinicians' system use

About System Data

Tracking EHR use, using action log data, can address clinician burnout and improve satisfaction.

The American Medical Informatics Association suggests there are **seven (7) core measures of EHR use that impact clinician efficiency and satisfaction**



Amount of undivided attention on patients

1. This important metric is unfortunately not captured in system data.



Time in EHR

2. Time in Notes
3. Time in Orders
4. Teamwork for Orders, (standing orders)
5. In Basket Time
6. TOTAL Time



7. Time in EHR outside scheduled hours

REALTIME FEEDBACK



Additional
Comments?



4

Design a new optimal workflow to facilitate integration

ASK

What should the new workflow look like?

ILLUSTRATION

The possibilities of an AI patient summary tool

GUIDANCE

1

Understand the current workflow.

2

Process or journey mapping with team of end users, test, and PDSA plan for a new workflow.

3

Identify the precise moment and context to implement the AI product.

4

Prepare to enable AI implementation: participants, productivity and capacity impact, roles, SOPs, etc.

Chart Review: Today vs. With AI



~19 mins per patient



~5 mins per patient

~73.7%
less time per pre-visit chart review

One view
notes, labs and outside records together

Fewer misses
chronic conditions surfaced with evidence

5

Evaluate pre-integration safety and effectiveness of AI product

ASK

What safety guardrails do we want in place? (E.g., safety, privacy, ethical use, risk management, compliance, HR, etc.)

ILLUSTRATION

Vendor assessment templates
AI specification model card

GUIDANCE

1

Review AI application model card

2

Inquire about risk and liability to vendors

3

Establish a standard for desired performance

4

Adapt workflow design

5

Validate the process with end users

6

Plan for how risk will be evaluated and controlled

7

Get approval from the AI governance team

AI Vendor Assessment and Questionnaire

AI Vendor Assessment

Use the completed vendor questionnaire to evaluate the vendor's qualifications.

Note: A score of 0 in response to any compliance, regulatory, or security-related questions may warrant disqualification.

2 - Meets requirements: The answer is complete, well-documented, specific, and aligns with the organization's standards.

1 - Needs clarification: The answer is partially complete or vague, suggesting further follow-up is needed.0 - Does not meet requirements: The answer is incomplete, non-specific, or fails to sufficiently address the question.

Category	High Priority Questions	0	1	2	Notes
AI Functionality & Features	What are the key features and capabilities of your AI tool?	☐	☐	☐	
Patient Safety & Care Quality	How would you describe your history with bias management and ensuring accuracy in your AI models?	☐	☐	☐	
	How do you ensure your AI model's accuracy? (Request case studies or test results.)	☐	☐	☐	
	How do you ensure patient consent and privacy when using the AI tool?	☐	☐	☐	
Data Security & Compliance	Does your company face any pending AI-related litigation, threats of litigation, or regulatory inquiries?	☐	☐	☐	
	How do you handle sensitive or confidential information?	☐	☐	☐	
Integration & Scalability	How does your AI tool integrate with our existing systems?	☐	☐	☐	
Ethical Considerations & Accountability	What ethical guidelines and principles do you follow in the development and deployment of your AI tools?	☐	☐	☐	
	What is your policy on accountability for errors or negative outcomes resulting from the AI tool?	☐	☐	☐	
Training Data and Customization	How do you ensure that the training data is representative of my patient population?	☐	☐	☐	
	Can you confirm that your AI models were trained with properly licensed content?	☐	☐	☐	
Cost	What is the total cost of ownership of your AI system, including licensing, implementation, and ongoing maintenance?	☐	☐	☐	
	Beyond the initial cost, what are the ongoing costs such as support, updates, or subscription fees?	☐	☐	☐	
SCORING TOTALS					TOTAL

0-8	The vendor does not meet the organization's standards.
9-16	The vendor may meet the standards, but further follow-up and documentation may be necessary.
17-26	The vendor meets the organization's standards.

TIP:
Check in with your IT/security, data, and compliance teams to make sure these tools fit your policies, and keep reviewing AI solutions for accuracy, security and ethical use.

AI Vendor Questionnaire

Please complete the following questions, providing as much detail as possible.

VENDOR CONTACT INFORMATION

Vendor Name	
Contact Name	
Title	
Address	
Email	
Website	
Summary of Products & Services	

AI Functionality & Features				
Yes	No	N/A	Question	Details (if applicable)
			Does your AI tool have key features and capabilities?	
			Does your AI tool address specific clinical or operational problems?	
			Is your AI's core technology based on deep learning, reinforcement learning, supervised learning, or another specific architecture? Please specify.	
			Can your AI tool handle large data volumes and real-time settings effectively?	
			Will the AI tool's intelligence and accuracy improve over time?	
			Can the AI tool work on data it has not been trained on before?	

AI Vendor Questionnaire are filled out by AI Vendor to:

- Give Key Details: vendors share info about how the AI tool works and how they handle data.
- Choose Wisely: easy to see if vendor's solution is safe, reliable, and fits your health center's needs.

Filled out by health center team to:

- Compare Vendors Easily; Check compliance, security, and fit for your health center.
- Choose with Confidence: Helps you pick solutions that meet your goals and reduce risk.

How to Use the AI Model Card Within Your Organization

Model Facts	Model name:	Locale:
Approval Date:	Last Update:	Version:
Developer Name:	Developer Contact (phone and email):	
Summary		
Mechanism		
- Outcome - Output - Target population - Time of prediction - Input data source..... - Input data type - Sensitive attributes included as input data - Training data location and time-period [include information about inclusion / exclusion criteria] - Model type.....		
Validation and performance		
Example type info		
	Prevalence	AUC
	PPV	Sensitivity
	Cohort Type	Cohort URL / DOI
Training Cohort		
Local		
Retrospective		
Local Temporal		
Local Prospective		
External Cohort		
Target Population		
Risk mitigations to ensure fairness		
- Problem identification and procurement steps: - Development and adaptation steps: - Clinical integration steps: - Lifecycle management steps:		
Uses and directions		
- Intervention prompted by model output: - Benefits: - Target population and use case: - Intended user of model: - General use: [provide information about whether the model informs, augments, or replaces clinical judgment] - Appropriate decision support: - Before using this model: - Safety and efficacy evaluation:		
Warnings		
- Risks: - Inappropriate Settings: - Clinical Rationale: - Inappropriate decision support: - Generalizability: - Discontinue use if:		
Post-implementation performance monitoring		
- Model and intervention monitoring: - Intervention effectiveness monitoring: - Model fairness monitoring: - Intervention fairness monitoring:		

- Intervention updating criteria: - Model updating criteria:
Other information:
- Outcome Definition: - Related model: - Intervention treatment effect estimation: [provide references and links to publications that demonstrate treatment effect of intervention prompted by model] - Model development & validation: - Model implementation: - External validation methods and results: - Clinical trial: - Clinical impact evaluation: - Funding source for model development: - Party that conducted external testing:

Open Access License
This work builds off prior work performed by Sendak, et. al related to the 'Model Facts' label and published in Nature Digital Medicine: <https://www.nature.com/articles/s41746-020-0253-3>. The prior work was released under a Creative Commons Attribution 4.0 International License: <https://creativecommons.org/licenses/by/4.0/>. Changes were made to the 'Model Facts' label to include all data elements required for HTI-1 compliance. This 'Model Facts' label is licensed under a Creative Commons Attribution 4.0 International License, which permits use, sharing, adaptation, distribution and reproduction in any medium or format, as long as you give appropriate credit to the original author(s) and the source, provide a link to the Creative Commons license, and indicate if changes were made. To view a copy of this license, visit <http://creativecommons.org/licenses/by/4.0/>.

Integrate in Procurement

Use model cards during vendor evaluation to gain insights into AI models’ design, data, and performance.

Ensure Transparency

Request completed model cards from existing vendors to maintain accountability and support monitoring.

Standardize Internal Use

Encourage internal teams to use the template for consistent AI model documentation across the organization.

Build Trust and Responsibility

Standardizing model cards fosters openness, reduces bias and improves decision-making for stakeholders.

ASK

What is the change management plan for people, process, and technology related to this implementation?

ILLUSTRATION

Change Management Framework (OCMF)
“From–To” Communication Framework

GUIDANCE

1

Create a communication plan for all stakeholders.

2

Create an implementation or project activities (key meetings, touch points, and feedback process).

3

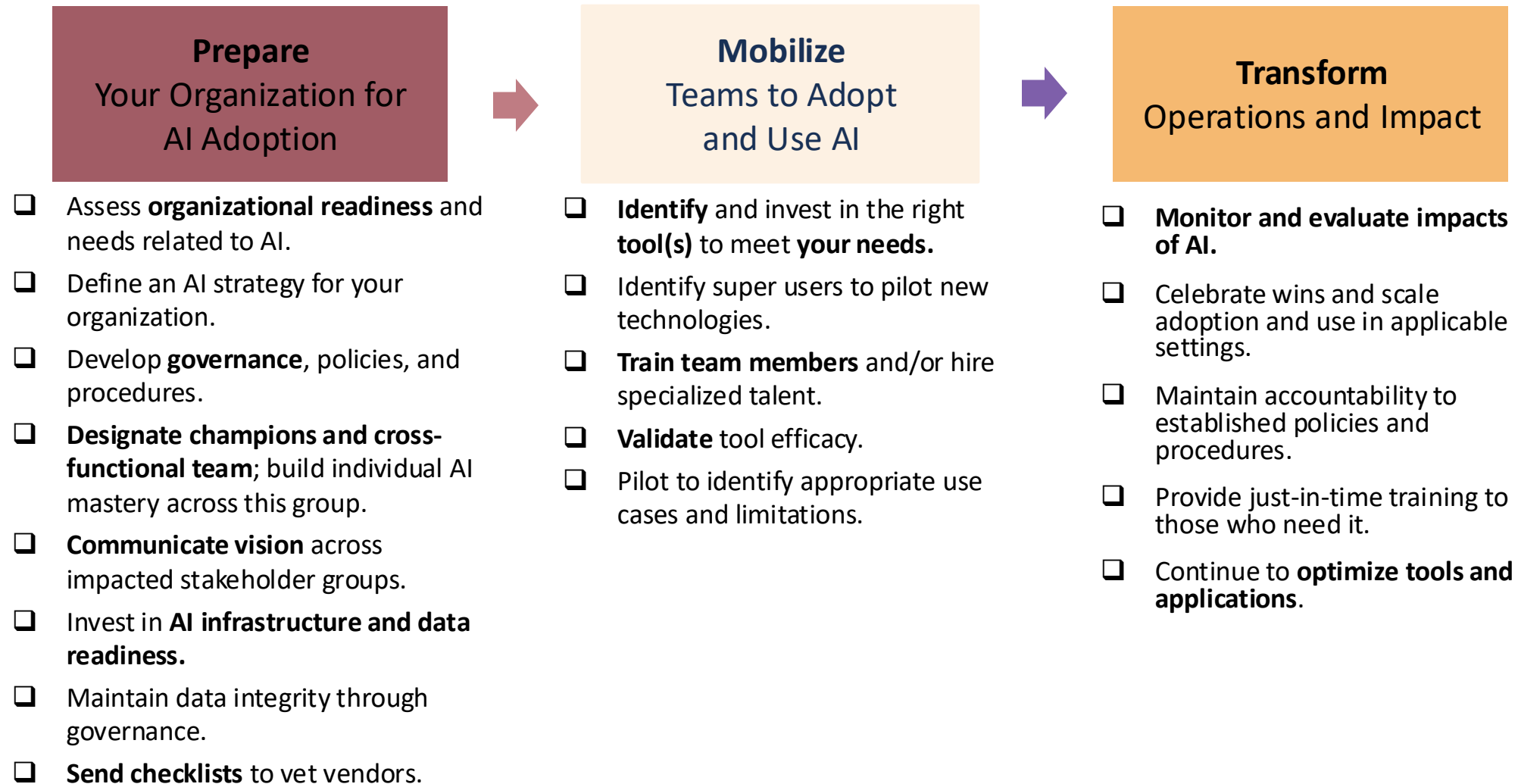
Create a pilot plan.

4

Create an ongoing change management plan.

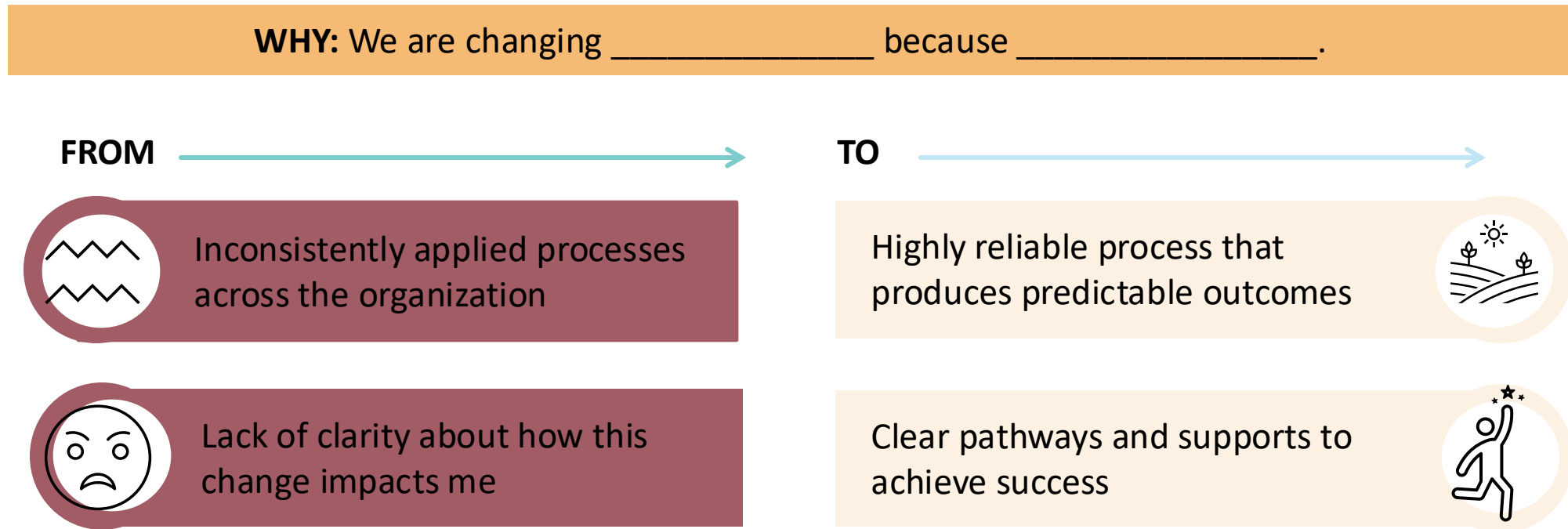
Building Organizational Readiness for AI

Members can take steps to build the readiness needed to ensure fair, appropriate, valid, effective, and safe use of artificial intelligence.



Clearly Communicate *What's Changing* and *Why* by Defining the From-To

Use the **from-to framework** depicted below to clarify the vision, help frame the why, and clearly communicate what is changing.





Monitor and maintain the AI product

ASK

How do we monitor and maintain this AI product: who, what, where and when?
What are the related procedure and policies that we should have in place?

ILLUSTRATION

Overview of AI tool development methodology

GUIDANCE

1

Monitor AI performance: hallucination, drift and brittleness of tool

2

Monitor work environment

3

Audit

4

Identify potential risks

5

Sustain improved outcomes

6

Gather post-implementation impact data

Development Methodology

Use Case Research

- Understanding the problem
- Expert and end-user discussions
- Workflow investigations and design

Cross-Role Review

- Assessment of potential risks and biases
- Review of input, predictions, evaluations and workflow integrations

Prototyping

- Data gathering
- Prototype prompts
- Evaluation – model briefs

Monitoring

- Ongoing assessment
- Usage and user feedback
- Operational outcomes

CATEGORIES OF AI PRODUCT PERFORMANCE MEASURES

Category	Definition	Example Metrics
Model performance	Effectiveness, accuracy, and reliability of the AI model or algorithm in fulfilling its intended tasks within the clinical or healthcare context.	Sensitivity (recall, true positive rate), Specificity (true negative rate), Area Under the ROC Curve (AUC-ROC), F1 Score, Precision (positive predictive value).
Software performance	Efficiency and responsiveness of processing tasks, delivering results, and overall performance of the software components and its interactions.	Inference time, throughput, model latency, response time, resource utilization, scalability.
Clinical effectiveness	Assessment of impact of product use on healthcare outcomes.	Mortality rate, intensive care unit requirement, complication rate
Usability	Quality of users’ interactions with the AI-based medical software.	Clinician satisfaction, user error rates, ease of use.
Safety and security	Safe and secure operating software, evaluating harm to patients and protection against unauthorized access, data breaches, and cyber threats.	Number of identified safety risks and mitigations, adherence to cybersecurity standards, detection of adversarial attacks, incident response time.
Business Impact	Business objectives and outcomes	Reduction in diagnostic time, cost savings, clinician burden etc.

8 Update or Decommission the AI Product

ASK

- How did it work?
- Do we like it?
- What are the pros and cons?
- Can it be enhanced or optimized?
- Do we want to keep using the tool?

ILLUSTRATION

AI implementation life cycle

GUIDANCE

1

Evaluate qualitative and quantitative insights about the tool

2

Determine if work environment requires adaptation

3

Evaluate scaling beyond the pilot

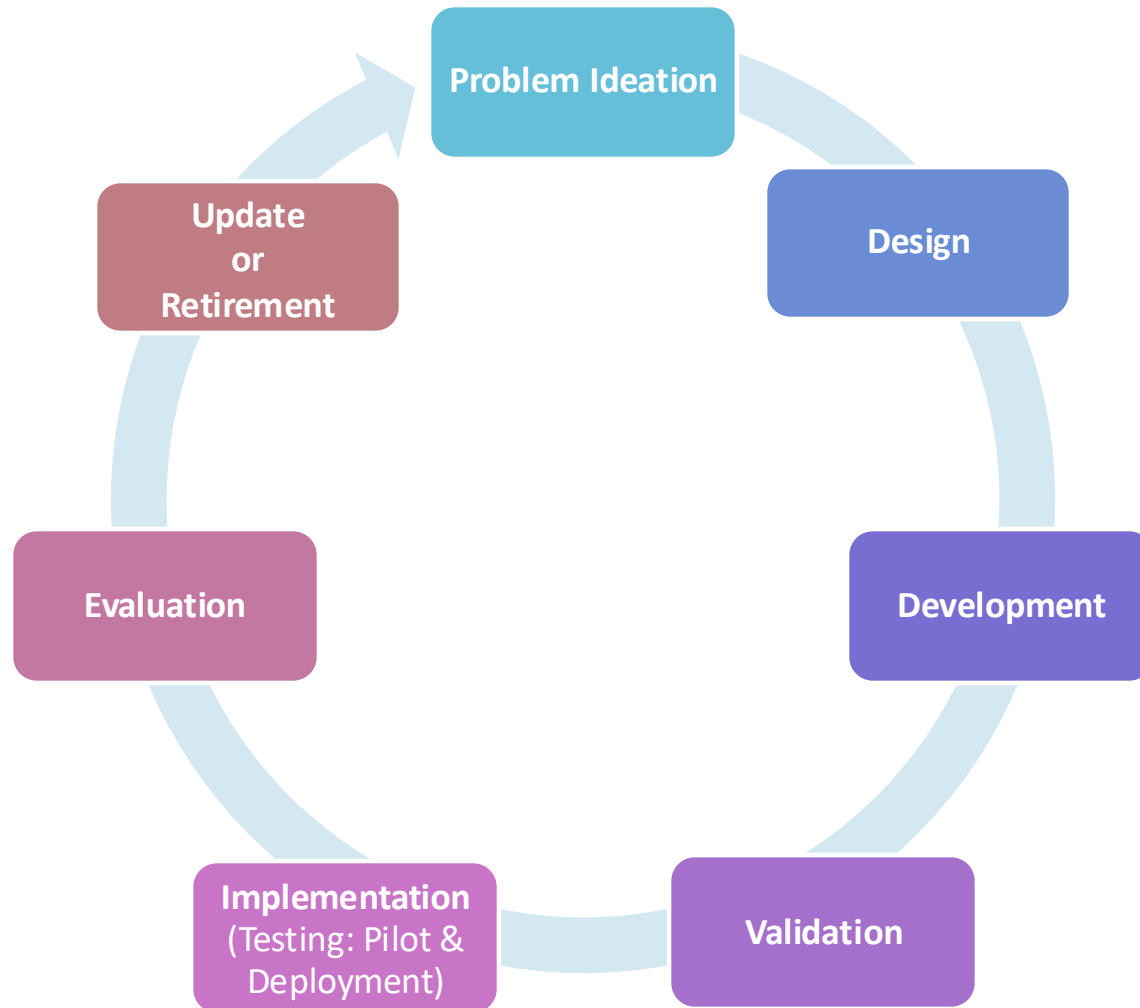
4

Determine if updating or decommissioning is necessary

5

Minimize disruptions if decommissioning

AI IMPLEMENTATION LIFE CYCLE



AI has a life cycle where it needs continuous improvement and adaptation

It is essential to see it as an iterative cycle to prevent issues such as drift or generating hallucinations.

Key Takeaways



1

Start with the problem, not the technology.

The biggest wins come from fixing a workflow pain your team already feels every day.

2

AI adoption is a team sport.

Clinical, operational, technical, and governance voices together turn a pilot into lasting change.

3

Build the muscle, not just the tool.

Keep monitoring and keep upskilling — that is what keeps AI safe, effective, and worth the investment.

Open Discussion

Starter Question: Which step do you anticipate would be the most challenging step in this adoption framework?

1

Identifying and prioritizing a **problem**

2

Evaluating AI as a **viable** component of the **solution**

3

Developing measures **of outcomes** and success of the AI product

4

Designing a new **optimal workflow** to facilitate integration

5

Evaluating pre-integration **safety** and **effectiveness** of the AI product

6

Executing **change management**, workflow integration, and scaling strategy

7

Monitoring and maintaining **the AI product**

8

Updating or **decommissioning** the AI product

Questions?

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THANK YOU!

Next Up: OFFICE HOURS

SESSION SURVEY

We value your opinion!
Please take a quick minute to complete our exit poll.



ONGOING SUPPORT



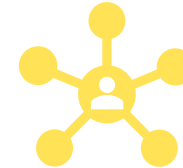
TECHNOLOGY ADVANCES

The technology continues to advance and the evidence base grows.



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DIY kind of person? We have numerous resources and a reliable network to get your answer. We're federally funded so our information and resources are at your disposal.



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