Clinic AI demonstration worksheet

Use one synthetic case. Record what works in the product and deployment being offered. Keep planned features separate from demonstrated behaviour.

Clinic/service: _____ Vendor/product: _____
Version/deployment: _____ Date/reviewer: _____
Workflow being evaluated: _____

Tick one state per test. “Partly demonstrated” includes a manual workaround. A verbal promise alone is “not demonstrated”. Note the evidence, limits and follow-up.

1. Open the source and date behind one answer or flag. Distinguish supplied facts from generated interpretation.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up:

2. Use reports with conflicting dates or units and a duplicate. Show what is flagged and what needs a person to resolve it.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up:

3. Remove one patient detail. Show how the assistant handles the gap without stating it as a fact.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up:

4. Correct an input. Show which dependent outputs change, which need review and how the correction is recorded.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up:

5. Show who can approve, modify or reject a proposed action, and what another role is prevented from doing.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up:

Follow the action and its limits

6. Follow an approved action through saving and delivery. Explain what the delivery status proves and how a failure is handled.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up: _____

7. Show completion, decline and no response as separate states, with a named owner for follow-up.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up: _____

8. Make a request outside the assistant's permitted role. Show its response and the human handoff where needed.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up: _____

9. Demonstrate role-based access and consent controls. Inspect an event record with actor, source, version and time; request the relevant data-use documents.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up: _____

10. Define a comparison with the current process, including loading, checks, corrections, review and recovery. Agree the completion standard and sample.

☐ Demonstrated ☐ Partly demonstrated ☐ Not demonstrated

Evidence / follow-up: _____

A case to bring

Synthetic example; no real patient data. Use two lab reports dated six months apart, a duplicate, an incorrect imported date and a note with family history blank. Inspect any patient-specific statement, correct the date and follow the proposed action through review and delivery where available. Record unavailable steps explicitly. A prototype does not establish availability in the deployment you are buying.

After the demonstration

Unresolved issue: _____

Evidence needed / owner / date: _____

Pilot task and success measure: _____

A serious gap in sources, authority or failure recovery needs resolution even if other tests passed. This worksheet does not establish clinical effectiveness or replace clinical, security, regulatory and procurement review.

Adapted from the mechanism, incentives, workflow and governance framework attributed in *Buying Health AI: A Practical Buyer's Guide* to Akin Oyalowo, MD, MS and Nupur Srivastava. These ten tests are Kalibra's editorial adaptation, not a validated clinical or procurement score.

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