AI IN DATA ENABLEMENT AND COMPLIANCE

Tegria

Clinical Note De-Identification With AI

Combining Epic, clinical, technical, legal, and compliance expertise to de-identify free-text notes to a legal standard and unlock safe secondary use of data

- **Primary Challenge:** Free-text notes contained valuable R&D insights, but PHI risk prevented broad internal sharing and any scalable external use.
- **What AI Does:** An AI pipeline de-identifies clinical notes at scale, with clinician annotation, expert determination, and audit-ready pass/fail review.
- **Who Benefits:** Research, innovation, legal, compliance, security, and data teams that need governed access to unstructured clinical data.
- **Why It Matters:** The client turned a security bottleneck into a governed asset that now supports research collaboration and revenue generation.

THE PROBLEM

- Free-text notes contained scientific, clinical, and operational value, but sharing identified notes created privacy, security, and governance concerns.
- The organization needed a legally defensible method for broader research and development use.

HOW THE SOLUTION WORKED

- We combined Epic knowledge with technical AI delivery to build a note de-identification pipeline at scale.
- In-house clinicians performed annotation to improve precision on real clinical language and edge cases.
- Legal and compliance teams helped construct an expert determination framework that passed formal audit review.

OPERATIONAL AND BUSINESS IMPACT

- The client now processes about 10.5 million notes per year through the pipeline.
- De-identified notes can be shared more safely with trusted collaborators and support downstream use cases like clinical decision support, scheduling, and trial matching.
- The program created a revenue-generating data stream, safely turning hard-earned data into a product for research and development.

WHERE THIS PATTERN COULD GO NEXT

- Any workflow that requires governed transformation of sensitive unstructured data before reuse for analytics, research, or model development.
- Future AI programs that require deep coordination across clinicians, technical teams, legal, compliance, and operations.

WHY THIS PROJECT STANDS OUT: It shows the ability to align clinicians, technical teams, legal, compliance, and operations to move a complex healthcare AI project from concept to audit-ready execution.