

# How Heidi meets Supply Ontario's VOR Requirements

To ensure a consistent and fair evaluation of AI scribe vendors, Supply Ontario and its project partners outlined a set of mandatory and scored criteria across three main categories:

- Clinical & Business – focused on the ability to deliver high-quality, accurate documentation that fits seamlessly into existing clinical workflows
- Legal & Privacy – ensuring that all data is handled in accordance with provincial and federal privacy laws
- Security – assessing whether vendors meet best-in-class cybersecurity standards and safeguards

The table below outlines and provides clarity on how Heidi meets each of these requirements.

Category	Requirement	Description	How Heidi adheres
Clinical & Business	Transcription	The solutions must provide near-instant transcription (within 30 seconds) of the patient-clinician conversations. The solution should also have features to pause/resume without data loss, filter out background noise and irrelevant content, and differentiate multiple speakers (e.g. patient, caregiver, clinician).	<p>Heidi provides near-instant transcription of patient-clinician conversations, typically generating a structured note in about 10 seconds, though it can take 20 seconds for more complex structured data.</p> <p>It automatically filters out superfluous conversation, focusing on what is medically pertinent.</p> <p>Heidi is designed to allow for a normal conversation, meaning providers don't have to signpost things or speak differently with the patient.</p> <p>Heidi supports pause/resume without data loss during a session. The mobile app supports offline and low-wifi settings. Providers can pause and resume a session to add additional observations or findings.</p> <p>Heidi currently does not perform voice fingerprinting or speaker diarization at the transcription stage, so it cannot independently identify who is speaking in real time in a multiple speakers setting. However, the system can infer speaker changes based on contextual cues in the conversation when generating summary or notes.</p> <p>If things are repeated, Heidi knows to filter out the repeated information.</p>

Clinical & Business	Note Creation & Editing	<p>The solution must be able to automatically generate detailed, high-quality notes reflecting the full patient visit, while adhering to CPSO documentation standards. Clinicians must be able to review/edit these notes within the platform using typing or voice dictation, ensuring accuracy, completeness, and control over final notes.</p>	<p>Heidi can automatically generate high-quality notes from clinical conversations. The goal is for notes to be "perfect" upon generation, reducing or eliminating the need for further editing by the clinician (however clinicians do need to verify the notes for accuracy). Heidi aims to produce robust notes that cover all pertinent information instantly. Notes generated by AI are significantly more robust, leading to less auditing headaches and better note closure.</p> <p>Heidi emphasizes adherence to high-quality documentation that meets requirements for various purposes, including medical necessity and billing. Notes can be customized to include justifications for codes and procedures, ensuring all relevant information is present.</p> <p>Clinicians can review and edit notes directly within Heidi after they are generated. Heidi also offers an "Ask Heidi" bar that allows users to edit notes or generate additional documentation by typing or dictating commands.</p>
---------------------	-------------------------	---	---

Clinical & Business	Templates	<p>The solution should offer a range of structured note templates such as SOAP, referral, consult, and summary formats. Clinicians will be able to customize existing templates or create their own and have the flexibility to switch between templates mid-session without losing previously captured data.</p>	<p>Heidi offers structured note templates, including SOAP notes and H&amp;P notes, as default options. It can also generate various other documents such as referral letters, patient explainers, summaries for billing/coding teams, prior authorisation letters, and discharge letters.</p> <p>Heidi provides extensive customisation capabilities for templates, allowing users to define specific structures, wording, and dynamic behaviours using natural language. This includes customising shorthand, sentence structure, information inclusion, and formatting (e.g., bullet points vs. narrative paragraphs).</p> <p>Heidi can also create templates based on existing notes or through prompts.</p> <p>There is a large community library of thousands of templates submitted by other doctors for various specialties and approved by our Medical knowledge team. Users can switch templates to generate different documents from the same session transcript, even after the initial note has been created, without data loss.</p>
Clinical & Business	Language Capabilities	<p>The solution must accurately transcribe and generate notes in English and be able to process diverse accents and medical slang and standard clinical acronyms. The solution's interfacing must be available in English by default. Scribes should also be optionally available in French (and other languages), French-language interfacing may also be offered.,</p>	<p>Heidi transcribes and generates notes in English accurately. It leverages state-of-the-art transcription models fine-tuned on medical datasets for industry-best accuracy and a very low rate of hallucinations (typically less than 0.1% of sessions). The accuracy across different languages is similar to English.</p> <p>Heidi can handle diverse accents, slang, and acronyms. It can be trained to replace common misspellings or shorthand (e.g., "Streptococcal pharyngitis" with "strep throat" or "pee" with "urinate"). It can contextually understand conversations to improve transcription accuracy (e.g., identifying "A box to sit in" as "amoxycillin" in a medical context).</p> <p>Heidi supports a wide array of languages for input, including Spanish and French, and can auto-detect languages in multilingual mode. Notes can be generated in English even if the conversation was in another language, or vice versa.</p>

Clinical & Business	Patient-Facing Summaries	The solution should generate patient-friendly visit summaries and care instructions, with the ability to adjust language for different reading levels.	<p>Heidi can generate patient-friendly summaries and care instructions. This includes summarizing visits, next steps, or specific health information. The system can also create patient explainers that include primary goals, actions, and even dietary recommendations or exercises based on the consultation.</p> <p>Heidi allows for the adjustment of language complexity in patient-facing documents, such as generating a summary in "friendly language" or in Spanish</p>
Clinical & Business	Workflow Integration	Clinicians should be able to easily transfer finalized notes into their EMRs. The solution should work on multiple platforms (web, mobile, desktop), and offer offline functionality with automatic sync when connectivity is restored.	<p>Heidi supports various methods for note transfer to EMRs.</p> <p>We're integrating with major players in Canada like Telus, Accuro, and more.</p> <p>The most common method currently is copy-pasting notes into the EHR, which saves significant time despite being a manual step.</p> <p>For web-based EHRs, Heidi offers a Chrome extension that overlays a widget, allowing users to automatically push specific sections of the note into corresponding text fields in the EHR.</p>
Clinical & Business	AI Transparency	The AI system must be designed so that clinicians can reasonably understand how it functions.	<p>Heidi provides a clear explanation of how the system summarizes and structures notes, with visible transformation steps from transcript to output. Clinicians can see how edits affect downstream sections.</p> <p>(these are pretty much filler)</p>
Clinician & Business	AI Disclosure and Reporting	Vendors must submit annual reports describing AI use cases, risk management, and system functioning. Additional info may be requested for public transparency obligations.	<p>Heidi is committed to responsible AI governance and transparency. We are prepared to provide annual AI risk reports and share necessary information for client compliance with public transparency and reporting duties.</p> <p>(these are pretty much filler)</p>
Clinician & Business	Online User Guides	Vendors must provide accessible and easy-to-follow online guides to support clinicians in using the solution.	<p>Heidi offers an extensive Help Center, embedded tooltips, and step-by-step onboarding modules. We also provide specialty-specific video walkthroughs and searchable documentation.</p>

Clinician & Business	Technical Support	Vendors must provide responsive technical support under the terms of the service agreement.	Heidi offers live chat, email support, and a dedicated account manager for enterprise users. Users can access support directly from the platform and instantly connect to AI chatbot before getting connected with a live agent. Our average support response time is under 10 minutes during business hours.
Privacy & Legal	Compliance with Privacy Laws	The solutions must comply with Canadian and Ontario privacy laws, including the Personal Health Information Protection Act (PHIPA), Personal Information Protection and Electronic Documents Act (PIPEDA), and the Freedom of Information and Protection of Privacy Act (FIPPA).	<p>Yes. Heidi Health complies with all relevant legislation, including:</p> <ul style="list-style-type: none"> <li>• All provincial specific requirements, such as PHIPA, PIPA, Quebec Law 25, etc.</li> <li>• PIPEDA (Personal Information Protection and Electronic Documents Act)</li> <li>• FIPPA (Freedom of Information and Protection of Privacy Act)</li> </ul> <p>Heidi ensures secure handling of personal health information (PHI) and sensitive data, consistent with these regulations. In addition, Heidi aligns with Infoway's AI Use Guidelines and the Model Artificial Intelligence Governance Framework promoted in Ontario and other provinces. All access to PHI is tightly governed, logged, and controlled under industry best practices. Further information can be found in our <a href="#">Trust Center</a>.</p>
Privacy & Legal	No Use of Personal Data for Training or Secondary Use	The solutions cannot use patient information (even if de-identified) for training or improving their AI models or any data from clinicians/patients for anything other than its intended purpose. The sole exception being using information solely for the benefit of the clinician using it. In the latter case, the vendor must remove identifying details.	Heidi Health does not use any patient data, including de-identified data, for model training, secondary use, or improving its AI.
Privacy & Legal	Location of Data Storage	All PHI must be stored and processed in Canada, unless: both the user and buyer are given appropriate notification (including a statement informing the buyer and user of their obligation to include this	Heidi Health ensures that all data is stored and processed within Canada for our Canadian users.

		information in their publicly available privacy policies) and in compliance with applicable privacy laws where required, in a location and with a cloud provider that meets equal or higher security standards as those required of the vendor themselves.	
Privacy & Legal	Business Continuity	Continuity of service is required on termination or if the solution is ever shut down or a clinician stops using the solution. The clinician must still be able to access its data and smoothly switch to another provider, without disruption. In the event there is a need for disaster recovery, vendors will have a written plan that explains how service will continue, even during technical failures or emergencies, and including how data will be recovered and how any service interruptions will be minimized.	<p>If you ever decide to stop using Heidi or if we were to discontinue the product, you won't be left stranded.</p> <p>Clinicians can export their data at any time, and we'll work with you to make sure there's a smooth transition to another tool if needed. Your data stays accessible and under your control throughout.</p> <p>We also have a full Business Continuity and Disaster Recovery Plan in place to cover any unexpected disruptions, whether it's a service outage or a broader issue.</p> <p>There's no lock-in, and no impact on your clinical workflow if you move on from Heidi.</p>
Privacy & Legal	Secure Deletion of Notes	The solution should destroy all summary notes from patient visits (and other related personal information) once a clinician has reviewed and uploaded the clinical note to their EMR.	Data retention periods are determined by clinicians, with options for automatic deletion if preferred over manual deletion. When data is deleted, it is securely destroyed using secure erasure methods and is unrecoverable from our servers.
Privacy & Legal	Third-Party Agreements	Vendors must ensure written agreements with any third-party providers, including security/privacy breach notification, and prohibition on secondary use of data.	Heidi maintains formal DPAs and service agreements with all vendors and subprocessors, each of which includes terms around data use restrictions, breach notifications, and equivalent security/privacy controls.

Privacy & Legal	Record of Disclosure	Vendors must maintain a 7-year record of any disclosures of personal information, including details of date, recipient, purpose, and accountable party.	Heidi logs all PHI access and disclosures. A full audit trail is available, and disclosure records are maintained for the legally required period.
Privacy & Legal	Training Data Legitimacy	Vendors must confirm that training data used for the AI system was lawfully obtained and entirely free of personal information.	Heidi's training data was sourced from publicly available or licensed datasets and never includes personal or health information. We adhere to strict data provenance and privacy-by-design principles.
Security	Security Operations	<p>The vendors must have technical safeguards in place to prevent data breaches or misuse, on top of following global security standards, including:</p> <p>Intrusion detection and prevention systems (IDS/IPS)</p> <p>Monitoring systems (SIEM)</p> <p>Endpoint security (EDR)</p> <p>Data loss prevention (DLP)</p> <p>Network security configurations</p> <p>Long-term log storage for auditing purposes</p>	<p>Heidi is built with security at its core. We use a range of modern tools and practices to keep your data safe, including:</p> <ul style="list-style-type: none"> <li>• Intrusion Detection and Prevention (IDS/IPS)</li> <li>• Security Information and Event Management (SIEM)</li> <li>• Endpoint Detection and Response (EDR)</li> <li>• Data Loss Prevention (DLP)</li> <li>• Secure network configuration</li> </ul> <p>Audit logs that are stored for forensic and accountability purposes</p>

Security	Threat Risk Assessment/Privacy Impact Assessment	The Vendors were asked to ensure security is fully integrated into its tools early in the process of planning, selecting, designing and modifying technology.	<p>Yes. We run regular security and privacy assessments to make sure everything's working the way it should and that we're keeping your data safe.</p> <p>That includes annual penetration tests conducted by independent security firms, as well as ongoing internal reviews of our infrastructure and processes. We also complete Privacy Impact Assessments and Threat Risk Assessments, especially when anything significant changes in the system.</p> <p>Our compliance and security team uses real-time monitoring tools and runs regular audits to catch issues early and reduce risk. It's all part of how we stay proactive and make sure Heidi remains safe to use in clinical settings.</p>
Security	Security by Design	The Vendors were asked to ensure security is fully integrated into its tools early in the process of planning, selecting, designing and modifying technology.	We follow a "security by design" approach, meaning security isn't something we bolt on later. It's built into the way we design, develop and run Heidi every day.
Security	Security Certifications	Vendors were required to provide at least one industry-recognized certification which assisted to confirm their scribe meets rigorous security standards. Accepted certifications included: SOC 2 Type II (certified within the past 12 months), ISO 27001, and HITRUST r2.	<p>Yes, we do. Heidi is certified to several well-known and respected standards, including:</p> <ul style="list-style-type: none"> <li>• ISO 27001 - for how we manage information security</li> <li>• SOC 2 Type II - which confirms we meet high standards for security, availability and confidentiality</li> <li>• ISO 9001 - focused on quality management and continuous improvement</li> </ul> <p>These certifications aren't just for show, they reflect how we actually run the platform from product development to data handling and incident response.</p>



Security	Data Backup & Disaster Recovery	Vendors were required to have systems in place in order to automatically back up their data regularly and have them be secure and encrypted and have in place a plan to restore systems and data in case of failures, outages, or emergencies to ensure clinicians experience minimal disruption.	<p>Heidi's infrastructure is built with resilience and data integrity in mind.</p> <p>All clinical data is automatically and continuously backed up to secure, encrypted storage within Canadian data centres.</p> <p>Our Disaster Recovery and Business Continuity Plan, covers everything from hardware failures to broader service disruptions as well as:</p> <ul style="list-style-type: none"> <li>• Encrypted, automatic data backups</li> <li>• Systems to ensure minimal service disruption in the event of a failure or outage</li> </ul>
Security	Warning of Missing Data	Vendor solutions must notify the user if part of a conversation is not fully processed or transcribed, ensuring that clinicians are aware of missing data.	Yes. Heidi has built-in safeguards that notify users if any part of the conversation is not fully processed or transcribed, ensuring clinicians are aware of missing or incomplete data before relying on the output.
Security	Multi-Factor Authentication	The solution must include capabilities to enforce multi-factor authentication integration that aligns with industry best practices.	Heidi supports MFA for user authentication as part of our secure login protocol, aligning with industry standards to safeguard clinician accounts and PHI.
Security	Annual Security Policy Review	The vendor must review and update their security policies at least annually based on updated assessments.	Heidi's security policies undergo annual reviews, with updates driven by our internal audits, risk assessments, and evolving threat landscapes.