From Blank Page to Clear Requirements

A Simple AI Thinking System for Health IT & Health Informatics Projects

How to use AI as a thinking partner when you're assigned a project—and you don't yet know the systems or workflow

Who This Guide Is For

This guide is for Health IT and Health Informatics professionals who:

- Are assigned to a **live EHR, EMR, or HIE project**
- Feel unsure where to start or what questions to ask
- Want to use AI but don't want to risk their credibility
- Don't have a mentor walking them through how to think on projects
- Care deeply about doing good, accurate work

You do **not** need to be technical.
You do **not** need perfect prompts.
You just need a **clear way to think**.

What This Guide Will Help You Do

By the end of this guide, you will be able to:

- Turn confusion into a clear project prompt
- Use AI as a **thinking partner**, not a shortcut
- Understand requirements, scope, and risks at a high level
- Ask better questions in meetings
- Build confidence that transfers to future projects

Project Overview: Your Starting Point

Imagine this scenario.

Your manager sends you a message:

> "*You're going to work on the patient sign-in screen for our EHR.*
> *We need to understand what fields should be there and how staff will use it*."

You pause.

You might be thinking:

- "I've never worked on this workflow before."
- "I don't know this EHR very well."
- "I don't even know what questions to ask yet."
- "I don't want to look inexperienced."

This guide shows you **exactly what to do next**—without guessing, panicking, or pretending.

You will use AI to **think through the project step by step**, using a real example:

👉 *A patient sign-in screen when patients arrive at a clinic.*

How to Use This Guide

- Total time: **20–30 minutes**
- Open ChatGPT (or your approved AI tool)
- Copy and paste each prompt in order
- Use the example first, then adapt it to your own project

Step 1 — Tell AI Who You Are

Before asking for help, tell AI **how to support you**.

Copy-Paste Prompt #1 — Role & Learning Style

```
I am a Business Analyst working on this for the first time.
I don't know all the systems yet.
Please avoid heavy jargon and explain your thinking step by step
so I can learn, not just copy.
Ask clarifying questions if needed.
```

Why this matters:
You remove pressure from yourself and create a safe learning space.

Step 2 — Dump the Confusion (Don't Overthink)

Now describe the project **exactly as it feels in your head**.

Copy-Paste Prompt #2 — The Messy Reality

```
I've been assigned a project to help define what should go on a
patient sign-in screen in an EHR when patients arrive at the clinic.
I don't know what information belongs on the screen or what
questions I should be asking yet.
I need help figuring this out.
```


You are not supposed to be clear yet.
Clarity comes **after** this step.

Step 3 — Ask AI to Clean Your Thinking (Not Solve Everything)

Copy-Paste Prompt #3 — Clarify the Problem

```
Rewrite my request for clarity and impact.
Keep it beginner-friendly.
Explain what the deliverables should be.
Here is the original request:
<paste your messy description>
```

This gives you your **first structured project prompt**.

Step 4 — Force Alignment (This Builds Confidence Fast)

Before moving forward, confirm AI understands the project correctly.

Copy-Paste Prompt #4 — Alignment Check

```
Before we continue, restate my problem and project scope in your own words
so I can confirm you understand it correctly.
```

If anything is off, correct it now—just like a real consulting engagement.

Step 5 — Surface Assumptions & Boundaries

This step helps you think like a senior—even as a beginner.

Copy-Paste Prompt #5 — Assumptions & Scope

```
List the assumptions you are making about this project and what is
explicitly out of scope.
Explain them in simple terms.
```


This clarifies:

- What you are responsible for
- What you are *not* responsible for
- Where risks often hide

Step 6 — Think Through Requirements

Copy-Paste Prompt #6 — Requirements Thinking

```
Using a consulting-style approach, help me think through:
1. What information the sign-in screen must capture
```

```
2. Why each piece of information is needed
3. How front-desk staff will use it in practice
Explain your thinking step by step in plain language.
```

This is where requirements begin to make sense.

Step 7 — Visualize the Screen (No Design Skills Needed)

Copy-Paste Prompt #7 — Simple Layout

```
Show a simple text-based layout of what this sign-in screen
might look like so I can visualize it.
```

This helps you:

- Understand workflow
- Ask better questions
- Communicate clearly with stakeholders

Step 8 — Ask the Questions You Didn't Know Existed

Copy-Paste Prompt #8 — Stakeholder Questions

```
List the most important follow-up questions I should ask stakeholders
(front desk, operations, compliance).
Explain why each question matters.
```

Now you walk into meetings prepared—not guessing.

Bonus Step — Think Like a Senior Consultant

Copy-Paste Prompt #9 — Devil's Advocate

```
Now play devil's advocate.
What would a senior consultant or architect say is missing,
unclear, or risky in these requirements?
```

This step builds credibility fast and helps prevent mistakes.

What You've Actually Learned

By following this process, you've learned how to:

- Move from uncertainty to clarity
- Use AI safely on real projects
- Think through requirements, scope, and risks
- Build skills that transfer to **any role or project**

This isn't about one sign-in screen.
It's about **how you think**.

Next Step:

Some professionals use this guide and feel immediate relief.

Others realize something deeper:

> *"**This helped me think more clearly—but I want to learn how to do this consistently, confidently, and at a higher level on my real project.**"*

That's where **1-on-1 project coaching** becomes valuable.

When we work together on *your* live or fictitious Health IT or Health Informatics project, you're not just learning how to use AI—you're learning how to **think and operate with confidence in real-world environments**, guided by someone who has been through it many times before.

In addition to everything you practiced in this guide, professionals often gain the following benefits through 1-on-1 coaching:

Learning from Real EHR / EMR Implementation Experience

- You're not learning from theory or generic examples
- You benefit from **20+ years of lived experience** across EHR, EMR, and HIE implementations
- You learn what *actually* matters in real projects—what gets teams stuck, what causes delays, and what senior stakeholders care about
- You gain practical insight that's hard to find in documentation or online content

Being Coached Toward Stability (Not Just Answers)

- Instead of reacting to every new task or meeting, you're coached toward **steady, repeatable ways of thinking**
- You learn how to slow down the chaos and regain control of your work
- The goal isn't speed—it's **stability, clarity, and confidence under pressure**
- Over time, projects feel less overwhelming because your thinking becomes more grounded

Having a Human Guide—Not Just AI

- You don't rely on AI alone

- You have **direct access to someone who can guide your thinking**, challenge assumptions, and help you reason through uncertainty
- You can ask questions out loud—without worrying how they sound
- AI becomes a powerful tool *alongside* human judgment, not a replacement for it

Additional High-Value Skills Professionals Often Build

- Bringing your **own voice** into project conversations and meetings
- Using AI to **interview you** and ask the questions no one else does—helping you clarify scope, uncover upstream and downstream systems, surface hidden requirements, and organize your thinking into a clear project document that sounds like you.
- Tracing data using the **standards and terminology specific to your environment**
- Linking business and product requirements to **data flows and test cases**
- Creating positive and negative test cases grounded in real workflows
- Building realistic sample data for testing packages
- Understanding validation vs verification in practice
- Writing use cases, user stories, and acceptance criteria that actually reflect how work happens
- Creating project contributor personas (front desk, clinical, technical, compliance)
- Turning one-off work into **repeatable templates**
- Creating AI agents you can assign responsibilities to (reviewer, tester, devil's advocate)

Everything happens **inside your real project**.

You're not learning in isolation.
You're being guided, supported, and coached toward **confidence that lasts beyond one assignment**.

There is no pressure to take this step.

For some, this guide is enough to get unstuck.
For others, having a steady guide—alongside AI—makes everything click faster.

Either way, you no longer have to figure it out alone.