DAX Copilot AI capabilities guide

Overview

The DAX Copilot offers powerful AI capabilities that allow you to edit, format, and extract information from summaries and transcripts. These features are easily accessible through a simple set of buttons. Additionally, a style wizard interface is available for you to customize your style settings according to your preferences.
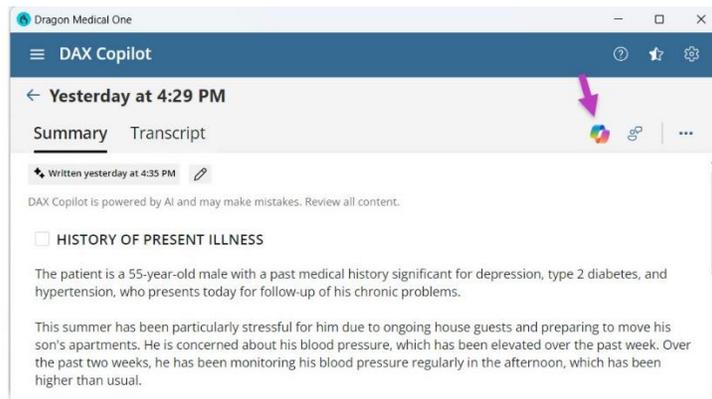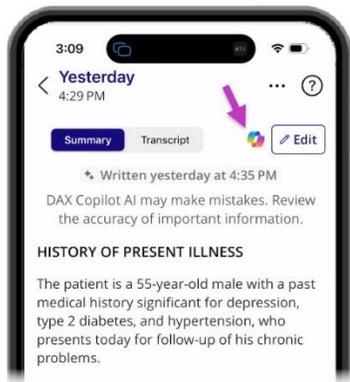
AI capabilities demo

This video provides a brief demo of the AI capabilities on both the mobile app and desktop app.

### Use the Copilot button to open the AI capabilities

To use the AI capabilities, please follow these step:
1. Launch the DAX Copilot application on your mobile device or desktop..
2. Choose a summary from your list of Summaries.
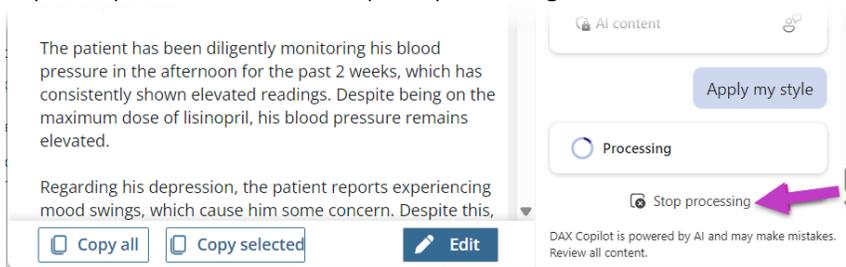3. Select the Copilot button located in the top right corner of the screen.

4. The DAX Copilot menu will appear, displaying the buttons for the AI capabilities.
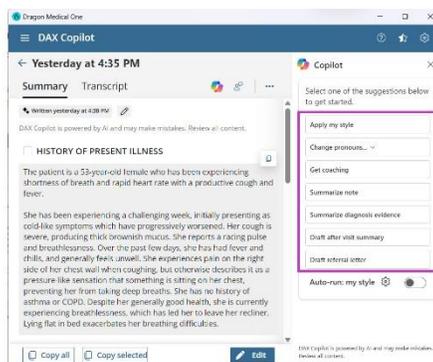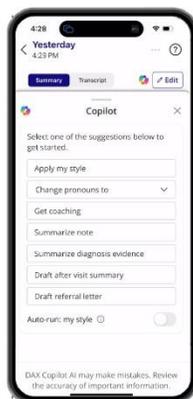
5. To use any of the AI capabilities, select the appropriate button corresponding to the action you wish to perform.
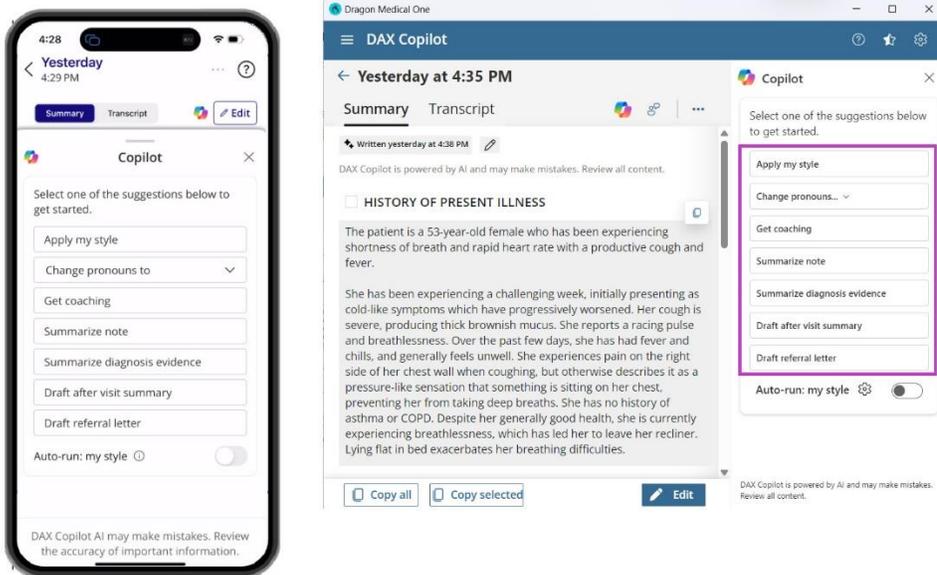
6. At any time you can choose to stop the processing.

7. In the capabilities panel, you will find a preview of the requested AI action. The options "Apply your style" and "Change pronouns" will modify the summary. To accept these changes, select "Apply changes." If you do not wish to keep the changes made in the summary, select the "Undo changes" button.
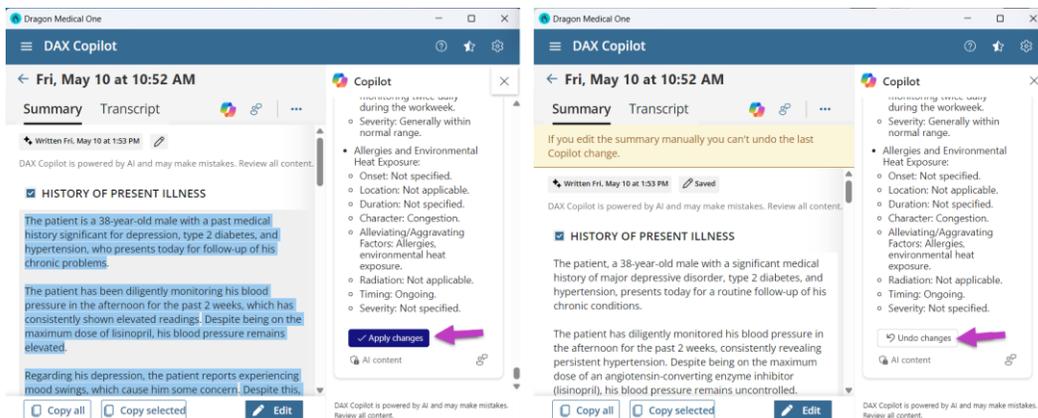
Available before or after editing

Before editing: You can create additional DAX Copilot recordings as long as the summary remains unedited, even after using AI capabilities features.

- For example, utilize the AI action "Get Coaching" to receive recording suggestions in the Copilot panel. Then, click the microphone button to add more DAX Copilot recordings.

After Editing: Once the summary has been edited, AI capabilities remain available; however, no additional DAX Copilot recordings can be created.

- For example, you can utilize the AI action "change pronouns" to modify the pronouns in the summary by selecting from the options in the drop-down list.

> **BEST PRACTICE:** To ensure efficiency, it is advisable to implement any manual changes using AI capabilities only after completing all recordings for the encounter. This approach helps prevent the need to redo the process due to updates in the summary.

AI capabilities synopsis

AI capability	Action type	Description
Apply my style	Edit (results in a change to the note on the Summary tab)	Your defined style preferences can be applied automatically or on-demand, ensuring a consistent look and feel for your documentation. This approach enhances efficiency and allows you to maintain your preferred documentation appearance. • The "Configure my style" button is located in the AI capabilities menu. It will change to "Apply my style" after you have established your style preferences using the Style wizard..
Change pronouns	Edit (results in a change to the note on the Summary tab)	Changes the pronouns throughout the summary.
Get coaching	Ask	Offers suggestions for enhancing note quality through effective recording techniques, while also confirming areas where the note quality meets acceptable standards.
Summarize note	Summarize	Summarizes the encounter and highlights key takeaways, serving as a quick refresher on the patient before finalizing the note.
Summarize diagnosis evidence	Summarize	Curates diagnostic evidence by analyzing subjective elements, such as reported symptoms, alongside objective elements, including laboratory results and imaging studies, as well as any other pertinent information shared during the patient encounter.

Draft after visit summary	Create	Drafts a patient-friendly summary that outlines important education and instructions from their visit. This summary is designed to empower patients to better understand and adhere to their care plan. • There is a copy button that allows this information to be easily pasted into an EHR, letterhead, or other document.
Draft referral letter	Create	Drafts a starter referral letter intended for a physician or clinic. • There is a copy button that allows this information to be easily pasted into an EHR, letterhead, or other document.

The first two AI capabilities modify the note on the Summary tab.

- *Apply my style* can be applied either manually or set to run automatically.

- You can configure your preferred pronouns in the Style wizard to ensure consistent usage. Alternatively, the Change pronouns button allows for manual adjustments of pronouns throughout the summary.

All remaining AI capabilities are accessible exclusively through the DAX Copilot menu.

- Other AI capabilities must be manually activated; they will only function when you select the corresponding button in the AI capabilities menu. Many of these features do not modify the summary but instead provide additional details in the Copilot window.

Leave feedback

We would love to hear your thoughts on the AI capabilities for DAX Copilot. Please share your feedback by clicking the button located at the bottom of the menu after the results are displayed.
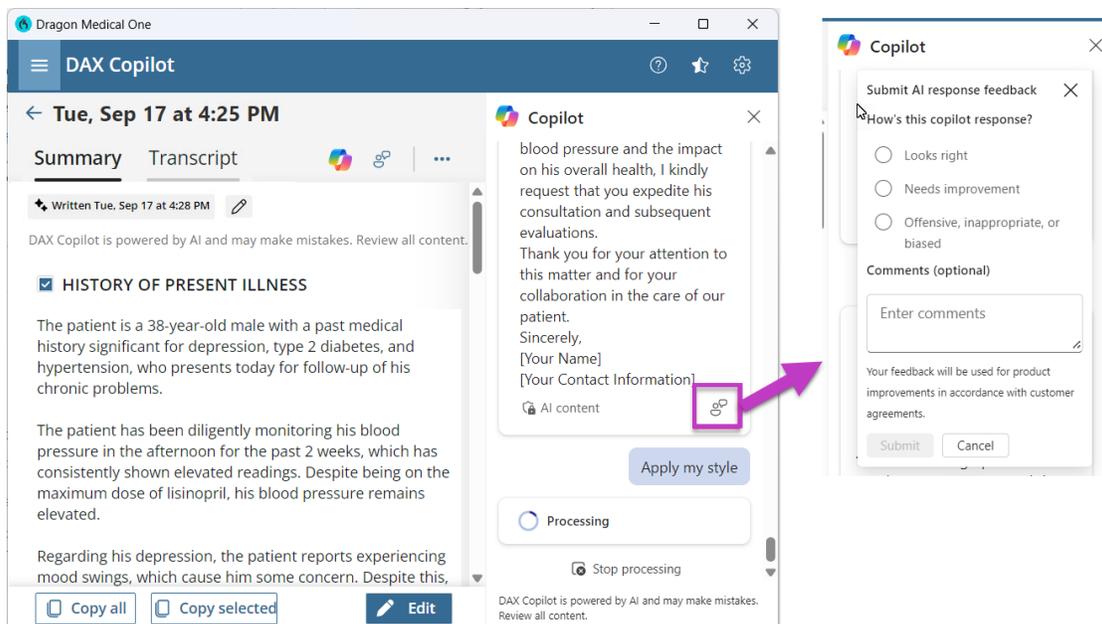
1. Select the feedback button to begin.

2. Evaluate the results by selecting the most appropriate response: **Looks Right**, **Needs Improvement**, or **Offensive, Inappropriate, or Biased**.

3. If desired, provide additional comments in the text box.

4. Once you have completed your feedback, click **Submit**.

Transparency: Please review the AI capabilities in DAX Copilot Transparency document, which outlines the capabilities and limitations of the AI capabilities in DAX Copilot feature.

Need help?

Connect with a Microsoft DAX Copilot consultant: Whether you are new to DAX Copilot or have some experience and still have questions, we are here to assist you.

- Receive live virtual help from a Microsoft DAX Copilot consultant.

- Schedule a virtual 1:1 training with a Microsoft DAX Copilot consultant.

Contact technical support: If you have issues logging in to either application, contact tech support.

- **email:** DAXCopilotSupport@nuance.com

- **phone:** 1-800-833-7776 - ask for DAX Copilot