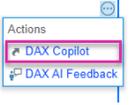
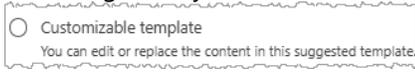


# DAX Copilot for Epic customizable templates

## ENHANCE YOUR NOTES WITH CUSTOMIZABLE TEMPLATES

Customizable templates let you personalize the AI-generated DAX Copilot SmartSections in your note. Customizable templates use a combination of text and AI prompts you can adapt to generate clinical summaries in the format you prefer.

### Where to find customizable templates

1. Launch DAX Copilot from the **Actions** menu beside any SmartSection in your note. 
2. Select the gear icon beside the **Apply my style** button to open the **Style** section in **Settings**. 
3. Navigate to the **Customizable template** *Format* option in the Allergies, Physical Exam, or Assessment & Plan sections. 
4. Edit the text or prompts in the default template if needed.

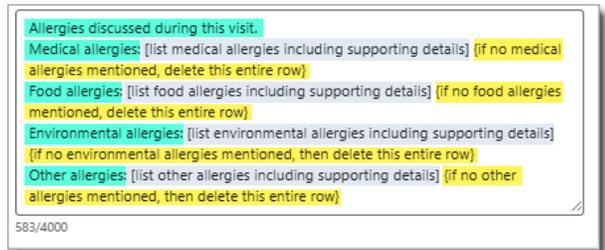
### WHY USE CUSTOMIZABLE TEMPLATES?

- **Efficiency:** Customizable templates can save time reviewing and editing.
- **Flexibility:** Use the pre-built templates as-is, modify them, or create your own version.
- **Personalization:** Tailor the templates to your personal workflow or documentation style.
- **Ease-of-use:** Apply customizable templates on-demand or automatically.

### Components in a customizable template can include:

- Labels/Headers
- Placeholders
- Instructions
- Looping commands

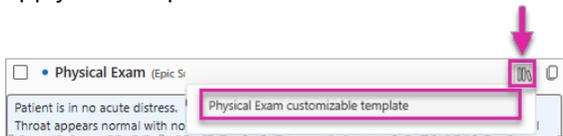
**Learn more here:** [Customizable template guidelines](#)



### Ways to apply a customizable template

Apply a single template (on demand):

1. Select the **Note** tab in DAX Copilot for Epic.
2. Select the customizable template from the library icon menu beside the appropriate SmartSection to apply the template on-demand:

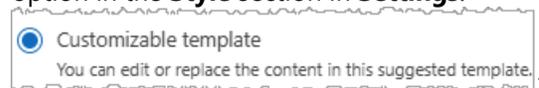


#### NOTES:

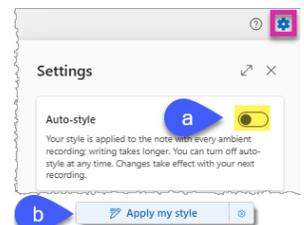
- Use this method to test a customizable template.
- The template does not need to be selected as the preferred SmartSection format.

Apply as a **Style** preference (on demand or automatically)

1. Select **Customizable template** as the default *Format* option in the **Style** section in **Settings**.



2. Options:
  - a. Enable **Auto-style** to apply the template and styles to every note DAX Copilot generates.
  - b. Select **Apply my style** to apply templates and style preferences on demand.



## NEED HELP? CONNECT WITH A DAX COPILOT FOR EPIC CONSULTANT

- **Get live virtual training support (8am-7pm ET M-F exc. holidays) or Schedule a virtual 1:1 training session**

# DAX Copilot for Epic customizable templates

## FREQUENTLY ASKED QUESTIONS

**Will the customizable template feature be available in additional sections of the Summary, or will it remain limited to Allergies, Physical Exam, and Assessment and Plan?** Currently, the feature is available for the Allergies, Physical Exam, and Assessment and Plan sections, but we plan to extend this functionality to other sections in future releases.

**Is there a character limit for customizable templates?** Each section has a character limit of 4,000. This equates to approximately 575 to 1,000 words, including spaces.

**How specific must a clinician be when verbalizing content for customizable templates? For allergies, must the clinician specify "food allergy to peanut," or can the AI categorize allergies into appropriate subheadings?** Our testing indicates that the AI accurately processes data corresponding to each field. It is not necessary to explicitly state "list food allergies" for the AI to categorize food allergies correctly. Users can keep the instructions within brackets straightforward. However, since the AI can make errors, users should customize the template for improved outcomes and review the content before final validation.

**How many "if-then" statements can be placed within the brackets?** Customizable templates utilize Generative AI, making it difficult to predict how the large language model (LLM) will perform in every scenario. We recommend keeping the instructions within the brackets simple, with a maximum of two "if-then" statements. However, you may experiment with more complex instructions to see if the results meet your expectations.

**Can users have more than one customizable template per section?** Currently, users can only apply one standard template per section. We are actively gathering user feedback to explore the possibility of extending this capability, which may include the option to apply different templates based on the encounter and patient diagnosis.

**Do the customizable templates manage discrete data?** The customizable template generates the section output in text format, following the instructions in the template, and based on the combined transcript of all recordings made with DAX Copilot. The generated content is a text, not discrete fields, and will be transferred to EHR as a text.

**How do I test changes to a customizable template?** Avoid applying a customizable template repeatedly to the same note. If you don't achieve the desired outcome, remove the previously applied template modifications before re-applying a revised version of your customizable template. To do this, either a) restore a previous note version from the *Version history*; or b) regenerate the note by adding another ambient recording (if you have not begun editing).