Frequently asked questions

This document provides answers to common questions on the following topics:

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Need support?

Bookmark the DAX Copilot support guide for directions.

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Mobile devices

What platforms can I use with DAX Copilot? DAX Copilot is available within the PowerMic Mobile app – which requires an iOS mobile device such as an iPhone.

Does DAX impact my phone's battery life? No. The phone only captures the recording. All processing is done on a secure DAX back-end servers. DAX does not impact battery life any more than just using your mobile device with other apps.

What happens if I lose my Wi-Fi connection? You need a connection (either Wi-Fi or cellular) to start DAX Copilot. If connectivity is lost after a recording has been initiated, the recording will be stored in the mobile app until a connection is established. When connectivity is restored, the recordings will be uploaded to DAX for processing. After uploading, the audio file is permanently and securely deleted from the mobile app.

What happens if my device screen goes to sleep? You can shut off the display and DAX will keep recording. Tip: To adjust your iOS device sleep settings, go to Settings > Display and Brightness > Auto-Lock; then choose a length of time.

What happens if my phone locks while recording? Recording will continue until you unlock your phone and stop the recording. (*NOTE: Recording will stop after 75 minutes whether your phone is locked or not.*)

What happens if I receive an incoming call? Any activity that interrupts the microphone will pause recording. The recording will pause while the phone is ringing and while you are on the call if you choose to answer it. The recording may stay paused as the incoming caller leaves a voicemail. Once the microphone is no longer in use, you should manually restart the recording. We recommend that after any interruptions, you check the DAX recording timer to confirm that the recording timer is counting upwards again. **NOTE:** Follow these directions to set your mobile device to Do Not Disturb to prevent interruptions while using the mobile app.

Workflow options

Can I pre-chart/pre-edit? Yes, you may pre-chart with or without DAX. You can create pre-chart recordings using DAX, or directly pre-chart in your note template. You can preload patient encounters in DAX at any time. Additional recordings you create during or after the encounter will update the summary and transcript. **IMPORTANT:** DAX does not upload/pull any information from the electronic medical record. You must verbalize everything you want to have considered for DAX to include it in the summary.

When can I record? You can record at any time (pre-encounter, during the encounter or post encounter).

What happens if I have multiple recordings for a patient? DAX will combine all recordings for the summary and transcript. Each subsequent recording will regenerate the summary to incorporate the newly added information so long as no editing has been done yet on the summary.

Can I record while navigating to other applications? DAX can record in the background so long as it still has access to the microphone. There will be an orange microphone icon at the top of the screen indicating you are still recording.

Can I use DAX with multiple historians in the room? Yes, there can be multiple historians contributing to the conversation (e.g., a pediatric visit with parents present.) DAX does not make any kind of prioritization between historians, so their contributions are all treated equally.

Do I need to be in the medical record to record conversations? No, it is not necessary to access the medical record to make a recording. Simply open the DAX Copilot mobile app and initiate the recording process.

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Can I use DAX on telemedicine encounters? Yes, DAX can effectively capture conversations during telemedicine visits. As long as the dialogue is loud and clear enough for your mobile device's microphone to pick up, it will function properly. Please note that the telemedicine session must take place on a different device than the one being used for DAX. Additionally, ensure that the patient has given consent to be recorded..

Can I use DAX with a translator? Yes, you can use DAX with a translator; however, it is essential that key information is clearly articulated in English. You must carefully review your notes, as any non-English dialogue will be included in the transcript and may lead to inaccuracies in the AI-generated sections of your documentation. Note that DAX Copilot does support the capture clinician-patient conversations conducted in Spanish without requiring a translator.

What happens if I accidentally record for multiple patients in the same recording? The summary will include all pertinent information for all patients. The transcript will include information for both patients as well. You can copy and paste the appropriate summary and transcript pieces into each patient chart. You can also start new patient encounters for each patient and complete a post encounter dictation. **NOTE:** The best practice is to record one patient per summary.

Can I record information presented to me from my MA, nurse, fellow, etc.? Yes. You can record any information you would like DAX Copilot to use for the summary and transcript.

Can I delete a summary? No. However, you can archive a summary.

Can I unarchive a summary? No. Once a summary is archived, it cannot be unarchived, and no further editing can be done within DAX Copilot. However, an archived summary may be transferred to the EHR, and any editing can be done after the transfer to the EHR.

Dictation/recording

What do I do if I accidentally record on the wrong patient? DAX Copilot is not integrated with the electronic medical record. You can easily transfer the information from the summary and the transcript to the correct patient chart. You can also edit in the DAX Copilot summary any information you do not want to transfer.

Can I add additional recordings after I stop my initial recordings? Yes, you can add additional recordings in the DAX Copilot mobile app as long as you haven't edited or archived the summary. Once you edit or archive the summary, ambient recording is disabled. To avoid this, refrain from manual edits until all recordings are complete. You can set a warning message in the app settings to remind you. After selecting Edit, further ambient recordings are disabled, but dictation remains available for edits..

Can my phone have blue tooth going while I use DAX Copilot? No. Temporarily disconnect any Bluetooth device with a microphone that's connected to your mobile device before you begin ambient recording – including headsets, AirPods, or hearing aids. DAX uses the microphone on your mobile device, and any Bluetooth device with a microphone that's connected will prevent or interrupt ambient recording with DAX. See Disable bluetooth directions for iOS mobile device for guidance.

How does DAX handle "chit-chat" with patients? DAX does a good job filtering out conversation that is not relevant to the medical evaluation taking place. However, the more organized and to the point a conversation is, the more concise and to the point the DAX content will be.

Is there a limit on the number or length of recordings for a given patient encounter? You can submit multiple recordings. The recording length limit is 75 minutes. However, once a recording reaches 45 minutes, there will be a banner indicating that while you can still record for the next 30 minutes, the recording does not continue to draft information for the summary. However, it will continue for transcript purposes.

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Can I switch back and forth between DAX Copilot and Dragon Medical One? Each application needs access to the microphone. You can toggle between the PowerMic Mobile tab for Dragon and the DAX Copilot tab in the mobile app. Once you edit in DAX Copilot, the microphone available for dictation (edit with voice) in the mobile application is Dragon. Therefore, you can use your auto text to further enhance your summary before transferring to the electronic medical record.

Why is DAX Copilot not inserting my Dragon Medical One (DMO) auto-texts and words? DAX Copilot and DMO operate on two different back-end processes which does not allow the ability for DAX to insert DMO functions during the recording. The AI that writes the clinical summary does not have access to your DMO personalized settings. However, after the summary is written, you can use your DMO personalized features.

Note formatting

How can I personalize the formatting of the note that is generated? You can use any editing tools available to you to format the generated note. You also have the option to go to the Style wizard and select options for each report section and apply those style preferences either automatically or on-demand.

Is there a quick way to edit pronouns if they are incorrect? You can specify gender-specific or gender-neutral pronouns in the Style wizard. To edit pronouns, navigate to the Copilot menu, select "Change pronouns," and choose from "he/him," "she/her," or "they/them."

How does DAX handle problem-based charting? DAX Copilot will create a summary that is problem-based. Best practice is to start the recording with the problems that will be addressed during the visit. You can also do a recap at the end of the visit, verbalizing the problems and an overview of the plan for each of those problems.

Do I need to select the refresh button to pull in the content from DAX? No. However, you will need to transfer the information from the DAX Copilot desktop app into your note in the EHR. There are several ways to transfer the information into the note based on your note template and preferences.

Reviewing/editing a note

Can I record after I have edited? Once you edit, you will no longer have access to adding ambient recordings to that summary. You can start a new patient summary or use your edit tools to add additional information.

How do I edit the summary and transcript? There are multiple ways to edit your summary. You can edit on the mobile app or on the desktop app. You can edit, depending on the licenses you have, with either your voice or with your keyboard. The transcript cannot be edited as it reflects the verbatim conversation that was recorded during the encounter.

Does DAX learn from my edits? DAX learns as a whole from edits done within DAX Copilot (either on the mobile app or on the desktop app) for all users. It updates the system as a whole and not on an individual level. DAX Copilot does not see edits made in the electronic medical record. .

Can I search the summary and transcript? On the mobile app, no. The only way to review the summary and the transcript is to scroll through each. On the desktop app, you can use CTRL+F to search either the summary or the transcript, and the search results will be highlighted.

Why does content appear in the transcript but not in the summary? The AI model did not recognize the content as being relevant to the medical document. For example, chit-chat is filtered out. It is best practice to refer to the transcript to ensure that all pertinent information was captured in the summary.

How can I personalize the formatting of the note that is generated? You can use any editing tools available to you to format the generated note. You also have the option to go to the Style wizard and select options for each report section and apply those style preferences either automatically or on-demand.

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Why don't I receive follow-up when I provide in-app feedback? Your feedback is very important, and every feedback submission is reviewed by our Research team for improvement prioritization. Due to the magnitude of the feedback, we cannot address each one on a personal level but please know it is vital to DAX enhancements. Also note that feedback is used to improve the product and not a way to get immediate help with an issue.

How long are the summaries and transcripts available in DAX Copilot? Summaries and transcripts are accessible for 30 days after an encounter is recorded. After this period, they're automatically deleted from both the desktop and mobile app. Summaries that do not appear on your Summaries list may be due to filter settings (3, 7, 30 days). Summaries beyond 30 days cannot be retrieved. Be sure to transfer content from the DAX Copilot desktop app to your EHR within this timeframe.

Where do I go if I have questions about editing or if I would like more training information? If you would like more training information, you have multiple ways to obtain this information.

- Obtain training information on the mobile app: From the Summaries List page, tap your initials (located on the upper left of the screen) and then select Help.
- Obtain training information on the desktop app: From any DAX Copilot screen select the question mark icon to open the Resource Center.
- Visit the DAX Copilot drop-in sessions, available M-F, 8a-7p EST, excluding holidays. No appointment is necessary, and our consultation staff will be glad to assist you.
- Schedule an instructor-led virtual 1:1 training with a Microsoft Nuance consultant.

Why is content not under the heading I thought it should be? The AI model places content under a header in the context of the conversation as well as the content itself. For example, it will write medications associated with a symptom or concern in the HPI. As clinicians give feedback, DAX can prioritize how content is delivered most effectively for the clinicians.

Do the AI drafts improve over time? The model continuously improves with generative AI. In addition, forced model re-training based on our customers' feedback and insights occurs. It does take time to make sure the updates are thoroughly tested to meet responsible AI standards.

Retention/playback

Where is the recording being stored? Recordings are stored on Microsoft Azure Servers with stringent data protection requirements.

How is the transmitted data protected? All recording/data is securely encrypted using industry standard methods when transmitting to our secure data centers for processing.

Can I access a transcript of the recording? Yes. There is a transcript tab next to the summary tab on both the mobile and desktop app.

Is there the ability to play a recording back? No, not at this time.

Security/compliance

How do I know when DAX is recording? The microphone will change color (from white to dark blue) and the timer will run.

Can I stop recording if the patient requests it for a certain portion of the encounter? Yes. You can stop the recording at any time, then summarize later in an additional recording if that information is needed in the note.

What happens if I forget to turn off the microphone? The recording will continue until you stop recording or the recording reaches 75 minutes in length.

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Is the risk of recording extraneous conversation the same as we have today with Dragon? Yes, although it is more likely you will forget to turn off Dragon than you would forget to turn off DAX.

Is there a possibility that another patient or outside conversation will be recorded on a patient encounter? Yes, if you walk around with the recording on, it will capture the additional audio. There is a risk that the conversation will be captured into the summary and transcript. You will see this when you review the summary or if you review the transcript. If this occurs, you can edit out any information you do not want in the summary.

Customizable templates feature

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? This feature is available for the Allergies, Physical Exam, and Assessment and Plan sections only. NOTE: Microsoft Dragon Copilot offers a customizable template for additional sections. Please connect with your administrator to upgrade.

How are customizable templates constructed / what is the required content? Templates consists of four primary components. Not all are required, but you need to configure your template using these 4 data types to get the best outcome:

1. **Labels/Headers:** Labels/headers refers to fixed text that will be directly copied into the note, including titles, subheadings, or any "canned text" you wish to include. Do not enclose any fixed text in brackets.
2. **Placeholders:** Placeholders are specific sections within the template that will be updated by AI with information extracted from the note and transcript. Placeholder text must be enclosed within **[square brackets]**.
3. **Instructions:** Instructions help the AI understand what changes to make to the template after filling in the necessary information and are often structured as "if, then" statements. Place instructions inside **{curly brackets}**.
4. **Looping commands:** Looping commands are special instructions that tell the system to repeat a certain part of the information. Place looping commands inside **{curly brackets}**.

Is there a character limit for customizable templates? Each section has a character limit of 10,000. This equates to approximately 1600 to 2000 words, including spaces. However, for optimal results, we recommend that custom templates do not exceed 8,000 characters.

How many "if-then" statements can be placed within the brackets? Customizable templates utilize Generative AI, making it difficult to predict how the AI 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. In the meantime, you can still insert auto-texts as usual and update them using speech recognition. NOTE: Microsoft Dragon Copilot offers the option to create multiple customizable templates for each section. Please connect with your administrator to upgrade.

Do the customizable templates manage discrete data? No. Customizable templates are not designed to pull in information that is stored separately and distinctly within a database or system, such as vitals, lab results, etc. Rather, a customizable template creates content for its section following the structure specified in the template. The content created is text, derived from the transcript and from instructions in the template, and will be transferred to EHR as text.

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Capture Spanish feature

Is the "Capture Spanish" toggle "sticky?" Does it default to English with each recording or new patient, or does it remember the last used setting? The switch is currently configured to stay in the last setting used.

Do all recordings for the encounter have to be in one language? No, recordings can be made in Spanish or English. However, when using Spanish or a mix of Spanish and English, ensure the Capture Spanish toggle switch is set to on.

What happens if I forget to the toggle on or off? If the language setting is not activated, the system will attempt to interpret spoken words phonetically based on the expected language. For instance, if a clinician forgets to switch on Spanish and speaks in Spanish during the recording, the system may hear "si" but, expecting English, will transcribe it as "see."

Is any content displayed in Spanish when I use the Capture Spanish feature? Yes. The transcript will appear in Spanish (or a mixture of Spanish and English if both languages were spoken) if the toggle switch to capture Spanish was activated before recording. Note that the summary will always be generated in English, as English is the standard for medical documentation in the United States.

What will the transcript show if a mixture of Spanish and English was used during the recording (with the Capture Spanish switch toggled on)? If the toggle switch was set to Capture Spanish, the transcript will reflect the recorded language used. Conversations will be diarized, clearly indicating who spoke each part of the dialogue and reflecting the language spoken.

Does the English/Spanish model support specialty optimization for note output? Yes, when the Spanish setting is enabled, it will use the specialty-optimized model based on the clinician's primary specialty.

What dialects of Spanish does this feature include? This model covers all dialects of Spanish. Some may be more accurate than others, but it does not specifically exclude any.

Are there any requirements necessary to use this feature? The feature to capture clinician-patient conversations in Spanish is now generally available. However, its visibility may depend on your organization's specific configuration. Please reach out to your organizational administrator to request access to the capture Spanish feature. Once the feature is deployed, the only requirement is that you must be bilingual and fluent in Spanish to effectively utilize this tool and provide care to Spanish-speaking patients. Without engaging with Spanish-speaking patients, this tool does not offer significant benefits to clinicians.

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