

# Customizable template guidelines

Customizable templates use a combination of text and AI prompts you can adapt to generate clinical summaries in the format you prefer.

- Templates are available for the **Allergies**, **Physical Exam**, and **Assessment and Plan** sections.
- Each of the three sections contains a suggested template. You can choose the suggested template and modify it to better suit your specialty or workflow, or you may write your own.
- **Note:** Customizable templates utilize generative AI, making it difficult to predict how the AI will perform in every scenario. It is essential to review the generated content to ensure it aligns with your expectations and make any necessary edits.

## Customizable template components

When creating a customizable template, there are four types of data that you should consider to construct an effective template. Those four types of data are:

### 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.

- **No brackets:** Keep content as plain text. Do not enclose any fixed text in brackets. Example:
  - GENERAL APPEARANCE:
- For fixed content that is not a header or label, such as canned text, use quotation marks to indicate what text should be written exactly as is in the note. For instance, you might include a sentence like:
  - "Risks and benefits have been discussed with the patient."

### Placeholders

Placeholders are specific sections within the template that will be updated by AI with information extracted from the note and transcript.

- **[Square brackets]:** Placeholder text must be enclosed within [square brackets].
- The placeholder text can be detailed, providing guidance to the AI on how the content should be structured. Example:
  - Treatment: [Briefly describe any related treatments like lifestyle counseling, medications, or referrals. Do not include the name and location of the pharmacy.]

### Instructions

Instructions provide guidelines for the AI to update specific content. They 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. These commands typically follow the placeholders but may also appear in other sections of the template.

- **{Curly brackets}:** Place instructions inside {curly brackets}.
- Instructions should be positioned as close as possible to the elements or rows to which they pertain.
- Instructions are intended to be followed once the placeholder's content has been completed.

- Commonly used instructions include deleting a row if there is no content or replacing specific content with a designated word or phrase. Example:
  - {If none specified, then delete this entire row and its header}
- If you have an instruction that includes text you want to be copied verbatim in the outcome, enclose it in quotes within the curly brackets. For example:
  - HEAD, FACE, EYES: [List findings] {If HEAD, FACE, EYES is unremarkable use the statement "Normocephalic, atraumatic; PERRLA.", then append any noted exceptions. Delete this entire row if no findings were mentioned.}

## Looping commands

Looping commands are special instructions that tell the system to repeat a certain part of the information. This is useful when there are multiple instances of something, like a diagnosis that appears more than once. Sometimes, you also need to mark where the repeating section ends for everything to function properly.

- {Curly brackets}**: Place looping commands inside {curly brackets}.
- "Repeat" instructions, such as for diagnosis, need to be set before the diagnosis section. Example:
  - {Repeat for each diagnosis}

## Customizable template components example

The template presented below is an Assessment and Plan template, designed according to best practices. The components of the template are color-coded to distinguish the four types of data it contains:

- Labels/Headers
- Placeholders
- Instructions
- Looping Commands

{Repeat for each diagnosis}

[Diagnosis] {Do not number the diagnoses}

- Monitoring: [Briefly describe symptoms, signs, or testing to be followed as evidence of disease progression or evidence of disease regression]  
{If none specified, then delete this entire row and its header}

- Evaluation: [Briefly describe any analysis and interpretation regarding the patient's condition to determine how well the current treatment plan is working and to identify any necessary adjustments. This could include reviewing medical test results or describing the patient's response to treatment] {If none specified, then delete this entire row and its header}

- Assessment: [Briefly describe any clinical judgments and decisions based on the evaluation to address the patient's needs by planning and implementing appropriate interventions. This could include ordering new tests or procedures, discussing the patient's treatment options, or reviewing previous treatments] {If none specified, then delete this entire row and its header}

- Treatment: [Briefly describe any related treatments like lifestyle counseling, medications, or referrals. Do not include the name and location of the pharmacy] {If none specified, then delete this entire row and its header}

## Best practices when developing customizable templates

- **First, look at the note outcome with no custom templates.** In April 2025, DAX Copilot introduced specialty-specific AI enhancements designed to meet each specialty's documentation requirements to improve the overall quality of documentation, reducing the need for editing clinical summaries. Your primary specialty for DAX Copilot determines the AI used to generate your documentation summaries.
  - Review how your note outcome appears with the automatic application of your specialty-specific AI model. Then, use customizable templates to make any further improvements.
- **Craft clear AI instructions.** Ensure that you provide clear, concise, and specific instructions to the AI when creating placeholder content or guidelines.
- **Review and modify templates as needed.** Note that customizable templates utilize generative AI, making it difficult to predict how the AI will perform in every scenario.
  - It is essential to review the generated content to ensure it aligns with your expectations and make any necessary edits.
  - It is recommended to keep the instructions within brackets simple, limiting them to two "if, then" statements. However, you may experiment with more complex instructions to see if the results meet your expectations.
- **Utilize Auto-Style for Consistent Template Application.** When you set your style to auto-style, your selected style preferences will be automatically applied, including customizable templates, every time you add a new recording.
- **Manually apply for as-needed application.** If you opt not to run your style automatically and prefer to apply a customizable template manually, please note that adding a subsequent ambient recording will regenerate the note. To ensure the template takes effect, you must manually reapply your customizable template after adding another recording.
- **Avoid using a customizable template repeatedly without modifying the note content.** If the desired outcome is not achieved, consider adding another ambient recording (as long as you have not begun editing), restoring a non-structured note, or updating your customizable template before attempting to apply it again.
- **Avoid entering unnecessary prompts:** It is not necessary to include any of the following instructions, as they are integrated into our system:
  - Instructions to ask the AI not to hallucinate, such as "Do not hallucinate."
  - Instructions to request the AI to be medically relevant, such as "Use medically relevant information" or "Use formal, medically professional language for all content."
  - Instructions to ask for rewriting section content, such as "Rewrite the Assessment and Plan section with the following step-by-step directions." or "Here are the instructions you need to follow:"
  - Instructions to include note or transcript data, such as "All documented content must be supported by the transcript."

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