DAX Copilot is an AI-powered solution that automatically generates clinical documentation from in-person or telehealth patient encounters, and delivers clinical notes through Dragon® Medical One, while streamlining documentation and allowing clinicians to focus more on patient care.

Appointment Types

➢ BH Consult Psychiatric Eval follow ups.

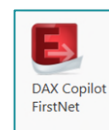➢ Integrated Behavioral Health Initial and Follow Up Appointments.

NOTE: **DAX Copilot has an optimal recording time of 45 minutes. An additional 30 minutes of recording time is available; however, this segment will be transcribed only and will not be included in the summary.**

Getting Started

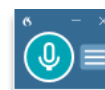**STEP 1:** Open the **PowerMic Mobile** app on the phone.

STEP 2: Open **Dax Copilot FirstNet**.

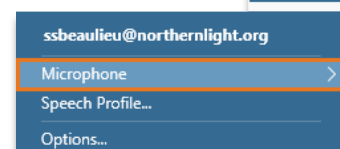**STEP 3:** Log into Dragon Medical One with network email and password.

▪ If opening for the first time, update specialty to **General**.

STEP 4: Update the microphone that will be used within the Dragon Medical One desktop app.

NLH DAX Copilot Resources

➢ Click here for educational video and flyer resources.

➢ For more information on DAX Copilot mobile device setup and resource information, click here.

Best Practices

➢ **Obtain Consent:** Prior to using DAX Copilot, it is considered best practice to obtain patient consent. A consent statement can be automatically inserted into the clinical note prior to initial use to ensure documentation compliance.

- Approved Language: **The content of this note was generated using the assistance of Artificial Intelligence (AI) technology. At the start of this visit, the patient was informed of its use and was given the opportunity to decline its use. The patient did not object.**

NOTE: **Do NOT use waivers at the end of the clinical documentation, i.e., "please excuse any typos or errors, this note was generated by dictation/AI." Creating this type of disclaimer due to error does not protect the provider. All documentation should be reviewed prior to signing.**

➢ **Maximize what DAX Copilot can do:** If a patient does not provide consent, DAX Copilot can be used after the patient interaction is over. Start a recording and recap the visit. DAX Copilot can also be used to pre-chart before a patient encounter.

➢ **Patient Introduction:** Use patient identifiers, such as name, DOB, FIN. Begin the recording with patient and/or visit identifiers, which will help find the correct summary from among other patient summaries within the PowerMic Mobile app. Include the patient's preferred pronouns and the reason for visit in the introduction to help the AI write the note.

- Example: *"John Joe, prefers he/him. He is here today for his annual physical."*

➢ **Ignore the app during the visit:** DAX Copilot listens and records during the exam. Once recording begins, there is no need to interact with the application.

➢ **Speak Clearly:** DAX Copilot understands natural language, so there isn't a need to use punctuations or robotic speech. A direct, natural conversation has the best impact on an AI-generated note.

➢ **Document for Success:** Verbalize throughout the visit to help AI distinguish the patient's diagnoses and other participating caregivers.

➢ **Use Auto Text:** Use auto text for documentation of MSE, ROS or other pertinent information.

➢ **Make a separate recording for each patient:** DAX Copilot is designed to work with one patient at a time. If more than one patient is in the room, such as a parent bringing multiple children, record a separate encounter for each patient.

➢ **Device placement:** Place the **mobile device** where DAX Copilot **can hear the conversation**. Place the device screen side up on a nearby surface, where DAX Copilot can hear the provider and the patient.

NOTE: **If the mobile device goes to sleep, DAX Copilot is still recording.**

➢ **DAX Copilot and Telehealth:** Do NOT wear a headset while using DAX Copilot in telehealth visits. DAX Copilot needs to hear both conversations. It is best practice to be in a private space with a desktop speaker.

➢ **Incoming Calls:** It is best practice to set the device to Do Not Disturb so recordings are not interrupted.

NOTE: **Incoming calls or other applications that may take over the microphone, will interrupt the recording. It is best to set the device to DO NOT DISTURB.**

➢ **Verbal Cues:** Verbalizing what you are going to do helps DAX Copilot understand what is going on in the room.

- Example: *"I'm going to listen to your heart and lungs."*
- Example: *"I'm going to renew your prescription for Zoloft 200 mg, once daily."*

For questions regarding process and/or policies, please contact your unit's Clinical Educator. For questions regarding workflow, please place a ticket to Health Informatics. For any other questions please contact the Customer Support Center at: 207-973-7728 or 1-888-827-7728.