
DAX Copilot is an AI-powered solution that creates clinical notes from patient conversations and delivers them immediately within Dragon® Medical One after conducting a patient visit.

What is DAX Copilot?

DAX Copilot uses conversational, ambient, and artificial intelligence technology to automatically document care while providers complete their normal workflow. It generates an automatic, standardized clinical summary within Dragon Medical One. This allows transfer of the finalized clinical summary directly into the note template.

Personal Device Setup

- Providers cannot access DAX Copilot until a license has been assigned and education has been completed.
- DAX Copilot is only available on iPhone devices.

STEP 1: From the App Store, download the Nuance PowerMic Mobile app.



NOTE: Do **NOT** log into the app until the QR code has been scanned below.

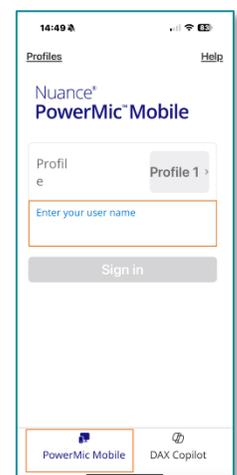
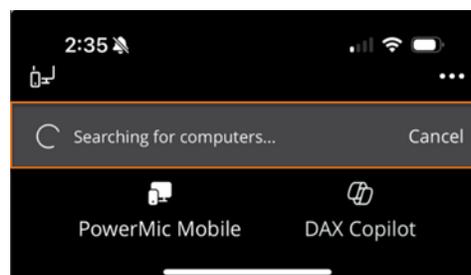
STEP 2: For personal devices only, scan the QR code below with your camera app:

NOTE: Do **NOT** use a QR code reader to scan the QR code below. This will create an error.



STEP 3: Within the app, tap the PowerMic Mobile tab.

- Tap the screen to add **network email and network password**.
- Tap **Continue**.
- A **Searching for computers** notification will appear across the mobile device. This can be disregarded.



STEP 4: Within the app, tap the **DAX Copilot** tab.

- Tap the screen to add network email and password.

STEP 5: Select **NLH** from the **Select a provider** pop-up menu.

STEP 6: A Northern Light Health window will appear.

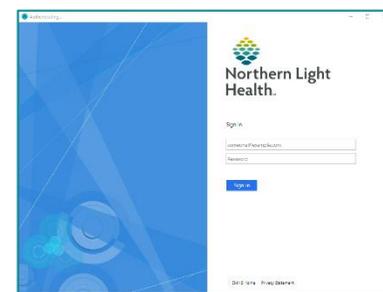
- Username: **network email**
- Password: **network password**

STEP 7: The *option* to set up Touch ID, Facial Recognition, or a Password is presented (depending on the iPhone model).

- Select sign in preference.

STEP 8: Select **Continue** when prompted **PowerMic Mobile Wants to Use “auth).com to Sign In?**

STEP 9: Click **Sign in**.



NLH Issued Device Setup

STEP 1: Select or search for **PowerMic Mobile** from the iPhone.

STEP 2: Within the app, tap the **PowerMic Mobile** tab.

- Tap the screen to add **network email** and **network password**.
- Tap **Continue**.

STEP 3: Within the app, tap **DAX Copilot** tab.

- Tap the screen to add **network email** and **network password**.

STEP 4: Select **NLH** from the **Select a provider** pop-up menu.

STEP 5: A **Northern Light Health** window will appear.

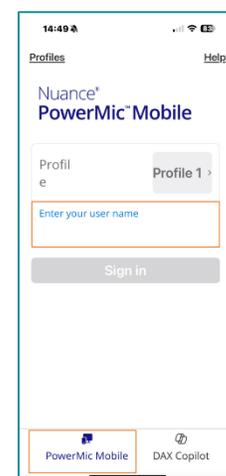
- Username: **network email**
- Password: **network password**

STEP 6: The *option* to set up Touch ID, Facial Recognition, or a Password is presented (depending on the iPhone model).

- Select sign-in preference.

STEP 7: Select **Continue** when prompted **PowerMic Mobile Wants to Use “auth).com to Sign In?**

STEP 8: Tap **Sign in**.



Logging into DAX Copilot PowerChart/FirstNet

Providers using PowerMic Mobile will use the following applications to access the Dragon Medical One desktop application to transfer Clinical Summaries.

STEP 1: From the Cerner Storefront, select **DAX Copilot PowerChart** or **DAX Copilot FirstNet**.



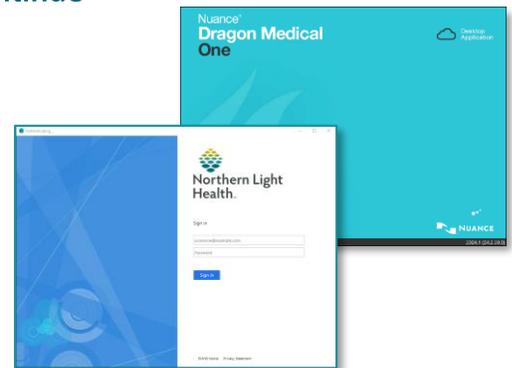
NOTE: Once logged into DAX Copilot Powerchart/FirstNet, continue using this for documentation purposes.

STEP 2: The Nuance Dragon Medical One screen will load.

- Enter the network email.
- Enter network password to sign in.

STEP 3: After successful login, the Nuance Dragon Medical One desktop application will appear.

- From the **Microphone: dropdown**, select the Microphone to use for voice commands.



NOTE: If a provider wishes to continue using a USB microphone for voice prompts or commands, this can be selected within the Microphone dropdown menu.

STEP 4: From the **Specialty: dropdown**, select the specialty that corresponds within the degree of practice PowerMic Mobile will be used.

NOTE: If a provider's specialty is not listed, select **General Medicine**.

STEP 5: Click OK.

STEP 6: A prompt will appear to log into Cerner.

- Enter Oracle Health (Cerner) credentials at login window.
- When logged in, the **Dragon Medical One (DMO)** icon will appear on the screen.



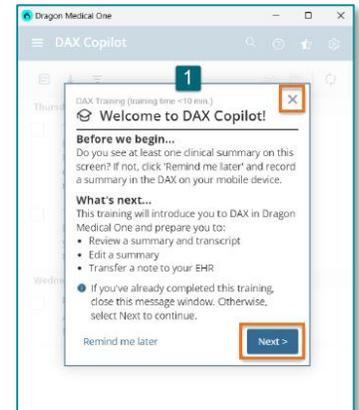
Optional DAX Copilot Education Training

NOTE: For NEW users, the Health Informatics Clinical Operations team will send DAX Copilot training videos prior to using DAX Copilot. Microsoft offers Optional live instructor led training. This is not mandatory.

➤ Upon opening DAX Copilot for the first time, in-app training content will be presented.

STEP 1: Select Next to review the material or X to come back later.

STEP 2: Select the ? button to access the in-app Training and Learning Library anytime.



Microsoft Training

STEP 1: Within the DAX Copilot app on the mobile phone, click **settings** (initials in top left corner).

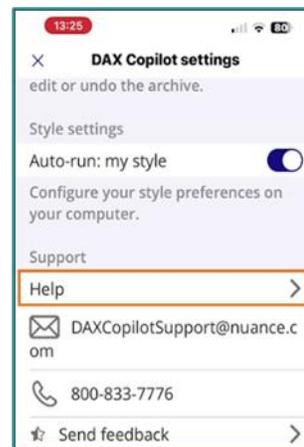
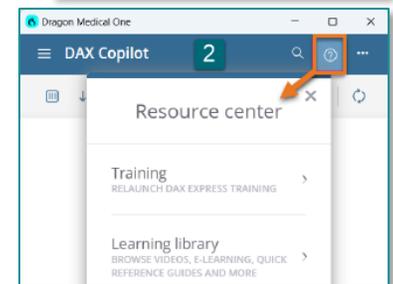
STEP 2: Tap **Help**.

STEP 3: Tap **Additional options**.

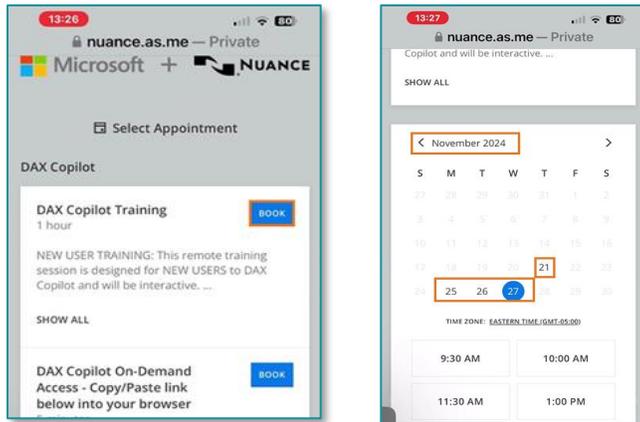
- Select **Schedule an instructor-led online training session**.
 - This option allows the provider to choose the best time that works for them.

STEP 5: Select the **Month, Day and Time** that works for provider's schedule.

STEP 6: Enter **First Name, Last Name, Phone Number and Email address**.



STEP 7: Scroll and select if either a **New User and Need Training** or if an **Existing user and Have Questions**.



STEP 8: Type **NLH** within the **Client/Facility/Hospital System** section.

STEP 9: Select **Yes** next to **Will You Have DAX Copilot Installed Prior To This Session?**

STEP 10: Select **Cerner** to **Which EHR/EMR Do You Use?**

STEP 11: Tap **Confirm Appointment** at the bottom of the screen.

NOTE: Check external **SPAM** mail for **Microsoft** training invite.

Recording a Patient Encounter

Use the Nuance PowerMic Mobile app to capture the encounter to focus on the patient.

STEP 1: From the mobile phone, open **Nuance PowerMic Mobile** app.

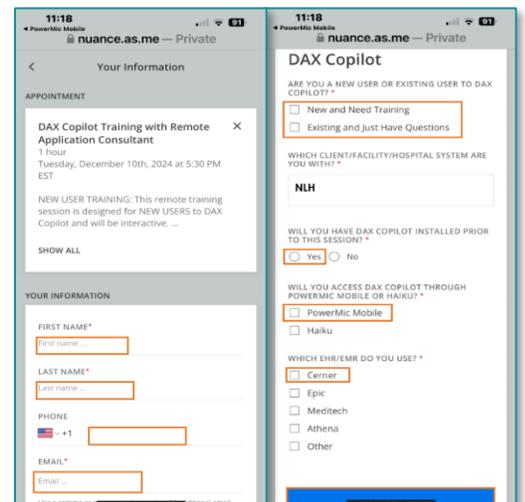
STEP 2: Within the app, open the **DAX Copilot** tab.

STEP 3: Select  to start a **new encounter**.

STEP 4: Select  to **start recording**.

STEP 5: **State patient identification verbally at the beginning of the recording.**

- Examples of patient identifiers are patient name, chief complaint, date of birth, MRN, FIN, and reason for visit.
- Consistently starting the recording with patient identifiers will help keep track of which summary corresponds to which patient when choosing from multiple summaries later.



STEP 6: Recap the visit while DAX Copilot listens.

- While using DAX Copilot, the need to use robotic language, punctuation, or commands is not needed. Include pertinent details of the patient interaction, including HPI, physical exam finding, and the plan of care that was discussed with the patient.

STEP 7: Select  again to stop the recording.

- After the recording is stopped, DAX Copilot will write a draft summary, which will be available on the mobile device and computer within seconds.
- Each summary will include a full transcript.

Transfer Summary

Completed summaries need to be transferred into the patient record within Oracle Health (Cerner).

STEP 1: Launch DAX Copilot PowerChart or DAX Copilot FirstNet.

- Log into Dragon Medical One.
- Ensure the microphone is set to the appropriate device.

STEP 2: After recording the patient visit, select the summary from the summaries list within Dragon Medical One.

- Select the **Options** menu from the DMO toolbar.

STEP 3: Select DAX Copilot from the dropdown menu to view available summaries.

STEP 4: Select a **summary** from the available **summaries list**.

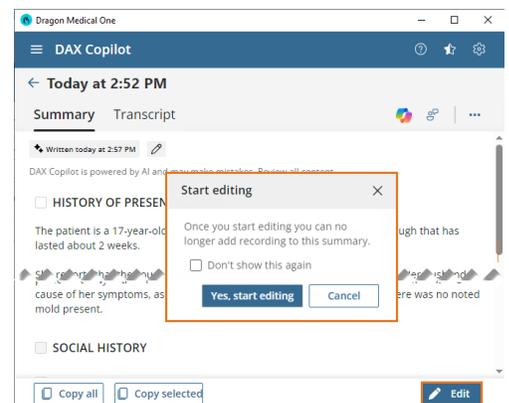
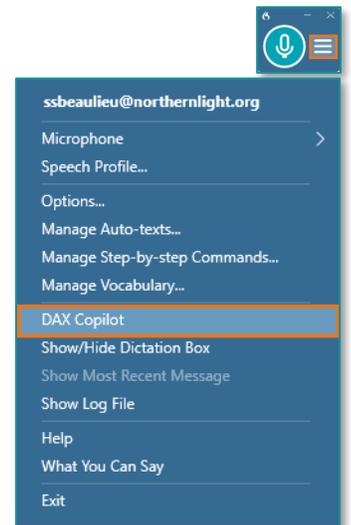
STEP 5: The Summary tab opens by default, displaying the sections of the clinical summary.

STEP 6: Review for accuracy and click **Edit** to edit text anywhere within the summary.

NOTE: Once Edit is clicked, the ability to add to the recording is no longer available.

STEP 7: Open the **dynamic documentation note** the summary will be transferred to (i.e., ED Note, Specialty Office Visit Note, etc.).

STEP 8: Place the **cursor** of where the text needs to appear within the note.



STEP 9: Activate Dragon Medical One microphone by making sure the DMO microphone is listening (is green) and use verbal commands such as “Transfer HPI,” “Transfer physical exam,” “Transfer assessment.”

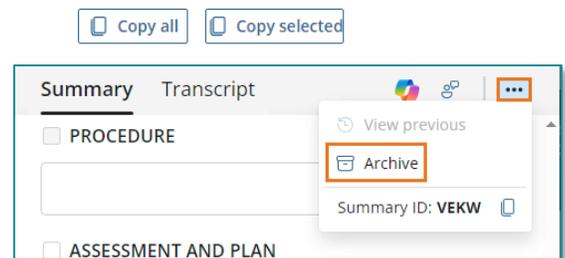
STEP 10: Review the note for accuracy and sign.

NOTE: During note review, auto text can be used before signing.

➤ Alternatively, text can also be manually copied from the summary into the dynamic documentation note by checking the box next to the headers within the Summary.

- Click **Copy Selected** at the bottom of the window.
- Place the cursor of where the text is to appear within the note **and** paste the text into the note.

➤ Once the summary is not needed, it can be archived by clicking the **ellipsis** in the top right of the summary and selecting **Archive**. This can also be done within the PowerMic Mobile app.



Note Formatting and Manually Adding Consent Statement

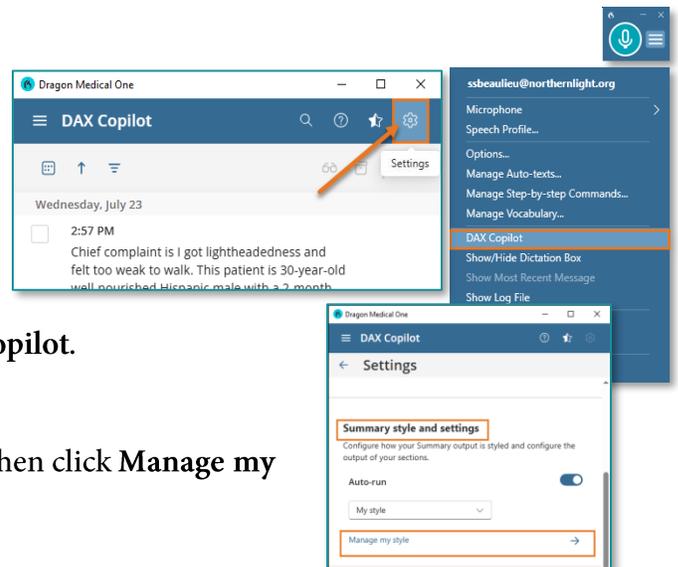
The Style wizard is available to apply preferences to notes either automatically or on-demand. Consent statements can be implemented via auto text or through automatic integration within DAX Copilot.

STEP 1: Within the DMO desktop app, select **DAX Copilot**.

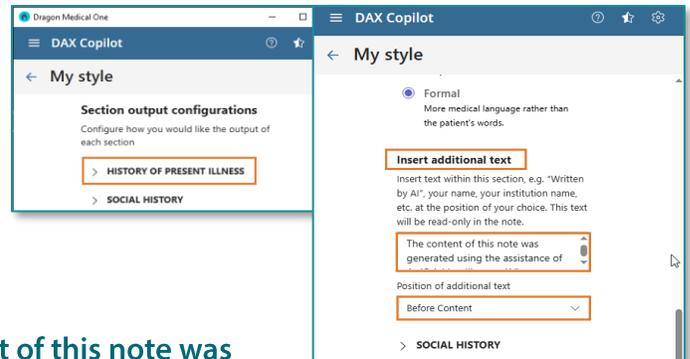
STEP 2: Navigate to **Settings**.

STEP 3: Scroll down to **Summary style and settings**, then click **Manage my style**.

STEP 4: Select note formatting options.



- STEP 5:** To add a consent statement, navigate to **Section output configurations** and click **History of Present Illness**.
- Insert consent statement within the **Insert additional text** section.
 - Select if consent will appear **Before** or **After Content**.



NOTE: **Approved consent statement: The content of this note was generated using assistance of Artificial Intelligence (AI) technology.**

STEP 6: Click Save.

NOTE: Additional formatting options are available within the HPI, Social History, Family History, etc., sections.

Best Practices

- Speak Naturally and have a genuine conversation with the patient.
- Obtain consent; do not use auto-text with written disclaimers excusing the use of transcription errors due to the use of AI.
- Obtain at least two patient identifiers at the beginning of the recording.
- Use DAX Copilot for one patient at a time when recording.
 - Instances when it may be acceptable to record two patients at once would be sibling well-child visits.
- Make sure the microphone of the mobile device is unobstructed when recording.
- Stop and restart recording any time before editing an encounter.
 - Example: When leaving the room to review test results.
- Use verbal cues to help DAX Copilot understand what is happening during the exam.
 - Example: Patient points to area of pain on the body. Remember to say, “Do you feel pain in your left knee?”
- Articulate and verbalize what DAX Copilot needs to capture.
 - This allows AI to know in which section to place the information.
 - Example: “I’m going to look in both of your ears.”
- Probe for relevant information and prompt for symptoms.

- Encourage the patient to describe what has been going on since they were last seen.
- Example: “It looks like we started you on 50 mg of Topamax since the last time you were in. Has this decreased your migraine frequency?” This will help ensure DAX Copilot will get the information into the summary while prompting the patient to talk about how they are feeling during the patient to provider interaction.

Recording Limitations

DAX Copilot has an optimal quality recording time of 45 minutes. After 45 minutes, an additional 30 minutes of recorded transcription will be captured. **The 30 minutes of transcription will not be turned into a note summary.** Maximum recording time is 75 minutes.

- When the 75-minute time has been reached, the recording will end, and the device will vibrate.
- For providers with patient visits longer than 75 minutes, a second recording may need to be started (a new encounter).
 - Please follow the patient identifier process when creating a new summary.

DAX Copilot Voice Commands for Transferring Summaries

| Command | Alternative Name |
|-------------------------------------|---|
| Transfer History of Present Illness | Transfer.... HPI History Subjective |
| Transfer Social History | Transfer.... Social Social and environmental history Psychosocial history Social background |
| Transfer Family History | Transfer.... Family Family medical history |
| Transfer Allergies | Transfer.... Allergy history Allergens Intolerances Allergies and intolerances |

| | |
|------------------------------|--|
| Transfer Medications | Transfer.... Meds Medication list |
| Transfer Immunizations | Transfer.... Vaccines Vaccinations Immunization status |
| Transfer Review of Systems | Transfer.... ROS Systems System review Systems review |
| Transfer Physical Exam | Transfer.... PE Physical Exam Physical assessment |
| Transfer Results | Transfer.... Labs Studies Imaging |
| Transfer Assessment and Plan | Transfer.... A and P Plan Plans Assessment Diagnosis Diagnoses |
| Transfer Procedure | Transfer.... Procedures Procedure performed Procedures performed |

NOTE: Say "What can I say?" to see a complete list of commands available within Dragon Medical One.

FAQs:

Q: I received a call on my cell during a patient visit and it interrupted the call. How can I stop this from happening?

A: Place your device in *Focus Mode* to prevent the recording from stopping. you will continue to receive texts or notifications, such as Imprivata.

Q: I am receiving the error “Microphone audio was lost. Please contact your administrator.”

A: Ensure your phone is not connected to another Bluetooth speaker device. DAX Copilot needs to use the iPhone speaker to listen to the provider and patient conversation or else note summaries will not be complete.

Q: I’m trying to scan the QR code during setup, but it’s not working.

A: Only scan the QR code with your iPhone camera, not with a QR code scanner. During initial setup, ensure you have not tried logging into the app first before scanning.

Q: I completed the visit with the patient, but the note summary has not appeared on the iPhone.

A: Changing the Wi-Fi connectivity from Employee Access to Guest Access (or vice-versa), can help establish a better connection.