

MICROSOFT SUPPORT • CLINICIAN GUIDE

Getting Started with Dragon/DAX Copilot for Epic

Capture patient conversations and turn them into clinical notes—right inside Epic.



OVERVIEW

What is DAX Copilot?

DAX Copilot uses conversational, ambient, and generative AI to document care within your patient workflow. It listens during the encounter, generates a standardized clinical summary in your preferred format, and delivers it directly to your Epic note.

Ambient listening

Captures your natural conversation with the patient—no robotic commands.

Generative AI notes

Produces structured summaries you simply review, edit, and approve.

Built into Epic

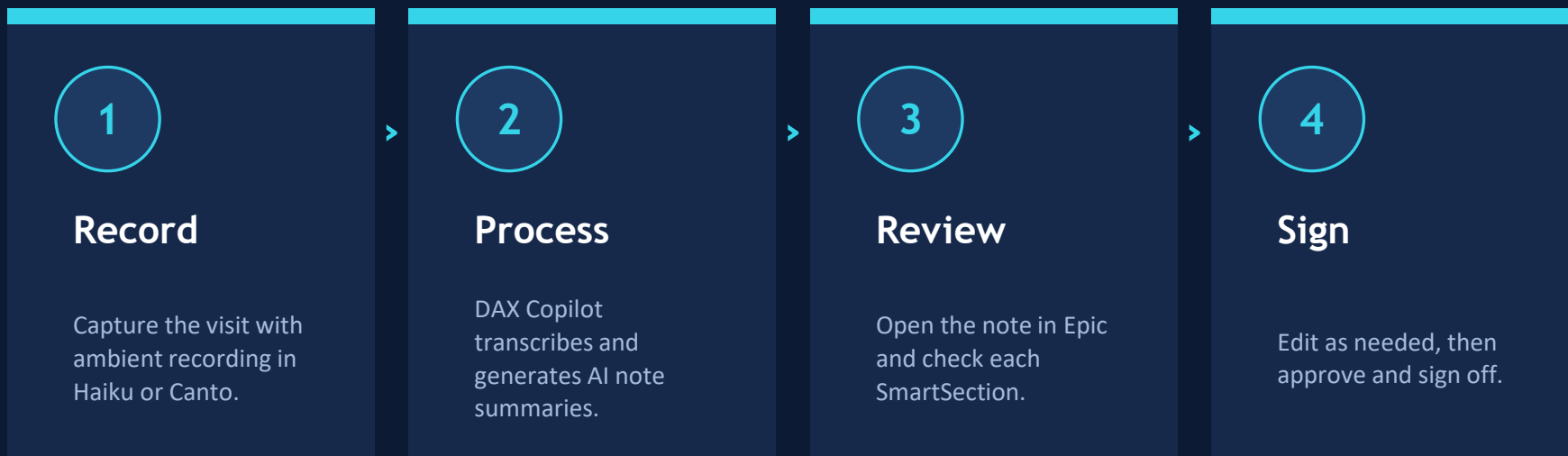
Works in Epic Hyperdrive and the Haiku and Canto mobile apps.



THE WORKFLOW

How it works

From the exam room to a signed note in four steps.



BEFORE YOU BEGIN

Add DAX Copilot SmartSections

To see the AI summaries DAX Copilot generates, your Epic note must include one or more DAX Copilot SmartSections. Add them to a personal SmartPhrase or template using these dot phrases:

.ambientconsent

DAX Consent — required in every template

.hpisec

History of Present Illness (HPI)

.apsec

Assessment & Plan

.pesec

Physical Exam

.resultsec

Results

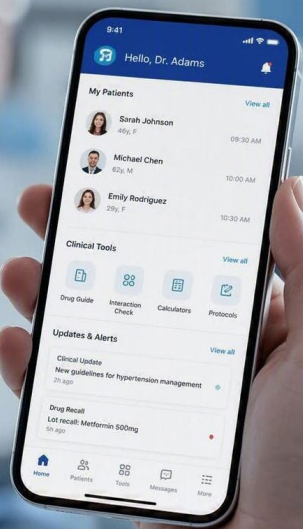
.pvssec

Patient Visit Summary (for AVS)

Tip Copy your preferred templates and add these SmartSections so each section auto-populates.

STEP 1

Record your first encounter



1

Open Epic Haiku or Canto on your mobile device and select a patient.

2

Tap DAX Copilot at the bottom of the screen.

3

Confirm patient consent per your organization's guidelines.

4

Tap the ambient recording button to start; tap again to stop.

Tip Start with key identifiers—name, age, gender, pronoun, and reason for visit.

STEP 2

Open and review your note in Epic

- 1 When processing finishes** — An alert appears in Hyperdrive—select Go to Note to open the Notes activity.
- 2 Find a SmartSection** — Locate a DAX Copilot SmartSection in the note, such as HPI or A&P.
- 3 Launch DAX Copilot** — Select DAX Copilot from the Actions menu to open the embedded window in the EHR.
- 4 Review and refine** — Personalize the format and use AI tools to make your summary accurate and complete.

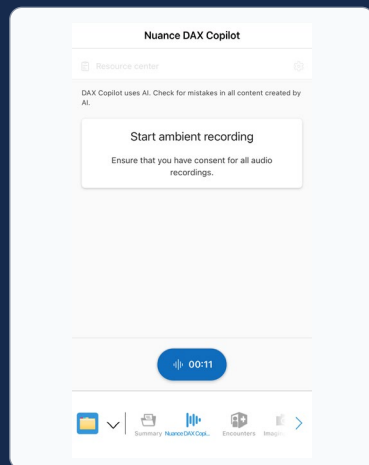
Tip SmartSections are easy to spot by their colored heading, icon, and highlighted summary text.

How it appears in Haiku and Epic

Record on mobile, then review the generated note in Epic before signing.

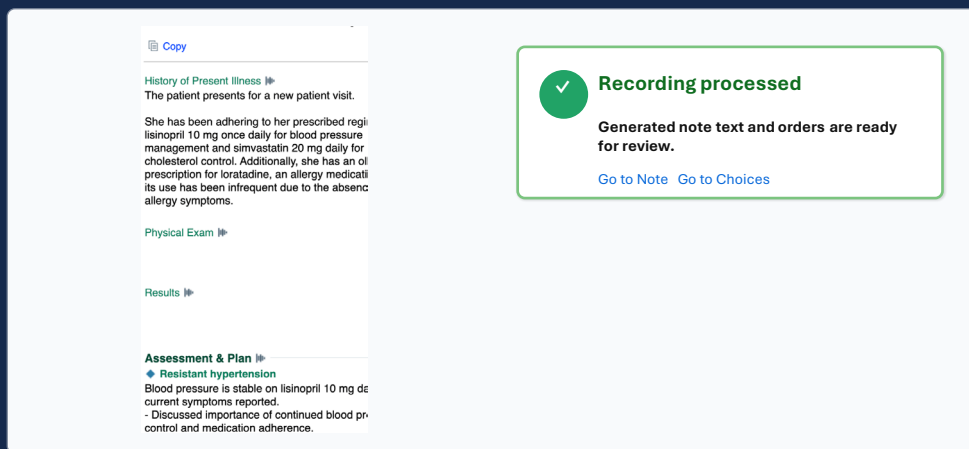
1 Haiku: capture the encounter

Tap DAX Copilot, confirm consent, and start/stop ambient recording.



2 Epic: review the generated note

Use the processing alert to jump into the note, then validate each SmartSection before signing.



Key takeaways

Haiku/Canto is the capture point • Epic is the review and signing point • AI-generated content must be checked before approval

GET ORIENTED

Navigate the session tabs

Use the Session tabs to move through a patient session inside DAX Copilot.

Timeline

The default view when you open DAX Copilot—navigate the full patient session.

Note

The clinical summary of your patient visit, ready to review and edit.

Orders

Directives for medications, labs, x-rays, imaging, and procedures.

Transcript

A written version of the conversation between you and the patient.

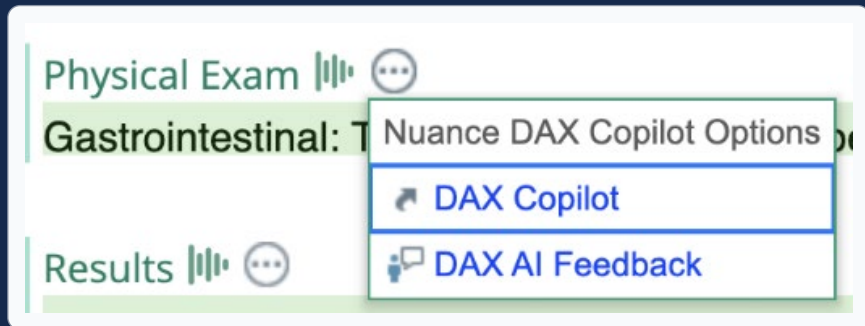
Access settings, help and resources, and split view from the upper-right corner of the screen.

Access DAX Copilot options in a note

Select the three-dots-in-a-circle icon on a DAX Copilot SmartSection to open the menu, then choose an option.

1 Open the options menu

In an Epic note, select the three-dots-in-a-circle icon on a DAX Copilot SmartSection to open Nuance DAX Copilot Options.



- **DAX Copilot** → opens the Activity tab in Epic
- **DAX AI Feedback** → sends feedback to Microsoft

2 Send feedback to Microsoft

Choosing DAX AI Feedback opens a short form—rate the AI summary, add optional comments, and select Submit.

A screenshot of the 'Submit AI summary feedback' form. The form has a title 'Submit AI summary feedback'. Below the title, there is a section 'How's this AI summary?' with three radio button options: 'Looks right', 'Needs improvement', and 'Offensive, inappropriate, or biased'. Below this, there is a section 'Comments (optional)' with a text input field labeled 'Enter comments'. At the bottom, there is a 'Submit' button. A small note at the bottom states: 'Your feedback will be used for product improvements in accordance with customer agreements.'

Good to know

Three dots in a circle opens the menu • DAX Copilot opens the Activity tab • DAX AI Feedback goes directly to Microsoft

Recording best practices

● Get consent

Always obtain patient and any care companions, for every conversation, every time

● One patient at a time

Make a separate recording for each patient encounter.

● Place your device well

Position it close by with the microphone unobstructed.

● Start with identifiers

Open with at least two identifiers—name, MRN, or DOB.

● Speak naturally

Just talk through the visit—no robotic commands needed.

● Use verbal cues

State your actions, exam findings, and laterality out loud.

Watch the clock A banner appears at 90 minutes (optimal limit) and again at 120 minutes, when recording stops.

Build confidence and keep improving

Set your specialty — Specialty mapping gives you the best AI output for your notes.

Pre-chart anytime — Create monologue recordings before or after the visit—each adds to the note.

Personalize your notes — Configure note styles and customizable templates as you build confidence.

Keep learning — Explore the DAX Copilot for Epic learning library for guides and resources.

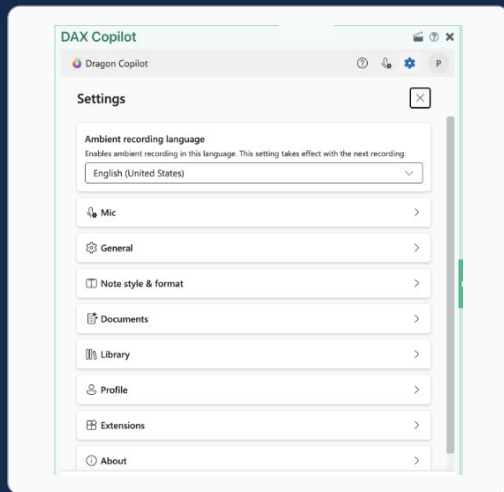
Spend less time documenting—and more time with your patients.

Make DAX Copilot your own

Tune settings, specialty, and note style so every AI-generated note fits the way you work.

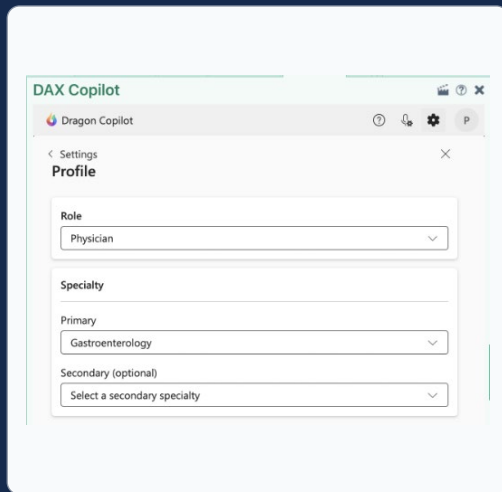
1 Open Settings

Reach recording language, mic, note style, and profile from a single hub.



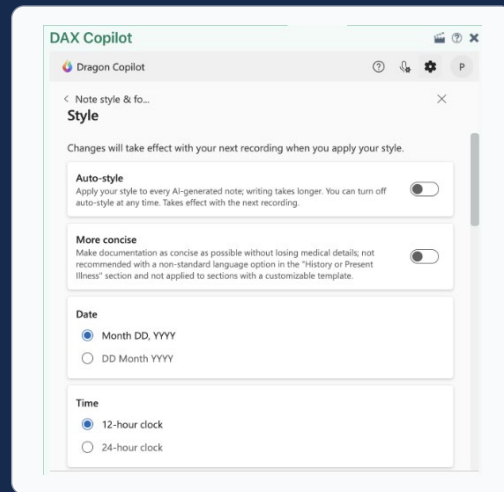
2 Set your specialty

Choose your role and primary specialty so notes are tuned to your field.



3 Tune note style

Choose how you want the output of your notes to look for each section.



Good to know

All personalization lives under Settings • Changes take effect with your next recording • Revisit anytime as you build confidence