Read the AI Summary and request blocks

Purpose: Understand the call quickly and see what Phone Copilot already handled.

Steps

1. Look at the right panel.
2. At the top, review Patient Info such as DOB, insurance ID, patient ID, email, and phone.
3. Read the Summary card to learn the purpose and outcome of the call.
4. Expand Request cards such as Need Appointment or Confirm Appointment to see the structured details.
5. Use the copy icons to copy any line if needed.

What you will see on this page

- A short description of the call length and outcome.
- Structured fields like reason, provider, and resolution.

Tips and good practice

- Start here before you listen to audio. It saves time.

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