

HealthCare Assistant

Ticket Processing, Document Validation & Notification Workflow

Current Challenges

- Manual ticket retrieval
- No automated document validation
- Missing/incorrect documents not detected
- Manual compliance checks
- Delayed communication
- Multiple systems involved

Capabilities

- Automated ticket retrieval from Jira
- Fast document extraction from SharePoint
- End-to-end medical renewal document validation
- Accurate compliance and policy checks
- Detection of missing or incorrect documents
- AI-generated validation summaries
- Automated email notifications via Outlook

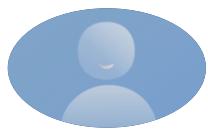
Business Impact

- Efficiency
- Accuracy
- Compliance
- Collaboration
- Auditability
- Faster Resolution

Key User(s)

- Support Team (L1 / L2 / L3 Agents).
- Compliance Officers / Quality Review Team.
- Healthcare Vendors / External Document Submitters.
- System Administrators (Jira / SharePoint / Outlook).
- Project Managers & Operational Leads.

HealthCare Assistant-Process Flow



User

Request Ticket Details



JIRA

Fetch Details



Agent

Validate Document



Email Service

Return Ticket Details

Validate Document

Request Missing Documents

Request Recipient's Email

Send Email Summary

HealthCare Assistant-Process Flow...



Hello, I'm Health Renewal policy Assistant
simplifies ticket management by fetching Jira
details, validating linked documents, and sending
notification emails, ensuring accurate information
and efficient follow-up.



3 minutes ago

Fetch KAR-5

A minute ago

HealthCare Assistant-Process Flow...



Here are the details for **KAR-5** from your Jira instance:

Ticket Found: KAR-5

Summary:

CAR Builders Inc. - W51002-01012025 - Renewal - IMPL-224135

Status:

OPEN

Priority:

High

Assignee:

Chandrika Cheerla

Created On:

2025-11-14

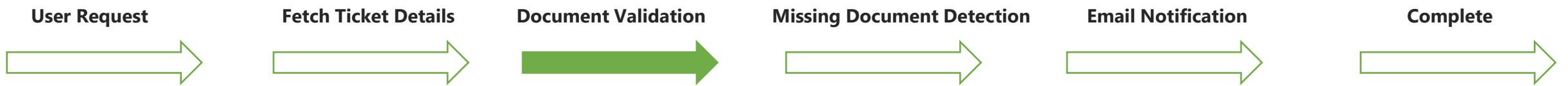
Description (Highlights):

- No benefit change comments
- Multiple implementation updates logged between 10/01 and 10/11
- Custom HPCC code required
- Group name changed from *Edwards Companies* to *Multicon Builders Inc.*
- Domestic partner coverage included
- No ID cards needed
- Enrollment file date TBD

Other Notes:

- ASO Dental rate guaranteed until 12/31/2025
- Custom Blue Card Prefix: **EDW**
- Group has Hinged Health
- Opt-In: 2025 CGM ABC

HealthCare Assistant-Process Flow...



Validate KAR-5

A minute ago

HealthCare Assistant-Process Flow...



Document Validation Results

Expected Documents List

- Required – Client Intent Letter (CIL)
- Required – CEP
- Required – ASIS
- Selections Report (if applicable)
- Any additional required renewal documents

Retrieved Documents List

- Required – Anthem KEY 2025 Client Intent Letter (CIL) (Signed) ¹
- Required – CEP – OH_KEY Woodworking Co. W0CG 01/01/2025 ²
- Required – CEP – OH_KEY Woodworking Co. W0CH 01/01/2025 ³
- Required – ASIS – IMPL-226636 ⁴
- Required – CEP – OH_PEN Corporation 8R9X 01/01/2025 ⁵
- Required – Signed – 2025 Client Intent Letter ⁶
- Not required – KEY Woodworking H87K Selections Report ⁷
- Not required – OH PEN Corporation 2022-01 ⁸

Validation Table

Document Name	Retrieved?	Status
Client Intent Letter (CIL)	Yes	Matched
CEP	Yes	Matched
ASIS	Yes	Matched
Selections Report	Yes	Not Required
Additional Renewal Docs	Yes	Matched

Matched Details Extracted From Retrieved Files

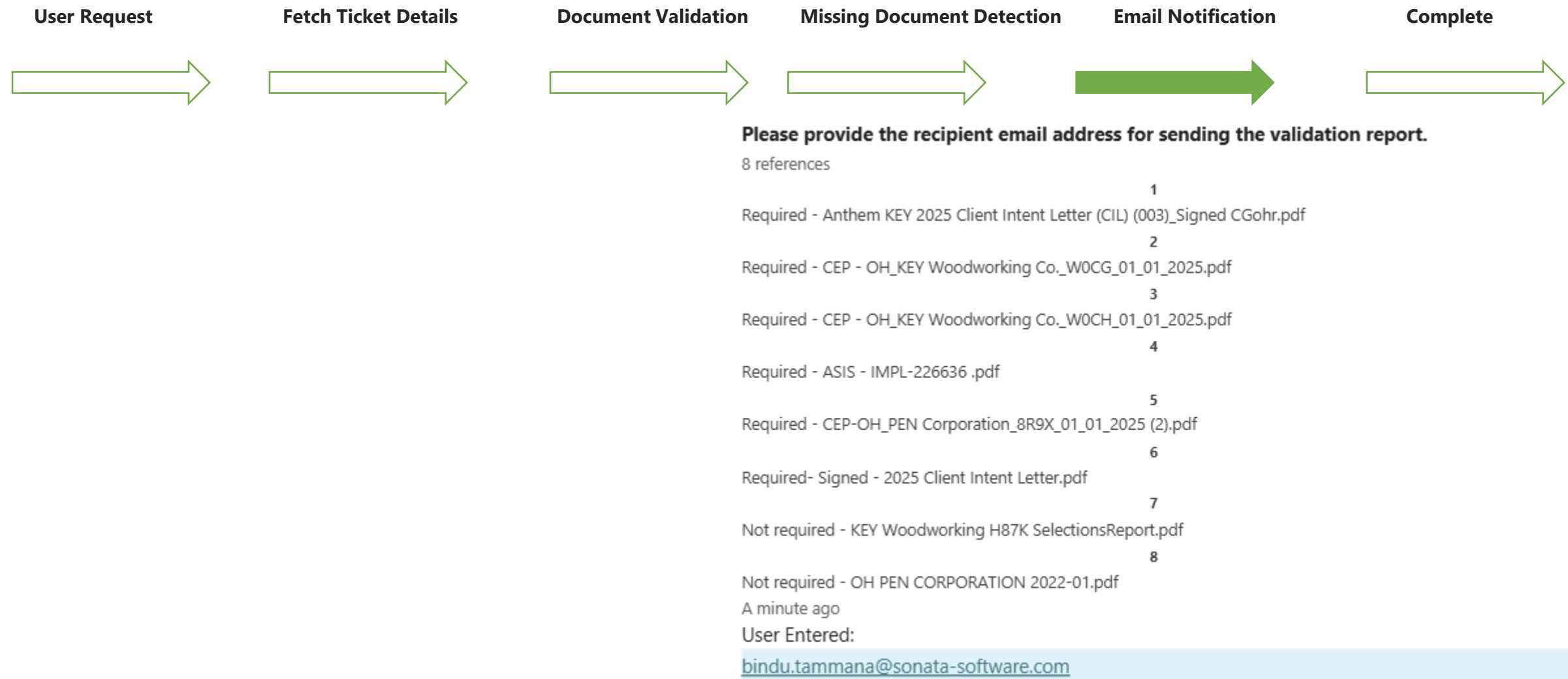
- Renewal confirmation and approval captured in signed CIL ¹
- ABC changes accepted and deductible modifications documented in CEP ²
- Custom HPCC and program additions documented in ASIS ⁴
- Additional CEP entries confirm benefit change approvals ⁵

Missing Documents

- None

Final Summary and Next Actions All required renewal documents for ticket KAR-5 have been successfully retrieved and validated. No further document action is required.

HealthCare Assistant-Process Flow...



HealthCare Assistant-Process Flow...



Cheerla Chandrika

To: Tamanna Bindu Swara Deepika



Wed 12/10/2025 5:39 PM

Dear User,

We noticed that several required documents are missing .

Missing Documents:

- QLI Document
- HPCC Code Update Document
- Exception Request Document
- Program Summary Document
- Custom Plan Design Document

Please upload them at the earliest so that we can continue processing your request.

Thank you,
Sales Team

HealthCare Assistant Agent-Use case

Steps	Capability	Description	Involved Component
User Request	User initiates ticket validation	User submits a Ticket ID	User, Copilot Interface
Fetch Ticket Details	Jira Assistant retrieves ticket information	Retrieves requester info, ticket summary, description, category, and status using Jira API.	Jira Assistant, Jira Connector
Document Validation	AI-based document comparison and verification	Compares required vs submitted files, validates pricing, contract details, and checks for mismatches.	Document Validation Assistant, GPT-5.1
Missing Docs Check	Identify missing or incorrect documents	Highlights missing, expired, mismatched, or incorrect documents for the ticket.	Validation Logic, SharePoint
Email Notification	Automated email trigger	Sends structured email with missing document details to the user/team via Outlook connector.	Email Copilot Agent, Outlook
Completed	Close the validation workflow	Confirms validation completion and ends the workflow after email notification is sent.	All Agents (Orchestrator)

Validation Approach

Test Set

- A Test Set contains multiple prompts and expected behaviors.
- Each test case checks the agent's response using metrics such as accuracy, relevance, completeness, and tool invocation correctness.

Evaluation Metrics:

- Response Match
- Topic Match
- Generative Answer Validation
- Execution Status

How It Works

A. Test Engine Execution

Each question is sent to the agent, and the response is captured.

B. Evaluation Logic

Responses undergo semantic similarity checks, relevance scoring, coverage assessment, and policy compliance analysis.

C. Scoring & Reporting

- Metrics are aggregated to generate Pass Rate %.
- Detailed results appear in the Evaluation dashboard.

Validation Results

JIRA Assistant

Evaluation > Evaluation results

Name	Pass rate	Questions	Date	Test Set	Created by	Status
Evaluate Jira Assistant	71%	7	5:27 AM today (UTC)	Evaluate Jira Assis...	Cheerla Chandrika	 Completed
Evaluate Jira Assistant	100%	10	7:10 AM Thursday (UTC)	Evaluate Jira Assis...	Cheerla Chandrika	 Completed

Document Validation Assistant

Evaluation > Evaluation results

Name	Pass rate	Questions	Date	Test Set	Created by	Status
Evaluate Document Validation Assistant	72%	39	9:21 AM today (UTC)	Evaluate Docume...	Cheerla Chandrika	 Completed
Evaluate Document Validation Assistant	70%	10	9:00 AM today (UTC)	Evaluate Docume...	Cheerla Chandrika	 Completed
Evaluate Document Validation Assistant	100%	3	12:26 PM yesterday (UTC)	Evaluate Docume...	Cheerla Chandrika	 Completed

Validation Results

Email Assistant

Evaluation > Evaluation results

Name	Pass rate	Questions	Date	Test Set	Created by	Status
Evaluate Email Assistant	71%	7	5:32 AM today (UTC)	Evaluate Email Ass...	Cheerla Chandrika	 Completed
Evaluate Email Assistant	88%	50	8:48 AM Thursday (UTC)	Evaluate Email Ass...	Cheerla Chandrika	 Completed

Orchestration Flow-Result

Evaluation > Evaluation results

Name	Pass rate	Questions	Date	Test Set	Created by	Status
Evaluate Health Renewal policy Assistant	90%	10	11:33 AM today (UTC)	Evaluate Health R...	Cheerla Chandrika	 Completed
Evaluate Health Renewal policy Assistant	68%	50	9:39 AM today (UTC)	Evaluate Health R...	Cheerla Chandrika	 Completed