

# 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

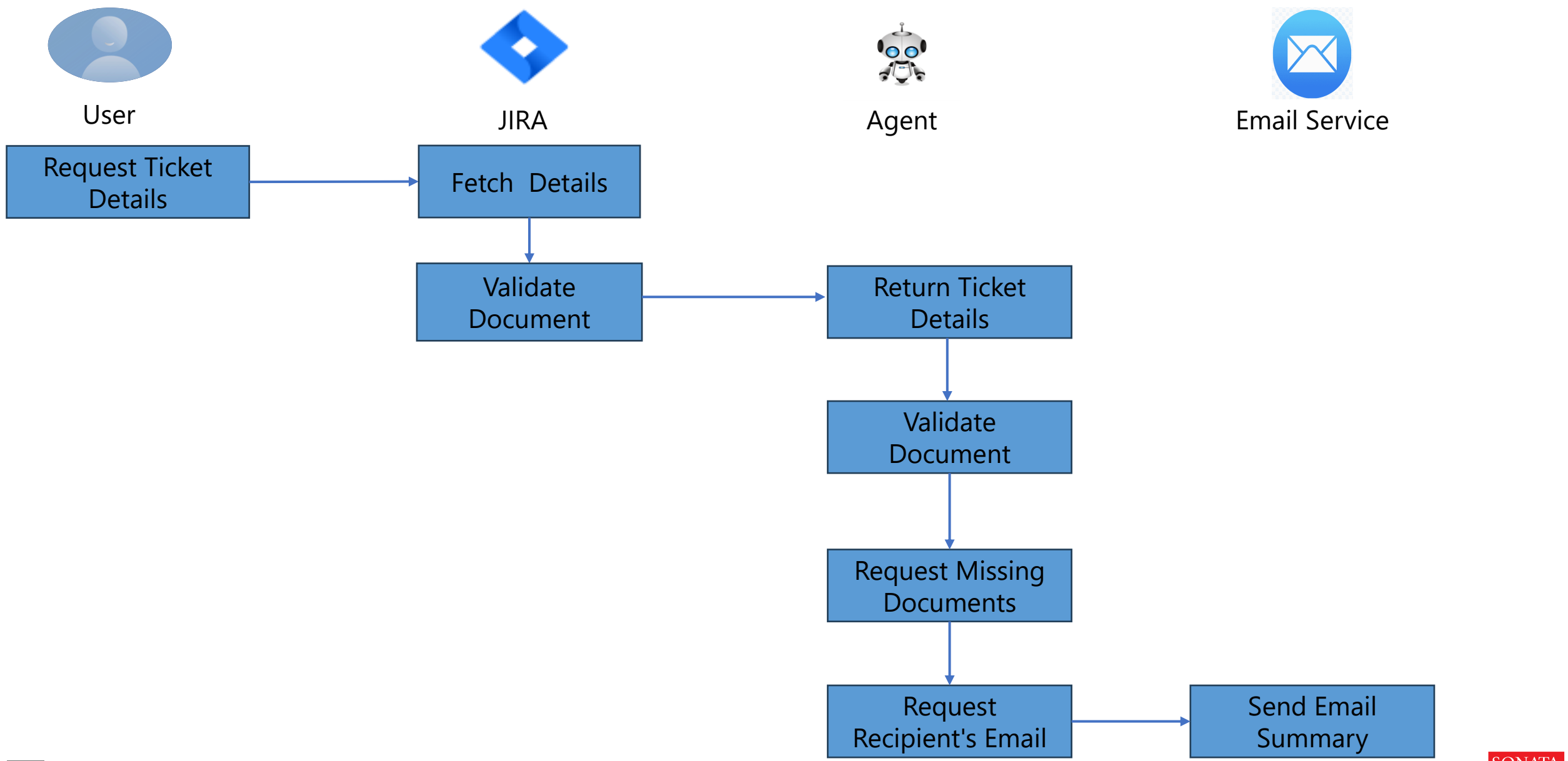
### Business Impact

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

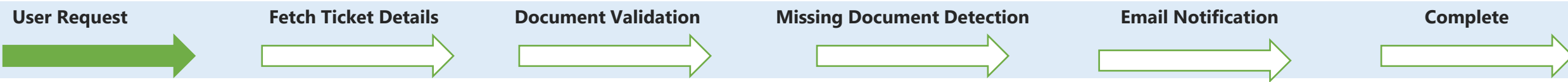
### Key User(s)

- 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



# 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.

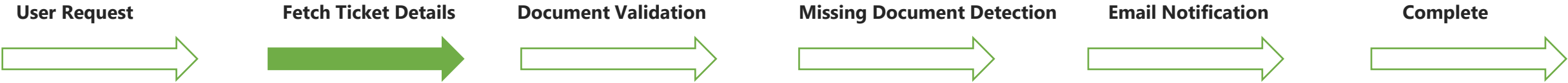
👍 👎

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

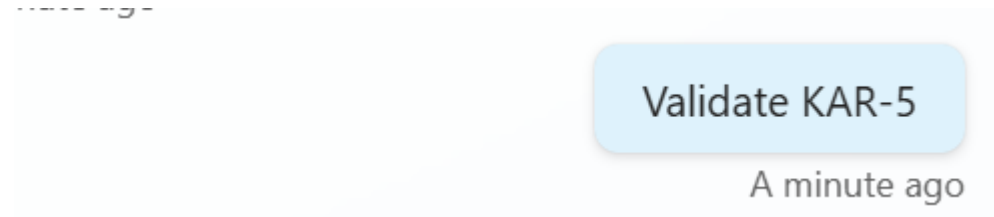
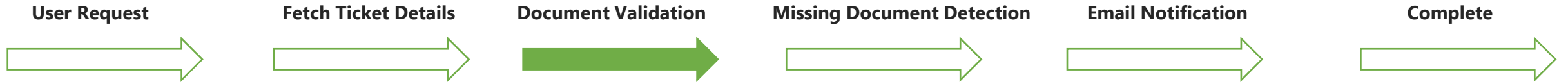
**Description (Highlights):**

- 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...



# 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) <sup>1</sup>
- Required – CEP – OH\_KEY Woodworking Co. W0CG 01/01/2025 <sup>2</sup>
- Required – CEP – OH\_KEY Woodworking Co. W0CH 01/01/2025 <sup>3</sup>
- Required – ASIS – IMPL-226636 <sup>4</sup>
- Required – CEP – OH\_PEN Corporation 8R9X 01/01/2025 <sup>5</sup>
- Required – Signed – 2025 Client Intent Letter <sup>6</sup>
- Not required – KEY Woodworking H87K Selections Report <sup>7</sup>
- Not required – OH PEN Corporation 2022-01 <sup>8</sup>

**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**

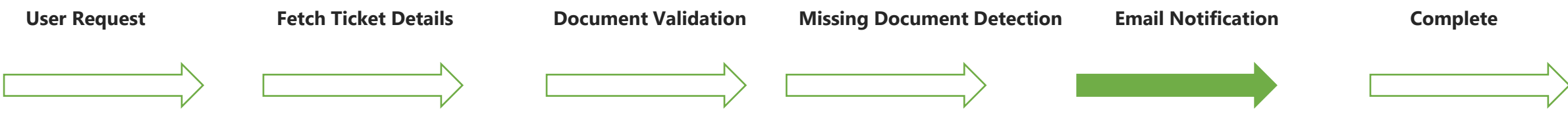
- Renewal confirmation and approval captured in signed CIL <sup>1</sup>
- ABC changes accepted and deductible modifications documented in CEP <sup>2</sup>
- Custom HPCC and program additions documented in ASIS <sup>4</sup>
- Additional CEP entries confirm benefit change approvals <sup>3</sup>

**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...



**Please provide the recipient email address for sending the validation report.**

8 references

- 1  
Required - Anthem KEY 2025 Client Intent Letter (CIL) (003)\_Signed CGohr.pdf
- 2  
Required - CEP - OH\_KEY Woodworking Co.\_W0CG\_01\_01\_2025.pdf
- 3  
Required - CEP - OH\_KEY Woodworking Co.\_W0CH\_01\_01\_2025.pdf
- 4  
Required - ASIS - IMPL-226636 .pdf
- 5  
Required - CEP-OH\_PEN Corporation\_8R9X\_01\_01\_2025 (2).pdf
- 6  
Required- Signed - 2025 Client Intent Letter.pdf
- 7  
Not required - KEY Woodworking H87K SelectionsReport.pdf
- 8  
Not required - OH PEN CORPORATION 2022-01.pdf

A minute ago

User Entered:

[bindu.tammana@sonata-software.com](mailto:bindu.tammana@sonata-software.com)

# HealthCare Assistant-Process Flow...



CC

Cheerla Chandrika

To: Tammana 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% <div><div></div></div>	7	5:27 AM today (UTC)	<button>Evaluate Jira Assis...</button>	Cheerla Chandrika	✔ Completed
Evaluate Jira Assistant	100% <div><div></div></div>	10	7:10 AM Thursday (UTC)	<button>Evaluate Jira Assis...</button>	Cheerla Chandrika	✔ Completed

## Document Validation Assistant

Evaluation > Evaluation results

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

# Validation Results

## Email Assistant

Evaluation > Evaluation results

Name	Pass rate	Questions	Date	Test Set	Created by	Status
Evaluate Email Assistant	71% <div><div></div><div></div></div>	7	5:32 AM today (UTC)	<button>Evaluate Email Ass...</button>	Cheerla Chandrika	✔ Completed
Evaluate Email Assistant	88% <div><div></div><div></div></div>	50	8:48 AM Thursday (UTC)	<button>Evaluate Email Ass...</button>	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% <div><div></div><div></div></div>	10	11:33 AM today (UTC)	<button>Evaluate Health R...</button>	Cheerla Chandrika	✔ Completed
Evaluate Health Renewal policy Assistant	68% <div><div></div><div></div></div>	50	9:39 AM today (UTC)	<button>Evaluate Health R...</button>	Cheerla Chandrika	✔ Completed