

WHITEPAPER

Everything healthcare leaders should know about AI Agents

Healthcare industry challenges are relentless. Rising costs, workforce shortages, and demands for technological innovation push health systems to the brink. Internal resources can't keep up. And patients are the ones caught in the middle.

Healthcare leaders are seeking answers – and fast. For the first time, [medical group leaders](#) rank AI above EHR usability as the top technological priority in 2025. Among the emerging solutions in this shift is the use of [AI Agents](#).

Health systems are already realizing how AI Agents can enhance patient experiences and gain a competitive advantage. So, what exactly are AI Agents, and how are they different from traditional AI automation?

This white paper provides a clear, practical foundation: everything healthcare leaders should know about AI Agents, from how they streamline workflows and ease administrative burden to their role in patient engagement and financial performance. Discover both the opportunities and security considerations associated with adopting AI Agents.

What is an AI Agent anyway?

Health systems have poured millions into modernizing data with EHRs. However, EHRs alone cannot carry the momentum. And while technology vendors pitch endless "AI solutions," [AI Agents](#) deliver real results. AI Agents take the stress out of patient access, care quality, risk management, and patient retention.

AI Agents act as digital workers that can think, learn, and adapt – not just follow pre-programmed rules – to free staff for higher-value work.

AI Agents handle real-world situations and take action, such as scheduling follow-up appointments or adjusting clinician workflows to close care gaps without human intervention.



“By investing in intelligent automation, we are removing the burden on the patient to determine when they need to be seen for care. At the same time, we are enabling the provider to take a more proactive approach with each patient,” says Kristen Guillaume, CIO, [NKC Health](#).

Here are five things you should know about AI Agents:

1. **More than automation.** AI Agents don’t just automate; they intelligently adapt workflows to meet real-time needs.
2. **Your digital workforce.** AI Agents work alongside human teams, complementing but not replacing clinical and administrative expertise.
3. **Scale smarter.** By taking on repetitive tasks, AI Agents free up people and resources, allowing organizations to grow without adding headcount.
4. **ROI you can measure.** With built-in tracking, AI Agents demonstrate a clear financial impact and adaptability, enabling continuous improvement.
5. **Safe by design.** With built-in patient data protection, safety standards, and compliance, you can deploy AI Agents without compromising data security.

AI Agents and the future of data security

As AI expands in healthcare settings, data security and protection become a top priority.

Specifically, organizations are looking for ways to [protect patient data](#) while modernizing their digital tools. Here are common AI scenarios to further explore:

- Data privacy and security breaches
- Bias and fairness
- Transparency and explainability
- Security vulnerabilities



An AI Agent accesses only the minimum necessary information required to complete its specific, assigned task for a particular patient at that precise moment. It can't browse the database freely or access data outside the scope of its immediate job.

AI safety checklist for CIOs

AI Agents work when AI safeguards protect patient data. Here's a checklist your CIO should use to assess vendor [AI safety](#) and security.

- ✓ **HIPAA compliance and beyond:** Does the vendor follow HIPAA regulations?
- ✓ **Zero-retention policy:** Do vendor agreements enforce immediate deletion of any data processed, ensuring nothing persists after task completion?
- ✓ **Encryption:** Are strong encryption methods used for data in transit and at rest?
- ✓ **Strict access controls:** Do users and systems only have access to the data and functions essential for their role?
- ✓ **Data minimization:** Is only the minimum necessary information used for each task?
- ✓ **Bias mitigation:** Does the vendor rigorously test across diverse patient samples to monitor the presence of bias?
- ✓ **Explainability and hallucination prevention:** Do AI systems provide quoted, traceable evidence for their findings? Is there a human review to validate outputs?
- ✓ **Safety guardrails:** Are AI guardrails in use to assess outputs for faithfulness, relevance, and harmful content?
- ✓ **Secure development and operations:** What are the secure coding standards?



AI Agents vs. automation in healthcare

Data protection is only part of the story. To understand the true value of AI Agents, we need to see how they evolve beyond traditional automation. [Automation](#) works best for simple, repetitive, and predictable tasks that need to be performed with speed and accuracy. For example:

- **Appointment and PCP outreach:** Automated messages remind patients of upcoming appointments or help them get assigned to a primary care doctor.
- **Care gap outreach:** Automated care gap processes can identify patients who are behind on specific care, such as breast cancer screenings, and send automatic reminders to help close those gaps.

AI automations are quick and reliable. However, what distinguishes AI Agents from automation is their decision-making capabilities and the ability to adapt to changing circumstances.

Traditional [automation](#) is like an assembly line robot: efficient but inflexible. AI Agents function more like trained staff members. AI Agents:

- Understand the "why" behind tasks, not just the "what"
- Can handle unexpected situations and exceptions
- Coordinate across departments and systems
- Maintain performance 24/7 without fatigue
- Multiply capacity instantly and work in different languages, eliminating both staffing and language barriers



AI Agents and human staff align to power the future of healthcare

AI Agents can take full ownership of repetitive tasks in “autopilot” mode, handling appointment reminders, processing documents, verifying insurance, and more without daily intervention.

For more intricate workflows, however, AI Agents can assist human staff to perform tasks more quickly and accurately. An example is Notable’s AI assistant, Sidekick, which acts as a “copilot,” helping staff sort faxes, generate prior authorization packets, and extract insights from complex data sets. These tasks require human review, but Sidekick accelerates the process, reduces manual work, and improves accuracy, empowering staff to work faster and smarter.

Together, [humans and AI Agents](#) create a flexible, scalable healthcare workforce. By automating where possible and collaborating where necessary, health systems can meet growing demands without growing headcount, paving the way for a more sustainable and patient-focused future.

The platform advantage for AI Agents

When AI Agents act as a digital extension of your team, they take on routine tasks to boost accuracy, efficiency, and task completion. However, AI Agents only transform care at scale when orchestrated through one unified platform.

The [platform advantage](#) allows AI Agents to interact, share data, and automate end-to-end workflows across departments. Each Agent is specialized but designed to integrate seamlessly with others, creating a flexible, intelligent operating model for healthcare organizations.



The financial upside with AI Agents: Montage Health

While traditional automation breaks when processes change, AI Agents adapt. Take [Montage Health](#), for example. By leveraging an AI platform powered by AI Agents, the organization is unlocking millions in financial outcomes while prioritizing quality improvement.

Early results show an estimated \$2 million in annual gross value from revenue capture and cost savings, and the potential is only growing. Here's how the organization focused its AI efforts:

Patient satisfaction

The first project was to unify the system's patient experience through registration and intake automation. No-show rates dropped by 11% with automated appointment reminders and the ability to confirm or cancel digitally. Their patient-centered approach has achieved a 96.8% patient satisfaction rating.

Care gap closure

In addition to registration and intake, Montage Health targeted five care gap categories for AI support: cervical cancer, colon cancer, diabetic eye exam, breast cancer, and hypertension.

AI has reviewed over 17,000 charts, providing information to patients for follow-up and scheduling appointments for their screenings to close the gap. The results include a 14.6% total care gap closure rate.

"We really are improving the lives of the patients and our community," Meg Dingae, Director of Human Experience, says. "From a financial perspective, this is helping our medical group meet its quality metrics. And there's no way our medical group had time to manually scrub the charts of 17,000 patients."



Revenue capture

Streamlining the payment process for patients has led to more efficient collections, resulting in a 2.8% increase in point-of-service cash collections.

Access and equity

AI Agents aid accessibility and equity, offering Spanish outreaches and reducing manual burden related to Montage referrals and scheduling. The AI partnership also freed up the equivalent of 13 full-time employees.

Montage Health demonstrates how AI Agents enhance team impact by automating once-manual tasks. With the right strategy, any health system can apply these lessons to achieve similar gains.

The clear case for AI Agents in healthcare

The digital tools that once drove technological transformation have reached their limits. EHRs, traditional data systems, and point solutions laid the groundwork, but they cannot propel organizations into an era of innovation. Health systems need more than static automation. AI Agents, unified by a single platform, are a new kind of digital partner: elastic, intelligent tools that balance overburdened systems and restore financial health.

AI Agents turn today's challenges into tangible opportunities for excellence by:

- Taking on repetitive tasks
- Anticipating patient needs
- Extending the reach of human teams

With so much at stake – patient trust, clinical outcomes, and revenue – health systems cannot afford to delay action. Now is the time to define your AI Agent strategy and become the change agent patients and communities need.

