



Healthcare AI Agent Playbook

AI-Powered Efficiency

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E-BOOK

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Introduction to Copilot Agents

What are Copilot Agents?

A Copilot Agent is an AI-powered digital assistant designed to help users' complete tasks, solve problems, and generate content through natural language interaction. Unlike traditional chat agents, Copilot Agents are conversational, goal-oriented, and context-aware, making them highly effective for a wide range of applications.

They leverage advanced language models to understand user intent, maintain coherent dialogue, and perform complex, multi-step tasks. These agents are often multimodal, capable of working with text, images, code, and more. These agents are typically integrated with tools, APIs, or internal systems to extend their functionality beyond simple conversation.

Real-world examples include Microsoft 365 Copilot, which assists with productivity tasks in Word, Excel, and Outlook; GitHub Copilot, which helps developers write and understand code; and custom-built Copilot Agents tailored for specific domains like customer support, education, or healthcare.

Building your own Copilot Agent allows you to tailor its capabilities to your unique workflows, integrate it with proprietary tools or data, and enhance productivity, creativity, and decision-making within your environment.

How Do Agents Differ from Traditional Chat Agents?

- **Smarter:** Uses advanced AI models (like GPT-4 or later) for deeper understanding and reasoning.
- **More Capable:** Can manage complex workflows, multi-step tasks, and dynamic user needs.
- **Context-Aware:** Maintains memory or session context to provide coherent, personalized assistance.

Why Build Your Own Agents?

- Tailor the agent to your unique workflows or business needs.
- Integrate with proprietary tools or data.
- Enhance productivity, creativity, and decision-making in your environment.

Privacy & Security

Copilot doesn't learn from individual user interactions in the way humans do. Instead, it relies on a vast amount of pre-existing data and continuous updates from its developers to improve its responses. This data includes books, articles, websites, and other text sources from trusted sources, ensuring the information provided is accurate and relevant.

While Copilot can remember the context of the current conversation to maintain coherence, it doesn't store personal data or learn from specific user interactions, ensuring your privacy and security. Additionally, users have the option to delete their Microsoft Copilot interaction history, which includes their prompts and the responses Copilot returns.

Integration with Organizational Data

Microsoft 365 Copilot's ability to leverage organizational data is a key differentiator. It integrates with various data sources within Microsoft 365, such as emails, Teams messages, SharePoint documents, and more. This integration allows Copilot to provide responses that are not only based on the user's prompt but also grounded in the data the user has access to within the organization. This ensures that the responses are relevant and tailored to the user's specific context.

For example, Copilot can:

- Summarize emails and documents from SharePoint and OneDrive.
- Retrieve information from Teams chats and meetings.
- Access calendar events to provide scheduling assistance.
- Utilize data from Dynamics 365 and other enterprise systems through Microsoft Graph connectors.

Enhancing Copilot with External Data

Copilot can also be extended to integrate with external data sources using Copilot connectors. These connectors allow organizations to bring in data from various systems, enhancing the AI-driven experience. For instance, you can use Microsoft Graph connectors to integrate data from non-Microsoft sources, providing a more comprehensive view and enabling more informed decision-making.

AI Use Cases for Healthcare & Life Sciences

The Role of AI in Modern Healthcare

Healthcare organizations are embracing AI agents to streamline clinical workflows, enhance patient engagement, and reduce administrative burdens. From drafting clinical documentation to assisting with patient communications, AI agents (or “Copilot” assistants) in healthcare help clinicians and staff save time and focus more on patient care. The following use cases illustrate how Microsoft 365 and Power Platform tools can be configured to build powerful healthcare AI assistants in a secure, compliant manner.

The healthcare industry is under growing pressure to improve both access to care and the quality of services delivered, all while navigating ongoing workforce shortages and rising costs. At the same time, there's a strong push to accelerate innovation in patient care, streamlining research and development, without compromising on regulatory compliance or data security.

Opportunities to Impact Healthcare

AI presents transformative opportunities across the healthcare landscape by enhancing operational efficiency, improving patient outcomes, and accelerating innovation. From reducing wait times and readmission rates to streamlining claims processing and speeding up drug development, AI enables data-driven decision-making and automation at scale.

Patient/ Customer Retention: This KPI measures the percentage of patients who return to the same healthcare facility for future care or customers who remain with the same insurance plan.

Readmission Rate: This measures the percentage of patients who are readmitted to the hospital within a specific time frame after being discharged.

Wait Times: This measures the average time a patient waits before receiving care. It's calculated by dividing the total wait time by the number of patients.

Claims Processing Time: This KPI measures the average time to process a claim and can impact patient satisfaction.

Product Time to Market: The time spent on drug research and trials. Reducing time to market can reduce costs and accelerate revenues.

Healthcare Roles Using AI



Clinician

Description: Provides direct patient care, diagnoses conditions, and prescribes treatments.

AI-Enhanced Productivity:

- Assists in clinical decision-making using real-time data and evidence-based guidelines.
- Summarizes patient histories and generates progress notes.
- Flags potential drug interactions and alerts for abnormal test results.

Researcher

Description: Conducts studies to advance medical knowledge and improve healthcare outcomes.

AI-Enhanced Productivity:

- Automates literature reviews and data extraction from research databases.
- Identifies patterns and correlations in large datasets.
- Drafts research summaries and visualizes findings for publication.

Claims Manager

Description: Reviews and processes insurance claims, ensuring accuracy and compliance.

AI-Enhanced Productivity:

- Extracts and validates claim data from multiple sources.
- Flags inconsistencies and potential fraud.
- Generates claim summaries and approval recommendations.

Medical Director

Description: Oversees clinical operations, ensures quality of care, and sets strategic direction.

AI-Enhanced Productivity:

- Synthesizes performance metrics and clinical outcomes.
- Drafts policy updates and strategic reports.
- Identifies areas for operational improvement and compliance risks.

Nurse Practitioner

Description: Provides advanced nursing care, including diagnosis and treatment, often in collaboration with physicians.

AI-Enhanced Productivity:

- Summarizes patient encounters and generates care plans.
- Assists in triage and prioritization of patient needs.
- Flags follow-up requirements and care gaps.

Agent: SOAP Note Taker



Agent Name: Clinician Documentation Agent

Agent Description

An AI-powered assistant that automatically generates clinical notes (e.g. **SOAP** notes, **Subjective, Objective, Assessment, Plan**) and patient visit summaries from doctor–patient conversations or voice dictations. This agent transcribes audio recordings and produces structured notes, helping clinicians create accurate documentation faster while reducing paperwork burnout.

Tools Used

Microsoft Teams: Used for recording calls or dictation.

SharePoint: Used to store transcripts and notes.

Copilot Studio: Workflow orchestration, chatbot interface for retrieving notes.

Azure AI Services or Copilot: Provides the LLM for transcription & text generation.

Teams / Outlook: Share the completed notes with stakeholders or collaborate on revisions in real time.

Key Actions & Data Flow

A clinician records a patient visit—either by speaking directly into Teams or uploading an audio file. The AI agent transcribes the audio using speech-to-text technology and then uses a GPT-based model to generate a structured SOAP note from the transcript.

The draft note is automatically saved to a SharePoint folder or Dataverse record and emailed to the clinician for review. The clinician can make corrections and finalize the note in the patient's record.

Over time, the agent learns from the clinician's feedback, improving the accuracy and quality of future notes.

How to Build the Agent

Create a Knowledge Base

Start by compiling frequently asked questions, like clinic policies, medication instructions, and appointment procedures, into a SharePoint list or use Power Virtual Agents' built-in "Add Knowledge" feature. You can also use Dataverse for Teams to store this information.

Important: Make sure sensitive information (like personal health details) is only accessible after proper authentication. The FAQ should never expose personal data without verifying the user.

Build the Chatbot in Copilot Studio

Create a new bot tailored for your clinic. Organize it by topics such as:

- Appointments
- Symptoms
- Medications
- Billing

For each topic, add **trigger phrases** like:

- "I have a fever"
- "Schedule appointment"
- "Find my test results"

This helps the bot understand and respond to common patient queries.

Enable AI for Complex Questions

Activate Generative AI in Copilot Studio to manage unstructured or unexpected questions. Use the "Connect to an AI model" feature to link your bot with Azure OpenAI.

Provide access to trusted sources like:

- SharePoint Sites
- Document URLs

This allows the bot to generate conversational, accurate responses even when the question doesn't match a predefined topic.

Automate Tasks with Power Automate

For more advanced actions, build flows that the bot can trigger. Examples:

- **ScheduleAppointment:** Creates a calendar event or sends a request to the scheduling team via Teams.
- **SymptomTriage:** Logs symptoms in a secure list and alerts a nurse if urgent follow-up is needed.

Use Copilot Studio's action node to pass details like patient ID or symptom info to these flows.

Test & Deploy

Use PVA's built-in test chat to simulate real scenarios. Pay special attention to emergency hand-offs, e.g., if someone types "chest pain," the bot should immediately provide emergency contact info or escalate the case.

Once ready:

- For patients: Embed the bot on your website using the provided iframe code.
- For staff: Add it to a Teams channel (e.g., "Patient Triage" for nurses).

Reminder: Include disclaimers about medical advice and require sign-in for personal queries like *"What are my lab results?"*

Example Prompts

How the Virtual Nurse Assistant Responds

Patients often ask questions in everyday language, like:

- *"Can I get a same-day appointment?"*
- *"How do I refill my prescription?"*

The Virtual Nurse Assistant replies with helpful, conversational responses:

- Appointment Request *"We offer same-day appointments for urgent concerns. Would you like me to check today's availability?"*
- Prescription Refill: *"To refill a prescription, you can contact your pharmacy or use our patient portal. I can also arrange for a nurse to call you. What would you prefer?"*

If a patient types symptoms such as:

- *"I have a headache and blurred vision"*

The assistant may trigger a symptom triage flow and respond with:

- *"Those symptoms could be serious. I recommend seeking medical care. Would you like me to connect you with a nurse now?"*

Agent: Clinical Protocol Summarizer



Agent Name: Medical Protocol Summarizer

Agent Description

Trade This AI-powered assistant helps healthcare professionals quickly understand complex clinical materials, like treatment guidelines, research papers, or standard operating procedures, without having to read every page. It works by ingesting documents from sources like SharePoint or internal databases, then summarizing the key points, recommendations, and action items into concise, easy-to-read content.

Clinicians and staff can also ask specific questions about the material, and the assistant will provide targeted answers based on the document's content. By streamlining access to critical information, this assistant helps teams stay informed and make faster, evidence-based decisions.

Tools Used

SharePoint: Stores source documents such as clinical protocols, guidelines, and research papers (PDFs, Word files, etc.).

Microsoft Syntex or Azure Form Recognizer (optional): Extracts text from structured or scanned documents for easier processing.

Azure OpenAI or Microsoft 365 Copilot: Uses large language models (LLMs) to generate summaries and answer questions based on the document content.

Copilot Studio: Orchestrates the workflow, connecting document ingestion, summarization, and delivery. Provides a conversational interface where users can ask questions or request summaries.

Microsoft Teams: Allows clinicians and staff to interact with the assistant directly via chat, making it easy to request summaries or ask protocol-related questions.

Key Actions & Data Flow

A clinician, nurse, or admin can activate the agent in two ways:

- By uploading a new protocol document (e.g., a PDF or Word file) to a designated SharePoint library
- Or by asking a question through a chat interface (like Teams or a chatbot).

Once triggered, the agent performs the following steps:

1. Extracts the document's content using a text extractor if needed (e.g., Syntex or Form Recognizer).
2. Generates a concise summary that highlights the most important updates or recommendations (e.g., "This 50-page protocol's key changes are...").
3. Stores the summary in a central location for future reference.
4. Answers specific questions such as "What's the recommended dosage for pediatric patients?" by referencing the document using a large language model (LLM).
5. Delivers the result to the user via Teams message or email.

In short, the data flows from:

Document → AI Processing → Summary/Q&A → User

How to Build the Agent

Set Up the Document Library

Create a SharePoint library named “Protocols” or use an existing one where clinical documents are stored.

Add metadata fields like “Document Type” and “Summary” to store AI-generated outputs.

Important: Ensure appropriate access controls are in place, as these documents may contain sensitive information.

Extract Text from Documents

Use Copilot Studio with the trigger:

“When a file is created or modified” in the Protocols library.

- For Word files or text-based PDFs: Use the SharePoint connector to retrieve the file content directly.
- For scanned PDFs: Use AI Builder’s Form Processor or OCR to extract text.
- Optionally, use Microsoft Syntex (if available) to classify and extract content, but for simplicity, assume OCR is used.

Generate a Summary

Add an action to call Azure OpenAI (via HTTP request or custom connector) or use the built-in “Summarize text” action if available.

Provide a prompt like: “Summarize the following medical protocol in 5–7 bullet points, focusing on recommendations, dosage, and key warnings.”

Save the generated summary to:

- A metadata field in the SharePoint item
- A new file
- Or as a comment within the document

You can also generate a short title or key takeaways using a similar prompt.

Enable Q&A via Chat (Optional)

For interactive use, deploy a Power Virtual Agents (PVA) bot or use Copilot in Teams.

The agent can:

- Retrieve document text or summaries using the SharePoint connector
- Use Azure OpenAI to answer user questions based on the content

If using Microsoft 365 Copilot with SharePoint indexing enabled, users can ask questions directly in Teams.

To keep the solution self-contained:

- Create a Copilot Studio topic called “AskProtocol”
- Let users specify the protocol or search by title
- Use an AI action to generate a response based on the document

Deliver the Output

If triggered by a file upload: Automatically email the summary to relevant users (e.g., pharmacists for a pharmacy protocol).

If triggered by a user question: The agent responds directly in the chat.

Important: Log all queries and responses in a SharePoint list or Dataverse for auditing—especially important for clinical decision support.

Example Usage

A doctor at a hospital hears about a newly released 40-page guideline on diabetes management. Instead of reading the entire document, she opens Teams and messages the Medical Protocol Summarizer bot:

"Summarize the new diabetes protocol and highlight any changes from the previous version."

The assistant responds with a concise summary:

"Summary: The updated protocol emphasizes earlier insulin intervention, recommends A1C monitoring every 3 months (previously every 6), and introduces new guidance for adolescent patients.

*Key changes include:

- Revised dosage ranges for Type 1 diabetes
- A new section on continuous glucose monitoring
- Removal of the previous recommendation regarding [X]..."*

The doctor then follows up with: "What are the dosage ranges for Type 1?"

The agent retrieves that specific detail from the document and replies instantly, saving the doctor valuable time and ensuring no critical updates are missed.

Agent: Research Paper Analyzer



Agent Name: Medical Research Summary Agent

Agent Description

This AI-powered research assistant helps clinicians and medical researchers stay current with the latest scientific literature. It can process one or multiple research papers to:

- Generate clear, concise summaries
- Highlight key findings and outcomes
- Compare results across studies

Users can interact with the agent by asking questions like: *"What was the sample size and outcome of this trial?"* or *"Summarize the latest findings in cardiovascular research."* The agent delivers fast, reliable insights, saving hours of manual reading and accelerating evidence-based decision-making in clinical and research settings.

Tools Used

Copilot Studio: Coordinates the end-to-end workflow, from retrieving research papers to processing and delivering summaries or answers.

SharePoint: Stores research documents (e.g., PDFs, Word files) and can also connect to external sources via API for automated ingestion.

Azure OpenAI: Uses large language models (LLMs) to generate summaries, extract key findings, and answer user questions based on the content.

Power BI or Excel: Supports cross-paper data aggregation and visualization when comparing results or trends across multiple studies.

Teams: Provides an interactive chat interface where users can ask questions and receive insights in real time.

Outlook: Sends automated email digests with summaries of newly published research tailored to the user's specialty or interests.

Key Actions & Data Flow

The agent operates in two modes: on-demand and proactive.

On-Demand Mode

A user, such as a clinician or researcher, uploads a research paper (PDF or link) or submits a question through a chat interface. The agent then:

1. Extracts the text from the document using built-in tools or OCR (for scanned PDFs).
2. Processes the content with a large language model (LLM) to generate a structured summary, covering the study's objective, methodology, results, and conclusions.
3. Answers specific questions, such as:
"What was the sample size and outcome of this trial?" or
"Compare this paper's findings to last year's WHO guidelines."

If the referenced guidelines are available in the knowledge base, the agent provides contextual comparisons.

Proactive Mode

The agent can be configured to monitor selected journals, databases, or RSS feeds for new publications on defined topics. On a scheduled basis (e.g., weekly), it:

1. Scans for new research matching the user's interests.
2. Generates summaries for each new article.
3. Delivers a digest via email or Teams, helping users stay current without manual searching.

How to Build the Agent

Integrate the Content Sources

Decide how users will submit research papers. Common options include:

- Uploading files to a SharePoint library (e.g., "ResearchPapers")
- Providing URLs or DOIs for online access

For automated digests, maintain a list of topics and sources—such as PubMed queries or journal RSS feeds. Accessing these may require custom connectors or API calls (e.g., to arXiv or PubMed).

Tip: For simplicity, this guide assumes users manually provide the papers.

Build the Summarization Flow

Create a Power Automate flow that triggers when:

- A new file is uploaded to the "ResearchPapers" library
- Or a user manually activates the flow via a button or chat command

Steps in the flow:

1. Retrieve the file content
 - a. For Word or text-based PDFs: use the SharePoint connector
 - b. For scanned PDFs: use AI Builder's "Extract text from PDF" or OCR
2. Generate the summary
 - a. Call Azure OpenAI using an HTTP request or custom connector
 - b. Use a prompt like: *"Summarize the following research paper. Include the study's purpose, methodology, key results (with statistical significance), and conclusions. Limit to 200 words."*
3. Store the output
 - a. Save the summary in a SharePoint metadata field
 - b. Or create a new file (e.g., PaperName_Summary.txt)

Enable Q&A Capabilities

Create an interactive interface using Power Virtual Agents (PVA) or a Teams message extension.

In Copilot Studio:

- Let users select a paper (e.g., from a Dataverse table of recent uploads)
- Accept questions like: "What was the sample size in the ABC trial?"

Bot flow:

- Locate the relevant document (e.g., ABCtrial.pdf)
- Extract the text or use the stored summary
- Prompt OpenAI: "From the following text, answer: What was the sample size in the study?"
- Return the answer in chat

Set Up a Literature Digest (Optional)

For proactive updates, create a scheduled Power Automate flow (e.g., weekly) to scan for new publications.

Options:

- **Email alerts:** Route journal alerts to a dedicated Outlook inbox, then parse emails for links and fetch PDFs
- **RSS/API feeds:** Use HTTP actions to retrieve article titles and links

For each new paper:

- Provide just the title and link
- Or generate a full summary (note: summarizing multiple papers may be resource-intensive)

Compile the results into a digest and email it to subscribers.

Make the Agent Accessible

Integrate the summarizer into Microsoft Teams for easy use:

- Create a channel like "Journal Club"
- Add the bot so users can type: "@ResearchBot summarize file XYZ" or "@ResearchBot what's new in cardiology this week?"
- Map these commands to trigger the summarization or digest flows.

Security Tip: Ensure that content from paywalled journals is only shared with licensed users. While internal summaries may fall under fair use, avoid broad distribution.

Example Usage

A physician uploads a PDF of a newly published clinical trial to the ResearchPapers SharePoint library. Then, in Teams, she messages the Research Summarizer bot:

- *"Please summarize the trial I just uploaded."*

Within seconds, the bot replies with a concise summary:

- *"Summary of 2025 XYZ Trial: This randomized controlled trial (n=250) evaluated a new hypertension drug versus placebo. The treatment group showed a 15% average reduction in systolic blood pressure, compared to 5% in the placebo group ($p < 0.01$). Mild headaches were the most common side effect. The authors conclude the drug is effective and well-tolerated for moderate hypertension."*

The physician follows up:

- *"Were there any notable side effects or risks mentioned?"*

The bot scans the document and responds with relevant details. If enhanced with image or table handling, it could even offer:

- *"Would you like to view the full text or see key figure highlights?"*

In another scenario, every Monday morning, the department receives an email from the agent titled:

- *"This Week's Cardiology Literature Digest"*

The message includes a curated list of new research:

- **[Title 1]** – Brief summary and key findings
- **[Title 2]** – Summary with link to full paper
- **[Title 3]** – Summary and clinical relevance

This keeps the entire team informed, without the burden of manually scanning journals or reading full papers.

Agent: Healthcare Data Trends Analyzer



Agent Name: Health Insights Agent

Agent Description

This AI-powered analytics agent helps healthcare leaders and analysts uncover meaningful trends in population health and operational performance. It scans data sources such as patient demographics, hospital KPIs, and public health datasets to identify patterns, outliers, and emerging issues.

For example, it can analyze:

- Hospital readmission rates
- Emergency room wait times
- Disease incidence across regions or clinics

The agent supports both **proactive reporting** and **on-demand insights**. It can automatically generate trend reports or respond to natural language questions like:

"Which clinic had the highest patient growth this quarter?"

"Are there any unusual spikes in flu cases this month?"

By acting as a smart, always-on analyst, this agent frees up human teams to focus on strategic decision-making, turning raw data into actionable insights with minimal effort.

Tools Used

Power BI: For modeling healthcare data and visualizing key metrics such as readmission rates, patient growth, or disease trends.

Power Automate: Schedules data queries and orchestrates AI-driven analysis workflows.

Azure OpenAI: Interprets data and generates narrative summaries or answers to natural language questions.

Dataverse, SQL, or Azure Data Lake: Stores raw healthcare data; simpler setups may use Excel files or SharePoint lists.

Microsoft Teams: Delivers reports and insights directly to users through chat or channel posts.

Copilot Studio: Enables interactive querying via chatbot, allowing users to ask questions like "What's the trend in ER wait times this month?"

Key Actions & Data Flow

The agent operates in two modes: **scheduled** and **on-demand**.

Scheduled Mode

At regular intervals (e.g., monthly), the agent automatically:

1. **Retrieves data** from defined sources such as Power BI datasets, Dataverse tables, or exported CSV files.
2. **Analyzes metrics** using built-in Power BI analytics or custom formulas to detect trends, anomalies, or threshold breaches.
3. **Generates a narrative summary** using Azure OpenAI, such as: *"ER wait times at Clinic A increased by 15% this month, likely due to staffing shortages."*
4. **Delivers insights** via Teams or email. If critical thresholds are exceeded (e.g., outbreak indicators), the agent sends immediate alerts to relevant stakeholders.

On-Demand Mode

Users can interact with the agent through chat (e.g., in Teams or Power Virtual Agents) by asking questions like:

“Compare diabetes case counts across our clinics for the last year.”

The agent then:

1. **Fetches the relevant data** using Power BI REST API or a preloaded dataset.
2. **Processes the query** with AI to generate a clear, contextual response.
3. **Optionally includes visualizations**, such as charts or tables, to support the answer.

Data Flow Overview

Data Retrieval → Optional Analytics → AI Interpretation → Output to User (via Teams, Email, or Chat)

How to Build the Agent

Prepare the Data

Start by identifying the datasets the agent will use—such as hospital operations data (admissions, wait times, readmissions, etc.). These can be stored in:

- A database (e.g., SQL, Dataverse)
- An Excel file updated regularly
- Or ideally, a Power BI dataset or datamart that consolidates and refreshes the data on a schedule

Power BI can provide built-in measures like percentage changes, rankings, and trend indicators. The key is to ensure the agent has access to a structured, reliable data source.

Build the Narrative Generation Flow

Use Power Automate to create a scheduled flow (e.g., on the first of each month). The flow should:

1. Query the data using:
 - a. Power BI connector actions like “Run a query against a dataset” (using DAX or predefined measures)
 - b. Or, if needed, use the Power BI REST API via HTTP calls
 - c. Alternatively, export a summary table from Power BI to SharePoint as a CSV for the flow to read

2. Generate insights by composing a prompt for Azure OpenAI, such as: *"You are a healthcare data analyst. Based on the following metrics comparing last month to the previous month, provide three key insights. Include plausible causes or implications."*
3. Capture the AI-generated summary, which might look like: *"Insight 1: ER wait times increased by 10%, due to staffing shortages. Insight 2: Readmission rates declined slightly, suggesting improved post-discharge care..."*

Store this output for delivery.

Implement Alerting Mechanisms

To detect urgent trends (e.g., a spike in infection rates), add conditional logic to the flow or use Power BI's data alerts. For example:

- If a metric exceeds a defined threshold (e.g., infection rate > X), bypass the full report
- Send an immediate alert via Teams or email with the critical insight

This ensures timely attention to high-priority issues.

Enable Interactive Q&A (Optional)

Deploy a Copilot Studio Agent for real-time analytics queries.

Users can ask questions like: *"Which department had the highest increase in patient satisfaction?"*

The bot can:

- Use Power Automate to interpret the question (optionally with OpenAI to parse complex queries)
- Query the data source
- Return a clear, conversational response

Note: Power BI's built-in Q&A feature supports natural language queries within the service, but for a custom chatbot experience, using an LLM as an interpreter may be necessary. You can also pre-define question templates for simpler implementation.

Deliver the Output

For scheduled reports:

- Post the AI-generated insights in a Teams channel (e.g., “Operations Insights”) using adaptive cards or chat messages
- Or email the summary to stakeholders

Attach relevant visuals, such as:

- A PDF or image exported from Power BI (using the “Export report” action in Power Automate with a premium license)

For Q&A interactions:

- Deliver responses directly in chat, keeping the experience seamless and conversational

Example Usage

Every Monday, the Population Health department receives a message in Teams from the Insights Agent:

Weekly Trends Update

1. **Flu cases doubled in the North Region** (20 this week vs. 10 last week), an early spike linked to low vaccination rates. Consider launching public health messaging.
2. **Clinic B’s patient satisfaction score rose** from 4.0 to 4.5 following the rollout of a new scheduling system, a notable improvement.
3. **ER wait times at Hospital X are 30% above average**, staffing adjustments may be needed.

A chart titled “**Flu Cases by Week**” is attached, allowing team members to discuss trends directly in the channel. Later, an executive sends a private message to the bot in Teams:

“Hey, what was our overall telehealth usage trend this quarter?”

The agent instantly replies:

“Telehealth visits increased by 12% this quarter—340 visits compared to 305 last quarter. This upward trend suggests growing patient adoption.”

This kind of instant, data-backed response empowers leaders to make informed decisions on the spot—whether in meetings, strategy sessions, or day-to-day operations.



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