



TARPON HEALTH

a healthcare automation
community

Agentic Heat Check *(Part 1?)*

Tarpon Health – Technology Forum Webinar
04/16/2026

Agenda

1. Agentic "Heat Check"
2. Framing the conversation
3. Discussion
4. What have we seen?
5. Lessons Learned
6. Questions

Agentic "Heat Check"

Agentic/AI implementation sentiment then

- 2023-2025: Tools were introduced and assumptions were made...
 - "It is the end of the digital-working-class"
- 2025: Agents are difficult to develop, implement and scale
 - ([MIT](#) Study 95% of AI projects can't escape POC)

Agentic/AI implementation sentiment now

- Familiarity and Confidence are growing and we are escaping POC
- Implementation guidelines are becoming established – how do we manage new technologies
- LLMs & agentic tools are leveraged within processes, but agentic orchestration is a WIP

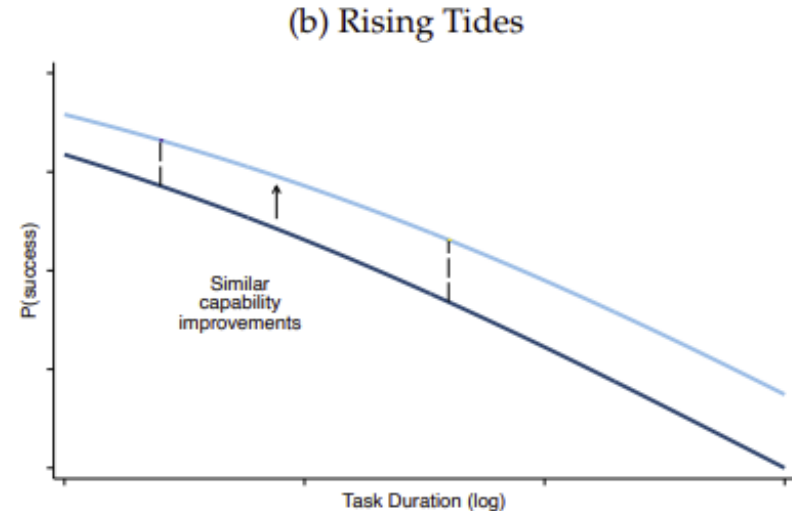
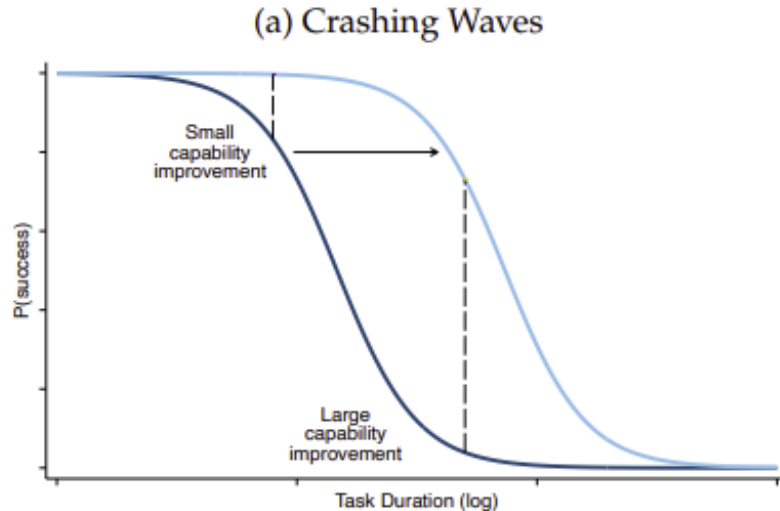
Agentic/AI implementation sentiment future

- [Cornell/Arxiv](#) "...this pace of AI improvement implies that LLMs will be able to complete most text-related tasks with success rates of, on average, 80%–95% by 2029 at a minimally sufficient quality level."
 - We already see accurate text generation today, but complex use cases will take time

Agentic "Heat Check" *(continued)*

How should we be thinking about Agentic/AI advancements

- [Cornell/Arxiv](#) : "AI automation is a continuum between: (i) crashing waves where AI capabilities surge abruptly over small sets of tasks, and (ii) rising tides where the increase in AI capabilities is more continuous and broad-based."
 - Crashing waves = new use cases are unlocked
 - Rising tides = automation success & stability increases



Industry/Community "Heat Check"

Framing the conversation

...I have a problem that needs solving

- Does it have financial impact on my organization?
- Do I have enough staff?
- Does it happen often?
- Is it complex?

Traditional Automation Tools

- File Transfers/ETL
- RPA
- API/Integrations
- OCR/Template IDP

Traditional Automation Management Tools

- Orchestration
- Logging & analytics
- Maintenance systems
- Governance

Framing the conversation *(continued)*

I still have all the traditional tools available, and still have to manage the program, but now I have...

Large Language Models

- Open AI/Chat GPT, Google/Gemini, Anthropic/Claude
 - Reasoning, decision-support, generative

Enhanced OCR/IDP

- "Find the subscriber id" adaptative understanding vs creating a template to look for "subscriber ID"

Evaluation, memory, and contextual tools

- RAG, multi-layer memory, confidence scoring, guardrails & policy enforcement, self-correction loops

Interface layers & Coding assistants *(prompt-based development)*

- "Return the claim details on this page" vs developing the selectors and clicks
 - Deterministic automation vs goal-driven execution tool

Agentic Orchestration Control Systems

- UiPath – Maestro, Moxo

Framing the conversation *(continued)*

So, what has changed?

I have more tools to solve my problems

- More use cases are accessible (*wave*)
 - Complex use cases previously avoided, or handled partially in a modular way, can now be solved end-to-end
 - Past use cases can be enhanced to reach 100% effectiveness
- Success rates and accuracy improves with advanced technologies (*tide*)
 - Our ability to solve the problem increases

How do I create a cohesive infrastructure for agents

- How do I store contextual documentation?
- How do I reinforce and maintain agentic prompts?
- How do I build scalable agents?

Recap – Framing & "Heat Check"

What is Tarpon's Sentiment?

- There is a lot of noise with new technologies, but old tools are still important
 - What new tools, internally or externally, are available to me?
 - How do I use it?
 - When do I use it?
 - How much does it cost to use?
- The types of solutions are changing, but the need to govern them is not...
 - The difficulty of creating an agent is not necessarily the barrier; it is how healthcare/health systems operate in general
 - IT & Compliance restrictions
 - Applications & accessibility
 - Changing landscape
 - Limit the amount of internal barriers

Discussion

Questions and/or Comments from Framing and Heat Check?

What is the current community sentiment? What has changed for you?

What crashing waves or rising tides have you experienced in the last year?

How have agents "unlocked" use cases?

Generation of content/text

- RPA Example:
 - =CONCATENATE(ORG_NAME, " does not agree with ", PAYER_NAME, " decision regarding claim ", CLAIM_NUMBER, ", denied for the reason of ", DENIAL_REASON, "...")
- Agent Example:
 - "Use the appeal text found in storage bucket XYZ and the 3 documents listed in your context to write an appeal letter"

Data extraction & formatting

- RPA example:
 - Coordinates/Anchors/Text Parsing/etc to find and extract "subscriber ID" based on "template"
- Agent Example:
 - "Find the subscriber ID from the document"

Simplifying complex business rule assignment/routing logic

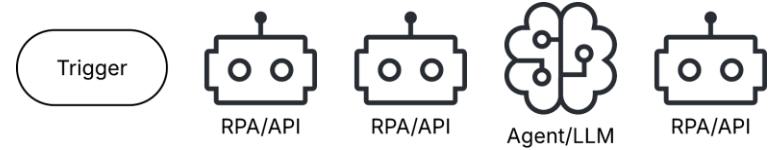
- RPA Example:
 - If row("ROUTE_HIM").ToString = "Y" Then Call workflow to transfer to WQ 12345
- Agent Example:
 - If HIM review needed, escalate to HIM workflow.

What have we seen?

Appeal letter generation

Denial --> Medical records --> Payer policy --> Letter generated --> Submission/status

- Agent = Letter Generation
- RPA/API = Gather MR & Policies, Submission & Status



Correspondence triaging

Fax received --> Information digitized --> Indexed/Triaged --> Assigned

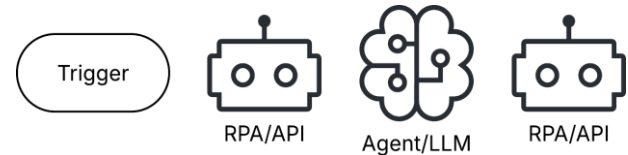
- Agent = Read, Extract, and assign
- RPA/API = Index, Update EMR



Prior Authorization

Scheduled visit --> Payer policy/Portal check --> Determination --> Submission

- Agent = Determination
- RPA/API = Portal check/Submission & Status



What have we seen?

Denials Orchestration

Denial --> Categorization --> Orchestration --> Resolution --> Monitoring

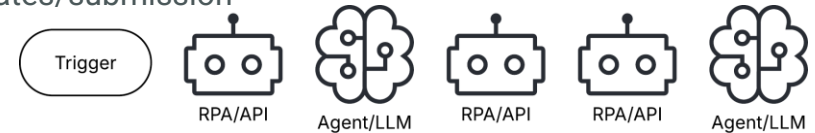
- Agent = Categorization, assignment, historical success rates reinforcement
- RPA/API = Appeal/coding/re-order/pt letter/adjust...(resolution)



Charge capture

Encounter evaluation --> Chart review --> Charge entry --> Claim edits & submission

- Agent = Orders & chart review
- RPA/API = Get documents, charge entry, claim updates/submission



Scheduling & pre-service instructions

Visit trigger --> Intake/Triage --> Patient outreach --> Scheduling --> Pre-service checklist --> visit

- Agent = Visit type, outreach, Patient and Physician assignment, historical success rate reinforcement
- RPA/API = Outreach, Schedule visit, pre-service requirements



Lessons Learned

The Automation lifecycle has not changed

- Ideation, Design, Development, Testing, Maintenance
- Good operational process = good agent/RPA

Main difference... teaching rather than telling

- RPA is told how to solve the problem (click here click there)
- Agents are taught the problem, to then know how to solve the problem
 - here is an SOP and policy that shows you how to solve this issue

Summarization

- We can think of this shift as a difference of PDD and SDD
- In the agentic & traditional worlds, the PDD is the same... the operational problem needs to be defined.
- In the agentic & traditional worlds, the SDD is different. The SDD is no longer one "traditional" solution, it is a complex web of different technologies being orchestrated.

Lessons Learned *(continued)*

Set up your agentic processes with upstream "prep" jobs

- Agentic process starts --> RPA to download policy --> RPA to download record --> Agent review policy & record --> Generate letter
- RPAs triggered ahead of time for policy & record | Agentic process starts --> Agent review policy & record --> Generate letter
 - Reduce the cost and time of running an agent as much as possible

Create agents, and prompts, that can scale *(prompt library)*

- Appeals agent --> train on organizational material, not dept/payer specific
- UHC duplicate denials appeals agent --> leverages high level appeals-agent, then uses payer/department context for refinement to the specific use case

Agentic orchestration is good for development and POC, but traditional frameworks that call upon Agents/LLMs solve volumes better

- Start with human in the loop, then move to unattended with "action center"

If I could go back in time...

Start an operational SOP initiative to ensure all processes are documented within your organization

- If there is nothing to train a human with, how are we going to train an agent?
- Capture inputs, outputs, decision points
 - Accurately define what values are necessary for the process
- Step by step instructions
- Share SOP formats across departments and domains
- Create a central repository of all process documentation

Properly structuring your operational information and data sets now will support agentic implementation in the future

- Teach the agent how to do the job instead of telling the RPA what to do

Questions

What research topics and/or items would you like to see discussed in Part 2?

- 1. Autopilot use and integrations white paper**
- 2. Full process end to end review and walk through**