

Project Plan: Contract Assistant Agent

Date	Doctype	For	By
11/06/2025	PPS	Bayou Braces & Smile Center	AgentsArchitects.ai

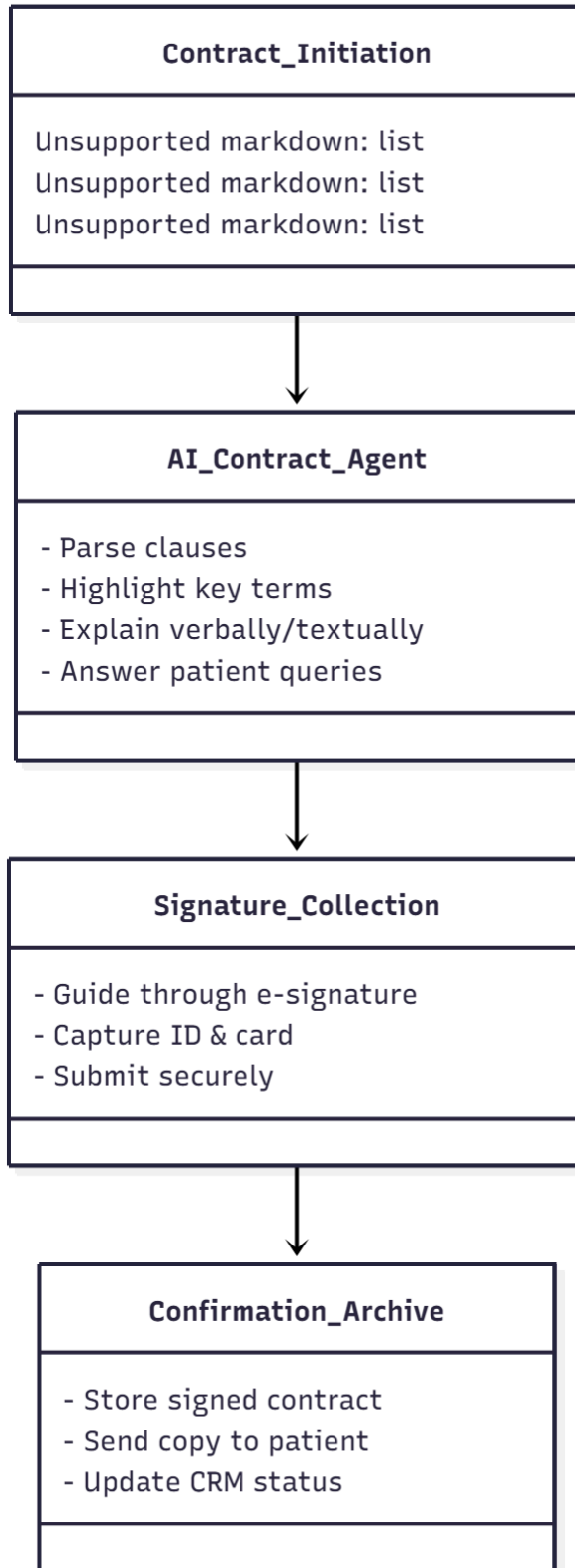
Project Overview & Goals

The Contract Assistant Agent will automate digital contract interactions from highlighting essential clauses to collecting e-signatures and ID validation. The agent will interact conversationally (voice or chat), summarize contract highlights, and answer patient queries using a trained context model. This ensures faster contract completion, better patient understanding, and compliance with HIPAA-grade data protection.

Key Measurable Goals

KPI	Baseline	Target
Contract turnaround time	1 day	15 minutes
Manual staff involvement	100%	20%
Patient comprehension rating	70%	90%
E-signature completion rate	60%	95%

Workflow Narrative



Detailed Workflow Narrative

A. Contract Initiation

- **Inputs:** CRM trigger, patient details, contract template.
- **Process Activities:** Generate contract instance and load variables (name, price, email).
- **Outputs:** Contract ready for review.
- **Accountability:** CRM Automation → AI Contract Agent.
- **Dependencies:** PandaDoc/DocuSign API integration.

B. AI Contract Interaction

- **Inputs:** Contract content, context knowledge base.
- **Process Activities:** Identify key sections (payment terms, policy, cancellation), summarize them, answer patient questions in real-time.
- **Outputs:** Highlighted and understood contract.
- **Accountability:** Contract Agent.
- **Dependencies:** HIPAA-compliant AI platform.

C. Signature Collection

- **Inputs:** Patient acknowledgment, identity proof.
- **Process Activities:** Guide user through e-signature and collect ID/credit card snapshot.
- **Outputs:** Signed, validated digital contract.
- **Accountability:** AI Contract Agent → Admin.

- **Dependencies:** PandaDoc or DocuSign workflows.

D. Confirmation & Archival

- **Inputs:** Signed document, metadata.
- **Process Activities:** Send signed PDF to patient, update CRM status, log transaction.
- **Outputs:** Archived contract and record.
- **Accountability:** System Automation.
- **Dependencies:** Secure drive (Google Workspace / HIPAA Cloud).

Tools & Licenses

Tool Name	Plan	Subscription Type	Usability
PandaDoc / DocuSign	Business	Monthly	Contract generation & e-signature workflow
HIPAA-Compliant AI Platform	Enterprise	Annual	AI comprehension and response handling
Replit / Vercel	Pro	Monthly	Runtime for AI agent
Google Drive / Workspace	Business	Monthly	Secure document storage
Zapier / n8n	Pro	Monthly	Automation triggers from CRM

