



Suhas Bhairav

AI Employee Benefits Insurance Help Guide

**A practical guide to using an internal AI bot to
explain health insurance and benefits jargon**

An explainable internal AI assistant to clarify benefits
in plain language.

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suhasbhairav.com

Automate vs Review: What to Explain

Automates routine benefits explanations. Complex, personalized, or high-risk cases stay with human benefits specialists.

Key move Start with 3 core plan explanations and a 20-term glossary.

PRACTICAL CHECKLIST

- 01** Automate plain-language summaries of medical plans, deductibles, copays, and network tiers.
- 02** Automate a living benefits glossary tailored to current company plans.
- 03** Route complex questions to human benefits specialists within defined SLAs.
- 04** Flag outdated policies for review and trigger updates when plans change.
- 05** Personalize explanations with employee-friendly language without disclosing private data.
- 06** Reuse responses across channels: intranet, chat, and email templates.
- 07** Log interactions for QA, auditing, and continuous improvement.

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Data, Tools, and Guardrails

Identify data sources and tools; enable privacy controls and governance. Use guardrails to ensure accuracy and safety.

Key move Security first: restrict data access and maintain audit trails.

PRACTICAL CHECKLIST

- 01** Policy documents: benefits brochures, plan PDFs, SPD summaries.
- 02** Glossary of terms: deductible, out-of-pocket max, copay, HSA, FSA.
- 03** Employee data: minimal, non-identifying inputs; never store sensitive health details.
- 04** Tech stack: internal LLM (Claude or GPT), Retrieval Augmented Generation (RAG) from docs, chat UI.
- 05** Integration: HRIS, benefits management platforms, intranet search.
- 06** Security: role-based access, data encryption, audit logs.
- 07** Quality: human-in-the-loop for ambiguous or high-risk topics.

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Weekly Adoption Plan

Follow a manageable weekly cadence to pilot, measure, and scale with clear ownership. Align with HR leadership and privacy/compliance requirements.

Key move **Ownership: assign a Benefits AI steward.**

PRACTICAL CHECKLIST

- 01** Week 1: Inventory benefits docs and definitions; create glossary.
- 02** Week 2: Build core bot with 5 plans and 15 glossary terms.
- 03** Week 3: Pilot with 15-25 employees; collect feedback.
- 04** Week 4: Establish escalation path to HR specialists; define SLAs.
- 05** Week 5: Add accessibility checks; ensure language plain.
- 06** Week 6: Instrument metrics: accuracy, time-to-answer, satisfaction, usage.
- 07** Week 7: Roll out to entire organization; monitor privacy and compliance.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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