

IBM Watsonx Orchestrate AskBenefits Agent - Setup Guide


This guide walks you through the complete process of creating, configuring, and deploying agents within IBM Watsonx Orchestrate (WxO). By following this step-by-step guide with visual instructions, you'll learn how to build an AI-powered healthcare assistant capable of accurately responding to benefits-related inquiries.

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Lab Overview

In this lab, you'll step into the role of an AI solution developer working within the IBM Watsonx Orchestrate platform. The lab is designed to simulate a real-world healthcare use case by guiding you through the process of creating, configuring, and deploying intelligent agents from scratch.




Lab Chatter

last seen: today at 14:49




May 13 at 14:49

CVS Lab Chat




Manager

Hey, we just got a new dataset that should allow us to offer more information about historical procedures and provide additional information about available procedures. Data team, can you create some tools to unlock value from this?




Data Engineer

I'm on it, looks like we'll be able to create a tool for filtering and grouping the data so we can show customers what's relevant to them.



Data Engineer



The tool is up and running and ready for use, I published an openapi specification file.



Manager

Nice, lab participant, it's on you now. Let's get these tools up and running in WatsonX Orchestrate so we can unlock some value for our customers.

Let's do this!



Aa

You'll be completing **three core activities**:

1. Build your first agent – AskBenefits

You'll create this agent yourself and configure it to use prebuilt external tools via a provided OpenAPI specification. AskBenefits is designed to support healthcare-related inquiries by retrieving historical data, identifying overdue procedures, and providing guidance on upcoming care.

2. Build a second agent – AskDental

You'll also create this agent from scratch. AskDental is a document-based assistant that uses an uploaded PDF to answer policyholder questions about dental benefits. You'll define the knowledge scope and deploy the agent for use in chat.

3. Enable collaboration between both agents

Once both agents are configured and deployed, you'll link them together to simulate a multi-agent orchestration pattern. This shows how Watsonx Orchestrate enables agents to delegate responsibilities based on domain expertise.

By the end of this lab, you will have:

- Built two custom agents using Watsonx Orchestrate
- Integrated tools via OpenAPI and knowledge via document upload
- Designed a collaborative solution to handle user inquiries across medical and dental domains

This is a complete hands-on experience that showcases AI orchestration, tool integration, and document-based reasoning in a business-ready context.

Agents Overview

AskBenefits is a proactive digital assistant designed to support questions related to medical procedures and health plan benefits. The agent intelligently classifies each inquiry as pertaining to a past, future, or overdue medical procedure and invokes the most appropriate tools based on the user's intent.

The agent is capable of:

- Retrieving historical data about procedures
- Identifying overdue care
- Providing guidance on upcoming procedures
- Offering plan-specific details (e.g., pharmacy benefits, coverage)
- Assisting with appointment scheduling

AskDental is a collaboration assistant designed to support questions related to dental benefits. The agent intelligently answers each inquiry as by referencing a provided PDF document.

The agent is capable of answering a variety of questions about dental benefits and coverage.

Lab Objective

This lab demonstrates how intelligent agents can be configured and deployed in Watsonx Orchestrate to address healthcare-specific use cases. By the end of this lab, participants will:

- Understand the end-to-end agent creation process
 - Be familiar with OpenAPI-based tool integration
 - Get practical experience with multi-agent solutions
 - Gain experience testing and validating agent behavior in practical scenarios
-

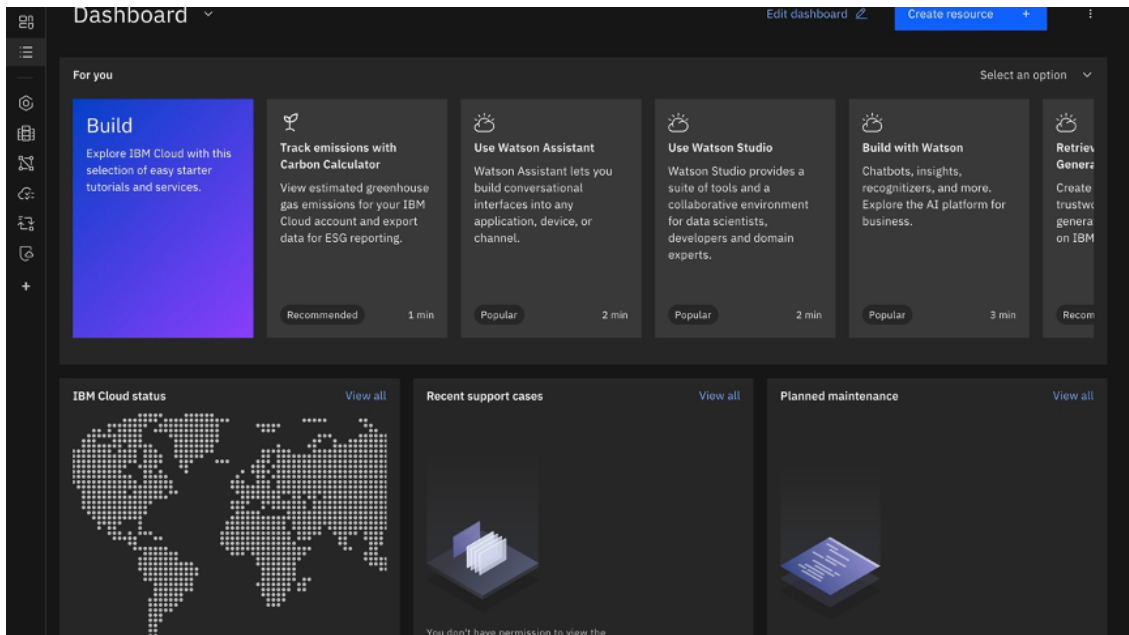
Prerequisites

- An active IBM Cloud account
 - Access to IBM Watsonx Orchestrate environment
 - The OpenAPI specification file (`openapi-tools-spec.json`)
 - The benefits file (`dental_benefits_summary.pdf`)
 - The optional WatsonX Assistant action file (`main-desk-concierge-action-v1.json`)
 - The optional reporting OpenAPI specification file (`openapi-tools-report.json`)
-

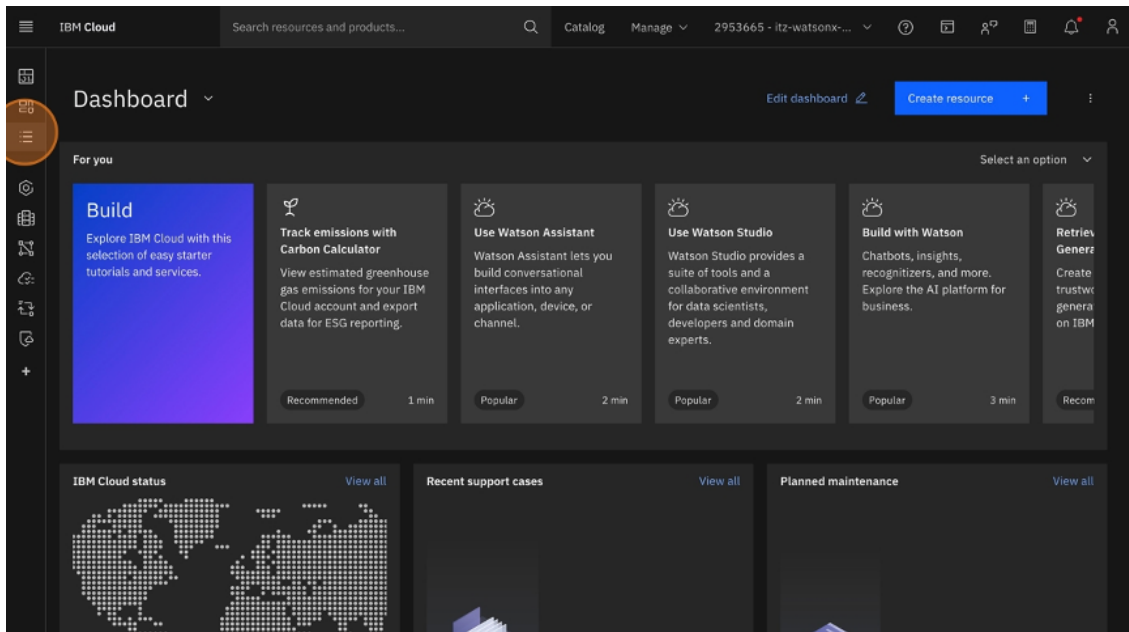
AskBenefits Step-by-Step Instructions

1. Accessing IBM Watsonx Orchestrate

1. Navigate to <https://cloud.ibm.com/>



1. Click on the menu icon in the top left corner



1. Select "Watson Orchestrate-itz"

Name	Group	Location	Product	Status	Tags
Filter by name or IP address...	Filter by group...	Filter...	Filter...	Filter...	Filter...
Compute (0)					
Containers (2+)					
Networking (0)					
Storage (1+)					
Converged infrastructure (0)					
Enterprise applications (0)					
AI / Machine Learning (4+)					
Watson OpenScale-itz	watsonx	Dallas (us-south)	watsonx.governance	Active	—
Watson Orchestrate-itz	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx Orchestrate	Active	—
Watson Orchestrate-itz	cb90ebd1e57b itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Runtime	Active	—
ws-itz-wxo-68126e9b0acb90ebd1e57b	itz-wxo-68126e9b0acb90ebd1e57b	Dallas (us-south)	watsonx.ai Studio	Active	—
Analytics (1+)					
Blockchain (0)					
Databases (1+)					
Developer tools (0)					
Logging and monitoring (0)					
Migration (0)					

1. Click "Launch watsonx Orchestrate"

Resource list /

Watson Orchestrate-itz
Active
Add tags
Details
Actions

Manage
Service credentials
Plan

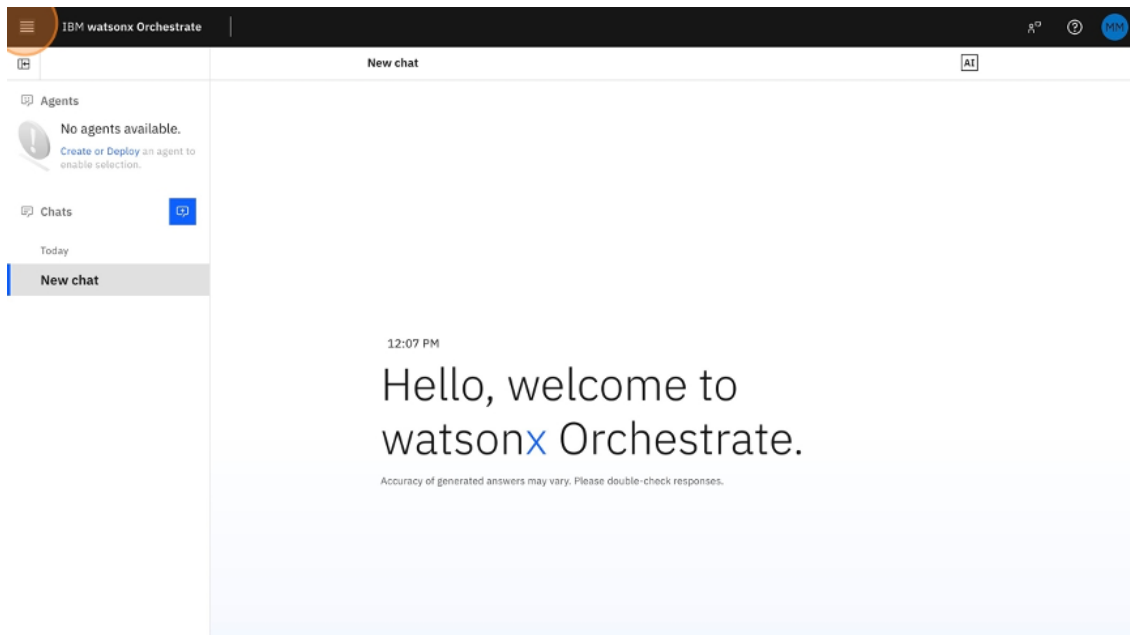
Start by launching the tool

Launch watsonx Orchestrate
Getting started tutorial

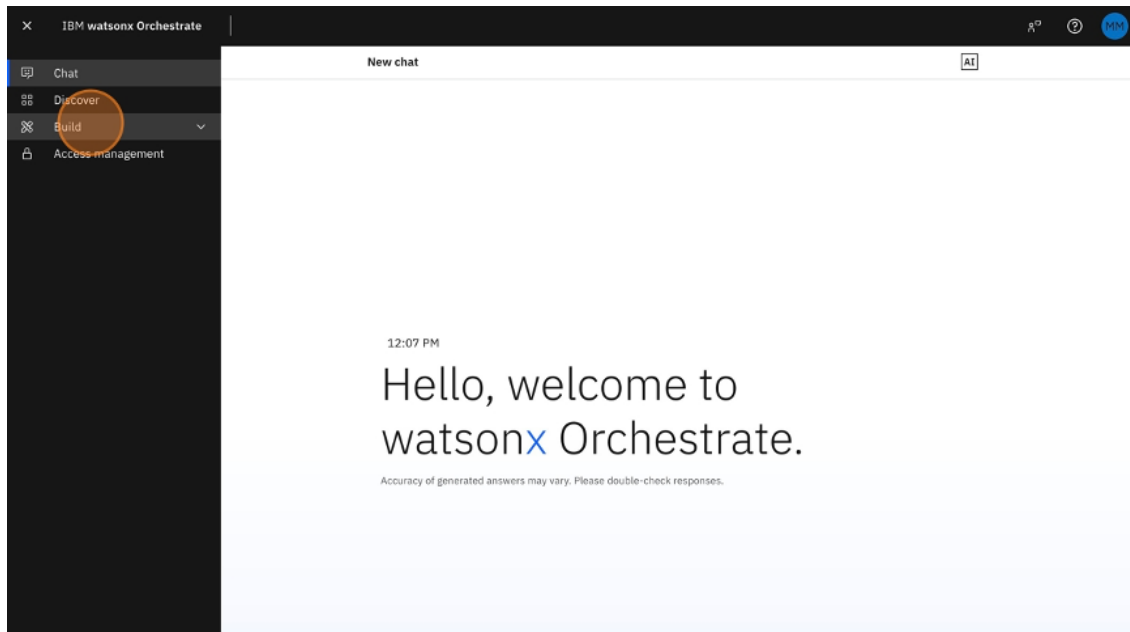
Plan
Essentials Plan
Upgrade

Credentials
Download
Show credentials
API key:
URL:
https://api.us-south.assistant-builder.watson.cloud:

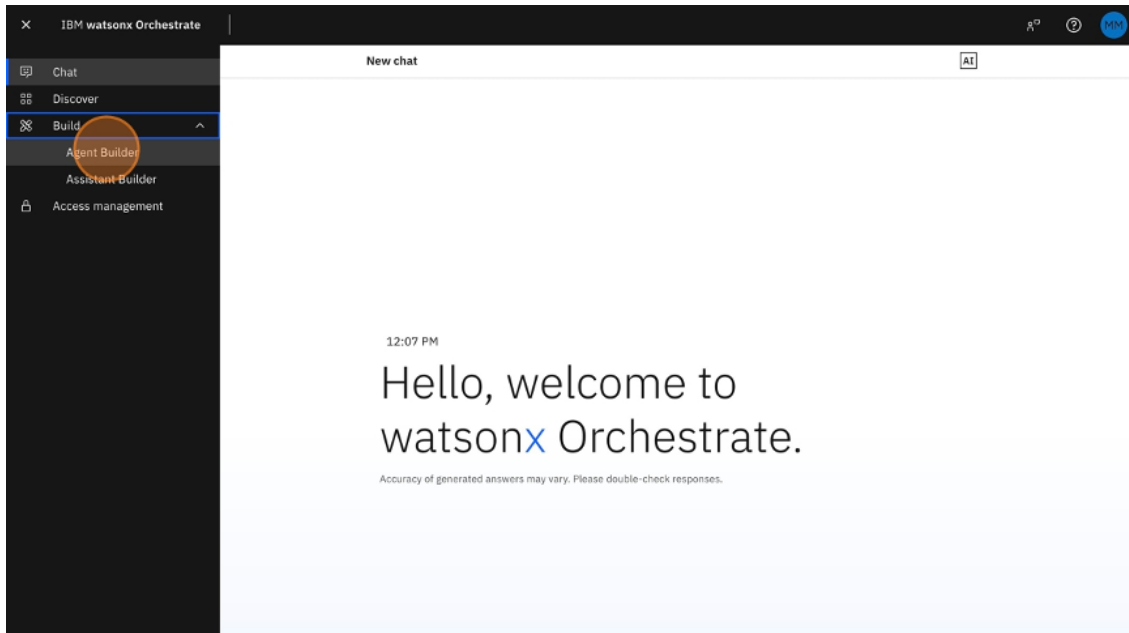
1. Click on the hamburger menu icon in the top left



1. Click on "Build"

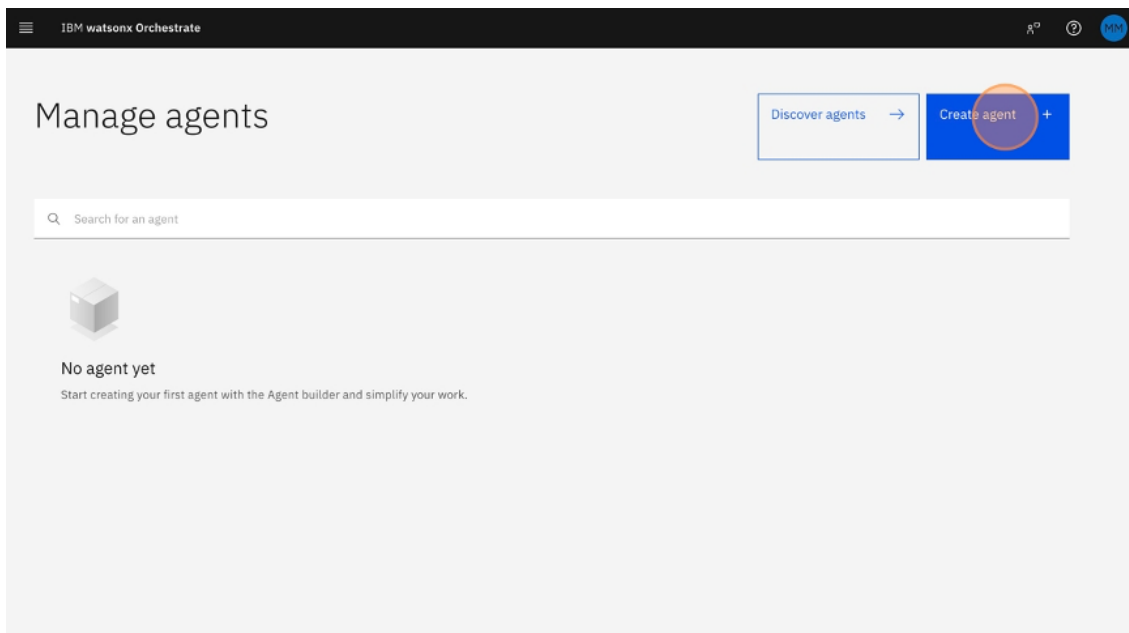


1. Select "Agent Builder"



2. Creating a New Agent

1. Click "Create agent"



1. In the "Name*" field, enter: AskBenefits

Create an agent

Create from scratch ☒
Build your custom agent step by step to create a custom solution.

Create from template ☐
Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*

Name your agent

Description*

Example: This agent helps answer customer questions about return and cancellation policies.

Describe your agent's purpose.

1. In the "Description*" field, enter: A proactive healthcare assistant designed to guide users through questions related to medical procedures and health plan benefits. The agent classifies each inquiry as pertaining to a past, future, or overdue medical procedure and selects the most appropriate tool accordingly. It can retrieve historical data, identify overdue care, offer guidance on upcoming procedures, or provide plan-specific details such as coverage and pharmacy benefits. When necessary, it can also assist in scheduling appointments. The assistant reasons step-by-step, selects tools based strictly on user intent, avoids redundant calls, and responds with professionalism, clarity, and empathy.

Create from scratch ☒

Build your custom agent step by step to create a custom solution.

Create from template ☐

Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*

AskBenefits

Description*

Example: This agent helps answer customer questions about return and cancellation policies.

Describe your agent's purpose.

Cancel Create

1. Click "Create" to initialize your agent

Create from scratch ☒

Build your custom agent step by step to create a custom solution.

Create from template ☐

Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*

AskBenefits

Description*

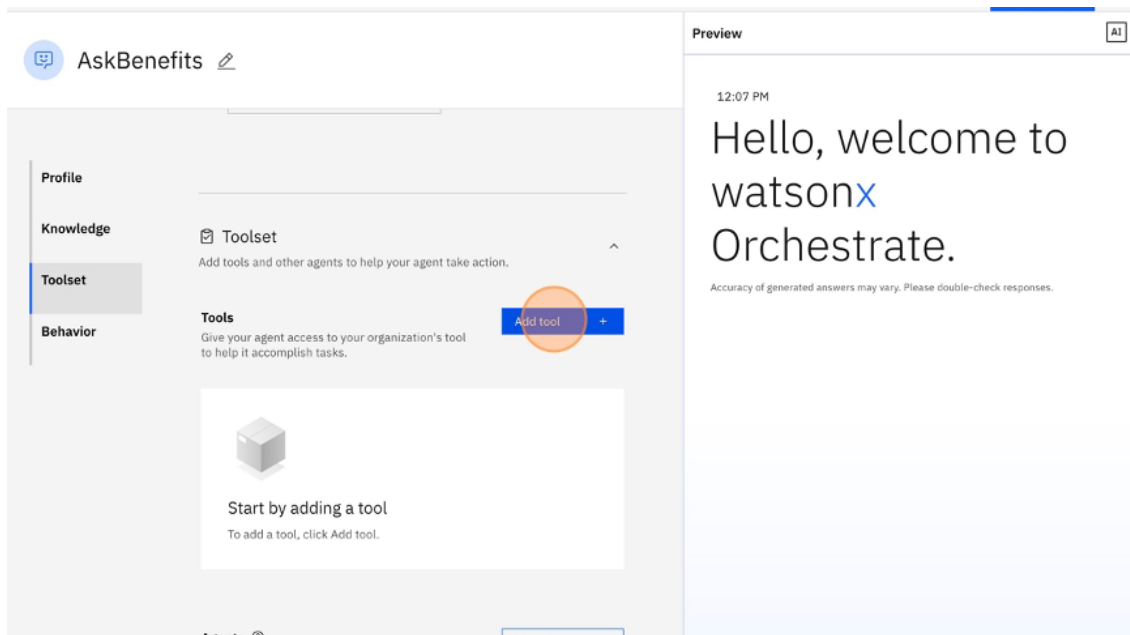
upcoming procedures, or provide plan-specific details such as coverage and pharmacy benefits. When necessary, it can also assist in scheduling appointments. The assistant reasons step-by-step, selects tools based strictly on user intent, avoids redundant calls, and responds with professionalism, clarity, and empathy

Describe your agent's purpose.

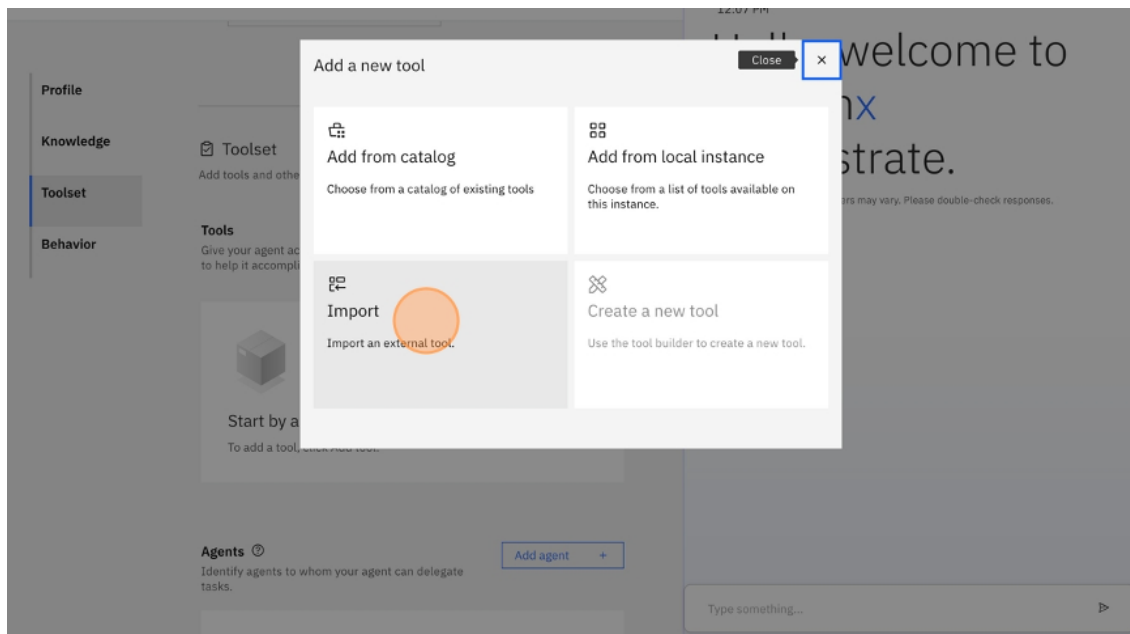
Cancel Create

3. Importing and Attaching Tools

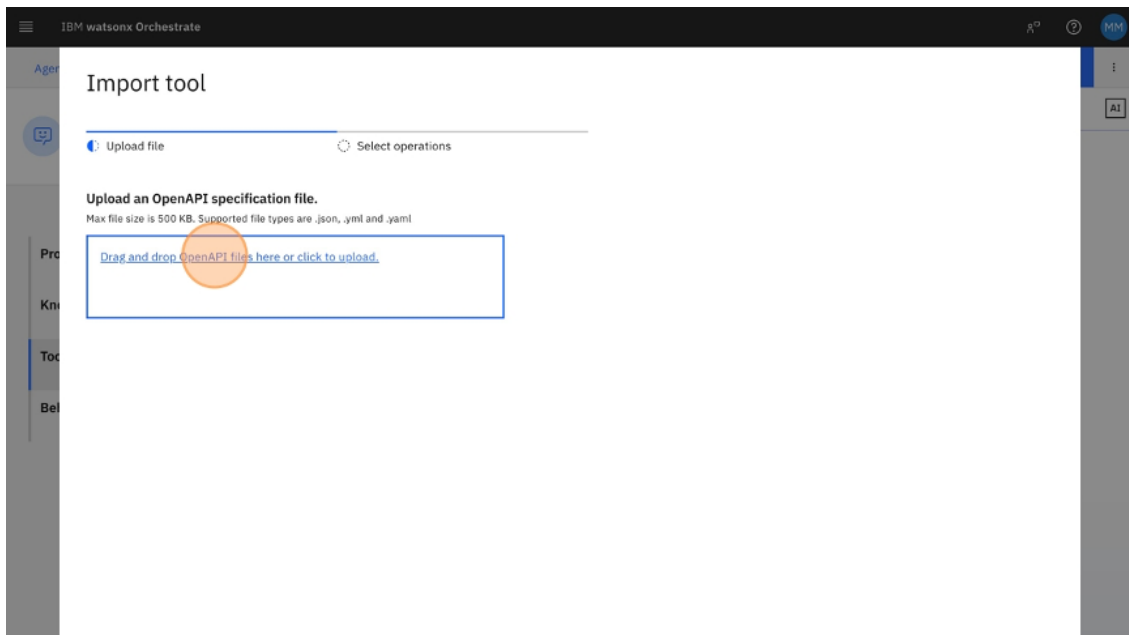
1. Click "Add tool"



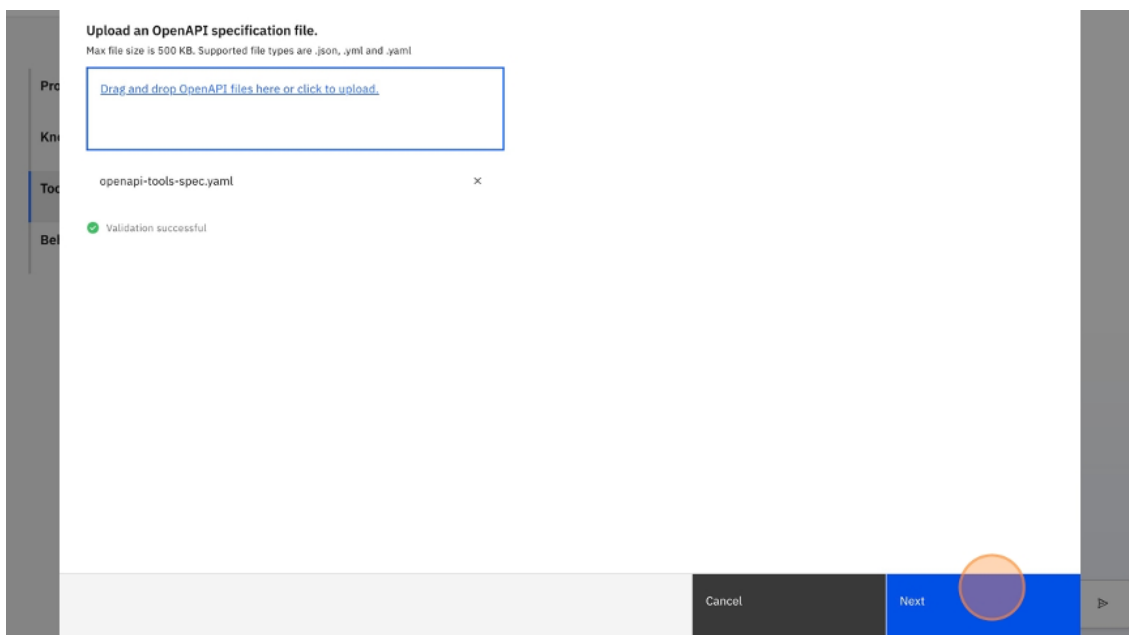
1. Select "Import an external tool."



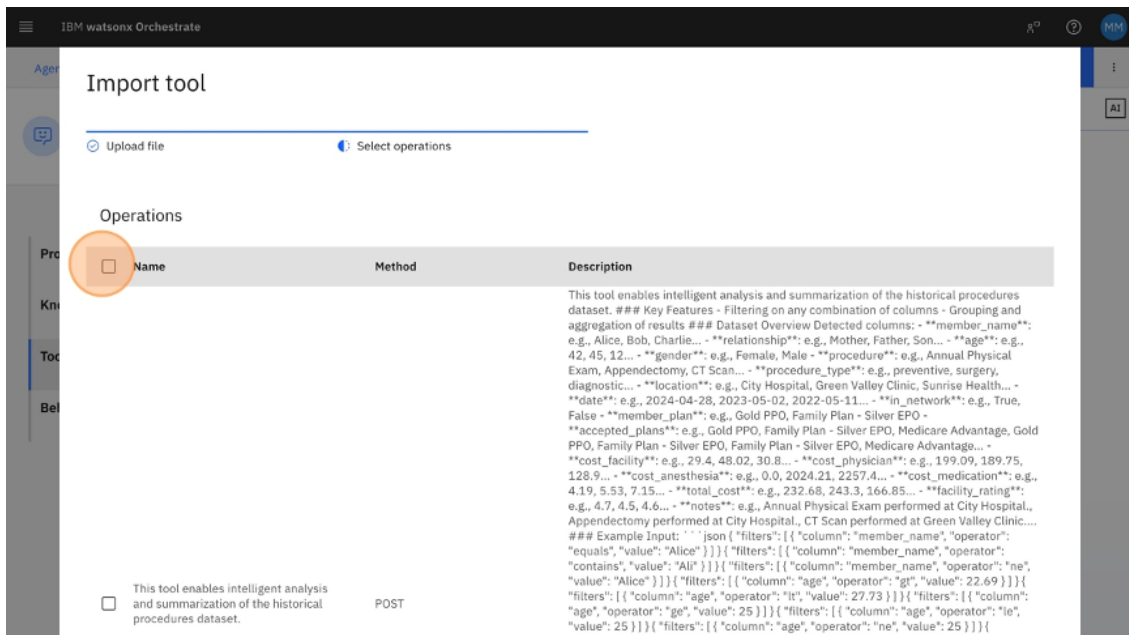
1. Click on the upload area labeled "Drag and drop OpenAPI files here or click to upload."



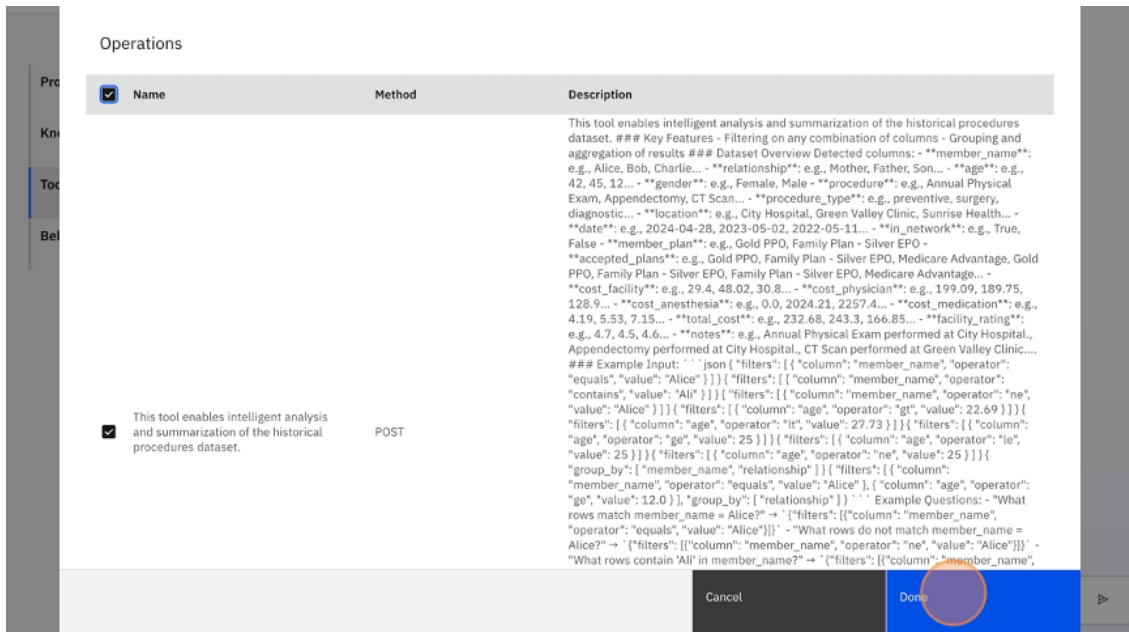
1. Upload the file containing the OpenAPI specification file: `openapi-tools-spec.json` (Note: `openapi-tools-spec.yaml` is also available if issues are encountered with file uploads)
2. Click "Next"



1. Click "Select all rows in the table" to select all available tools

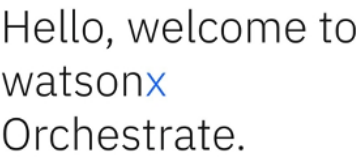


1. Click "Done"



4. Deploying and Testing the Agent

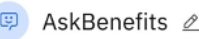
1. In the "Type something..." field enter the following and hit enter
Can you give me a cost breakdown for X rays?



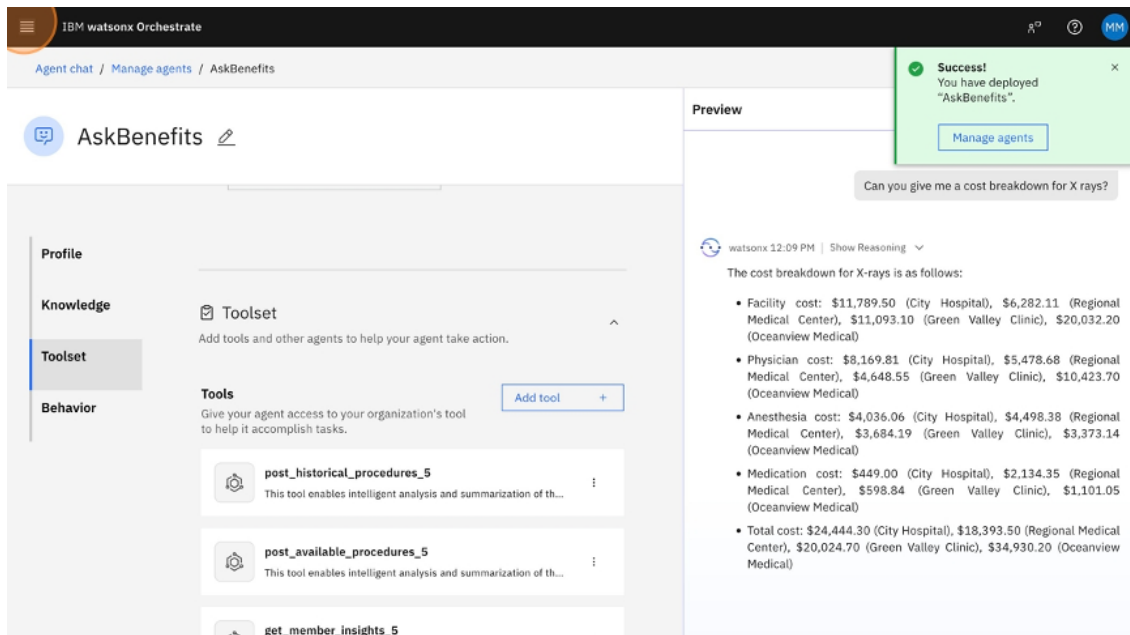
Accuracy of generated answers may vary. Please double-check responses

Type something...

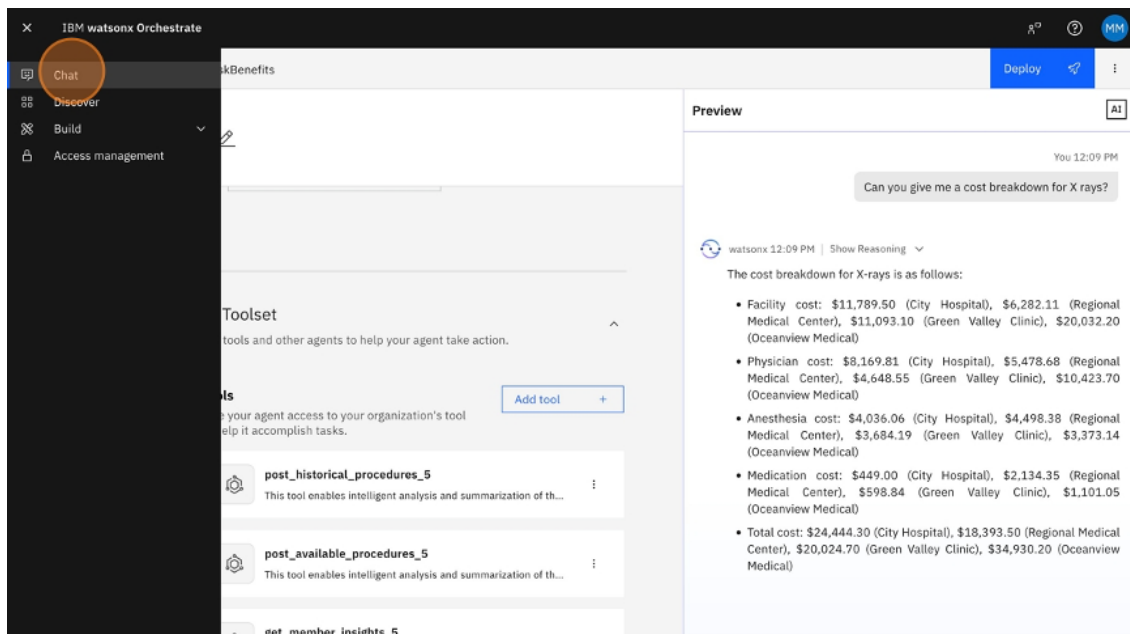
1. Click "Deploy" to activate your AskBenefits agent



1. Click on the menu icon in the top left corner



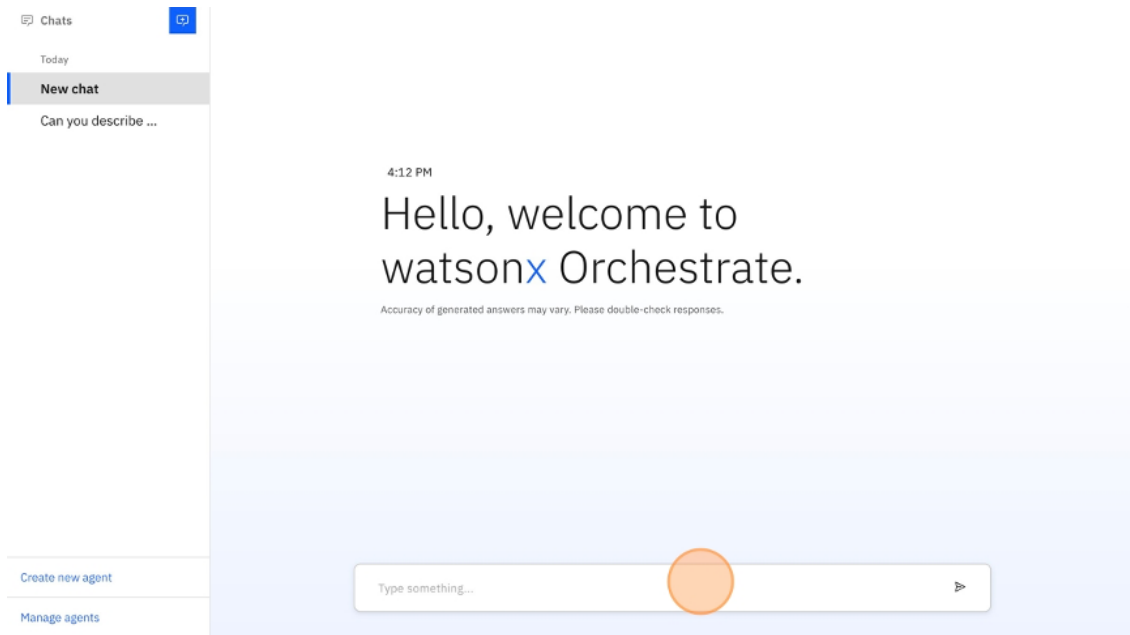
1. Click on "Chat"



AskDental Step-by-Step Instructions

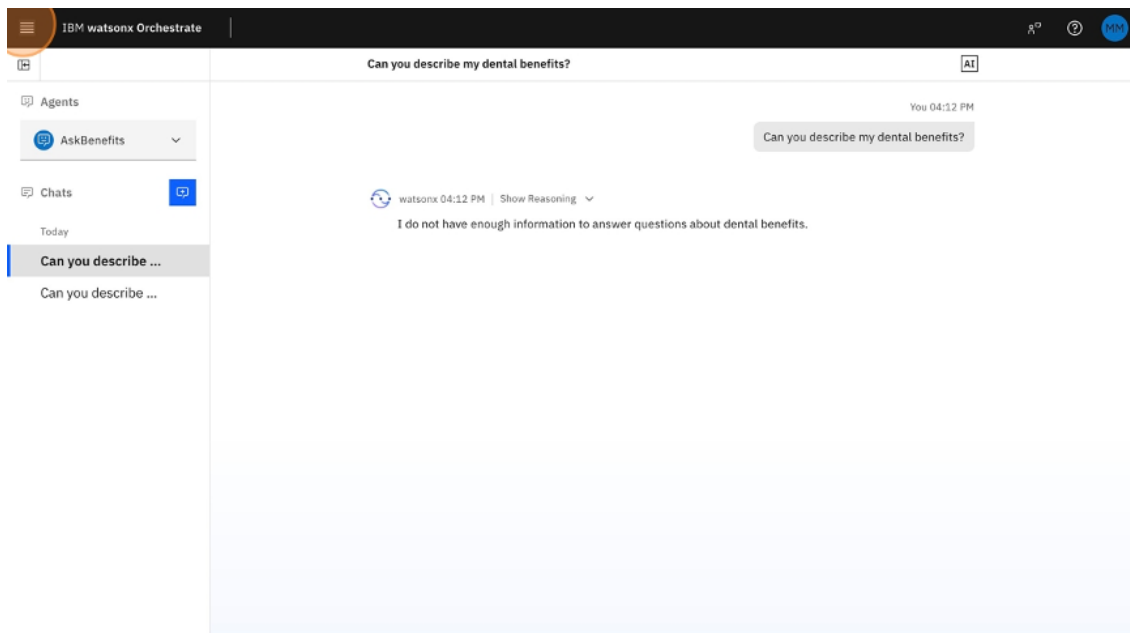
1. Identifying Knowledge Gaps

1. In the "Type something..." field enter the following and hit enter
Can you describe my dental benefits?

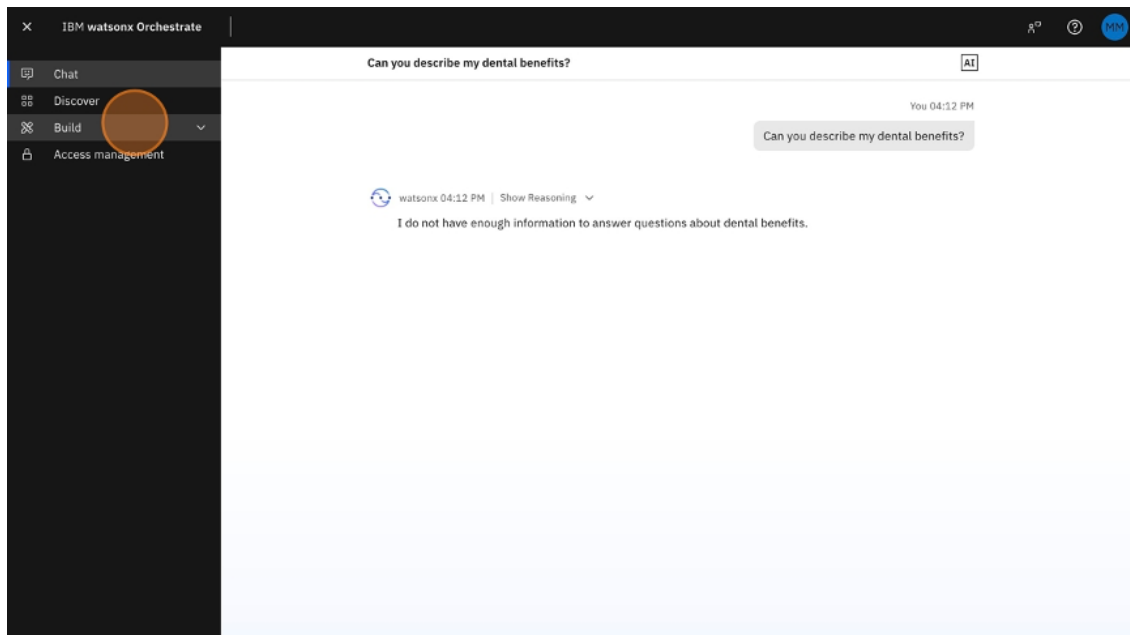


2. Creating a New Collaborator Agent

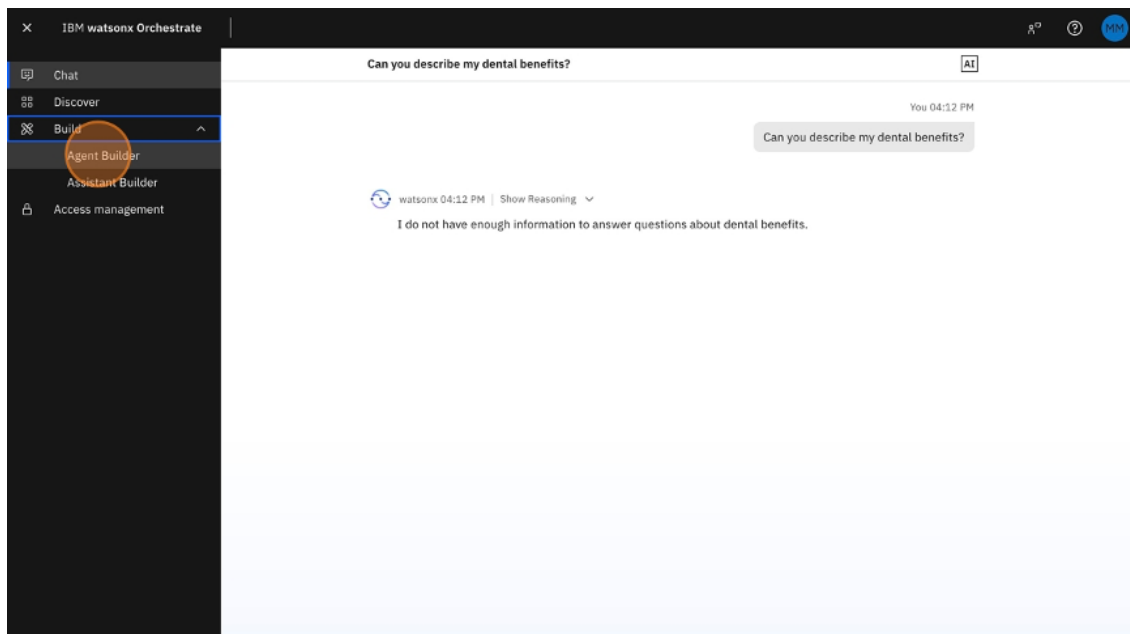
1. Click on the hamburger menu icon in the top left



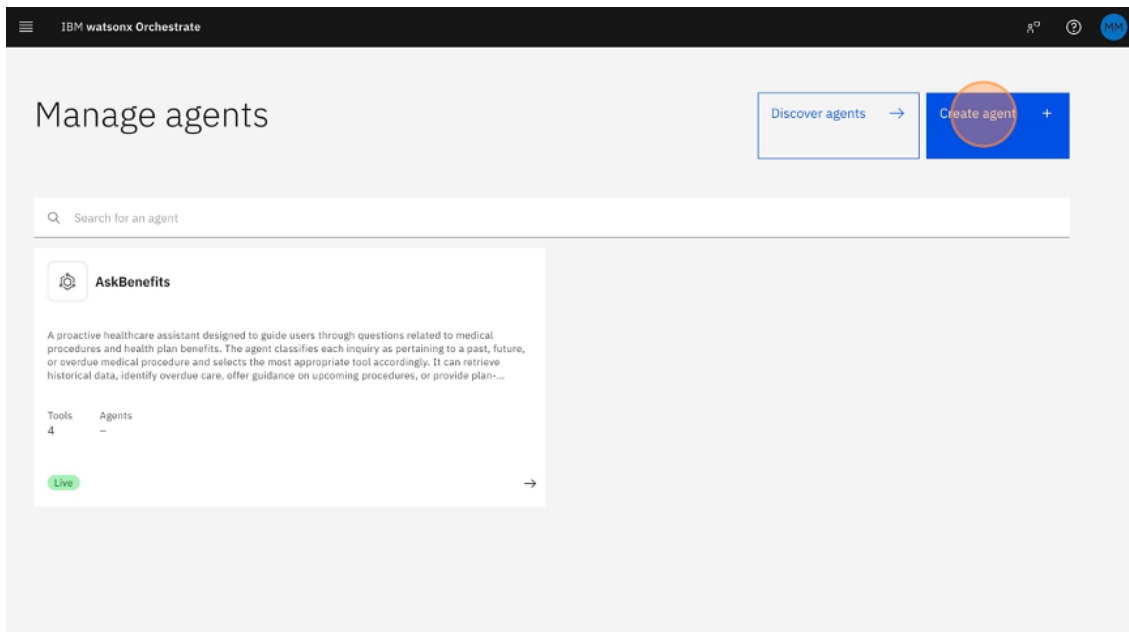
1. Click on "Build"



1. Select "Agent Builder"



1. Click "Create agent"



1. In the "Name*" field, enter: AskDental

1. In the "Description*" field, enter: The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their dental coverage and make informed decisions about their oral health care. By analyzing individual policy details and dental needs, the agent answers questions about coverage.

Create from scratch ☒

Build your custom agent step by step to create a custom solution.

Create from template ☐

Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*

AskDental

Description*

Example: This agent helps answer customer questions about return and cancellation policies.

Describe your agent's purpose.

Cancel Create

1. Click "Create" to initialize your agent

Create from scratch ☒

Build your custom agent step by step to create a custom solution.

Create from template ☐

Browse the catalog and use the attributes of another agent as a template to create your agent.

Name*

AskDental

Description*

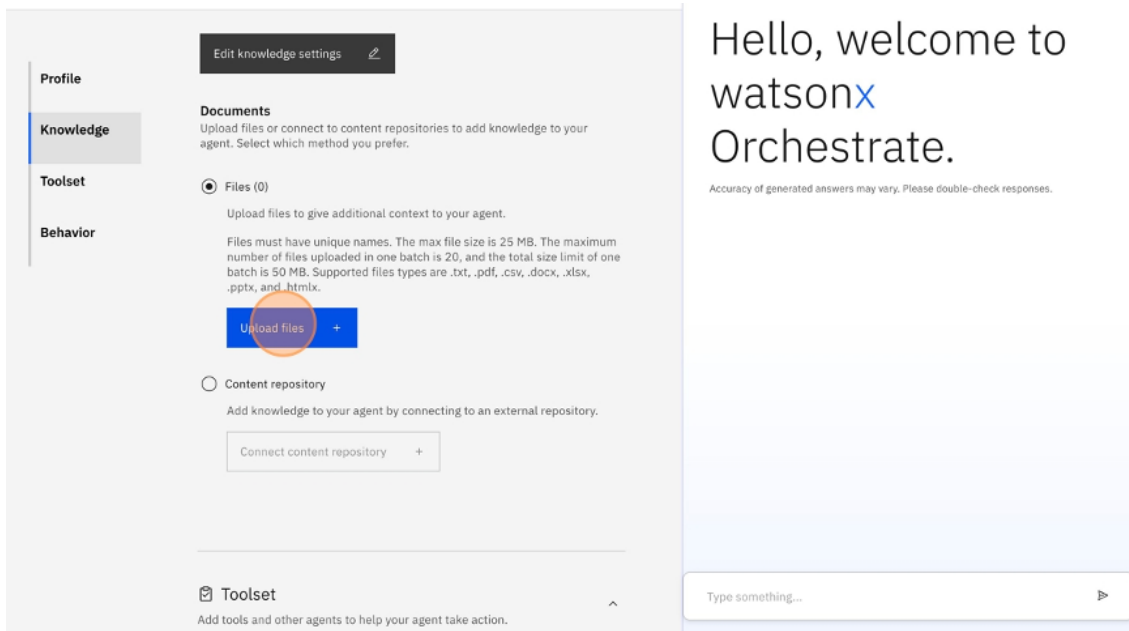
The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their dental coverage and make informed decisions about their oral health care. By analyzing individual policy details and dental needs, the agent answers questions about coverage.

Describe your agent's purpose.

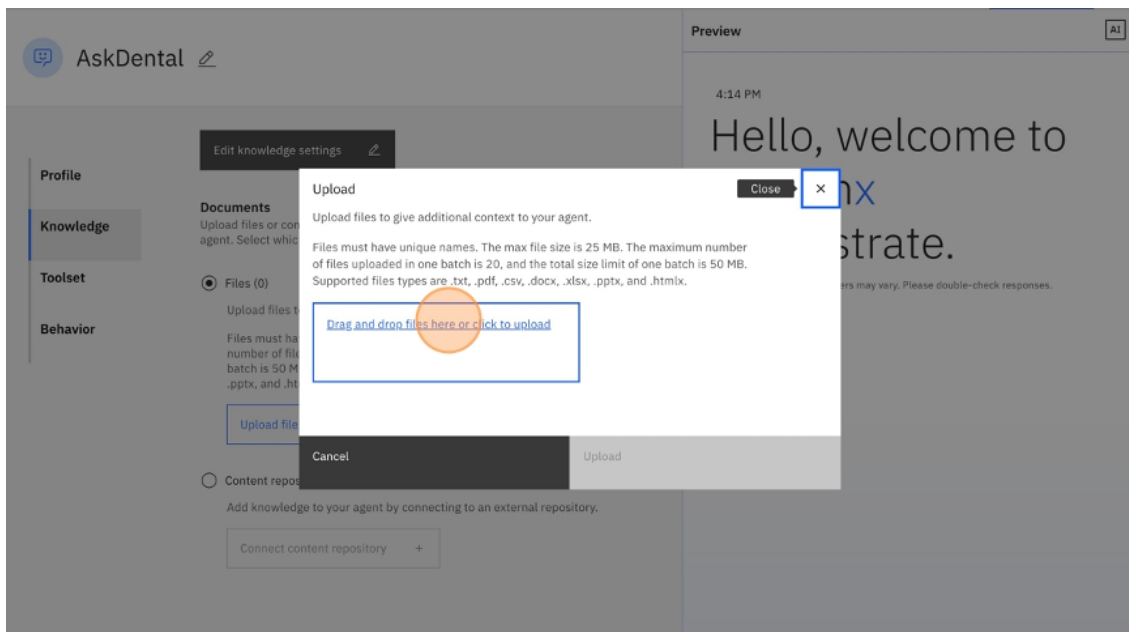
Cancel Create

3. Importing and Exposing Knowledge Documents

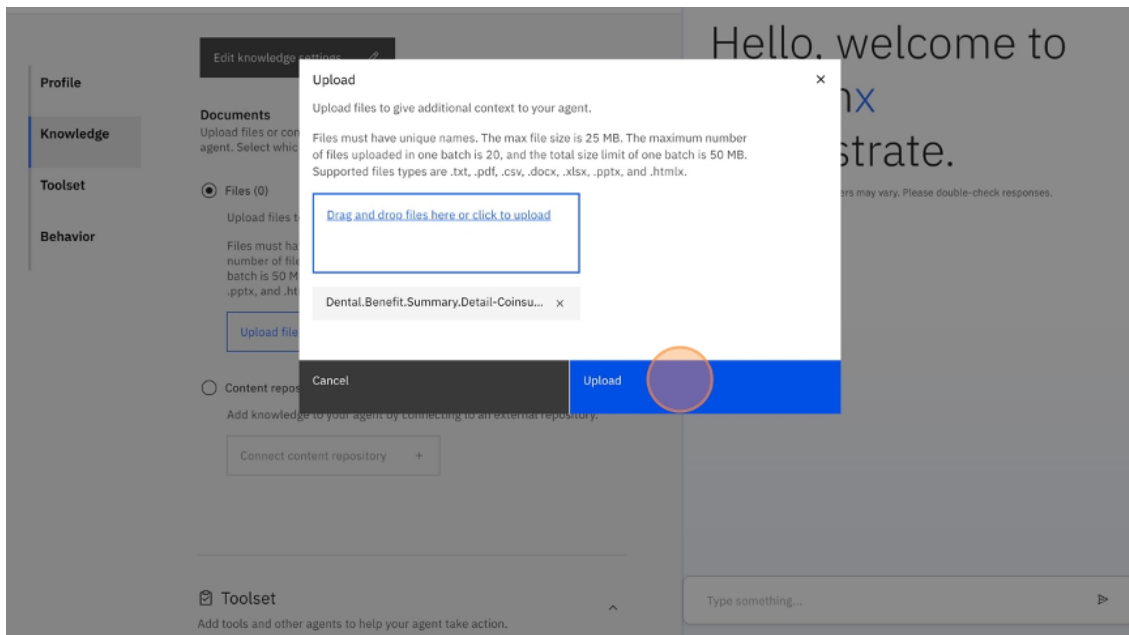
1. Click "Upload files" under "Knowledge"



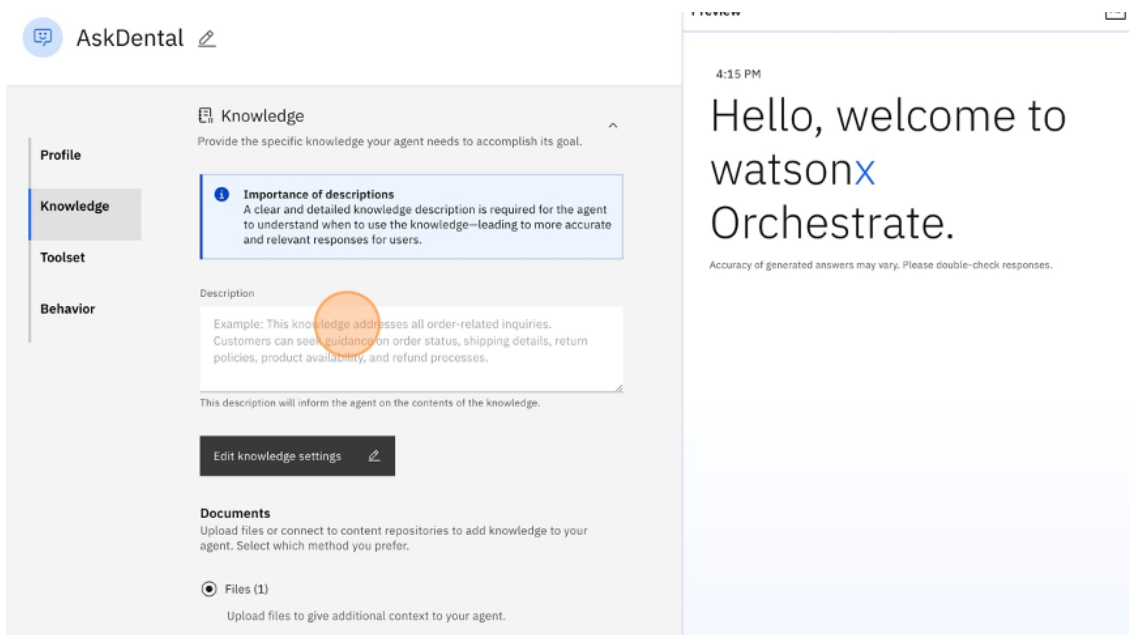
1. Upload the file containing Dental Benefit information:
dental_benefits_summary.pdf



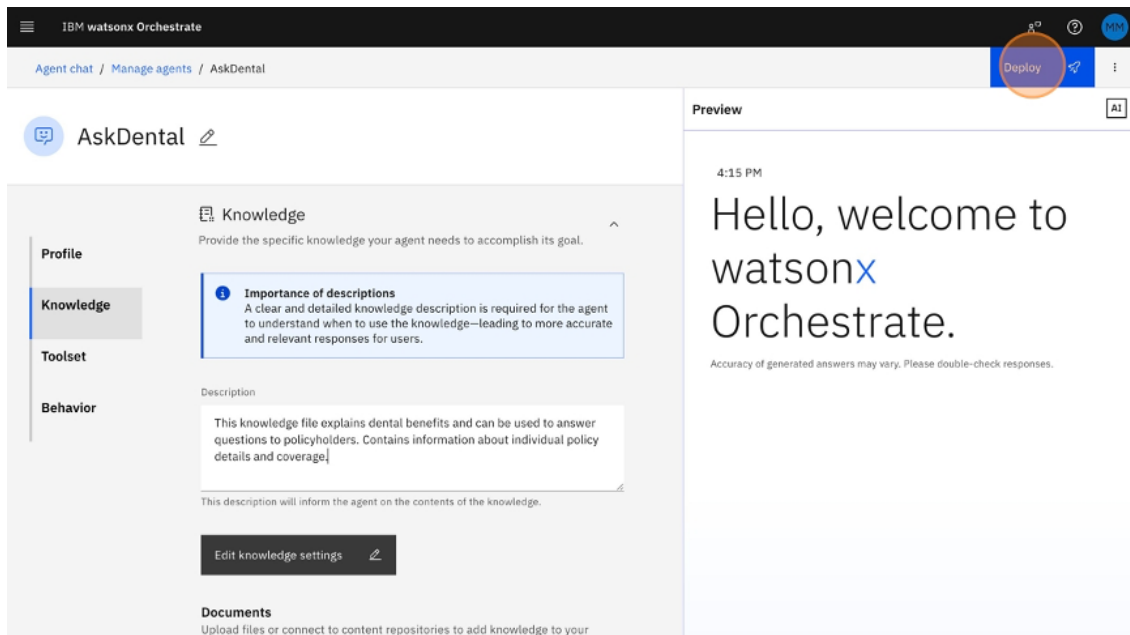
1. Click "Upload"



1. In the Knowledge Description field with "Example: This knowledge addresses all order-related inquiries. Customers can seek guidance on order status, shipping details, return policies, product availability, and refund processes." enter: This knowledge file explains dental benefits and can be used to answer questions to policyholders. Contains information about individual policy details and coverage. If the answer to the question is not contained in your knowledge base, instead of responding you should initiate a transfer to the supervisor agent, copying the users query verbatim.

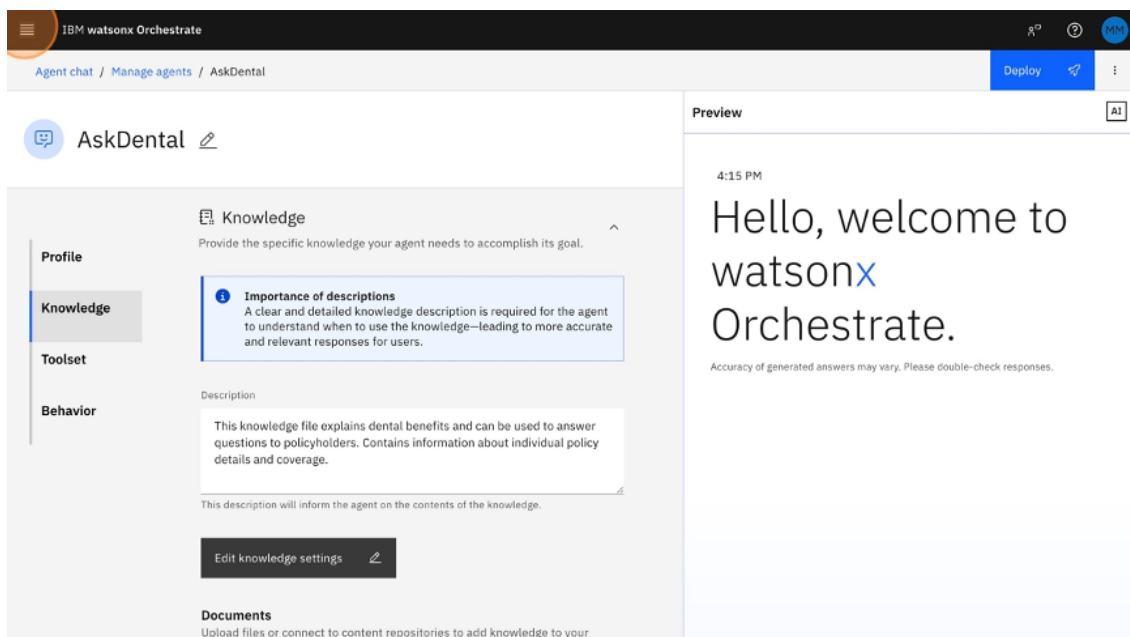


1. Click "Deploy"

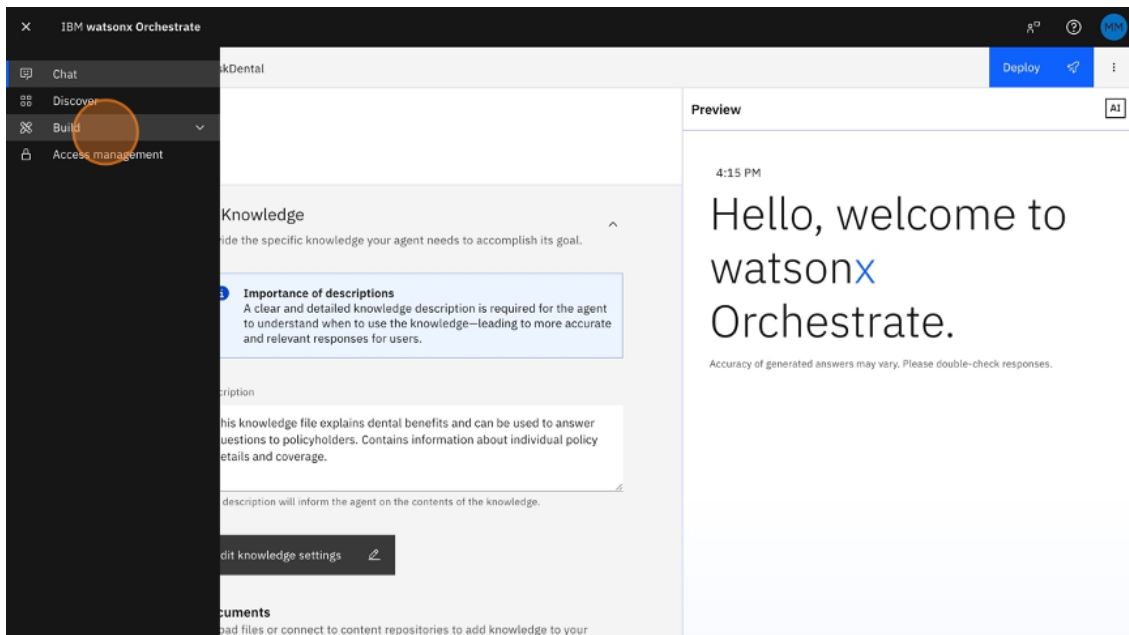


4. Integrating AskDental as a Collaborator

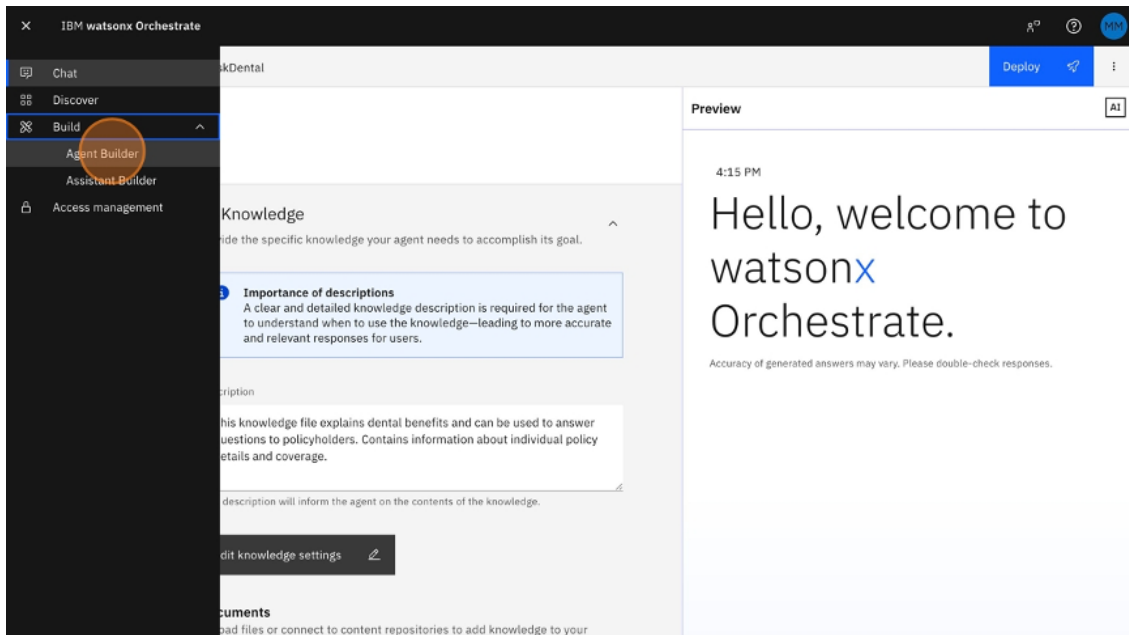
1. Click on the hamburger menu icon in the top left



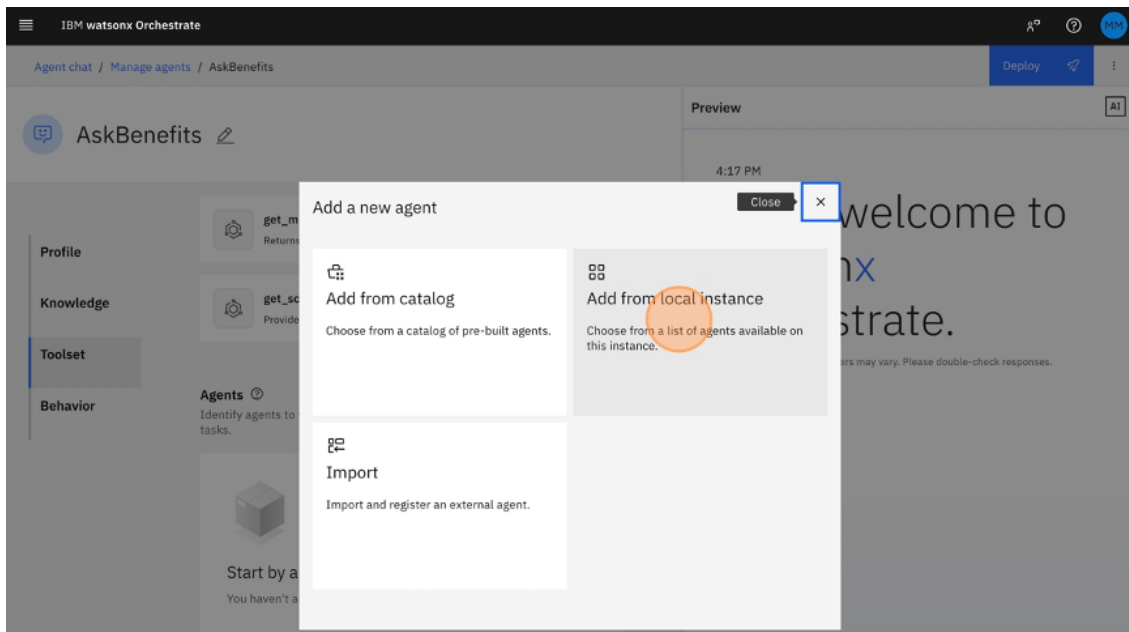
1. Click on "Build"



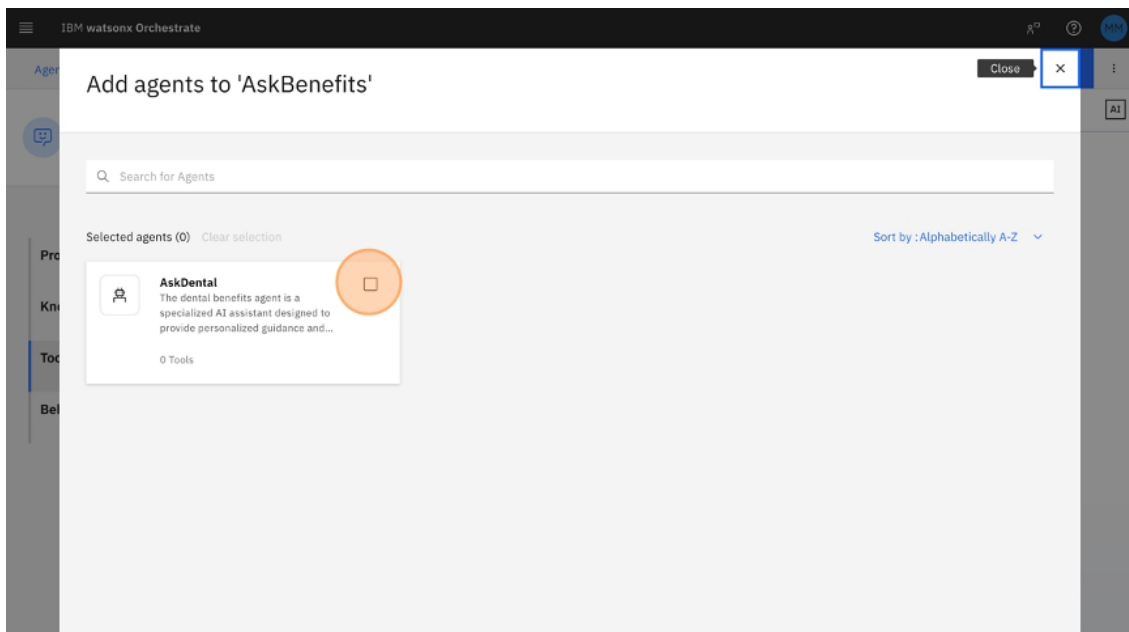
1. Select "Agent Builder"



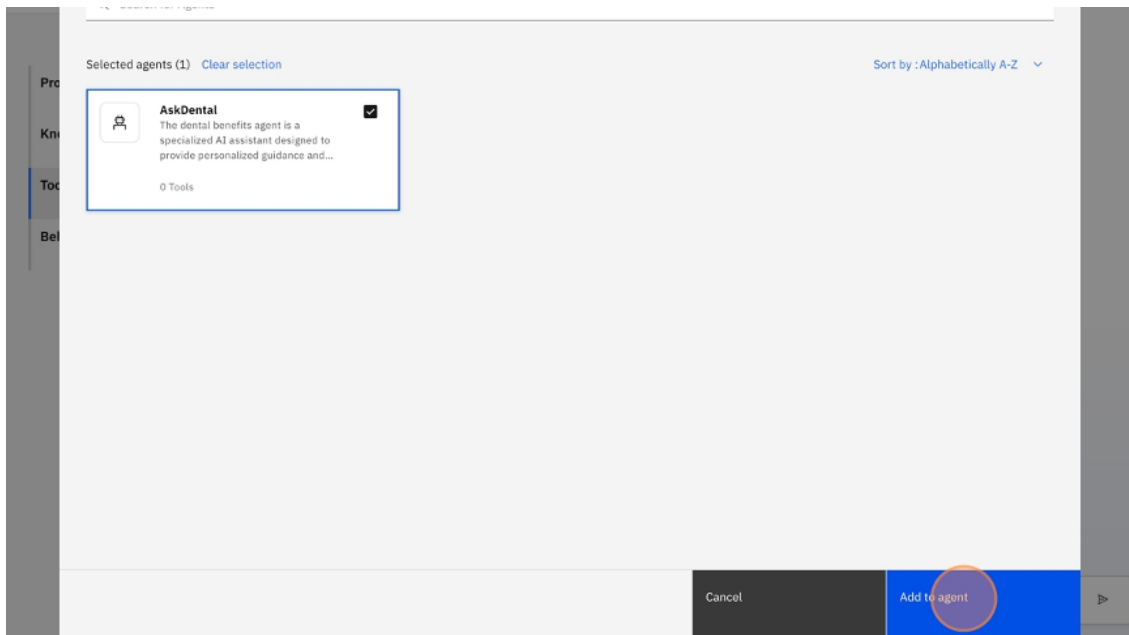
1. Select "AskBenefits"



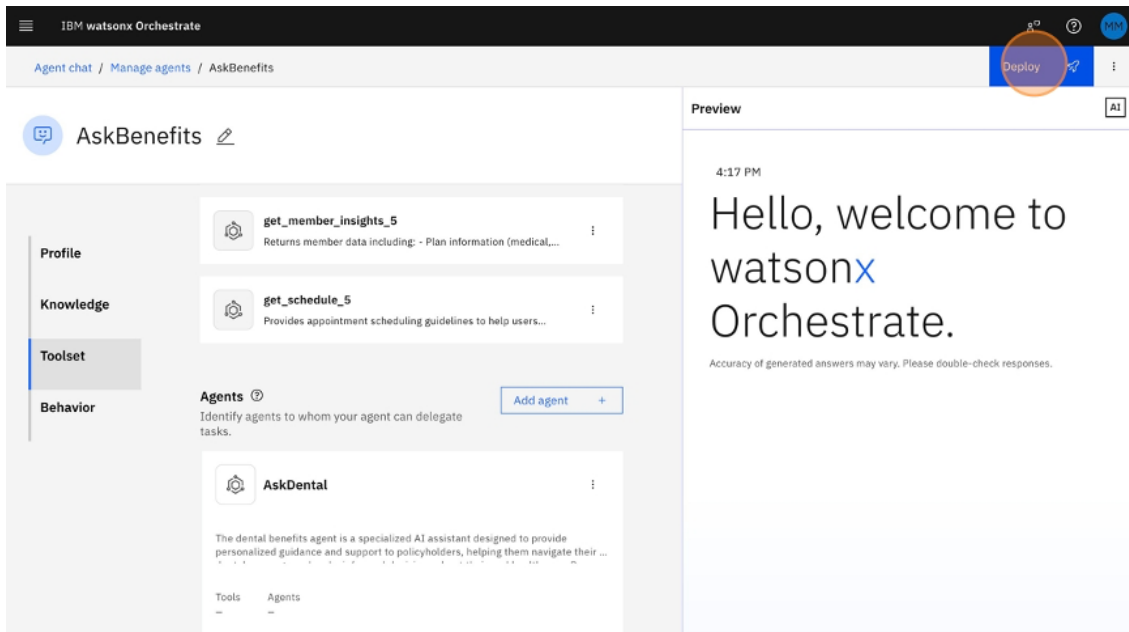
1. Select "AskDental"



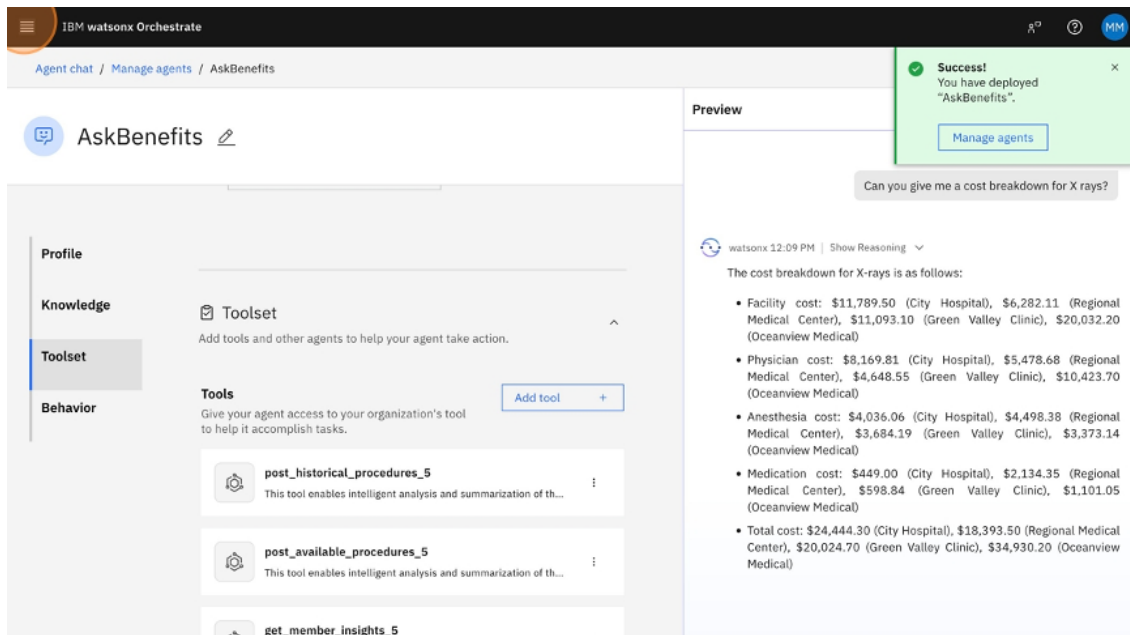
1. Click "Add to agent"



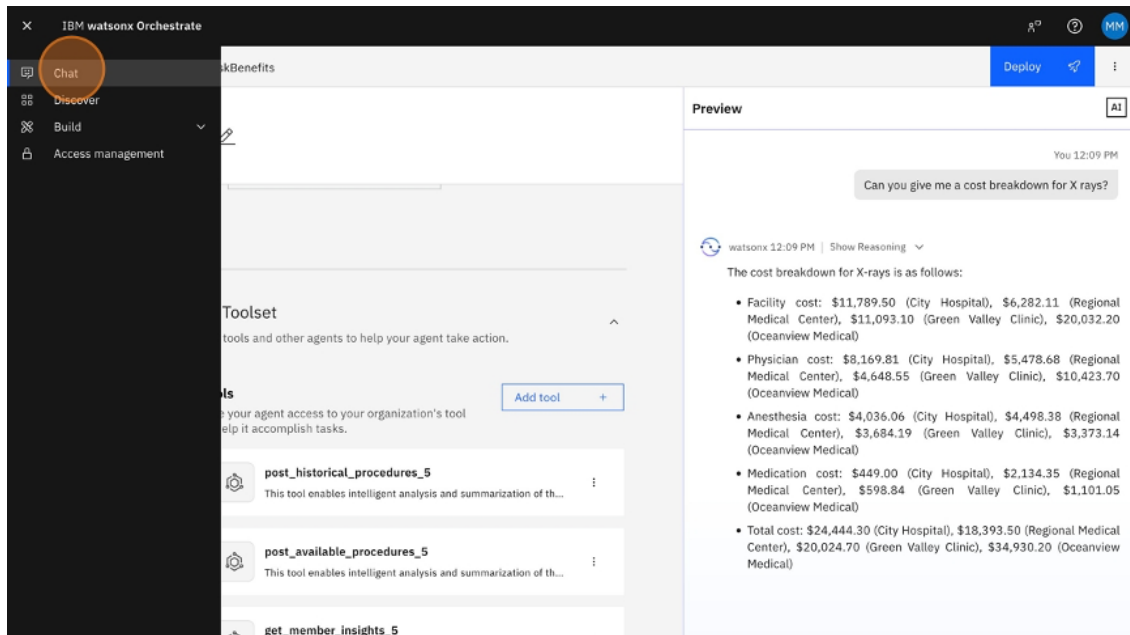
1. Click "Deploy"



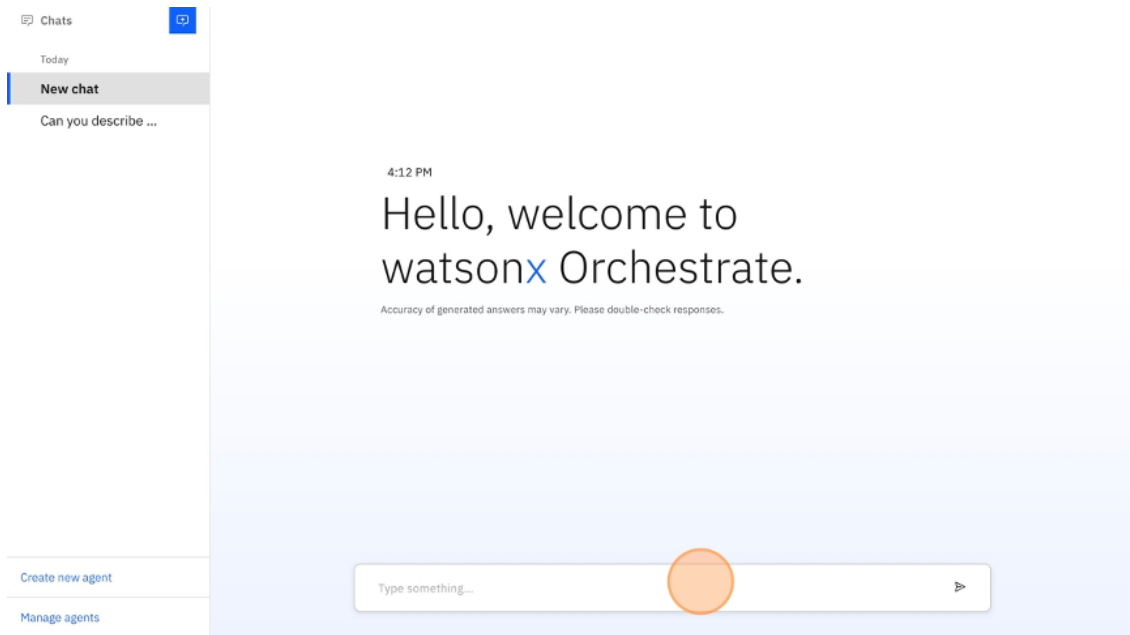
1. Click on the menu icon in the top left corner



1. Click on "Chat"



1. In the "Type something..." field enter the following and hit enter
Can you describe my dental benefits?



Testing Scenarios

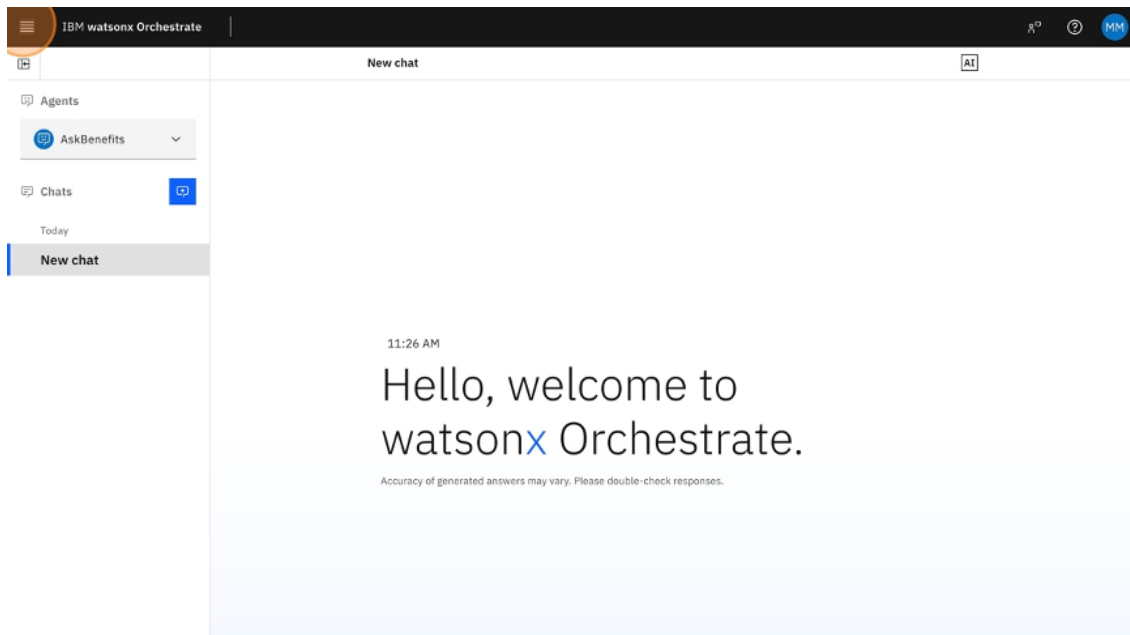
After successful deployment, test the AskBenefits agent with the following sample prompts to verify functionality across different healthcare scenarios:

1. **Procedure Cost Breakdown:** Can you give me a cost breakdown for X rays?
2. **Historical Procedure Review:** What procedures have we had at City Hospital in the last year?
3. **Preventive Care Alerts:** Are we overdue for any procedures?
4. **Appointment Scheduling:** Can you schedule an appointment for next Thursday at 10 AM?
5. **Document Access:** Thanks, how do I access my 1095 form again?
6. **Dental Document Question Answering:** Can you describe my dental benefits?

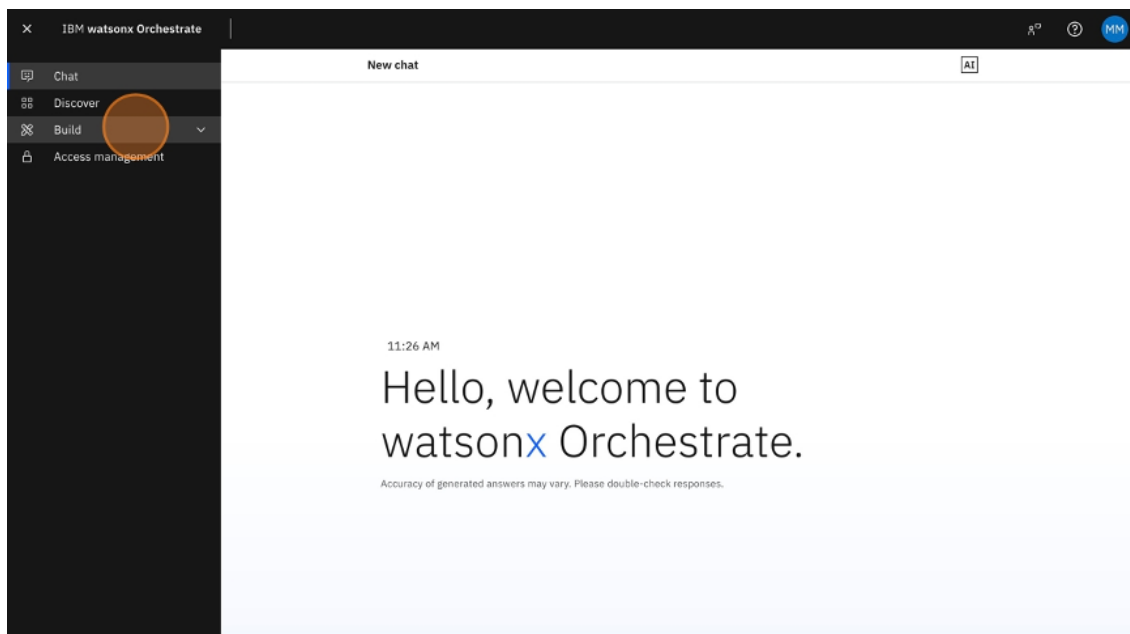
Incorporating a WatsonX Assistant

1. Creating a new WatsonX Assistant

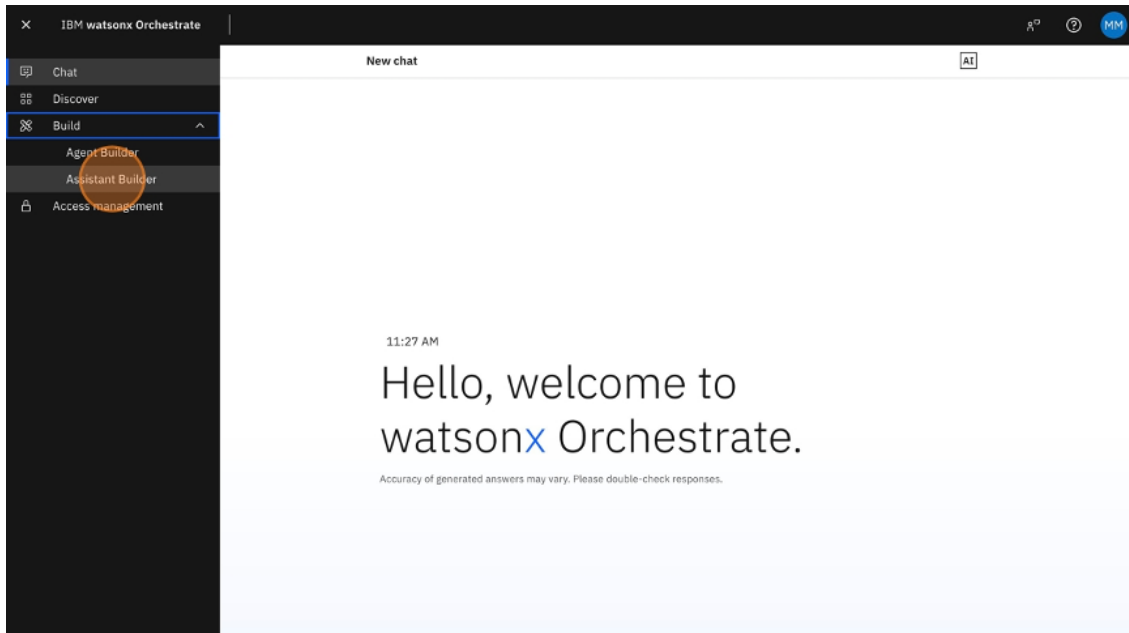
1. Click on the hamburger menu icon in the top left



1. Click on "Build"



1. Click on "Assistant Builder"



1. In the "Assistant Name" field enter Main Desk Concierge
Welcome to AI assistant builder

The image shows the 'Create your first assistant' form. At the top, there are four tabs: Create (active), Personalize, Customize, and Preview. Below the tabs is a heading 'Create your first assistant' followed by instructions: 'Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.' The form has three main sections: 1. 'Assistant name' with a text input field containing 'Example: Banking Bot' and a note 'Your assistant name will be kept internally and not visible to your customers'. 2. 'Description (optional)' with a text area containing 'Add a description for this assistant' and a character count '0/128'. 3. 'Assistant language' with a dropdown menu set to 'English (US)' and a note 'This is the language your assistant will speak.' In the top right corner, there is a dark notification bar with a checked box for 'Don't remind me again', an 'Install Desktop App' button, and a 'Dismiss' button.

2. Click on "Next"

IBM watsonx Orchestrate

AI assistant builder

8° ? MM

Welcome to AI assistant builder

Next

CreatePersonalizeCustomizePreview

Create your first assistant

Let's get your assistant up and running. Name your assistant, add a description, and choose a language. In following steps we'll gather more information, show you basic customizations, and give you a preview of what your assistant will look like.

Assistant name

Main Desk Concierge

Your assistant name will be kept internally and not visible to your customers

Description (optional)

0/128

Add a description for this assistant

Assistant language

English (US)

This is the language your assistant will speak.

1. Select the "Web" option.

Welcome to AI assistant builder

BackNext

CreatePersonalizeCustomizePreview

Personalize your assistant

Tell us where your assistant will live

You may add multiple channels from your dashboard.

Where do you plan on deploying your assistant?

Web

Tell us about yourself

This information will be used to personalize your onboarding experience.

Which industry do you work in?

Choose an option

What is your role on the team building the assistant?

Choose an option

Which statement describes your needs best?

Choose an option

This is what your customers will experience

Select a deployment choice to see what your customers experience

1. Select the "N/A (I am a student)" option.

② Personalize your assistant

Tell us where your assistant will live
You may add multiple channels from your dashboard.

Where do you plan on deploying your assistant?

Web

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in?

N/A (I am a student)

What is your role on the team building the assistant?

Choose an option

Which statement describes your needs best?

Choose an option

This is what your customers will experience

watsonx Assistant

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within 5 miles of you.

What size and color do you need?

I'm looking for a size 9 in white

Great news! The Speed Demons are available in white in a size 9.

You can purchase them for curbside pickup or we can ship them to you. Which would you prefer?

I'll pick them up! Ship them to me!

Type something...

1. Select the "Developer" option.

② Personalize your assistant

Tell us where your assistant will live
You may add multiple channels from your dashboard.

Where do you plan on deploying your assistant?

Web

Tell us about yourself
This information will be used to personalize your onboarding experience.

Which industry do you work in?

N/A (I am a student)

What is your role on the team building the assistant?

Developer

Which statement describes your needs best?

Choose an option

This is what your customers will experience

watsonx Assistant

Do you have the Speed Demons in stock?

The Speed Demons are in stock at our Downtown and Northgate locations, which are both within 5 miles of you.

What size and color do you need?

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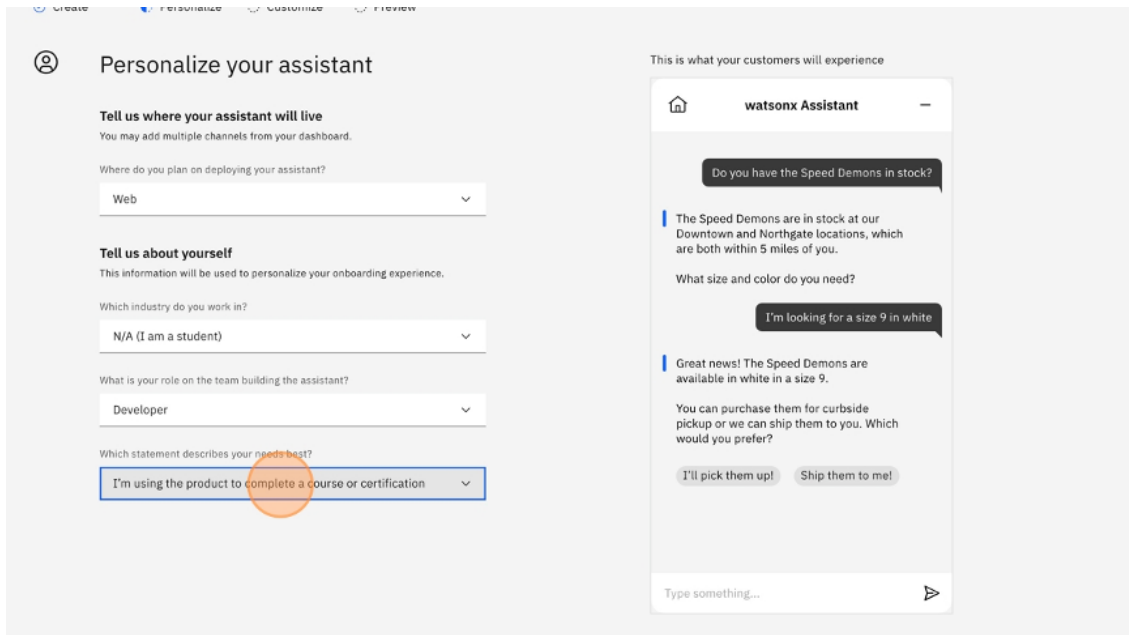
Great news! The Speed Demons are available in white in a size 9.

You can purchase them for curbside pickup or we can ship them to you. Which would you prefer?

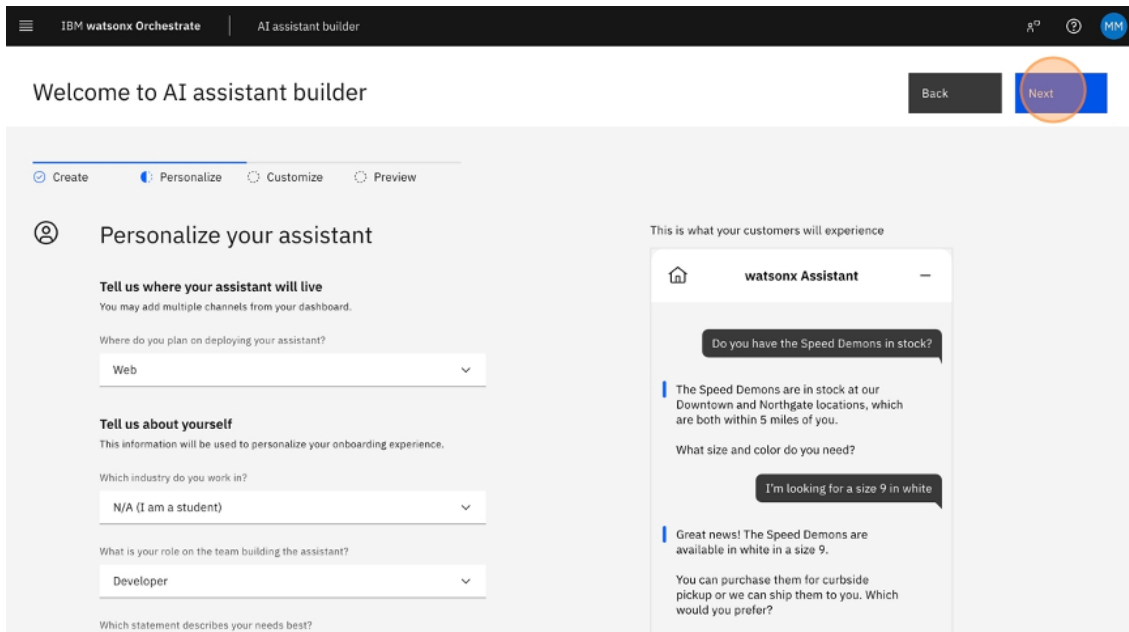
I'll pick them up! Ship them to me!

Type something...

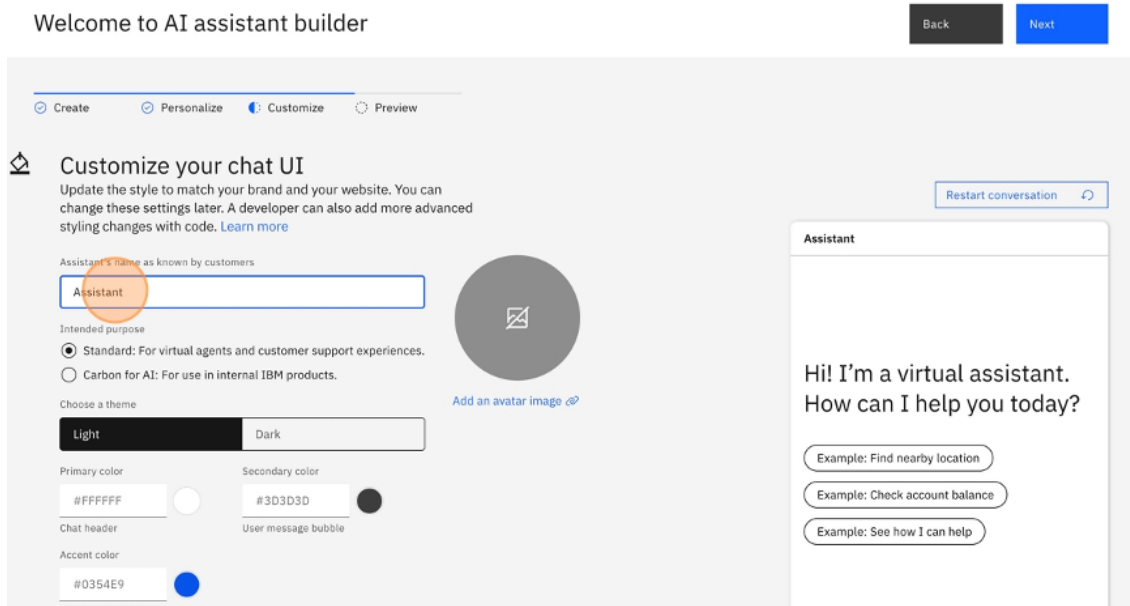
1. Select the "I'm using the product to complete a course or certification" option.



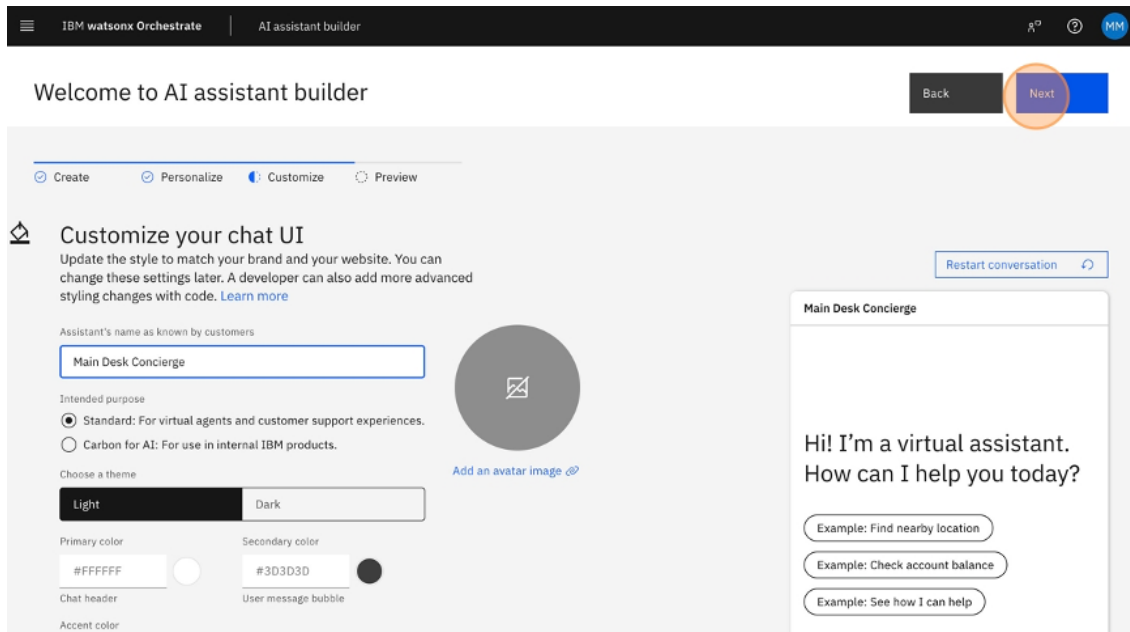
1. Click on "Next"



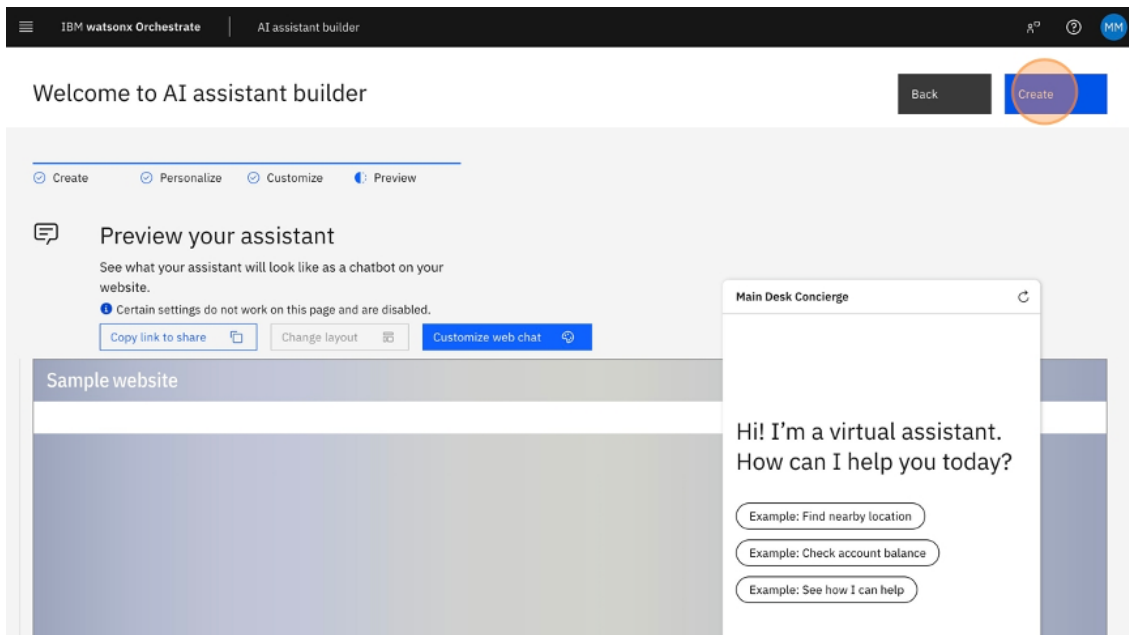
1. Type "Main Desk Concierge"



1. Click on "Next"

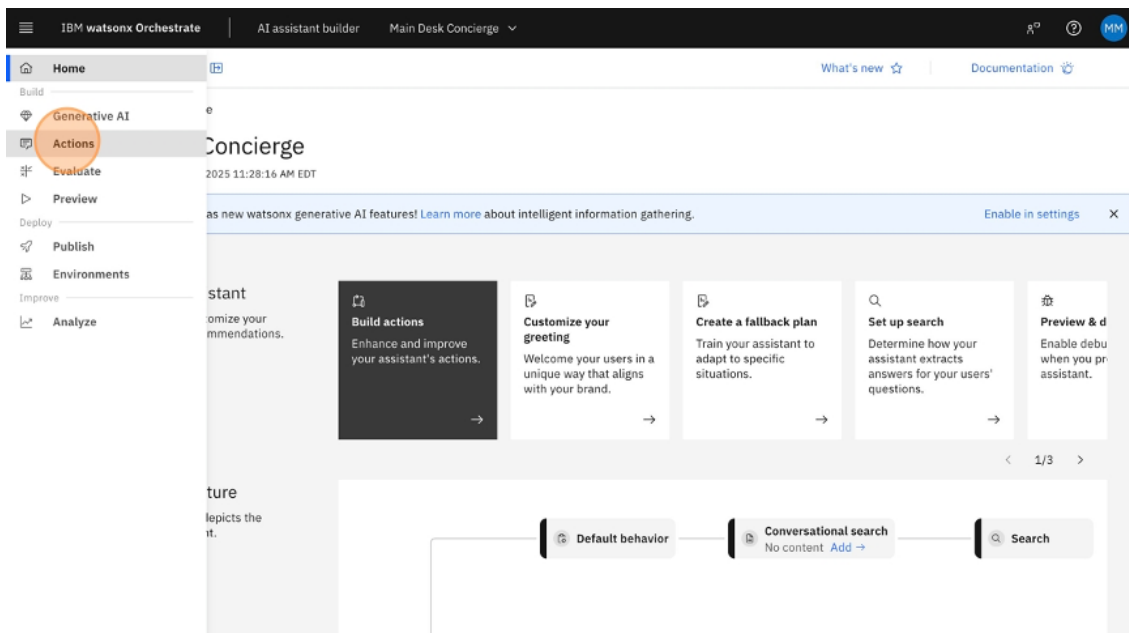


1. Click "Create"

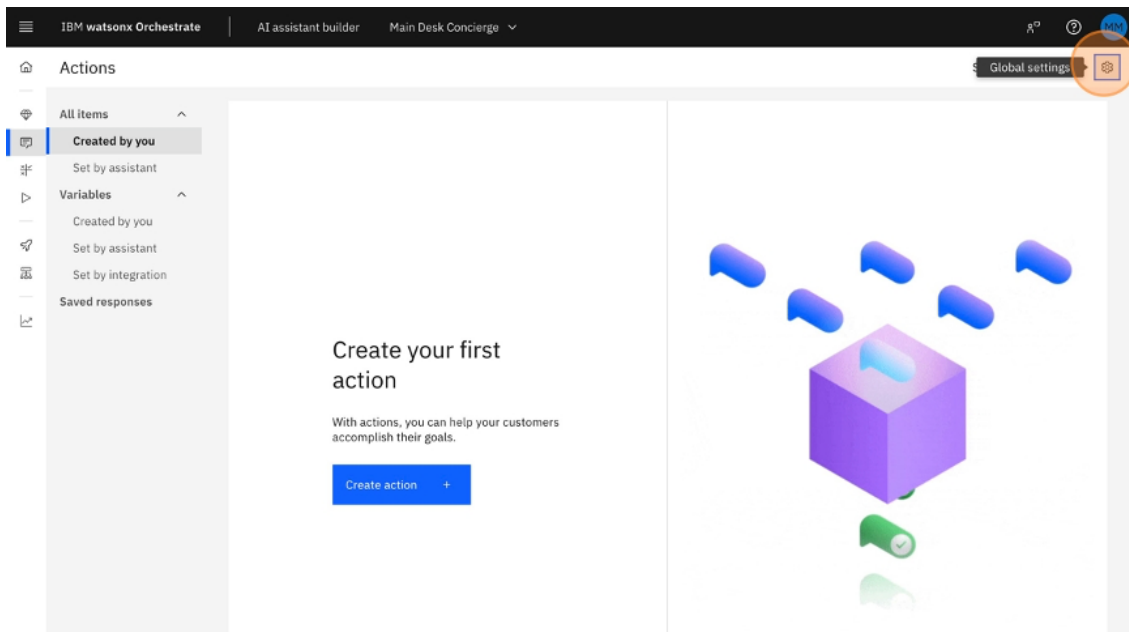


2. Importing the Pre-Made Action

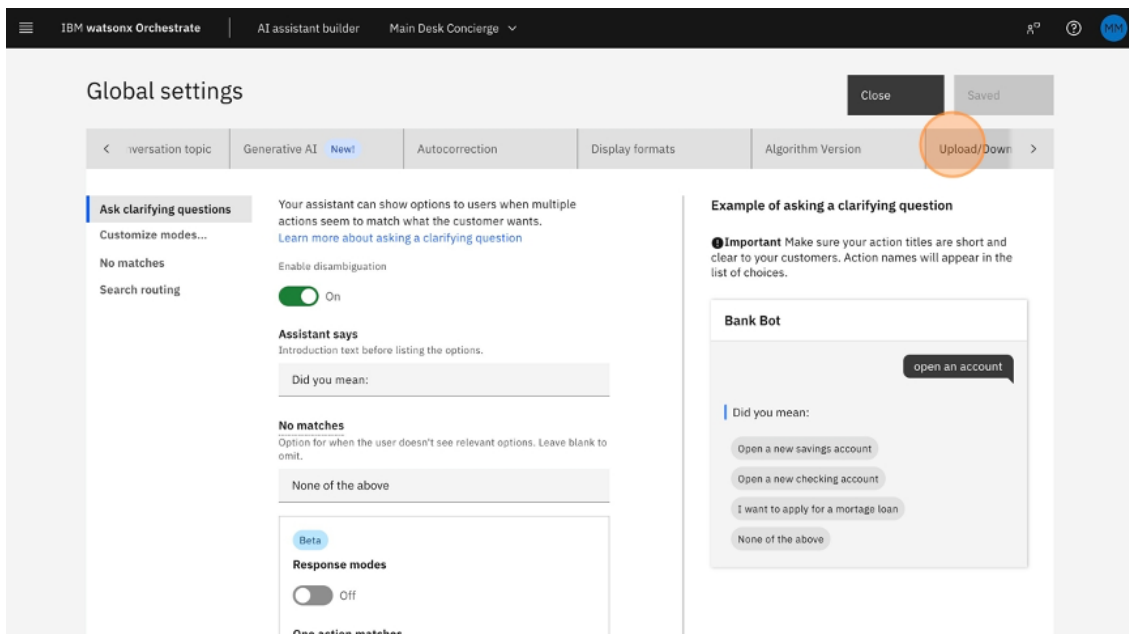
1. Click "Actions"



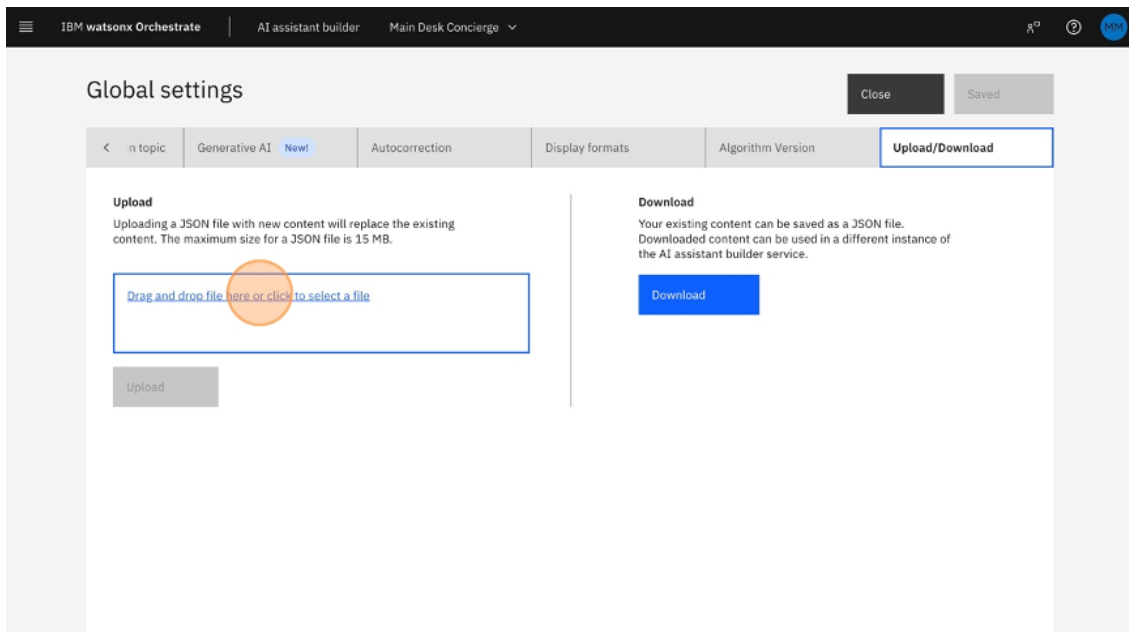
1. Click on "Global Settings"



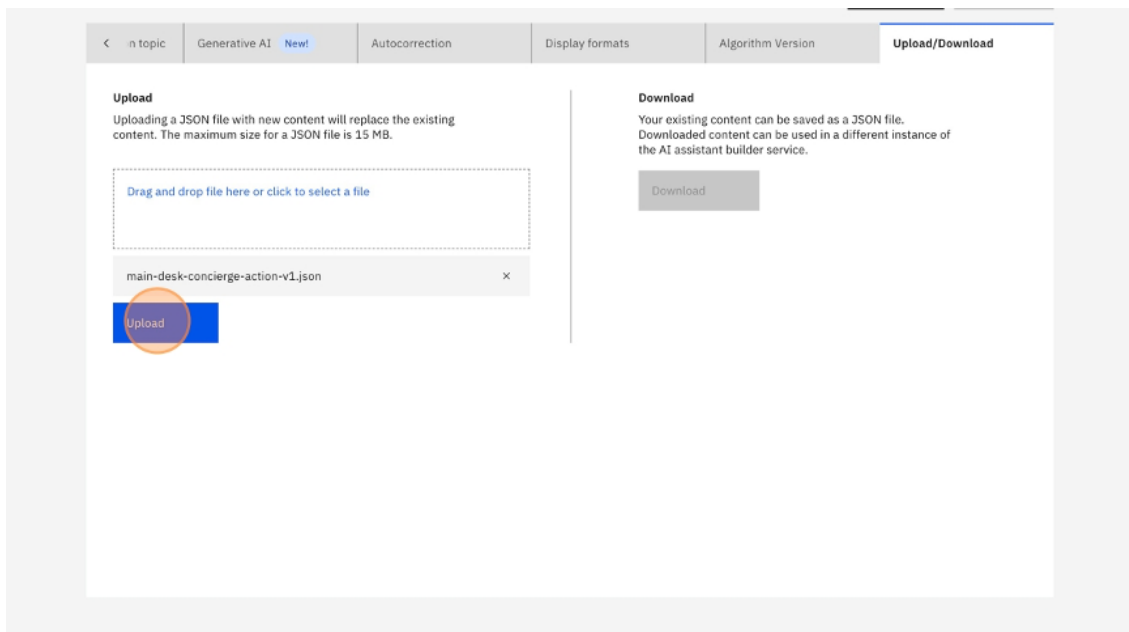
1. Click "Upload/Download"



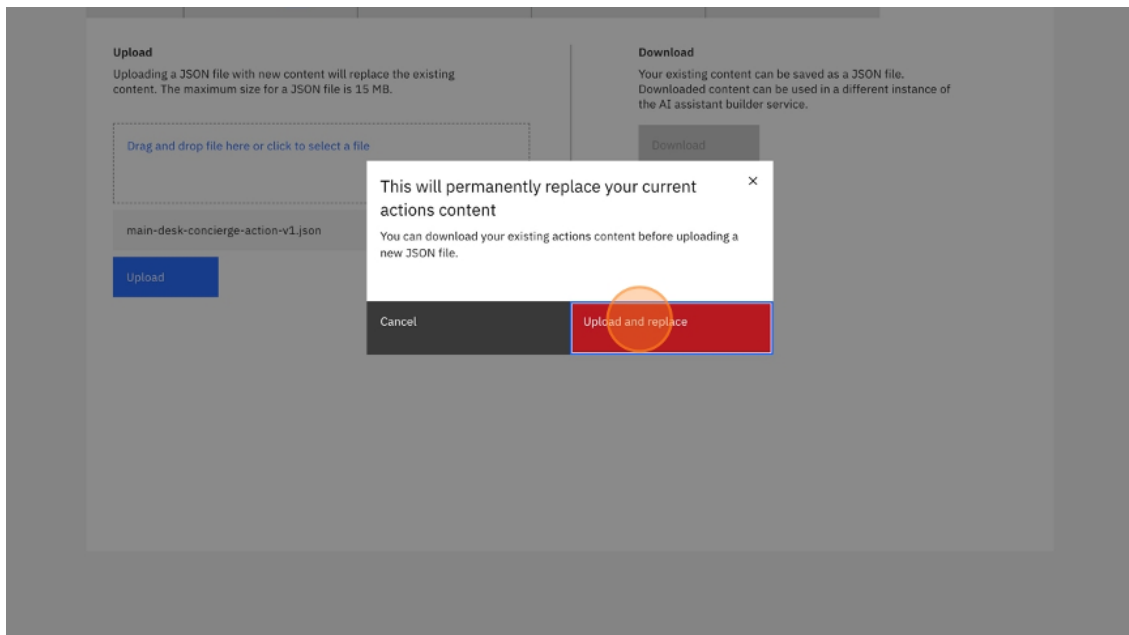
1. Click "Drag and drop file here or click to select a file" and upload Main-Desk-Concierge-action.json



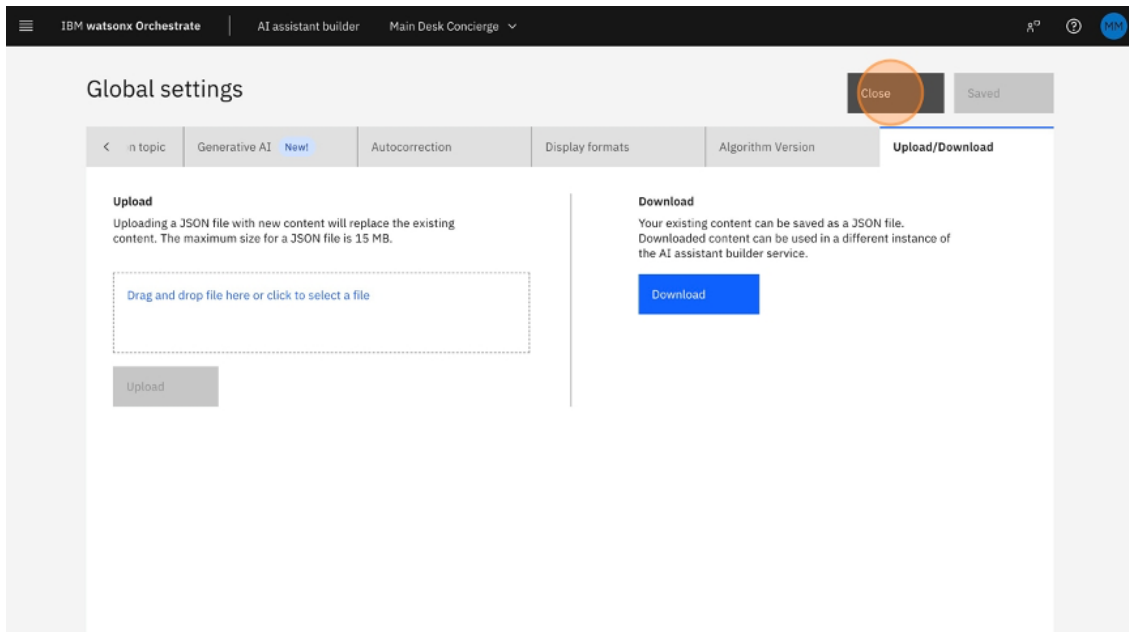
1. Click on "Upload"



1. Click "Upload and replace"

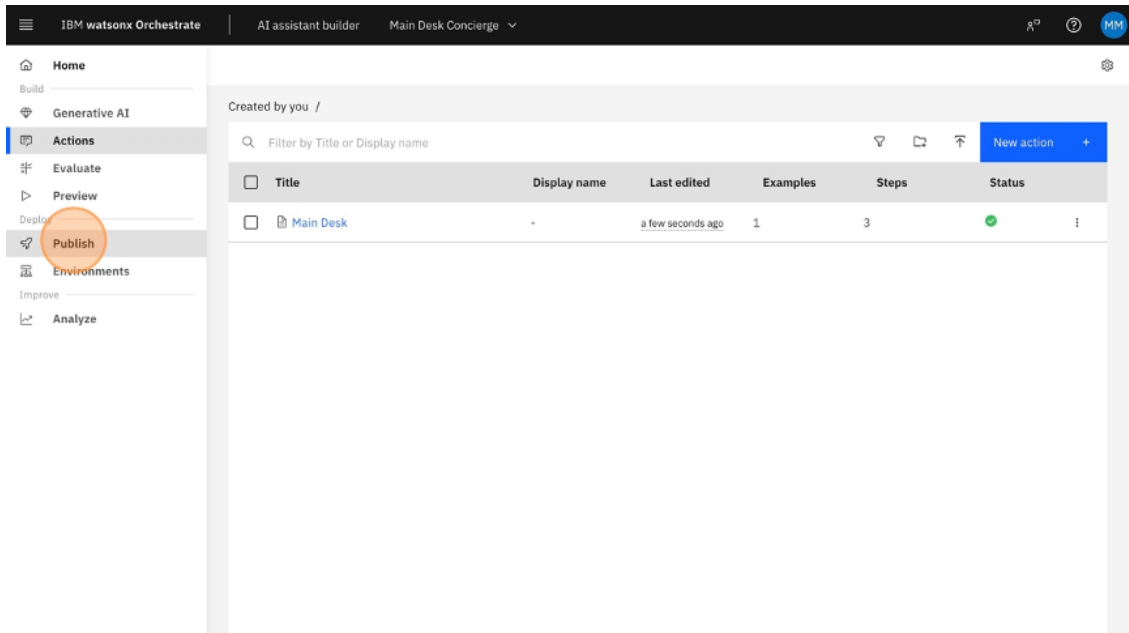


1. Click on “Close”

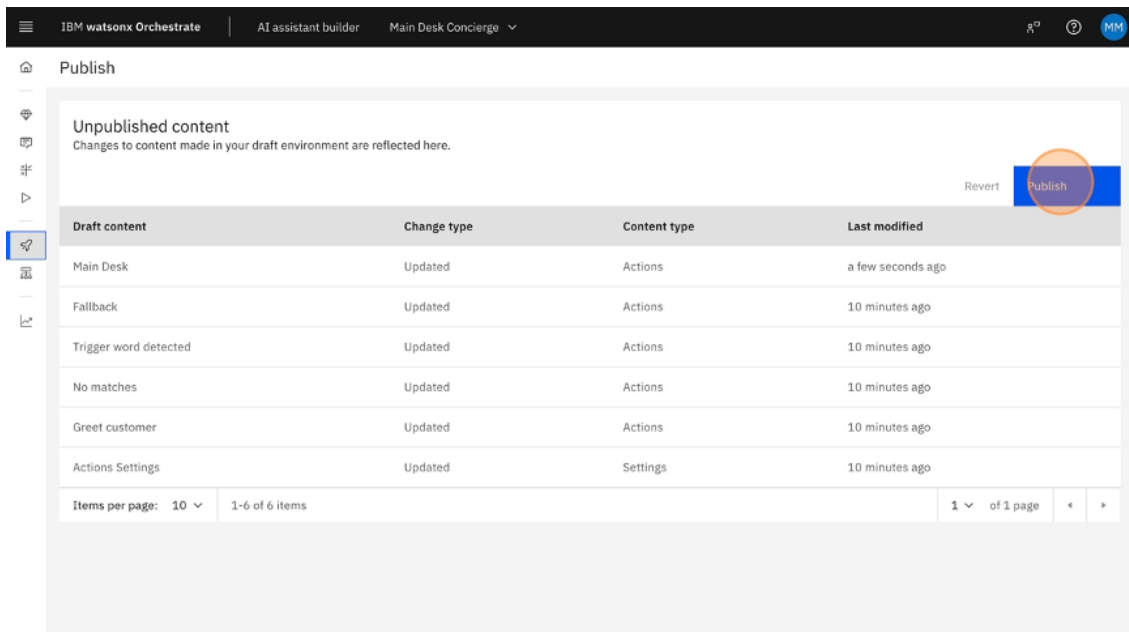


3. Publishing the Assistant

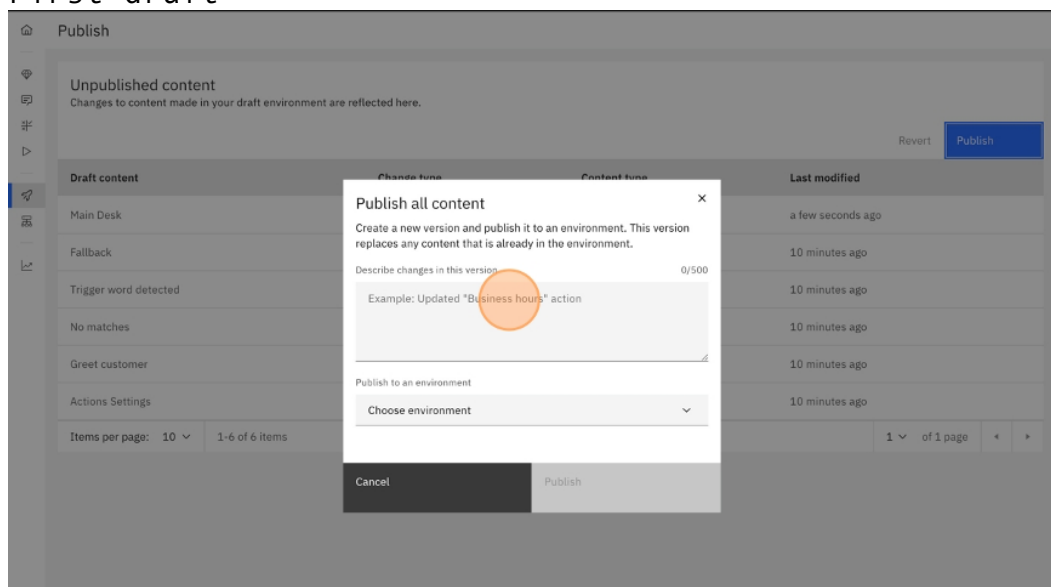
1. Click “Publish”



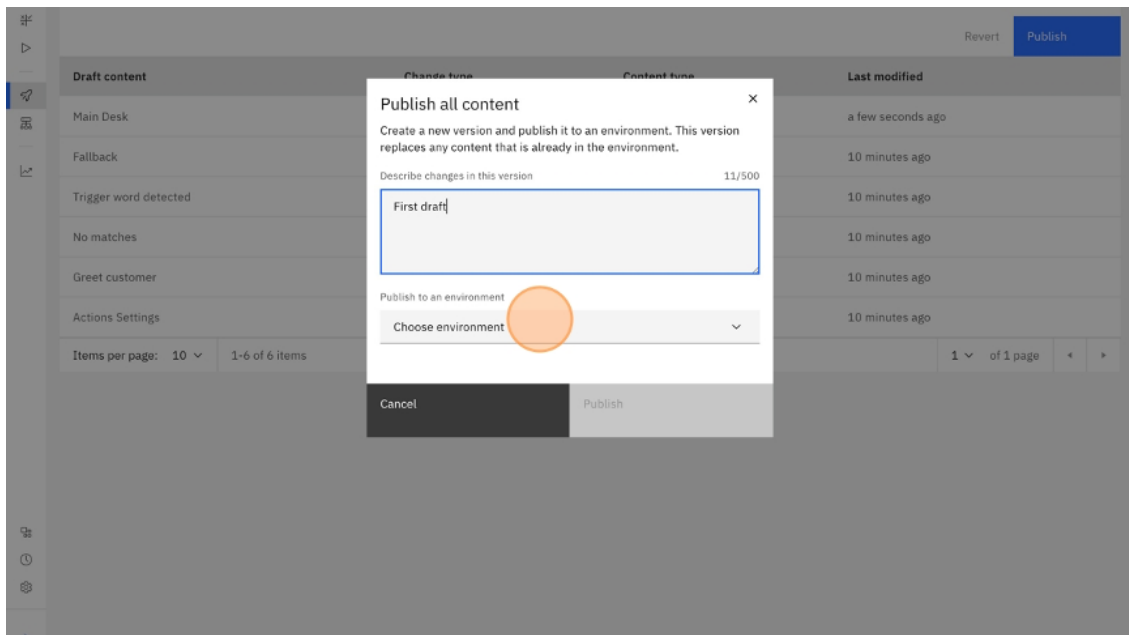
1. Click "Publish"



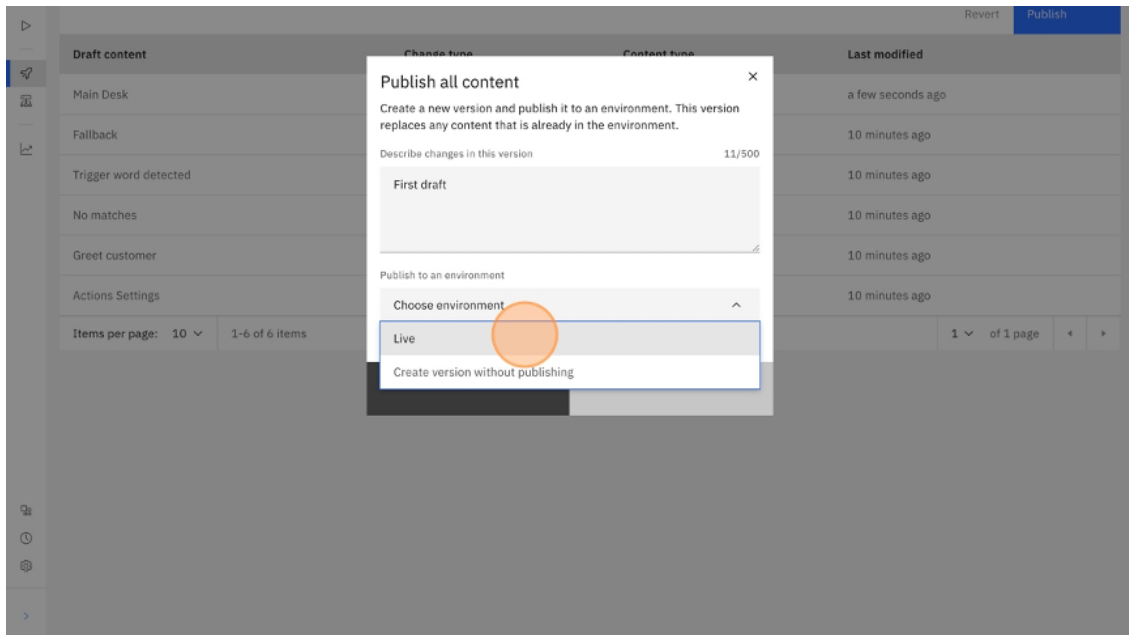
1. In the "Example: Updated "Business hours" action" field enter: First draft



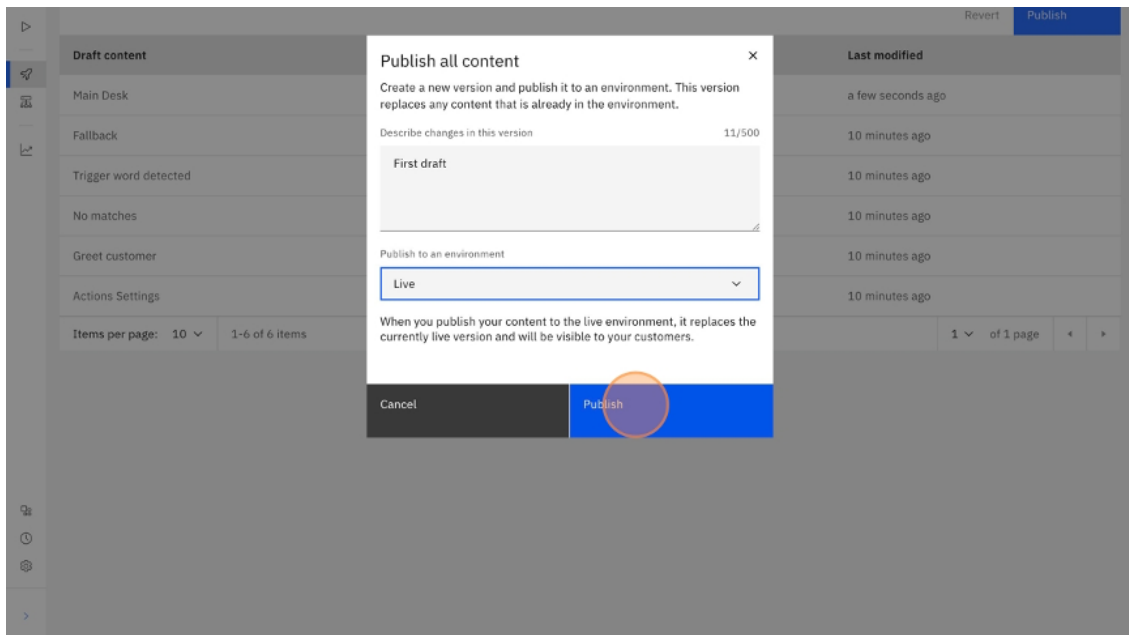
2. Click "Choose environment"



1. Click "Live"

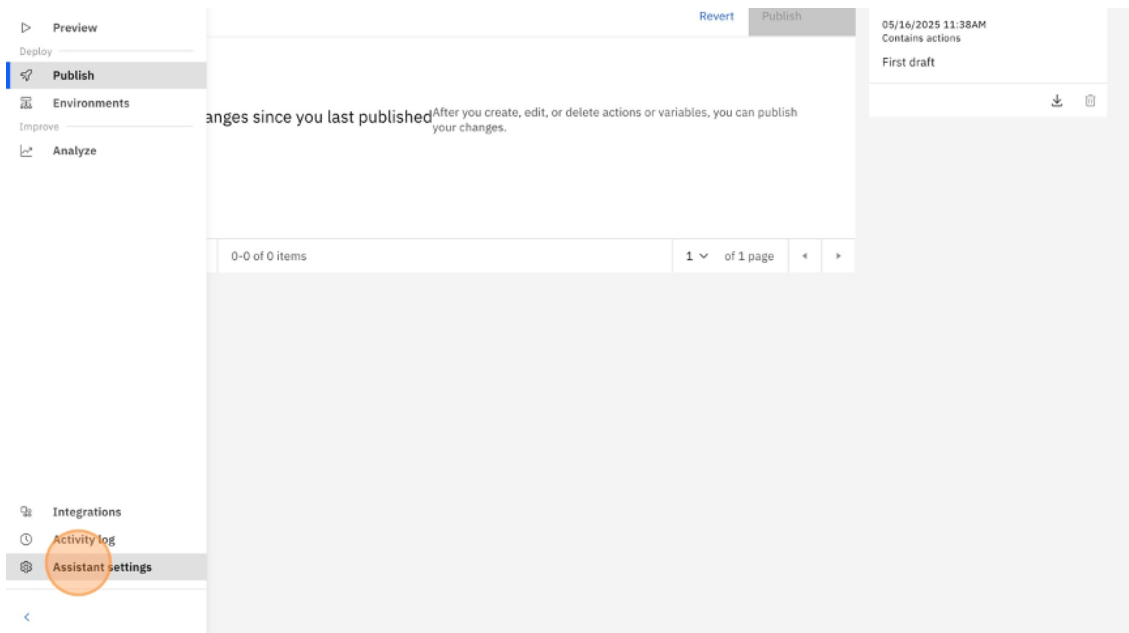


1. Click "Publish"



4. Getting Assistant Variables

1. Click "Assistant settings"



1. Click "View details"

Add a description for this assistant

CancelSaved

Security certificates (SSL/TLS)

Upload self-signed or trusted CA certificates to secure the services integrations and extensions in your assistant. To upload multiple certificate files, merge the files to a single file before uploading. Only PEM format is supported. [Learn more](#)

Protocol

☐ Trust uploaded certificates and any certificates signed by a trusted authority.

☐ Trust uploaded certificates only.

☒ Trust all certificates, operation insecure (Not recommended).

Assistant IDs and API details

Get IDs and API details for your assistant, skills, and environments.

View details

Download/Upload

Download or upload your assistant as a ZIP file. You can also enable the download of language data files so you can translate training examples and assistant responses into other languages and use in additional assistants. [Learn more](#)

1. Copy "Service Instance URL", "Assistant ID", "Live Environment ID" to a note on your machine

IBM watsonx Orchestrate

AI assistant builder

Main Desk Concierge

Assistant settings

Main Desk Concierge

Your assistant name will be kept internally and not visible to your customers

Description (optional) 0/128

Add a description for this assistant

CancelSaved

Security certificates (SSL/TLS)

Upload self-signed or trusted CA certificates to secure the services integrations and extensions in your assistant. To upload multiple certificate files, merge the files to a single file before uploading. Only PEM format is supported. [Learn more](#)

Protocol

☐ Trust uploaded certificates and any certificates signed by a trusted authority.

☐ Trust uploaded certificates only.

☒ Trust all certificates, operation insecure (Not recommended).

Assistant IDs and API details

Get IDs and API details for your assistant, skills, and environments.

Assistant IDs and API details

Service instance URL:
<https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/095...>

Assistant ID:
dfcdc7a1-4a37-4714-9189-daa05b3e4a9

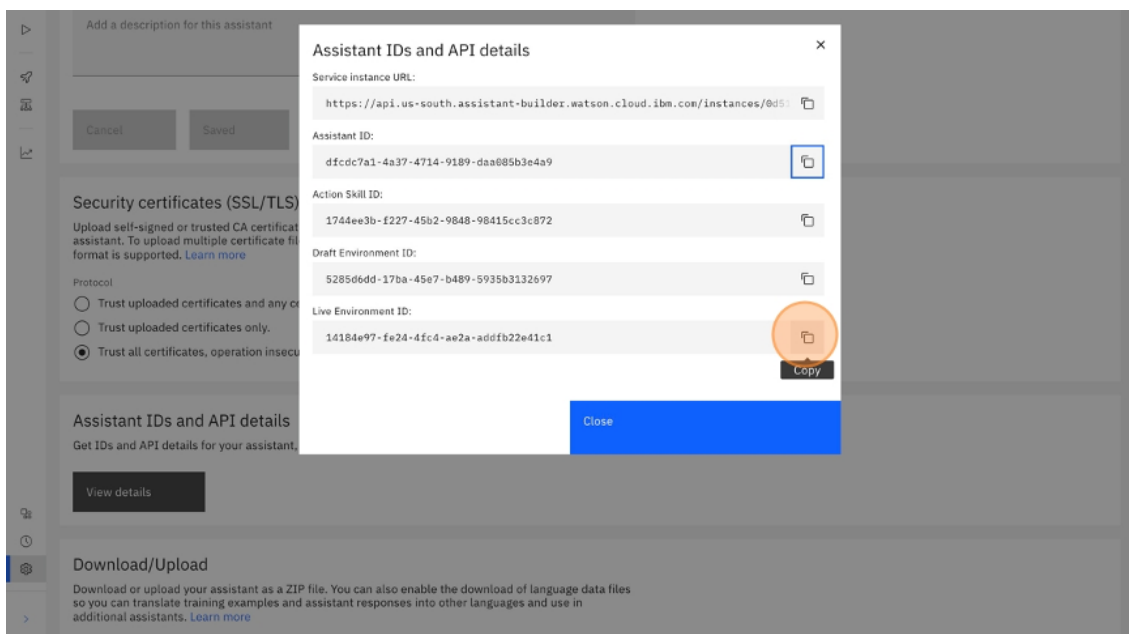
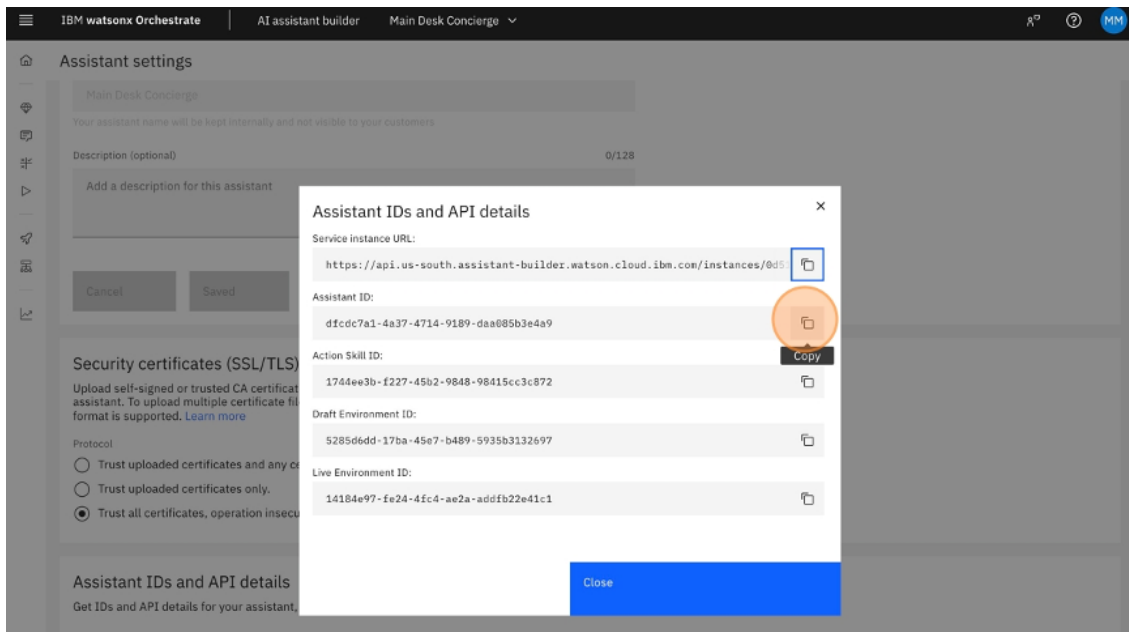
Action Skill ID:
1744ee3b-f227-45b2-9848-98415cc3c872

Draft Environment ID:
5285d6dd-17ba-45e7-b489-5935b3132697

Live Environment ID:
14184e97-fe24-4fc4-ae2a-addfb22e41c1

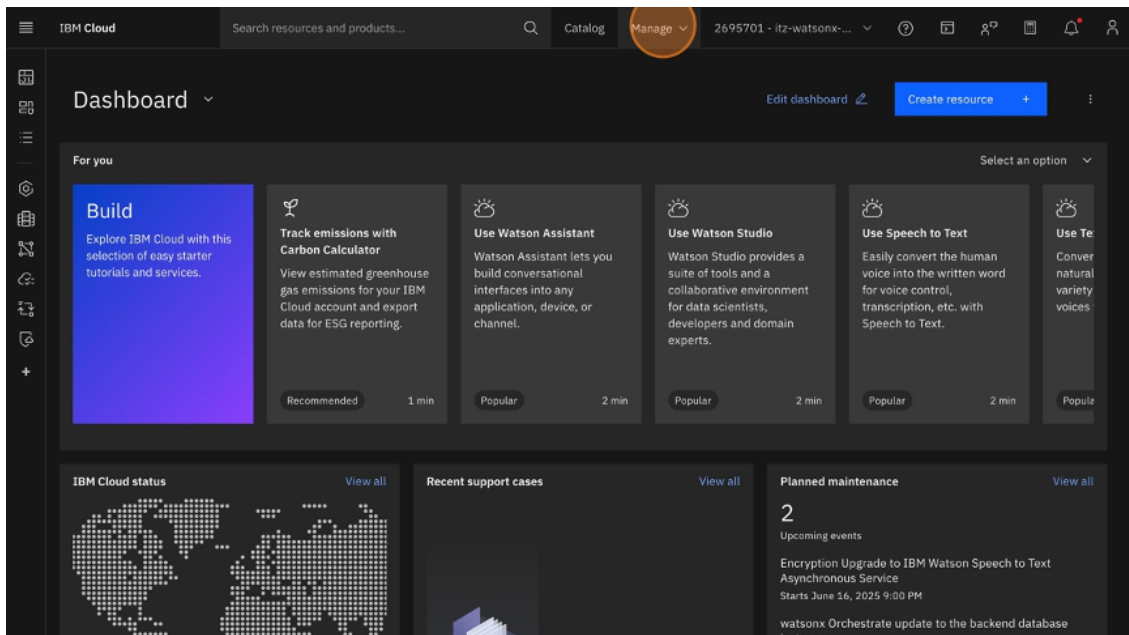
Copy

Close

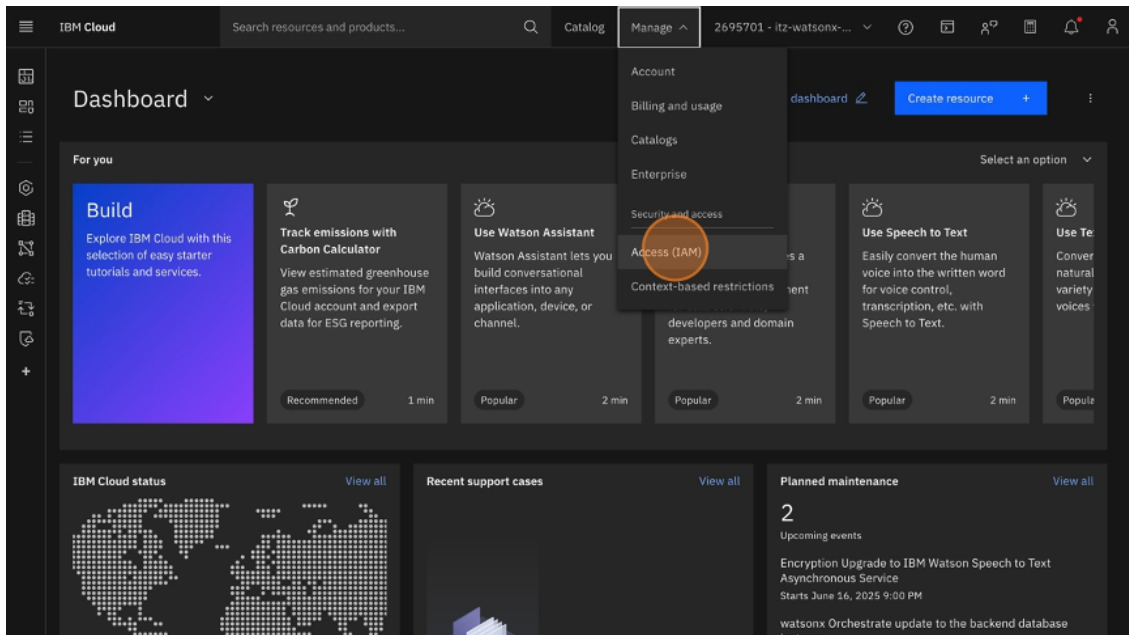


5. Generating an API Key

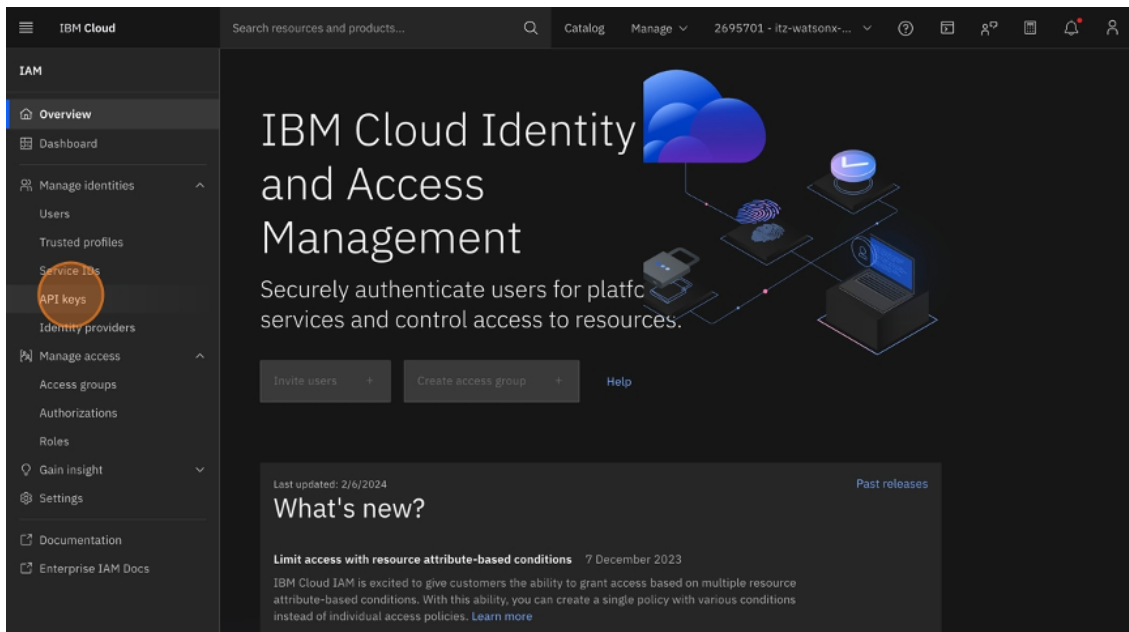
1. In a new tab, navigate to <https://cloud.ibm.com/>
2. Click "Manage"



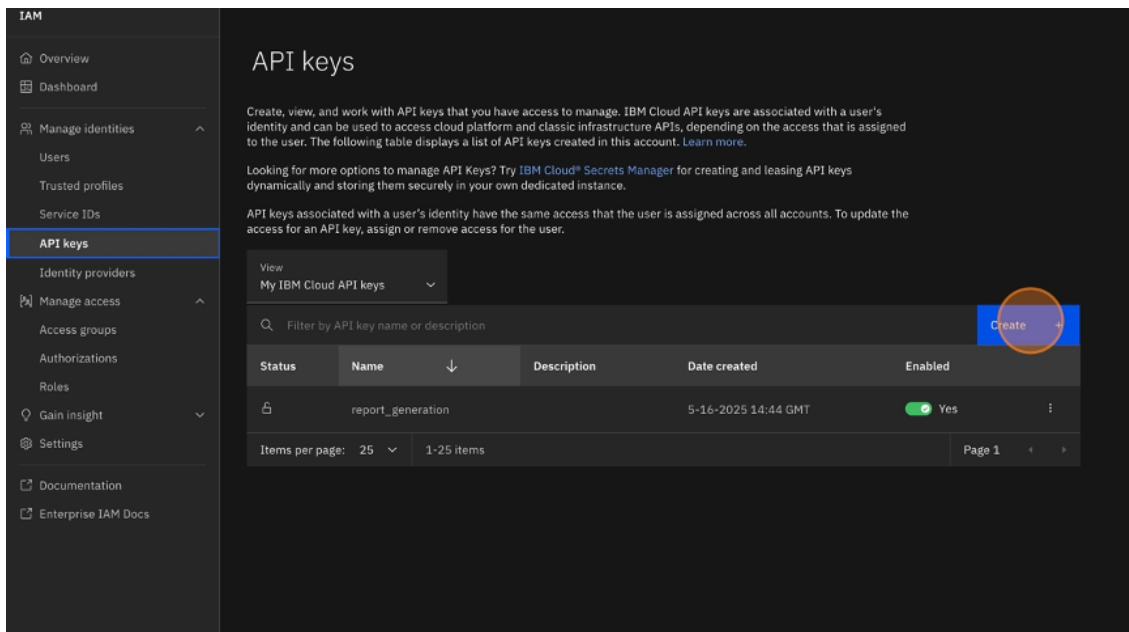
1. Click "Access (IAM)"



1. Click "API keys"

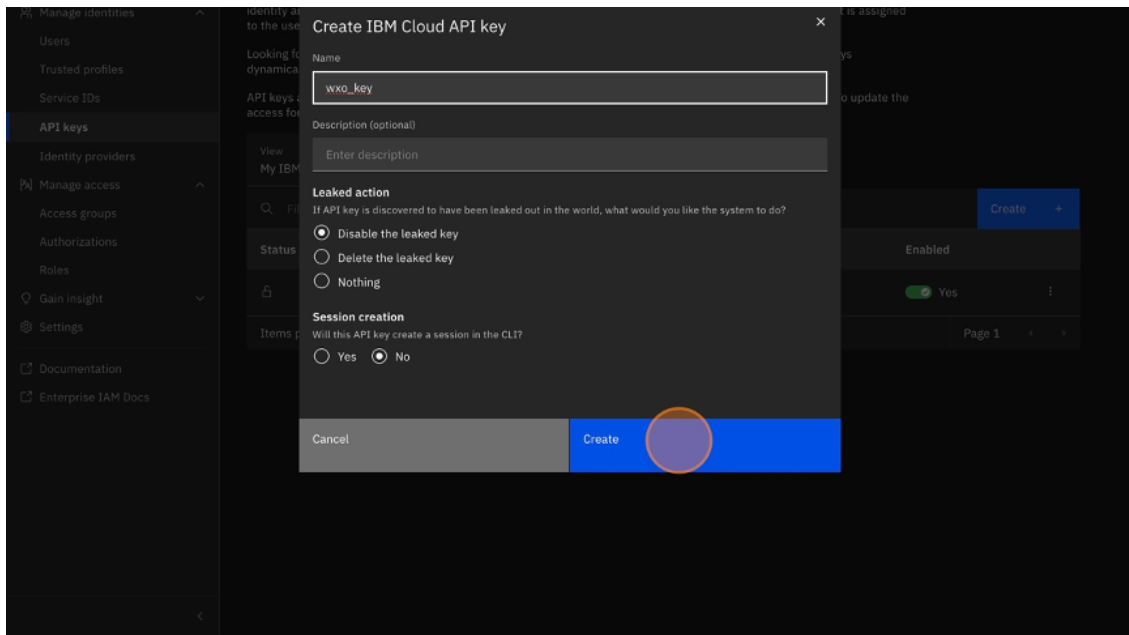


1. Click "Create"

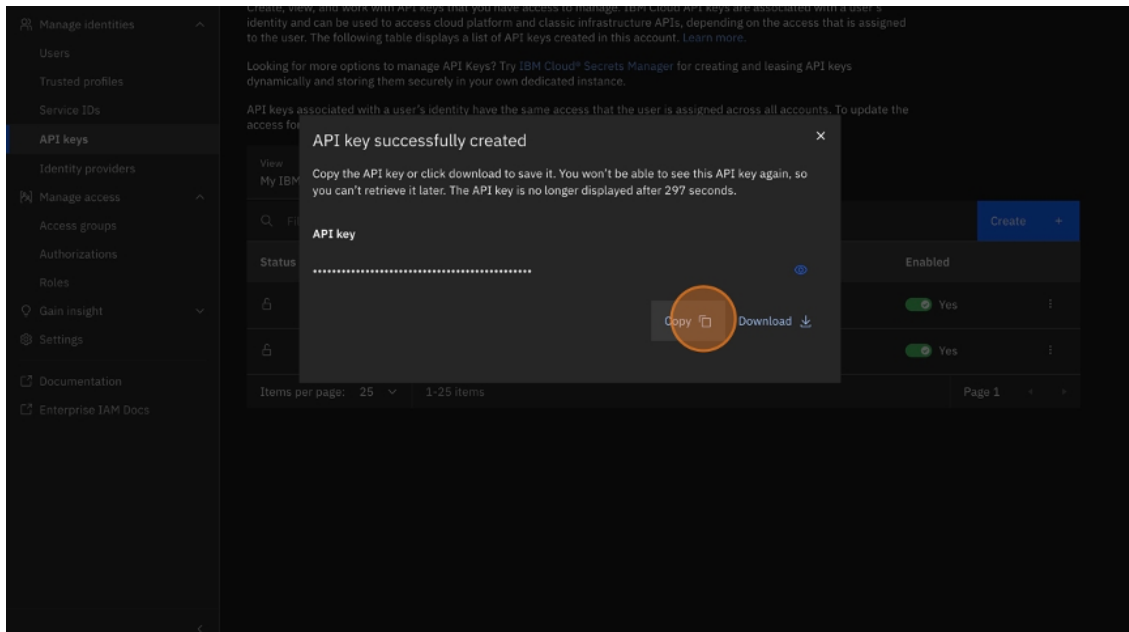


1. In "Name" field enter: wxo_key

2. Click "Create"

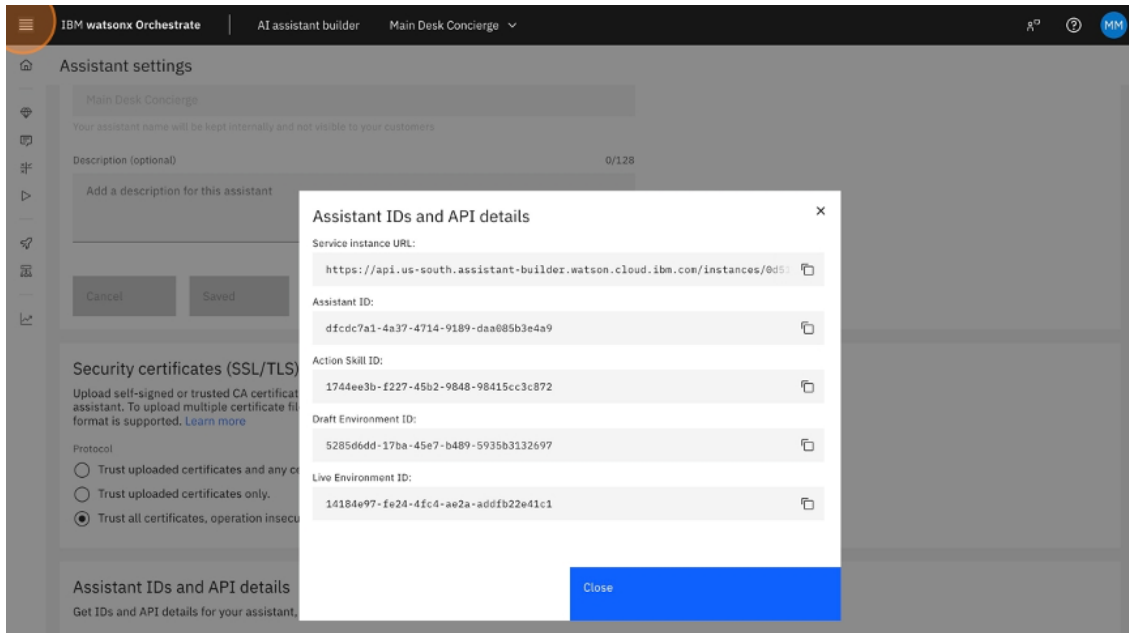


1. Copy API Key to Note on your local machine

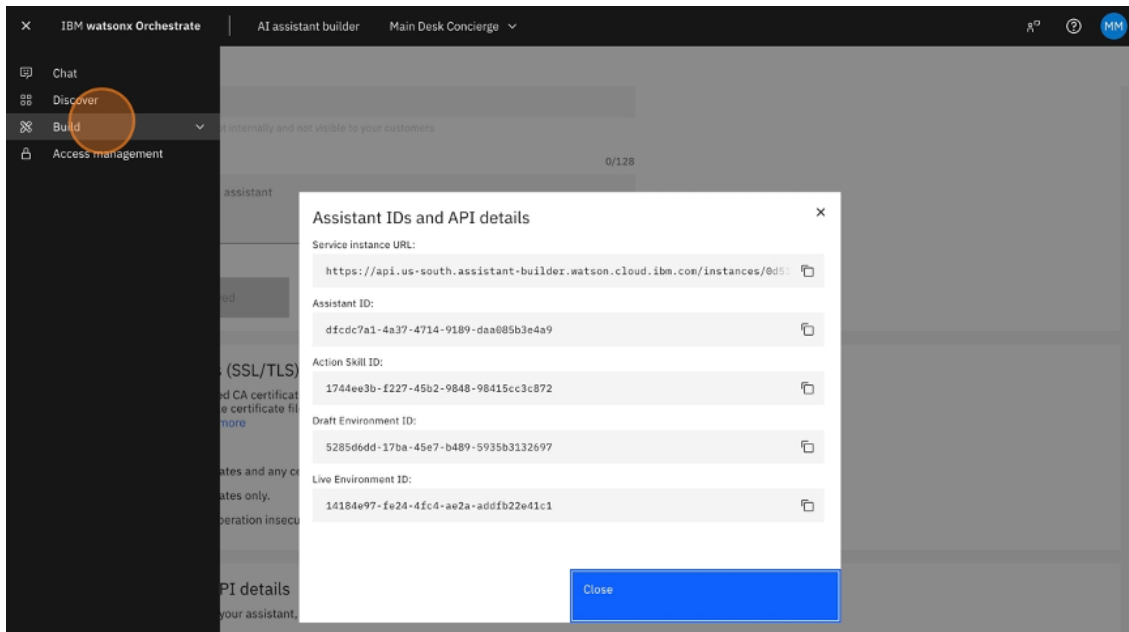


6. Importing the Assistant

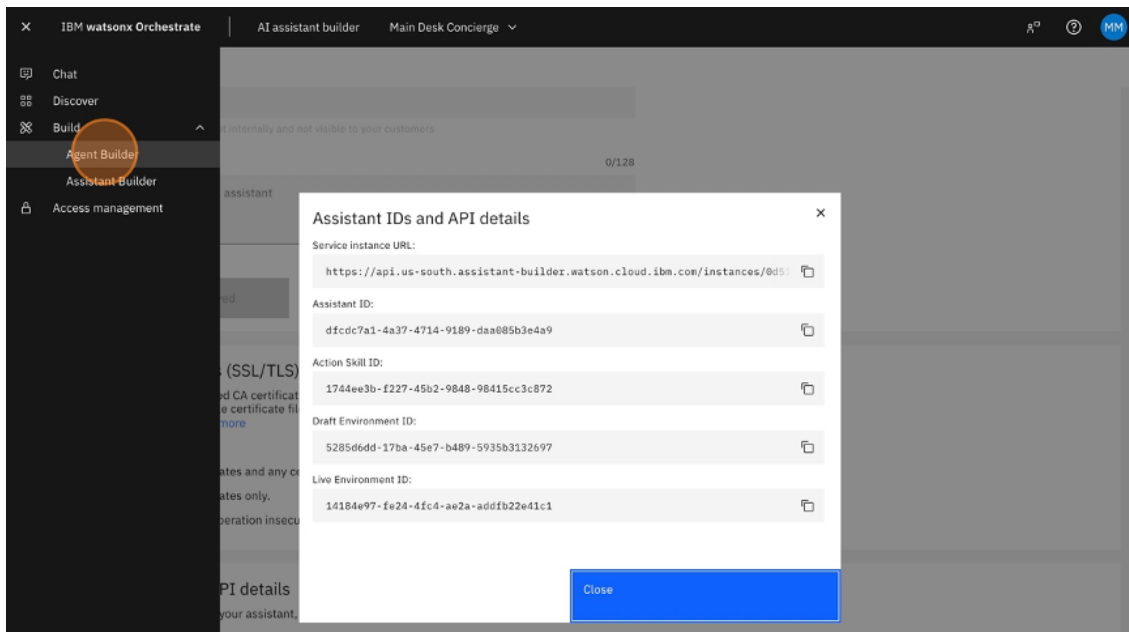
1. Switch to tab WatsonX Orchestrate tab.
2. Click on the hamburger menu icon in the top left



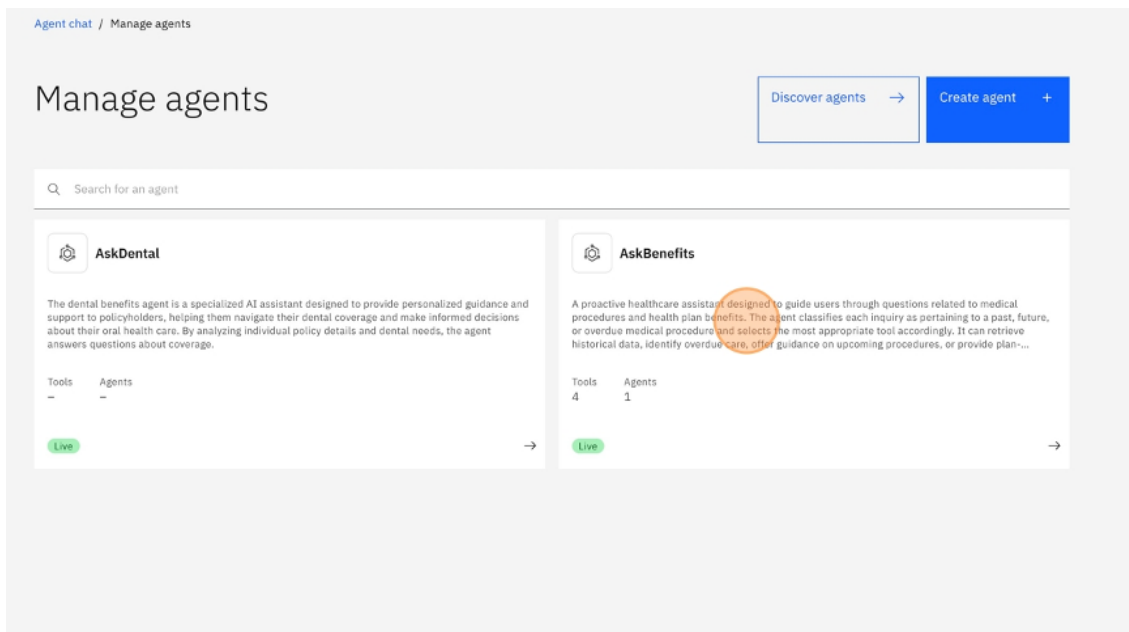
1. Click on "Build"



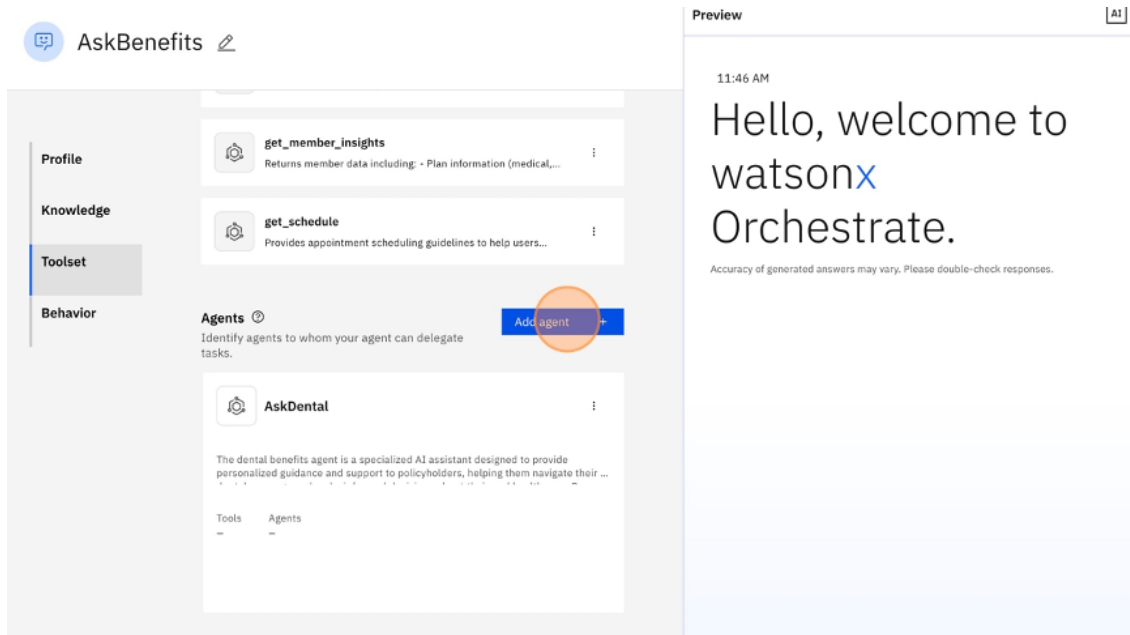
1. Select "Agent Builder"



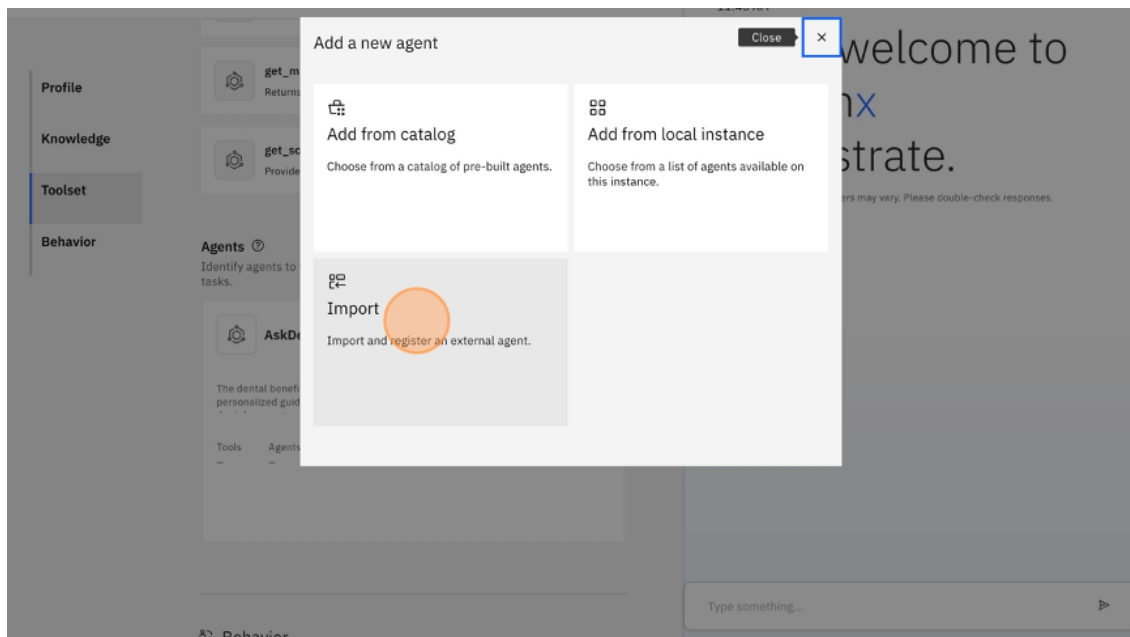
1. Select "AskBenefits"



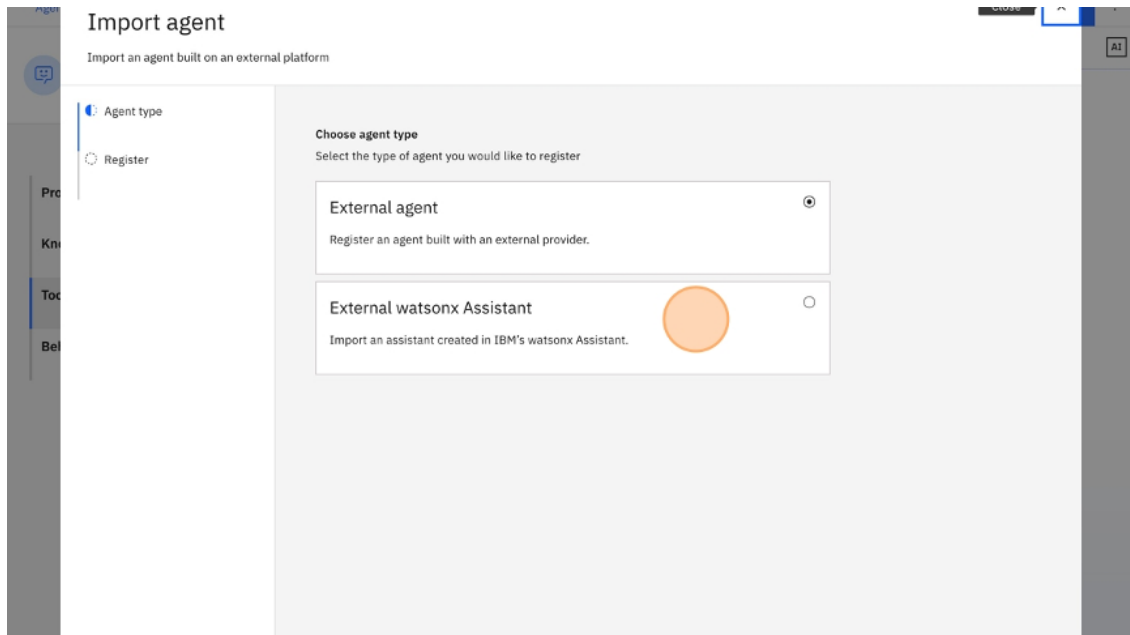
1. Click "Add Agent" under "Agents"



1. Click "Import and register an external agent."



1. Click "External watsonx Assistant"



1. Click "Next"

Choose agent type
Select the type of agent you would like to register

☐ External agent
Register an agent built with an external provider.

☒ External watsonx Assistant
Import an assistant created in IBM's watsonx Assistant.

Cancel Next

1. Copy "API Key", "Environment ID", "Assistant ID", "Service Instance URL" into the respective fields from your local

IBM watsonx Orchestrate

Import agent
Import an agent built on an external platform

Agent type
Register

Assistant details

API key: Enter API key
Environment ID: Enter environment ID
Version: Enter version
Assistant ID: Enter assistant ID
Service instance URL: Enter service instance URL

If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent
Provide details for how your agent will appear once added.

Display name: Example: Ask HR
The display name for this assistant
Description: 0/1000

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key Environment ID

..... 14184e97-fe24-4fc4-ae2a-adffb22e41c

Version Assistant ID

2024-08-25 dfcdc7a1-4a37-4714-9189-daa085b3e4

Service instance URL

Enter service instance URL

If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name

Example: Ask HR

The display name for this assistant

Description 0/1000

Example: Ask HR is a tool to help employees...

Produce a short description of what this assistant is capable of providing to your users. This will help the

1. In the "Version" field enter: 2024-08-25

Import agent

Import an agent built on an external platform

Agent type

Register

Assistant details

API key Environment ID

..... 14184e97-fe24-4fc4-ae2a-adffb22e41c

Version Assistant ID

Enter version Enter assistant ID

Service instance URL

Enter service instance URL

If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name

Example: Ask HR

The display name for this assistant

Description 0/1000

Example: Ask HR is a tool to help employees...

2. In the "Display name" field enter: Main Desk

The screenshot shows the 'Assistant details' form in the Watson Assistant console. The 'Service instance URL' field is highlighted with a blue box. The 'Display name' field is highlighted with an orange circle. The form includes fields for API key, Environment ID, Version, Assistant ID, and a description. The 'Define new agent' section is also visible.

Assistant details

API key: @ 14184e97-fe24-4fc4-ae2a-adffb22e41c

Environment ID: 14184e97-fe24-4fc4-ae2a-adffb22e41c

Version: 2024-08-25

Assistant ID: dfcdc7a1-4a37-4714-9189-daa085b3e4

Service instance URL: <https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/0d518aa4-2abc-4>

ⓘ If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name: **Main-Desk**

The display name for this assistant

Description: 0/1000

Example: Ask HR is a tool to help employees...

Produce a short description of what this assistant is capable of providing to your users. This will help the AI model determine the best assistant that would help your users. [What makes a good description?](#)

Buttons: Cancel, Back, Import agent

3. In the "Description" field enter: This assistant collects necessary user information when they need to access their medical records

The screenshot shows the 'Assistant details' form in the Watson Assistant console. The 'Description' field is highlighted with an orange circle. The form includes fields for API key, Environment ID, Version, Assistant ID, and a description. The 'Define new agent' section is also visible.

Assistant details

API key: @ 14184e97-fe24-4fc4-ae2a-adffb22e41c

Environment ID: 14184e97-fe24-4fc4-ae2a-adffb22e41c

Version: 2024-08-25

Assistant ID: dfcdc7a1-4a37-4714-9189-daa085b3e4

Service instance URL: <https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/0d518aa4-2abc-4>

ⓘ If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent

Provide details for how your agent will appear once added.

Display name: Main-Desk

The display name for this assistant

Description: 0/1000

Example: Ask HR is a tool to help employees...

Produce a short description of what this assistant is capable of providing to your users. This will help the AI model determine the best assistant that would help your users. [What makes a good description?](#)

Buttons: Cancel, Back, Import agent

4. Click "Import agent"

API key: Environment ID: 14184e97-fe24-4fc4-ae2a-addfb22e41c

Version: 2024-08-25 Assistant ID: dfcdc7a1-4a37-4714-9189-daa085b3e4

Service instance URL: https://api.us-south.assistant-builder.watson.cloud.ibm.com/instances/0d518aa4-2abc-4

① If you need help finding this information, refer to [Watsonx Assistant import documentation](#)

Define new agent
Provide details for how your agent will appear once added.

Display name: Main-Desk

The display name for this assistant

Description: 97/1000
This assistant collects necessary user information when they need to access their medical records

Produce a short description of what this assistant is capable of providing to your users. This will help the AI model determine the best assistant that would help your users. [What makes a good description?](#)

Buttons: Cancel, Back, Import agent (highlighted with a red circle)

1. Click "Deploy"

IBM watsonx Orchestrator

Agent chat / Manage agents / AskBenefits

AskBenefits

Profile

Knowledge

Toolset

Behavior

AskDental

The dental benefits agent is a specialized AI assistant designed to provide personalized guidance and support to policyholders, helping them navigate their ...

Tools Agents

Main-Desk

This assistant collects necessary user information when they need to access their medical records

Tools Agents

Preview

11:55 AM

Hello, welcome to watsonx Orchestrator.

Accuracy of generated answers may vary. Please double-check responses.

Buttons: Deploy (highlighted with a red circle), AI

Secondary Testing Scenarios

After successful deployment, test the AskBenefits agent with the following sample prompts to verify functionality with the included Main Desk Assistant:

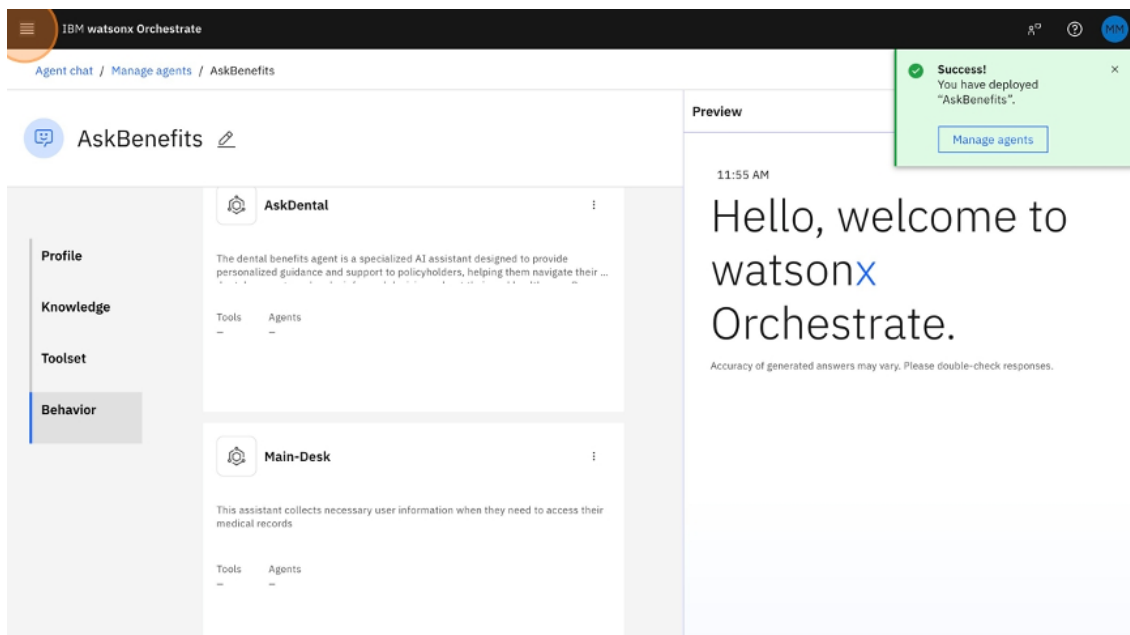
1. **Initiate Main Desk Assistant:** I need to access my medical history
2. **Provide Name:** Charlie Smith
3. **Provide Date of Birth:** 03-04-2013

4. **Previous Procedure Query:** When did I have my last vision exam?
 5. **Follow-up on Previous Procedure Query:** and where was it?
-

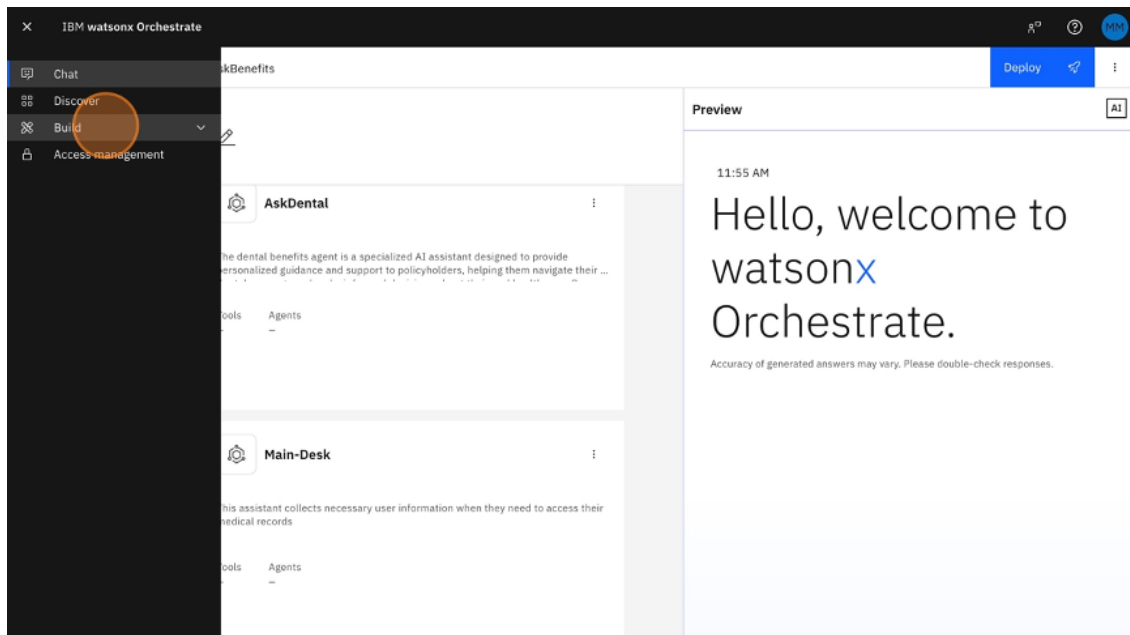
AskReporting Step-by-Step Instructions

1. Create AskReporting

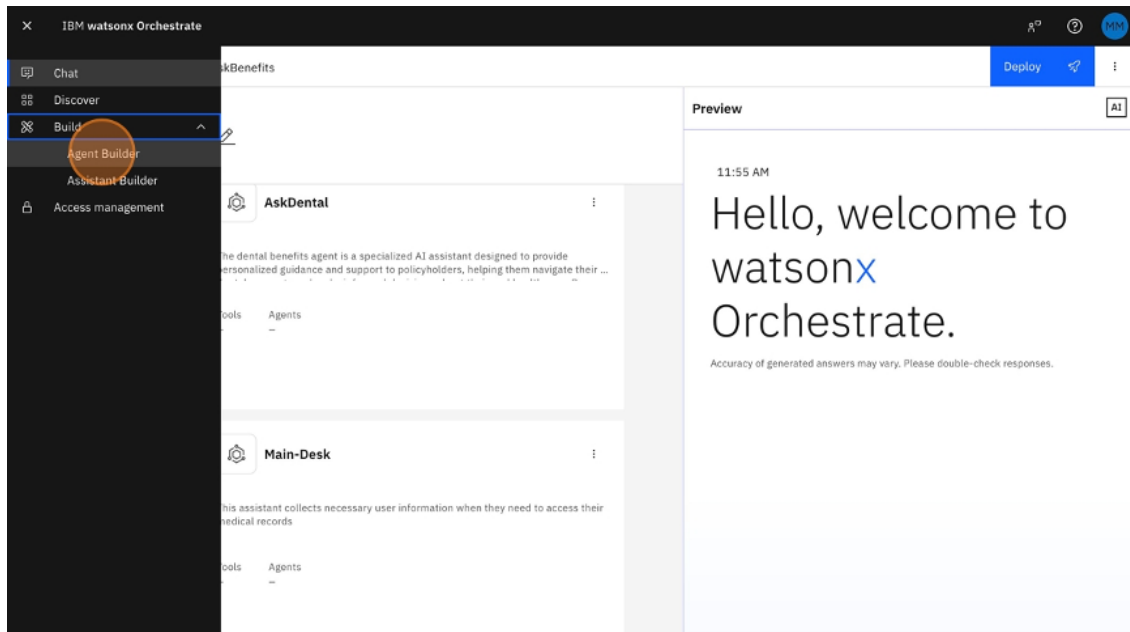
1. Click on the hamburger menu icon in the top left



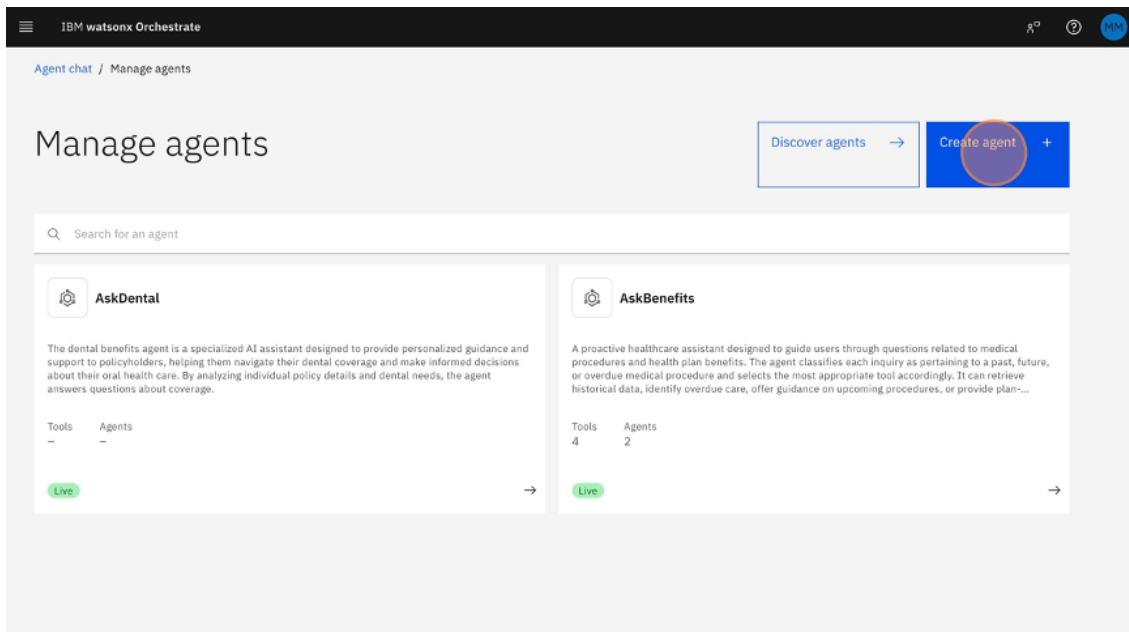
1. Click on "Build"



1. Select "Agent Builder"

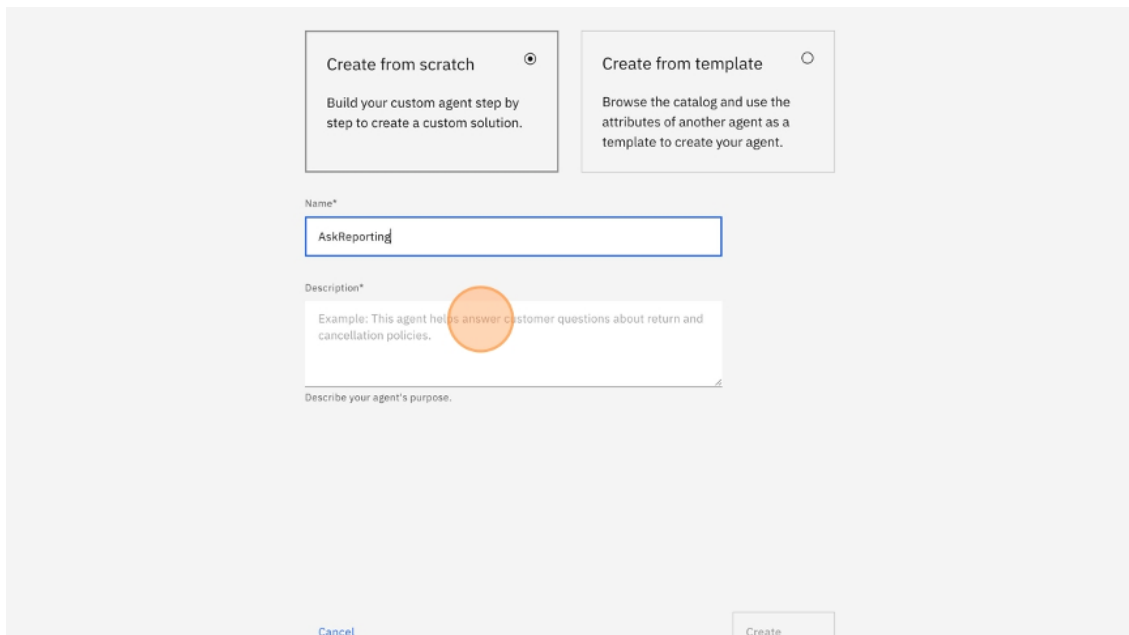


1. Click "Create agent"



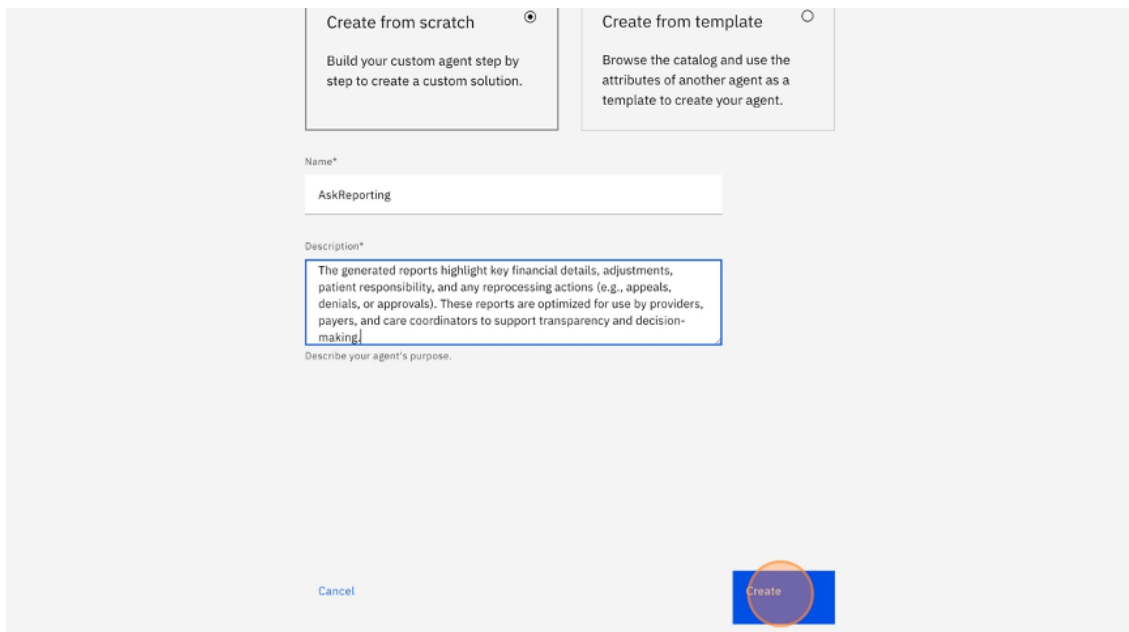
1. In the "Name*" field, enter: AskReporting

1. In the "Description*" field, enter: This agent is responsible for generating care reports that summarize the status and outcomes of healthcare claims. It reviews structured claim data and related correspondence to produce a clear, accessible summary of each claim's history, current status, and resolution path. The generated reports highlight key financial details, adjustments, patient responsibility, and any reprocessing actions (e.g., appeals, denials, or approvals). These reports are optimized for use by providers, payers, and care coordinators to support transparency and decision-making.



The screenshot shows a form titled 'Create from scratch' with a radio button selected. Below it is a text input field labeled 'Name*' containing 'AskReporting'. Underneath is a text area labeled 'Description*' with a placeholder text: 'Example: This agent helps answer customer questions about return and cancellation policies.' At the bottom right, there is a 'Create' button highlighted with an orange circle.

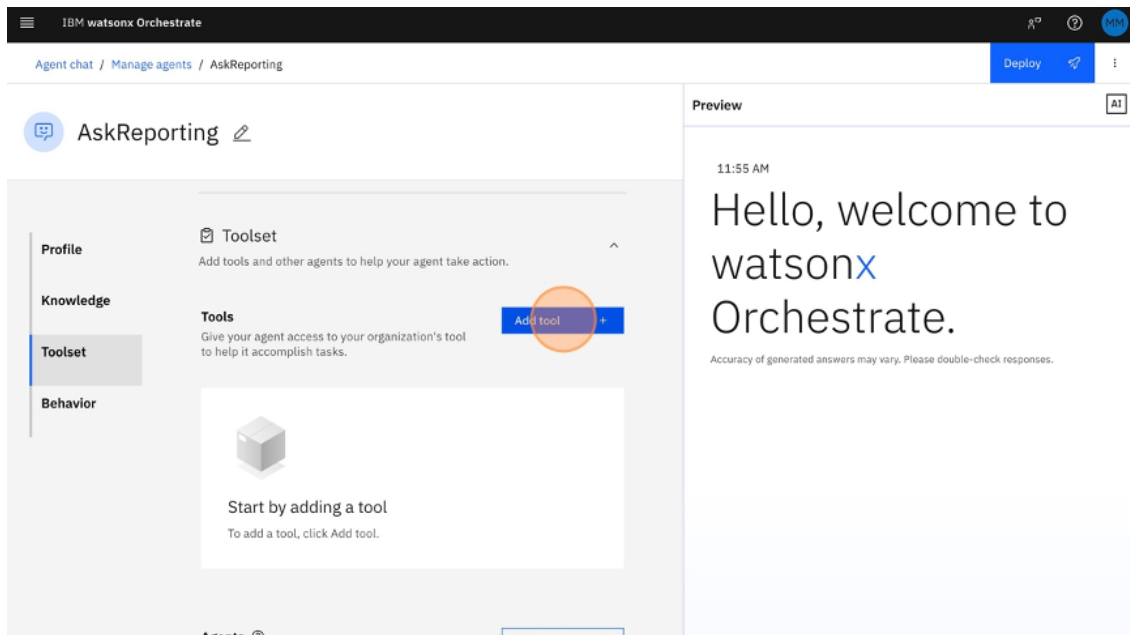
1. Click "Create" to initialize your agent



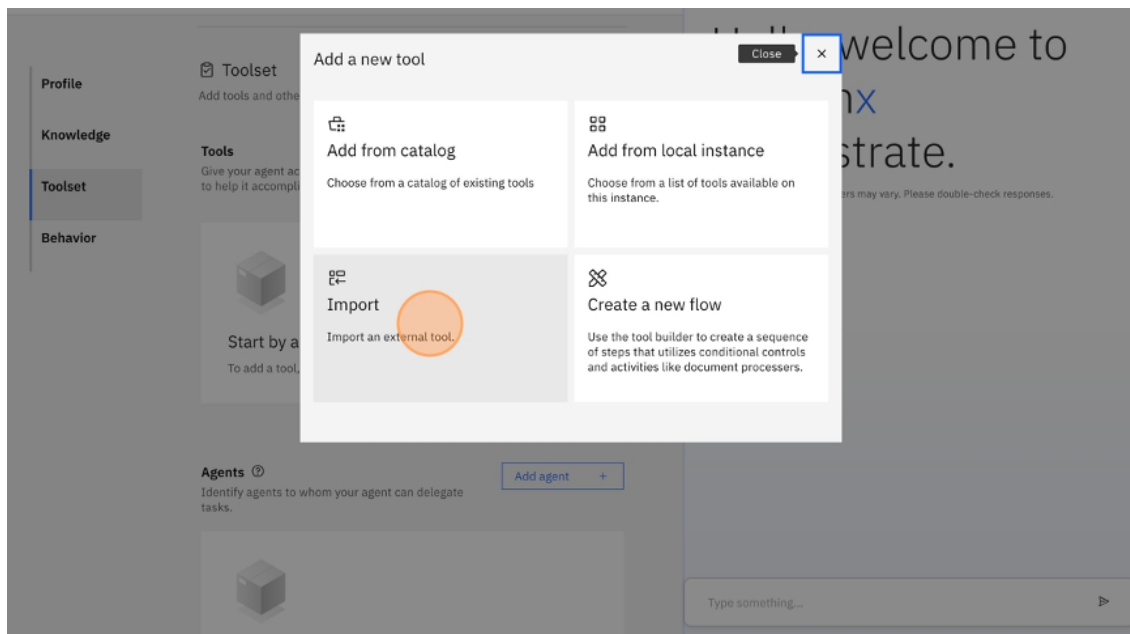
This screenshot is identical to the one above, but the 'Create' button at the bottom right is now highlighted with a blue circle.

2. Importing and Attaching Tools

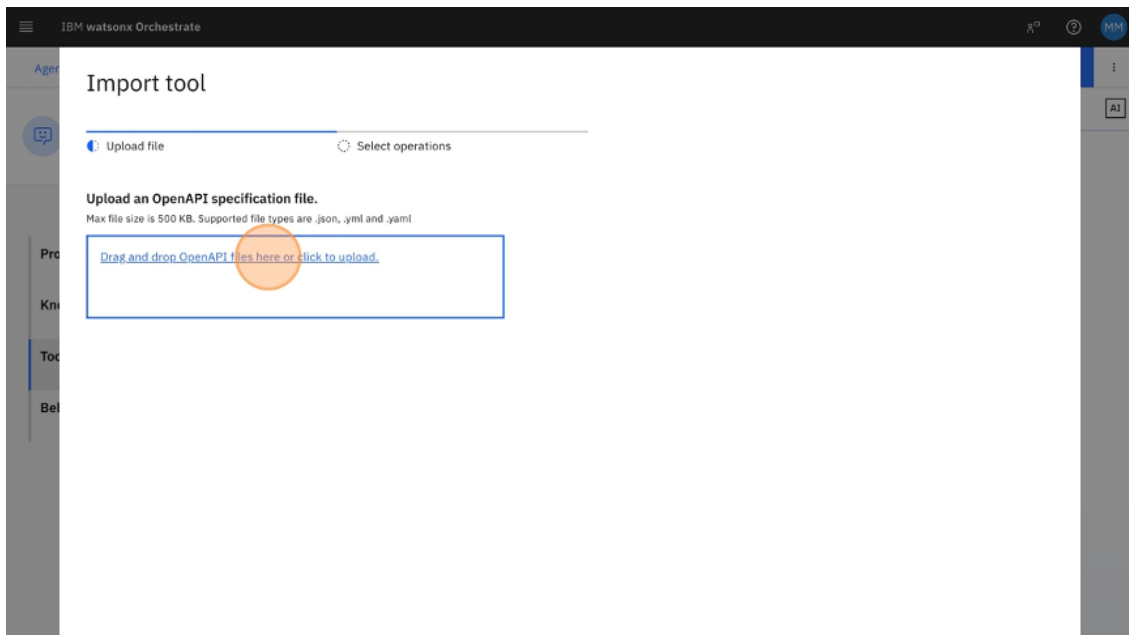
1. Click "Add tool"



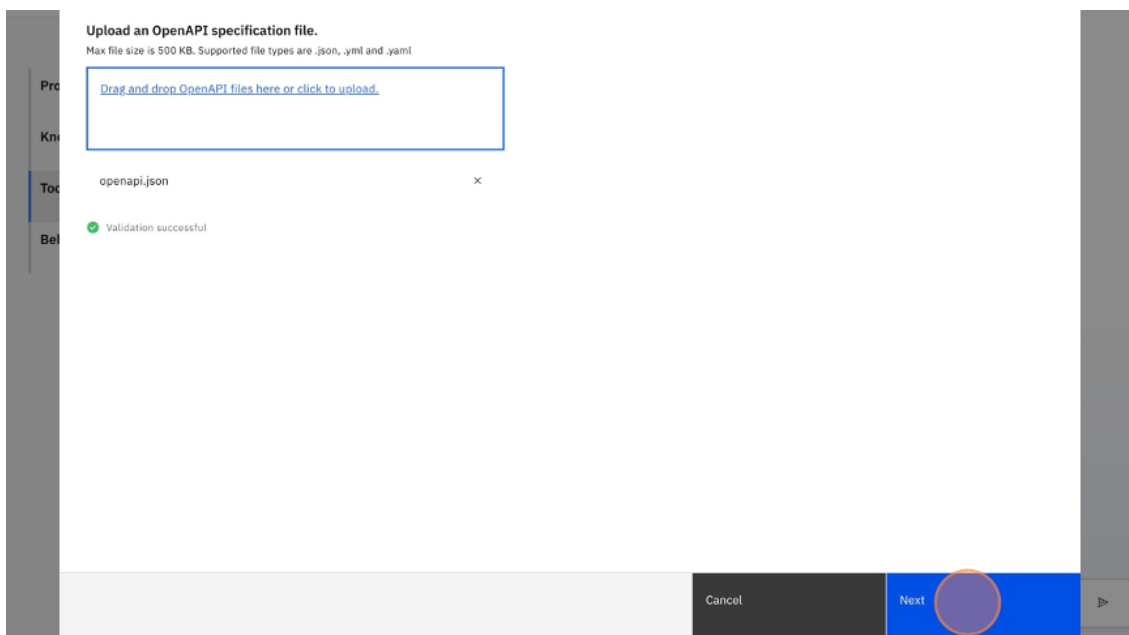
1. Select "Import an external tool."



1. Click on the upload area labeled "Drag and drop OpenAPI files here or click to upload."



1. Upload the file containing the OpenAPI specification file:
openapi-tools-report.json
2. Click "Next"



1. Click "Select all rows in the table" to select all available tools

IBM watsonx Orchestrate

Import tool

Upload file Select operations

Operations

<input type="checkbox"/>	Name	Method	Description
<input type="checkbox"/>	Generate Performance Report	POST	This API generates an HTML care report for the end user. How It Works - The input is a JSON array , where each item can be: 1. A string referencing the predefined section care_report . 2. A dictionary defining custom report elements: table , header , overview , or claim_review_chart . Predefined Section Key - care_report : This is the only prebuilt section available. It can be modified with additional elements (headers, overviews, tables, and claim review charts). Custom Sections You can pass individual report elements as dictionaries. The allowed custom elements are: - table : CSV file - header : No files required - overview : One TXT file - claim_review_chart : No files required (custom chart configuration can be provided). Valid element_type Values and Required Files : - header : (no files required) - overview : 1 TXT file - table : 1 CSV - claim_review_chart : No files required Approved Files (Grouped by Element Type) : overview : - /data/aetna_email.txt - /data/combined_email.txt - /data/provider_email.txt table : - /data/aetna_claim_review_summary.csv claim_review_chart : - No files required (can contain custom configuration). Do not reference other files or reuse these files for elements they were not designed for. Example Input <pre>json [{"care_report": {"element_type": "header", "title": "End of Report"}}] </pre> Custom Element Attributes You can also pass in custom element dictionaries to control specific sections. The following keys are supported depending on the element type: Common Across Custom Elements : - element_type (required): One of: header , overview , table , claim_review_chart - supporting_files : Required for all but header - title : Optional for all elements except header (required there) - prompt : Only applies to overview Per Element Details : - header : - Required: element_type , title - Optional: none - Example: <pre>json {"element_type": "header", "title": "Custom Header"} </pre> - overview : - Required: element_type , supporting_files[0] - Optional: title , prompt - Example: <pre>json {"element_type": "overview", "supporting_files": ["/data/aetna_email.txt"], "title": "Aetna Claims Overview", "prompt": "Summarize the Aetna claims overview in markdown."} </pre> - table : - Required: element_type , supporting_files[0] - Optional: title - Example: <pre>json {"element_type": "table", "supporting_files":</pre>

☐ Generate Performance Report POST

1. Click "Done"

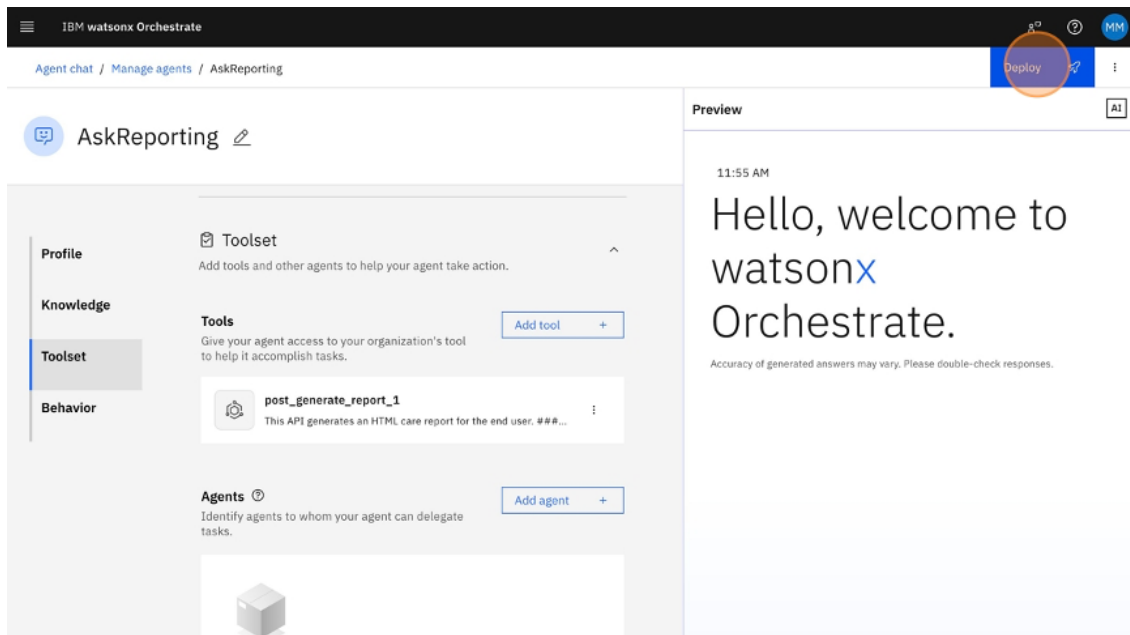
Operations

<input checked="" type="checkbox"/>	Name	Method	Description
<input checked="" type="checkbox"/>	Generate Performance Report	POST	This API generates an HTML care report for the end user. How It Works - The input is a JSON array , where each item can be: 1. A string referencing the predefined section care_report . 2. A dictionary defining custom report elements: table , header , overview , or claim_review_chart . Predefined Section Key - care_report : This is the only prebuilt section available. It can be modified with additional elements (headers, overviews, tables, and claim review charts). Custom Sections You can pass individual report elements as dictionaries. The allowed custom elements are: - table : CSV file - header : No files required - overview : One TXT file - claim_review_chart : No files required (custom chart configuration can be provided). Valid element_type Values and Required Files : - header : (no files required) - overview : 1 TXT file - table : 1 CSV - claim_review_chart : No files required Approved Files (Grouped by Element Type) : overview : - /data/aetna_email.txt - /data/combined_email.txt - /data/provider_email.txt table : - /data/aetna_claim_review_summary.csv claim_review_chart : - No files required (can contain custom configuration). Do not reference other files or reuse these files for elements they were not designed for. Example Input <pre>json [{"care_report": {"element_type": "header", "title": "End of Report"}}] </pre> Custom Element Attributes You can also pass in custom element dictionaries to control specific sections. The following keys are supported depending on the element type: Common Across Custom Elements : - element_type (required): One of: header , overview , table , claim_review_chart - supporting_files : Required for all but header - title : Optional for all elements except header (required there) - prompt : Only applies to overview Per Element Details : - header : - Required: element_type , title - Optional: none - Example: <pre>json {"element_type": "header", "title": "Custom Header"} </pre> - overview : - Required: element_type , supporting_files[0] - Optional: title , prompt - Example: <pre>json {"element_type": "overview", "supporting_files": ["/data/aetna_email.txt"], "title": "Aetna Claims Overview", "prompt": "Summarize the Aetna claims overview in markdown."} </pre> - table : - Required: element_type , supporting_files[0] - Optional: title - Example: <pre>json {"element_type": "table", "supporting_files":</pre>

☒ Generate Performance Report POST

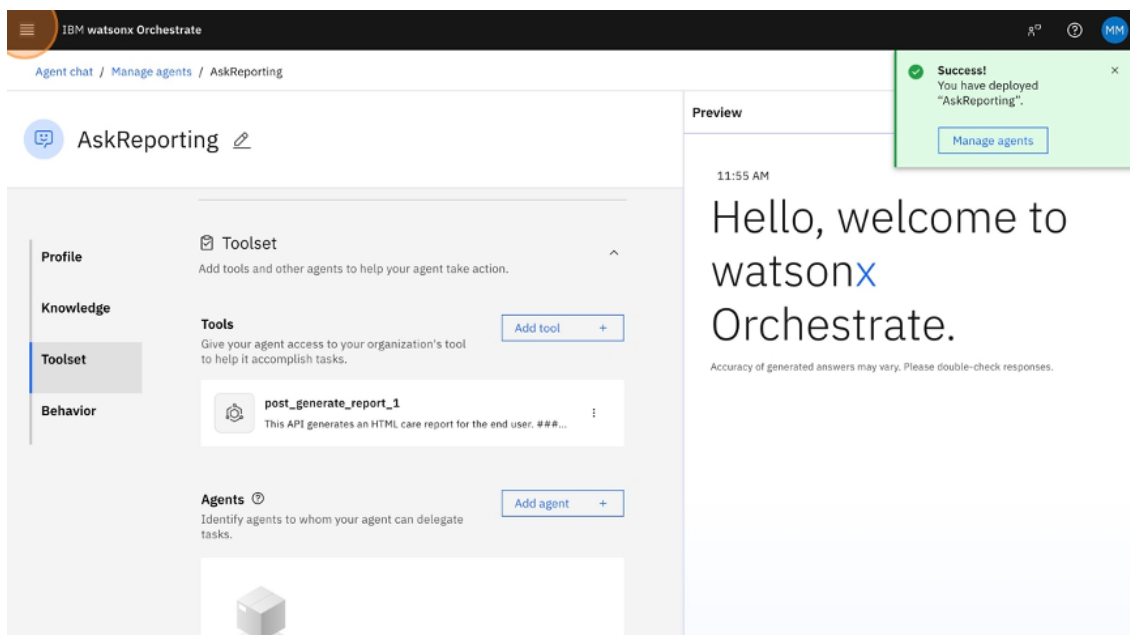
Cancel Done

1. Click "Deploy" to activate your AskReporting agent

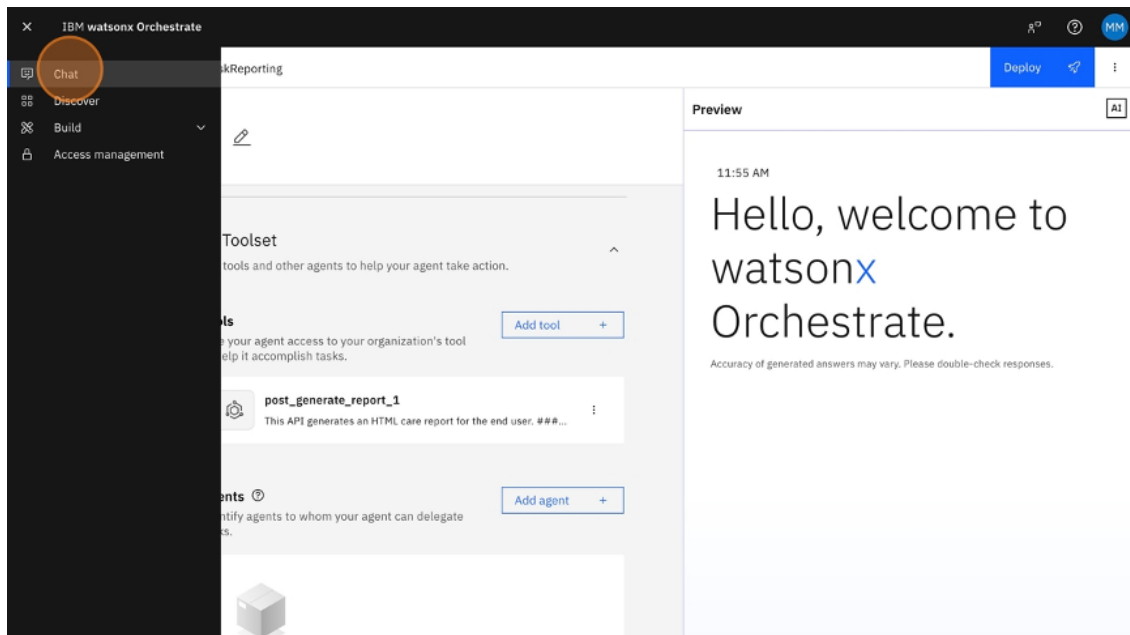


3. Switching to and Testing the Agent

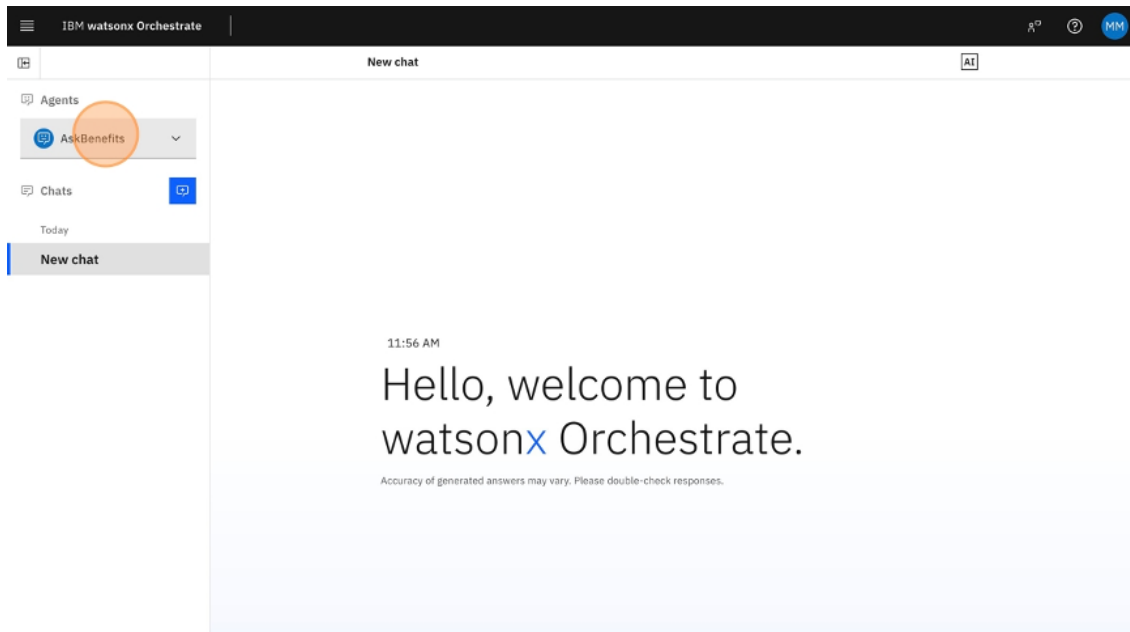
1. Click on the menu icon in the top left corner



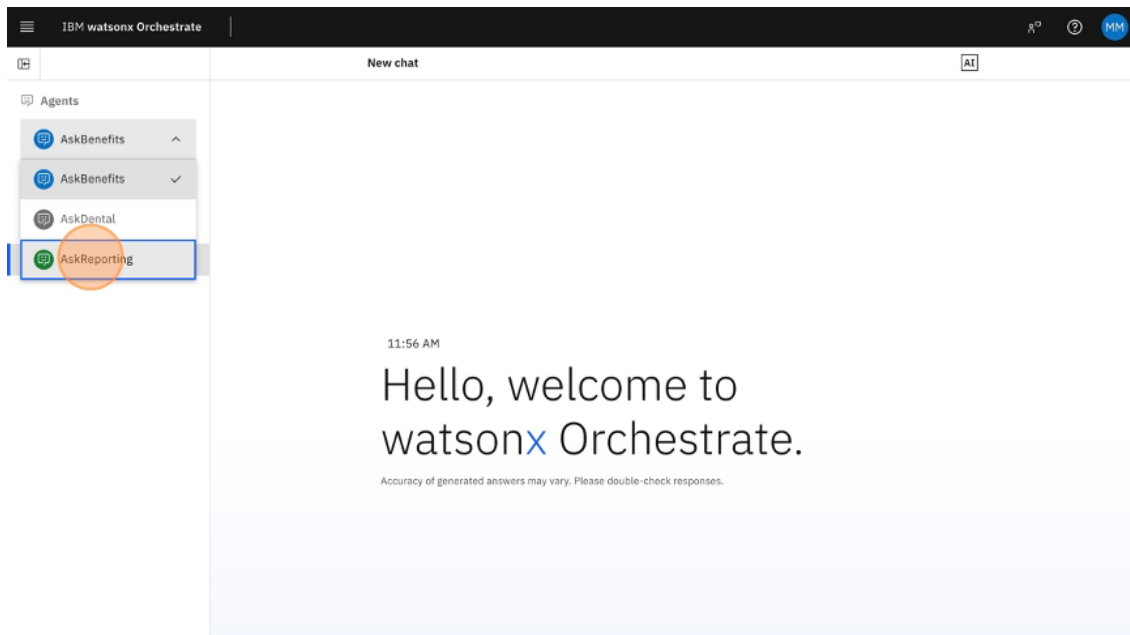
1. Click on "Chat"



1. Click "AskBenefits" Dropdown



1. Select "AskReporting"



Final Testing Scenarios

After successful deployment, test the AskReporting agent with the following sample prompts to verify functionality, clicking the generated urls to view reports:

1. **Ask for a Default Report:** Please create a care report
2. **Ask for a Custom Report:** Please create a care report with an additional section that translates the email from the provider into layman terms