Business intake: expand Member Assist

From: Elena Voss, Director, Member Services **To:** GRC / Privacy / Security **Date:** 2027-09-18 **Subject:** Expand Harborline Member Assist beyond the pilot pod

We piloted Member Assist on Pallet Desk starting **2027-06-08** with one Member Services pod (about 12 staff). GRC was not finished with a formal AI review then. That is on us. The pilot feels successful. I want expansion the week of **2027-11-02**.

Claimed purpose: help staff handle inbound member messages faster and more consistently.

Claimed in-scope: summaries, message-type classification, suggested priority, draft replies. Human review **before any message is sent to a member**. Categories: billing, account, and routine administrative. Care-navigation and symptom messages should stay on a **human-only** path. No diagnosis, treatment recommendation, or eligibility determination. No autonomous send.

Claimed data handling: attachments stay on the ticket and are not sent to the model. Customer-content training is **disabled**.

Please tell steering whether we can expand, under what conditions. Pallet is already under contract for this application. I am not asking you to rip out a vendor. I am asking how we govern **this use**.