CRESTORA AI

THE HEALTHCARE AI STARTER KIT

10 Practical AI Prompts | 5 Time-Saving Workflows | A 7-Day Action Plan

> A practical, beginner-friendly resource for healthcare professionals who want to explore AI responsibly, improve workflows, and save time.

Complimentary AI in Healthcare Summit Resource

Prepared by Brigette Caldwell, Founder of Crestora AI

Educational resource. Do not enter patient-identifiable information, protected health information (PHI), or confidential organizational data into unapproved AI tools.

Welcome: Start Small. Work Smarter.

AI can help healthcare teams draft, organize, summarize, brainstorm, and improve routine work. You do not need to be a technical expert to start. You do need sound judgment, approved tools, and appropriate safeguards.

A note from Brigette Caldwell

After years working across medical billing, provider credentialing, revenue cycle management, and healthcare operations, I know how much time administrative work can consume. I created this toolkit to help you identify useful, realistic starting points for AI - without losing sight of privacy, accuracy, and the people behind the work.

How to use this kit

Start with the readiness check, choose one prompt that matches your role, and follow the seven-day plan. Treat every AI output as a draft requiring human review. Use fictional examples or information your organization has explicitly approved for the tool.

> Your goal: Leave with one safe, repeatable use case - not a long list of tools you never use.

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01 | Your AI Readiness Scorecard

For each statement, give yourself 0 = Not yet, 1 = Somewhat, or 2 = Yes. This is a planning exercise, not a formal compliance assessment.

01. We can identify at least one repetitive, low-risk administrative task. [0] [1] [2]

02. We know which AI tools are approved for work use. [0] [1] [2]

03. We have clear rules for PHI and confidential information. [0] [1] [2]

04. Our team understands that AI outputs require verification. [0] [1] [2]

05. We know who can approve a small AI pilot. [0] [1] [2]

06. We can measure time saved or quality improved. [0] [1] [2]

07. We have a process to escalate errors or concerns. [0] [1] [2]

08. We have a person responsible for reviewing pilot results. [0] [1] [2]

> My total: _____ / 16
> 0-5: Build foundations first. 6-11: Choose a controlled pilot. 12-16: Consider a measured expansion, subject to organizational approval.

My best first use case: _____

Who needs to approve it? _____

02 | Ten Ready-to-Use AI Prompts

Copy a prompt into an organization-approved AI tool. Replace bracketed details with fictional, public, or approved non-sensitive information. Review and revise every output.

1. Improve an email

Act as a professional healthcare operations editor. Rewrite this fictional administrative email to be clear, warm, and concise. Audience: [role]. Goal: [goal]. Draft: [non-sensitive draft]. Avoid adding facts.

2. Build an SOP outline

Create a step-by-step SOP outline for [general administrative process]. Include purpose, roles, checkpoints, exceptions, and a quality-review section. Flag assumptions.

3. Create a staff training agenda

Design a 30-minute beginner training agenda on [non-clinical topic] for [team]. Include three learning objectives, a practice activity, and a knowledge check.

4. Summarize a public policy update

Summarize the following publicly available policy text for a healthcare administrative team. Separate confirmed requirements, effective dates, and questions to verify. Text: [public text].

5. Draft a meeting agenda

Create a 20-minute team meeting agenda to address [workflow challenge]. Include discussion questions, decisions needed, owners, and follow-up items.

02 | Ten AI Prompts (continued)

6. Generate process-improvement ideas

Suggest five low-risk ways to reduce manual steps in [administrative workflow]. For each, list benefits, risks, dependencies, and a simple measure of success.

7. Create a patient-friendly generic explanation

Draft a plain-language explanation of [general administrative concept, e.g., prior authorization]. Do not provide individual coverage, clinical, or legal advice. Include a reminder to confirm specifics with the appropriate team.

8. Design a quality checklist

Create a quality-assurance checklist for [billing or credentialing administrative task] using only these provided non-sensitive rules: [rules]. Add a section for human verification.

9. Draft a project plan

Create a two-week pilot plan for [approved low-risk AI use case]. Include scope, owner, success metrics, review checkpoints, and stop conditions.

10. Compare workflow options

Compare these two fictional administrative workflows: [A] and [B]. Evaluate effort, accuracy risk, training needs, and likely bottlenecks. Do not invent numerical savings.

03 | Five Time-Saving Workflow Ideas

These examples focus on support and administrative tasks. Implement only with approved systems, human oversight, and organizational policies.

1 | Administrative communications

Draft generic appointment-policy explanations, internal announcements, or non-patient-specific FAQ text.

Human checkpoint: Human reviewer checks accuracy, tone, and policy alignment.

2 | Medical billing operations

Create a denial-trend meeting agenda, an educational coding refresher outline, or a fictional claim-review checklist.

Human checkpoint: Qualified staff validate payer rules, coding guidance, and any final decisions.

3 | Provider credentialing

Outline a provider onboarding checklist, document-request template, or status-report format using placeholder data.

Human checkpoint: Credentialing specialists verify current payer requirements and actual statuses.

4 | Staff onboarding and education

Turn approved, non-sensitive procedures into quizzes, role-play scenarios, and training agendas.

Human checkpoint: A subject-matter expert confirms the content before distribution.

5 | Practice workflow improvement

Map a generic intake or referral process and brainstorm bottlenecks and measurement ideas.

Human checkpoint: Operational leaders assess feasibility, privacy, accessibility, and risk.

04 | Responsible AI in Healthcare Checklist

Before using AI for a work task, check every applicable item.

☐ Use only tools approved by your organization.

☐ Do not enter PHI, patient identifiers, credentials, or confidential data unless explicitly authorized under appropriate safeguards and agreements.

☐ Confirm whether a business associate agreement (BAA) and other contractual protections are required for the proposed use.

☐ Apply minimum-necessary access and organizational privacy/security policies.

☐ Verify facts, regulations, payer requirements, citations, and dates against authoritative sources.

☐ Keep qualified humans responsible for clinical, coding, billing, and operational decisions.

☐ Check outputs for bias, omissions, misleading certainty, and inappropriate tone.

☐ Follow documentation, retention, incident-reporting, and audit requirements.

☐ Test on fictional or approved de-identified examples before any real deployment.

☐ Get required compliance, IT/security, and leadership approvals.

> Important: A consumer AI chatbot is not automatically HIPAA-compliant. De-identification must be done appropriately, and even a tool marketed for healthcare still requires organizational due diligence. This kit is educational, not legal, compliance, or clinical advice.

05 | Your 7-Day AI Action Plan

Spend 10-20 minutes a day. The aim is one carefully reviewed pilot, not a full transformation in a week.

DAY 1

Identify one repetitive, low-risk task that does not require sensitive information.

DAY 2

Confirm your organization’s approved tools and applicable policies.

DAY 3

Try one prompt using a fictional or approved example.

DAY 4

Review the result for accuracy, completeness, clarity, and bias.

DAY 5

Refine the prompt and document the steps that improved the output.

DAY 6

Compare the approved test workflow with the current process; record effort and errors.

DAY 7

Share lessons learned with the appropriate team and decide whether to stop, revise, or seek approval to expand.

> My 7-day goal: _____
> My success measure: _____
> My next review date: _____

06 | What Is Your Next Step with AI?

You do not have to figure out AI adoption alone. Choose the path that fits your current role and organization.

PATH A | Learn the basics

Build confidence with practical AI concepts, prompt writing, and safe everyday applications.

PATH B | Improve a workflow

Identify a repetitive administrative process and explore a controlled, measurable improvement.

PATH C | Explore implementation

Discuss AI readiness, team training, automation opportunities, governance, and next steps with Crestora AI.

> Connect with Crestora AI
> Ask about healthcare AI education, workflow consulting, and responsible implementation.
>
> Website or booking link: [Insert Crestora AI URL]
> QR code: [Add linked QR code after final URL is confirmed]

About Brigette Caldwell

Brigette Caldwell is a healthcare industry expert, entrepreneur, and AI consultant with extensive experience in revenue cycle management, medical billing, provider credentialing, and healthcare operations. As founder of Crestora AI, she helps healthcare professionals and business owners explore practical AI opportunities while keeping people at the heart of healthcare.

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