ANCHOR NETWORKS WHITE PAPER · DRAFT

Putting AI to work in a Microsoft 365 Organization

A plain-English guide to Microsoft 365 Copilot, ChatGPT, and Claude — what each can do across your Microsoft apps, and what your agreements actually cover.

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Claude Test Draft

AT A GLANCE

3 assistants

Copilot, ChatGPT and Claude — three different paths to the same content

6 apps

Word, Excel, PowerPoint, Outlook, Teams and SharePoint

1 rule

Capability is not coverage — a feature existing does not mean your BAA covers it

WHY THE PLATFORM DECISION MATTERS

Three assistants, three different paths in

- All three assistants now work with Microsoft 365 content — but by different paths: built in, an add-in beside the open file, or an external app plus connector.
- What differs is how they get there, what setup they demand, and what your agreements cover when client information is involved.
- Moving away from native Microsoft integration adds another identity, data-processing and governance layer to review.
- Personal ChatGPT or Claude accounts sit outside every vendor's organizational BAA path — that use is uncontrolled disclosure risk today.
- No assistant fixes inappropriate existing access. Review who can see what first.

Capability

What the tool can do in the app. Every assistant here will work on whatever you give it.

Coverage

Whether your agreements cover that work when it touches PHI — decided by tier, feature and configuration.

THE RULE THAT FRAMES ALL OF IT

IN PLAIN TERMS · Capability is not coverage — and coverage is not compliance. A BAA is one prerequisite; risk analysis, minimum-necessary access, policy, training, monitoring, and incident response complete the picture.

ARCHITECTURE

The three ways AI reaches Microsoft 365

Every integration follows one of three architectures. Understanding them once saves re-learning them app by app.

BUILT IN

Microsoft 365 Copilot

Part of Microsoft 365 itself. Core grounding runs through Microsoft Graph under each user's existing identity and permissions — no installation.

Two paths need review

Generated web-search queries sit outside Microsoft's DPA and HIPAA commitments. "Preview models with data retention" are a separate path — default-off, admin opt-in.

ADD-IN BESIDE THE FILE

ChatGPT add-ins

Sidebars for Excel and PowerPoint work on the open file. No dedicated Word add-in is documented.

Claude add-ins

Excel, PowerPoint and Word are generally available; Outlook is beta. The file stays in Office, but selected content and prompts are processed in the vendor's environment.

APP + CONNECTOR

ChatGPT apps

Retrieves SharePoint, Outlook and Teams content per user — or, on eligible plans, syncs and indexes selected content in advance in OpenAI's environment.

Claude's M365 connector

Retrieves on demand under each user's delegated permissions rather than keeping an indexed copy. Each path is a separate grant.

RULE OF THUMB · Moving away from native Microsoft integration adds another identity, data-processing and governance layer to review — and the plan tier increasingly decides whether client information is covered.

APP BY APP

What each assistant actually does in your Microsoft apps

Word

Copilot: draft, rewrite and summarize inside the document. ChatGPT: no Word add-in documented — reach .docx through the SharePoint app. Claude: sidebar with citations and native tracked changes.

Excel

Copilot: formulas, analysis, charts and PivotTables. ChatGPT: sidebar builds, debugs and explains workbooks. Claude: answers with cell-level citations and keeps formula relationships intact.

PowerPoint

Copilot: build a deck from a prompt or a Word file. ChatGPT: draft and revise slides with editable structure preserved. Claude: builds on the deck's own template and makes native editable charts.

Teams

Copilot: the standout meeting assistant — recap by speaker, action items, live questions. ChatGPT: reads chats and channels, creates Planner tasks. Claude: no Teams surface; the connector reads Teams read-only.

Outlook

Copilot: draft replies, summarize threads, prep for meetings. ChatGPT: mailbox search and extraction from ChatGPT's own interface. Claude: a pane in Outlook, triage and unsent drafts (beta).

SharePoint & OneDrive

Copilot: native grounding across the files, mail and chats each user may access. ChatGPT: per-user retrieval, or admin-managed sync indexed in OpenAI's environment. Claude: on-demand, tenant-wide.

REMEMBER · Every assistant here will work on whatever you give it. Whether your agreements cover that work when it touches client information is a separate question.

CAPABILITY VS. COVERAGE

What your agreements actually cover

A feature existing does not mean your BAA covers it. Coverage is set by product tier, the feature and its data path, and configuration.

MICROSOFT 365 COPILOT

In scope **on Microsoft's published HIPAA BAA list**

Two feature paths still need separate review before PHI use: generated web-search queries, and "preview models with data retention" (default-off, admin opt-in).

CHATGPT

Regulated tiers **only**

ChatGPT for Healthcare, or Enterprise with Regulated Workspace. ChatGPT Business has no BAA path. The Excel and PowerPoint add-ins are named in OpenAI's HIPAA-eligible functionality.

CLAUDE

- Anthropic's BAA covers HIPAA-ready Enterprise first-party Claude features.
- Its Microsoft 365 connector and Office add-ins sit outside that BAA today — whatever plan you hold.
- Careful engineering — unsent drafts, local chat history — is good design, not coverage.

AND AT ALL THREE VENDORS

Consumer subscriptions sit outside every vendor's published organizational BAA-eligible offerings. Personal-account use with client information is uncontrolled disclosure risk today.

THE HONEST STATEMENT · A BAA makes coverage possible. Configuration and use make it real — alongside risk analysis, minimum-necessary access, policy, training, monitoring and incident response.

CHOOSING

Where each platform fits

A platform-fit conclusion, not a compliance guarantee. Service, feature, model path, contract and controls still have to be reviewed before PHI use.

EVALUATE FIRST

Microsoft 365 Copilot

For a Microsoft 365-centered organization expecting workflows that may involve PHI, Copilot is often the most practical platform to evaluate first.

Why it fits first

The identity, permissions, applications and governance environment are already Microsoft. It is also the shortest path — assign licenses, then do the governance work.

CREDIBLE ALTERNATIVE

Regulated ChatGPT

A separate-platform option with broad BAA-eligible functionality — and a heavier contracting path.

What it takes

A contracted regulated workspace, Entra admin consent per app, per-app action controls, and a chosen connection mode — per-user OAuth or managed sync.

TWO SEPARATE TRACKS

Claude Enterprise

HIPAA-ready Enterprise can support covered first-party Claude workflows, with policy, retention and access controls.

The line staff must know

The Microsoft-integration track — Office add-ins and the M365 connector — is outside Anthropic's BAA today. Staff need to know which track they are in.

YOU DO NOT HAVE TO PICK ONE · A workable pattern is Copilot as the primary BAA-in-scope platform, with a covered enterprise chat tool — or a strictly non-PHI tool with clear policy — for specific teams. Every tool needs a defined lane.

A PRACTICAL FIRST STEP

Start small, on content that is not PHI

What a first pilot looks like for a smaller ABA or behavioral-health organization.

01

Pick a few people

Three to five users — not the whole organization.

02

Pick one or two workflows

Non-PHI or properly de-identified content, and a short fixed scope.

03

Review access first

No assistant fixes inappropriate existing access — and Copilot makes oversharing easier to find.

04

Measure specific things

Time saved, rework required, output quality, and permission issues discovered.

Then decide the covered path — before any PHI use

Payer analysis, email and meeting recaps routinely contain PHI in real practices. Treat those as later, controlled workflows.

IN PARALLEL · A feature-level approval register, minimum-necessary access, a meeting-transcription policy, an offboarding step that revokes connections and tokens, and human review before reliance.

WHAT SHOULD I DO NEXT?

Three practical next steps

Anchor Networks helps ABA and behavioral-health organizations adopt AI inside the systems they already use — with the governance healthcare requires.

Anchor Networks
support@anchornetworks.com · (888) 694-7732

START HERE

1. Confirm what you already have

Check whether Copilot is available on your current Microsoft 365 plan, and what the add-on costs per user.

2. Review who can access what

Permissions hygiene comes before any assistant — Copilot makes existing oversharing easier to find.

3. Run a small, non-PHI pilot

Three to five users, one or two workflows, de-identified content, a short fixed scope and specific measures. Then decide the covered path before any PHI use.