



ANCHOR NETWORKS WHITE PAPER

Putting AI to Work in a Microsoft 365 Organization

A practical, app-by-app guide to Copilot, ChatGPT, and Claude – what each can do, what setup each requires, and what your agreements actually cover

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AI assistants

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Microsoft 365 apps

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essential rule

Capability is not coverage.

A feature existing does not mean your Business Associate Agreement covers it – and a BAA alone does not make a deployment compliant.

Product information checked August 12, 2026 against current official Microsoft, OpenAI, and Anthropic documentation.
Educational material – not legal or compliance advice.

ANCHOR NETWORKS · ABA AND BEHAVIORAL-HEALTH TECHNOLOGY

Executive summary

- All three AI assistants – Microsoft 365 Copilot, ChatGPT, and Claude – can now work **with** Microsoft 365 content, but through materially different paths: native Microsoft integration, Office add-ins beside the open file, or external connected apps. The differences are in *how they get there, what setup they demand, and what your agreements cover* when client information is involved.
- **Copilot is built in:** once licensed on an eligible Microsoft 365 plan (Business or enterprise), it appears across the principal Microsoft 365 applications with no installation, uses each person's existing sign-in and permissions for core Microsoft 365 grounding, and is listed by Microsoft as an in-scope service under its HIPAA BAA.
- **ChatGPT reaches Microsoft 365 two ways:** sidebar add-ins that edit the open Excel workbook or PowerPoint deck, and "apps" (connectors) that let ChatGPT search your SharePoint, Outlook, and Teams content. Setup involves a ChatGPT workspace, Microsoft admin consent, and per-app action controls.
- **Claude reaches Microsoft 365 two ways as well:** Office add-ins for Word, Excel, and PowerPoint (generally available), and Outlook (beta) that work on the open file, plus a Microsoft 365 connector for retrieving tenant content. Setup involves AppSource installs or admin deployment, plus a one-time Microsoft admin consent.
- **For work involving protected health information (PHI), capability and coverage are different questions.** A feature existing does not mean your Business Associate Agreement (BAA) covers it. The coverage picture, in one line: Copilot is BAA-in-scope on Microsoft's published list; ChatGPT's Microsoft integrations can be covered, but only in OpenAI's regulated tiers; Claude's covered surface is its first-party Enterprise features – its Microsoft 365 connector and Office add-ins sit outside Anthropic's BAA today, whatever plan you hold.

Decision in 60 seconds

Already centered on Microsoft 365 and expecting PHI use? Evaluate Copilot first.

Want ChatGPT as a separate organizational workspace for PHI? That requires a contracted, BAA-eligible offering (Healthcare or regulated Enterprise) – not ChatGPT Business.

Want Claude for covered work? HIPAA-ready Enterprise can fit for first-party Claude workflows – but its Microsoft 365 connector and Office add-ins are outside Anthropic's BAA today.

Want a low-cost first experiment with any of them? Start with non-PHI or properly de-identified workflows until the exact contracted path is approved.

About this edition

A PRACTICAL COMPANION

This white paper also served as the common source for an August 2026 PowerPoint workflow comparison between Microsoft 365 Copilot and Claude for PowerPoint. Both products received the same source content, the same Anchor template, and the same presentation objective. The raw first drafts are published separately alongside the online edition.

How to read this guide

The assumed reader runs, or works in, an organization centered on Microsoft 365 – Outlook, Word, Excel, PowerPoint, Teams, SharePoint – that handles client information some of the time.

Two questions run through every section:

1. **What can it do here?** – the practical use cases, with example prompts you can try.
2. **What does it take to set up?** – who has to do what before a user sees the feature.

One rule frames all of it: *capability is not coverage*. Every assistant described here will work on whatever you give it. Whether your organization's agreements cover that work when it touches PHI depends on the product tier, the specific feature and its data path, and the configuration – never on the tool's enthusiasm. And a further step: coverage is not compliance. A BAA is one prerequisite; risk analysis, minimum-necessary access, policy, training, monitoring, and incident response complete the picture.

About the example prompts: they assume a first pilot using non-PHI or properly de-identified content. Several of the workflows described (payer analysis, email, meeting recaps) routinely contain PHI in real practices – treat those as later, controlled workflows, attempted only after the relevant vendor path, agreement, and configuration are approved.

The plans this guide assumes, when it discusses covered use:

Assistant	Covered path assumed
Microsoft 365 Copilot	The Copilot add-on (Business or Enterprise) on an eligible Microsoft 365 plan – Microsoft lists Copilot as an in-scope service under its HIPAA BAA
ChatGPT	ChatGPT for Healthcare or ChatGPT Enterprise with Regulated Workspace (contracted tiers; ChatGPT Business has no BAA path)
Claude	Claude Enterprise with the HIPAA-ready configuration (covers specified first-party features; not its Microsoft integrations)

Consumer ChatGPT and Claude subscriptions sit outside those vendors' published organizational BAA-eligible offerings. For Microsoft, verify the exact contracted commercial service rather than relying on the Copilot brand alone. If staff are using personal AI accounts for work, that use falls outside the organization's approved contractual path and creates uncontrolled disclosure risk – a covered alternative, deliberately rolled out, is the practical fix.

The three paths, once

Every integration in this guide follows one of three architectures. Understanding them once saves re-learning them per app:

Built in (Copilot). The assistant is part of Microsoft 365 itself. Core grounding runs through Microsoft Graph under the signed-in user's existing Entra identity and permissions; interactions can be audited and retained through Microsoft Purview when the necessary licensing and controls are configured. Supported Copilot experiences can use Microsoft-operated models and disclosed OpenAI and Anthropic subprocessor paths under Microsoft's applicable terms. Two especially important feature paths need separate review before PHI use: generated web-search queries (outside Microsoft's DPA/HIPAA commitments, though the prompt and response remain within the service boundary) and separately enabled "preview models with data retention" (an independent-processor path outside Microsoft's Product Terms and DPA, default-off, tenant-admin opt-in). Agents and connectors can introduce additional terms and boundaries as well.

Office add-in beside the file (ChatGPT and Claude add-ins). A sidebar works directly on the open workbook, deck, or document. The open file remains in Office, while selected content and prompts are processed by the configured AI service (or, for Claude's add-ins, optionally routed through an organization's own inference platform – Amazon Bedrock, Google Vertex AI, Azure AI Foundry, or an LLM gateway – which changes the data path but does not by itself create BAA coverage).

External app + connector (ChatGPT apps, Claude's connector). The assistant's own interface reaches into tenant content. ChatGPT can retrieve permitted content for an individual user; eligible organizational deployments may also offer administrator-managed sync that indexes selected content in OpenAI's environment. Because OpenAI is actively changing deployment modes, verify the current help documentation before relying on a specific sync configuration. Claude's connector retrieves content on demand under delegated per-user permissions rather than maintaining a full indexed copy; results saved into a Claude conversation can still be retained. Each connected path is a separate grant, governed partly on the vendor's side.

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.

Microsoft Word

What each assistant can do

Copilot in Word – built into the document surface. Draft new content from a prompt box, rewrite or tighten selected text, summarize a long document, chat about the document's content, and generate drafts that reference other files or emails (with the Copilot license).

Try: "Draft a one-page summary of this policy for new staff." · "Rewrite this section in plainer language."

ChatGPT – no dedicated Word add-in is documented in OpenAI's official help center as of August 12, 2026. Word documents are reachable indirectly: the SharePoint app lets ChatGPT read and reference .docx content in chat, and ChatGPT can draft text you paste back. The drafting happens in ChatGPT, not in the open document.

Try (via SharePoint app): "Summarize the onboarding guide in the HR site and suggest three updates."

Claude for Word (generally available; paid Claude plans) – a sidebar that works on the open document. Ask questions with clickable section citations, edit selected passages while preserving styles and numbering, make every edit a **tracked change** reviewable in Word's native review pane, work through comment threads, summarize counterparty redlines, and fill templates in the document's own styles.

Try: "Work through my open comments as tracked changes." · "Summarize what the other side changed and flag anything worth discussing."

Setup

	Steps
Copilot	Licensing and deployment prerequisites – no per-app install
ChatGPT	No Word add-in documented; SharePoint app setup covers document access (see SharePoint section)
Claude	Install from Microsoft AppSource (user) or deploy via Microsoft 365 Admin Center → Integrated apps (admin); sign in with a Claude account

With client information

Core Copilot work in Word is processed under Microsoft's applicable service terms; web search, agents, connectors, and alternate model paths require separate review. Claude for Word is outside Anthropic's BAA. Do not use it with PHI through a direct Claude plan. A separately contracted third-party inference path requires its own legal, security, and BAA review. ChatGPT document workflows are covered only inside the regulated tiers.

Microsoft Excel

What each assistant can do

Copilot in Excel – invoked from the Copilot icon in the app. Three working modes (allow editing, plan first, or chat only). Generates data and formulas, summarizes and analyzes worksheets, creates charts and PivotTables linked to source data, applies conditional formatting and data validation, sorts, filters, and answers questions about the data.

Try: "Summarize this de-identified payer mix and flag outliers." · "Add a column computing month-over-month change."

ChatGPT for Excel (sidebar add-in; broadly available across plans, including free tiers) – build, update, and explain spreadsheets in natural language, including large multi-tab files with formulas and references. Cleans messy sheets, debugs broken formulas, runs scenarios and sensitivity tables, and can search the web for information to pull into the workbook. Desktop users can also drive the open workbook through Codex in the ChatGPT desktop app.

Try: "Why am I getting a #REF! error on the summary tab?" · "Build a formatted monthly budget with categories, totals, and charts."

Claude for Excel (generally available; paid Claude plans) – answers questions about the open workbook **with cell-level citations you can click**, updates values while keeping formula relationships intact, builds or populates models from natural-language descriptions, debugs errors to their root cause, and performs native operations (sort, filter, pivot edits, conditional formatting). Warns before overwriting data.

Try: "Walk me through how the number in C42 is calculated." · "Flex the growth rate from 5% to 10% and show the impact."

Setup

	Steps
Copilot	Licensing – no per-app install
ChatGPT	Home → Add-ins → search "ChatGPT" (user), or admin deploys the manifest via Integrated apps; sign in with a ChatGPT account; workspace RBAC can gate access
Claude	AppSource install or admin deployment via Integrated apps (same flow as Word); sign in with a Claude account

With client information

Same pattern as Word: core Copilot work under Microsoft's terms; ChatGPT's Excel add-in is expressly named in OpenAI's HIPAA-eligible functionality for regulated workspaces (and only there); Claude for Excel is outside Anthropic's BAA. A practical caution for *all three*: spreadsheets from outside your organization can carry hidden prompt-injection text – require human review of any AI-proposed bulk change, especially on files you didn't create.

Microsoft PowerPoint

What each assistant can do

Copilot in PowerPoint – create a presentation from a prompt or from a Word document, add and edit slides conversationally (including an agent mode for multi-step builds), summarize a deck, and rewrite slide text.

Try: "Create a five-slide staff-training deck from this policy document."

ChatGPT for PowerPoint (sidebar add-in) – create a first draft from source material, add or revise slides in an existing deck while preserving editable slide structure, tighten a deck for a specific audience, and interrogate a deck's story and gaps. Template adherence is designed-for but not guaranteed – review styling.

Try: "Turn this memo into 5 slides." · "What is the story of this deck, and where are the gaps?"

Claude for PowerPoint (generally available) – build new slides using the deck's own template, master, fonts, and colors; make pinpoint edits to specific slides without regenerating the deck; generate full deck structures; and convert bullets into **native, editable** PowerPoint charts and diagrams rather than pasted images.

Try: "Restructure the storyline across slides 4–7." · "Turn these bullets into a process flow diagram."

Setup

Identical pattern to Excel for all three (Copilot: licensing; ChatGPT and Claude: marketplace add-in install or admin deployment, then sign in).

With client information

Same coverage pattern as Excel – including ChatGPT for PowerPoint's express inclusion in OpenAI's regulated-workspace functionality list, and Claude for PowerPoint's exclusion from Anthropic's BAA.

Microsoft Outlook

What each assistant can do

Copilot in Outlook – draft and reply to email, summarize long threads, get coaching on tone before sending, prepare for meetings, and manage the inbox. Two tiers: basic inbox/calendar questions with eligible Microsoft 365 plans, and full enterprise-data reach with the Copilot license.

Try: "Summarize this thread and draft a reply agreeing to the timeline."

ChatGPT (Outlook Email + Calendar apps) – connect ChatGPT to the mailbox to search and retrieve messages with structured filters, summarize senders' updates, extract action items across threads, look up people in the directory, and – when an admin enables the relevant action controls – create and manage contacts. This is mailbox access *from ChatGPT's interface*, not a pane inside Outlook. Microsoft Graph consent and ChatGPT workspace action controls are separate layers – Entra approval alone does not enable actions.

Try: "Create a table of sender, subject, and date for emails about the audit in the last 7 days."

Claude for Outlook (beta) – a pane inside Outlook itself. Triage unread mail into what needs you, what Claude can pre-draft, and noise; draft replies in your own voice that land **unsent in the compose pane**; summarize threads into decisions, open items, and who-owes-what with per-email citations; read .docx/.xlsx attachments inline; search the mailbox semantically; find meeting times and draft invites into the native appointment form; and produce a one-page brief before your next meeting. In the direct Claude-account path it does not request the send permission – drafts require a human click.

Try: "What needs me?" · "Prep me for my 2pm."

Setup

	Steps
Copilot	Licensing – no per-app install
ChatGPT	Workspace admin enables the Outlook apps; a Microsoft Entra admin approves Graph scopes ; admin separately sets action controls (all / read-only / custom); users connect their account
Claude	AppSource install or admin deployment plus a one-time tenant-wide Graph consent by a Global Administrator (a provided consent link; organizations can substitute their own Entra app registration); users sign in with Claude credentials

With client information

Email is where PHI concentrates in most organizations – names, schedules, authorizations, clinical attachments. Core Copilot mailbox work runs under Microsoft's terms. ChatGPT's Outlook apps route mailbox content into OpenAI's environment – covered only in the regulated tiers. Claude for Outlook is beta and outside Anthropic's BAA; its careful mechanics (unsent drafts; in the direct path, the Microsoft Graph token stays in the user's browser) are good engineering, not coverage.

Microsoft Teams

What each assistant can do

Copilot in Teams – the standout meeting assistant: it summarizes discussion by speaker, surfaces action items, and answers questions during the meeting. Transcription has two modes that matter: **saved transcription is required for post-meeting recap and Copilot history; in-meeting Copilot can also run on temporary speech-to-text when the meeting is configured for "only during the meeting," leaving no post-meeting Copilot record.** It also summarizes chats and channels.

Try (during a meeting): "What did I miss in the last 10 minutes, and were any decisions made?"

ChatGPT (Teams app) – search and read chats and channels the signed-in user can access, summarize conversations, extract shared links, create Planner tasks from action items, and – for eligible Enterprise use – retrieve meeting transcripts and recording metadata. With actions enabled it can create chats and send messages.

Try: "Summarize my recent chat with the billing team and list the open questions."

Claude – no dedicated Teams surface. The Microsoft 365 connector reads Teams chat and channel messages (Teams stays read-only even when write tools are enabled elsewhere).

Try (via connector): "What did the ops channel decide about the schedule change last week?"

Setup

Copilot: licensing, plus a transcription decision per meeting policy (organizer-controlled). ChatGPT: same app-enable + Entra-consent + action-control pattern as Outlook. Claude: comes with the Microsoft 365 connector (next section) – no separate Teams setup.

With client information

Meeting transcripts are underappreciated PHI reservoirs – client names and clinical details spoken aloud become searchable text. The coverage pattern is unchanged; add one operational rule regardless of vendor: decide *which meetings get transcribed, and whether transcripts are saved*, as deliberately as you decide which tools get used.

SharePoint & OneDrive (your files at large)

What each assistant can do

Copilot – organizational grounding is Copilot's defining feature: it retrieves and synthesizes across the files, mail, and chats each user is permitted to access, through Microsoft's native Graph and identity controls. "Find and summarize what we already have" is its home turf.

Try: "Pull together everything we have on the payer credentialing process and draft a checklist."

ChatGPT (SharePoint app) – user-authenticated access can retrieve content a person is permitted to see. Eligible organizational deployments may also offer administrator-managed sync that indexes selected content in OpenAI's environment and applies permission-aware retrieval from that index. OpenAI is actively changing deployment options, so verify the current SharePoint documentation before relying on a specific plan, sync mode, or rollout path.

Try: "Consolidate all the documents on intake into a guide for new hires."

Claude (Microsoft 365 connector) – reads SharePoint, OneDrive, Outlook, and Teams content **on demand through the signed-in user's own delegated permissions** – content is retrieved during active queries rather than indexed in advance. Results incorporated into a saved Claude conversation can be retained, and authentication tokens are cached in encrypted form. Write tools (create/update files, send email, manage calendar) require separate administrative enablement. One scoping note: SharePoint search runs tenant-wide under the user's permissions – site-level restriction isn't supported.

Try: "Find last quarter's staffing analysis and summarize the assumptions."

Setup

	Steps
Copilot	None beyond licensing – grounding is built in
ChatGPT	Enable the SharePoint app; use per-user access or an eligible administrator-managed deployment; review Entra scopes, content scope, permission refresh, RBAC, and sensitivity-label behavior
Claude	Team/Enterprise owner adds the connector in organization settings; Entra Global Administrator grants tenant consent (guided flow or manual); each user clicks Connect; write tools require a separate admin opt-in

With client information

WHY ARCHITECTURE MATTERS HERE

This is where architecture matters most, because large portions of organizational content may be in scope, depending on the signed-in user's permissions and the sources the organization enables. Three different data paths: Copilot retrieves through native Graph permissions; Claude's connector fetches on demand under delegated permissions (with conversation-level retention of results); An administrator-managed ChatGPT sync path can hold an indexed copy of selected content in OpenAI's environment, with permissions enforced from synchronized metadata. Coverage: Copilot in scope under Microsoft's BAA; ChatGPT connectors covered in regulated tiers only; Claude's connector excluded from its BAA.

Setup, side by side

Total effort to a working, governed deployment – assuming a Microsoft 365 organization with an Entra admin available:

Copilot – the shortest path. Choose an eligible Copilot add-on or Microsoft 365 bundle and assign licenses; it appears across supported apps. The real work is governance configuration, not construction: review permissions hygiene (Copilot makes existing oversharing easier to find), review web search, agents, connectors, and any independent-processor model path before PHI use, and confirm Purview licensing and policies.

ChatGPT – a workspace plus a consent chain. Stand up the workspace (a contracted regulated tier for covered use), enable the Microsoft apps you want, have the Entra admin approve each app's Graph scopes, set per-app action controls (all / read-only / custom), deploy the Excel/PowerPoint add-ins via marketplace or manifest, and choose the organization's standard connection mode (per-user OAuth or managed sync).

Claude – two clearly separate tracks. *Covered first-party track:* activate HIPAA-ready Enterprise (self-serve) for covered first-party Claude workflows, with policy, retention, and access controls. *Microsoft-integration track:* deploy the Office add-ins and/or connector (AppSource, Admin Center, or manifest; Global Administrator grants the one-time Graph consent; write tools and cross-app mode are separate opt-ins) – **and treat this entire track as outside Anthropic's BAA today.** Staff need to know which track they are in.

Data and governance quick-guide

Where your content goes. Copilot: core prompts, responses, and Graph grounding are handled under Microsoft 365 contractual commitments; specific model, web-search, agent, and connector paths can have additional boundaries. ChatGPT apps/add-ins: content is retrieved to, or synced and indexed in, OpenAI's environment; business tiers are not used for training by default. Claude: three distinct paths – (1) Office add-ins in the direct path send prompts and file context to Anthropic, with inputs/outputs ordinarily deleted from Anthropic's backend within 30 days (documented exceptions apply) and chat history stored locally in the browser; (2) the Microsoft 365 connector retrieves on demand, with results retained in saved conversations; (3) add-ins routed through Bedrock/Vertex/Foundry/a gateway send content to the organization's chosen inference endpoint rather than Anthropic.

Audit visibility. Copilot interactions can be audited, searched, and retained through Purview when the necessary licensing and controls are configured. ChatGPT Enterprise offers compliance logs/API, and Microsoft Purview can ingest ChatGPT Enterprise interactions (post-collection). Claude's Office add-ins are *not* included in Anthropic's Enterprise audit logs or Compliance API today – Enterprise customers can route add-in telemetry to their own OpenTelemetry collector, with response text excluded.

Copilot feature paths that need review before PHI use. Generated web-search queries fall outside Microsoft's DPA and HIPAA commitments (the prompt and response remain within the service boundary) – disable web search for workflows that may involve PHI unless the path has been reviewed. Models labeled "preview models with data retention" are an independent-processor path outside Microsoft's Product Terms and DPA – default-off, tenant-admin opt-in; leave them off absent an explicit contractual determination. Agents and connectors added to Copilot carry their own terms. Standard model preference (among Microsoft-operated and disclosed subprocessor paths) is secondary – but the processor path, region, and published exclusions still require review.

Prompt injection – a caution for all three vendors. Files and emails from outside your organization can contain hidden text designed to manipulate an AI assistant into leaking or altering data. Vendor safeguards vary by product and action – organizations should require human review before accepting consequential changes, and treat inbound email and external files as untrusted input.

Permissions – the honest statement. Connected experiences can respect source-system permissions, but the enforcement mechanism varies: native Microsoft permission enforcement (Copilot), per-user delegated grants (Claude's connector, ChatGPT's user mode), or synced permission snapshots (ChatGPT managed sync). Standalone chat sees whatever staff paste, upload, record, or connect. And no assistant fixes inappropriate existing access – review who can access what *first*.

The governance checklist

Beyond tool choice, the items that decide whether adoption is actually governed:

✓ Feature-level approval register – approve by exact feature and path, not vendor brand.	✓ Minimum necessary – don't give an AI more data than the workflow requires.
✓ Offboarding – when an employee leaves: disable accounts, revoke OAuth/delegated connections and connector tokens, remove workspace access, review retained conversations.	✓ Retention map – vendor backend retention, local browser storage, synced indexes, and your own legal retention duties are four different clocks.
✓ Meeting transcription policy – which meetings may be transcribed, whether transcripts are saved, who can access them.	✓ Incident response – a defined step for "PHI went into an unapproved tool or excluded feature."
✓ Human review – formulas, bulk edits, payer analysis, outbound email, and financial conclusions get reviewed before reliance; no model output bypasses clinical, financial, or legal judgment.	✓ True total cost – base licenses, seat minimums, usage/credits, implementation, and administration, not just the sticker seat price.

Choosing

PRACTICAL RECOMMENDATION

For a Microsoft 365-centered healthcare organization expecting AI workflows that may involve PHI, Microsoft 365 Copilot is often the most practical platform to evaluate first – because the core identity, permissions, applications, and governance environment are already Microsoft. Regulated ChatGPT is a credible separate-platform alternative with broad BAA-eligible functionality and a heavier contracting path. Claude Enterprise can support covered first-party Claude workflows, but Anthropic's current BAA excludes its Microsoft 365 connector and Office add-ins – which removes most of the connected Microsoft work this guide covers.

That is a platform-fit conclusion, not a compliance guarantee. Exact service, feature, model path, contract, access, retention, governance, and customer controls still have to be reviewed before PHI use.

COMPLIANCE BOUNDARY

A BAA is one prerequisite. Appropriate use also requires risk analysis, minimum-necessary access, configuration, policy, training, monitoring, retention, and incident response.

Frequently asked questions

Is any of these tools "HIPAA compliant"?

No tool is HIPAA compliant or non-compliant on its own. Compliance is a property of your organization's configuration, agreements, and use. Each vendor offers paths that can support regulated work; each also has surfaces its agreements exclude.

Can we use PHI as soon as a BAA is signed?

No. Confirm the exact service and feature are within the covered path, then complete risk analysis, access review, minimum-necessary rules, policy, training, retention, monitoring, and incident-response planning.

Our staff already use personal ChatGPT/Claude accounts for work. Does choosing a covered platform fix that?

It is the necessary first half. Consumer ChatGPT and Claude subscriptions sit outside those vendors' published organizational BAA paths. Personal-account use with client information therefore creates an uncontrolled disclosure risk. The fix is a covered alternative good enough that staff prefer it – plus clear policy and training. Blocking alone tends to drive use underground.

Can we use the Claude models everyone talks about and still stay under Microsoft's terms?

Supported standard Copilot subprocessor paths can use OpenAI and Anthropic models under Microsoft's applicable terms, subject to Microsoft's published exclusions. Independent-processor preview paths are separate – default-off, admin opt-in – and must not be conflated with the standard paths.

Can Copilot see everything in Microsoft 365?

No. For core grounding, Copilot can surface content the signed-in user already has permission to access. That is exactly why permission cleanup matters – over-shared content becomes easier to find.

Does Claude's careful engineering (unsent drafts, local history) make it safe for client information?

Those are genuinely good design choices – and they are not coverage. Anthropic's BAA excludes the Microsoft 365 connector and the Office add-ins today. Good mechanics reduce some risks; they do not create a contractual PHI path.

What should our first pilot look like?

For a smaller ABA or behavioral-health organization: 3–5 users, 1–2 workflows, non-PHI or properly de-identified content, a short fixed scope, and specific measures – time saved, rework required, output quality, permission issues discovered.

What happens when an employee leaves?

Disable the account, revoke OAuth and delegated connections, remove workspace access, revoke connector tokens, review device access and retained conversations. Put it in the offboarding checklist now, not after the first departure.

Do we have to pick one vendor?

No. A workable pattern is Copilot as the primary BAA-in-scope organizational platform – subject to feature, model-path, and configuration review – with a covered enterprise chat tool, or a strictly non-PHI tool with clear policy, for specific teams. What matters is that *every* tool in use has a defined lane, and staff know which is which.

Sources and verification

All claims checked August 12, 2026 against current official vendor documentation. Vendor capabilities, product names, eligibility lists, and contractual boundaries change frequently; confirm the current pages before acting.

Microsoft

- Microsoft HIPAA/HITECH offering and in-scope Office 365 services: <https://learn.microsoft.com/en-us/compliance/regulatory/offering-hipaa-hitech>
- Data, privacy, and security for Microsoft 365 Copilot: <https://learn.microsoft.com/en-us/microsoft-365/copilot/microsoft-365-copilot-privacy>
- Microsoft 365 Copilot data-protection and auditing architecture: <https://learn.microsoft.com/en-us/microsoft-365/copilot/microsoft-365-copilot-architecture-data-protection-auditing>
- Microsoft Purview for Microsoft 365 Copilot: <https://learn.microsoft.com/en-us/purview/ai-m365-copilot>
- Public-web search data path: <https://learn.microsoft.com/en-us/microsoft-365/copilot/manage-public-web-access>
- AI model and processor categories: <https://learn.microsoft.com/en-us/microsoft-365/copilot/ai-models-overview>
- OpenAI as a Microsoft subprocessor: <https://learn.microsoft.com/en-us/microsoft-365/copilot/openai-subprocessor>
- Anthropic models in Microsoft Online Services: <https://learn.microsoft.com/en-us/microsoft-365/copilot/connect-to-ai-subprocessor>

OpenAI

- BAA availability for API and ChatGPT offerings: <https://help.openai.com/en/articles/8660679-how-can-i-get-a-business-associate-agreement-baa-with-openai-for-the-api-services>
- HIPAA-eligible products and functionality: <https://help.openai.com/en/articles/20001069-chatgpt-healthcare-and-regulated-workspace-functionality>
- ChatGPT for Excel and Google Sheets: <https://help.openai.com/en/articles/20001063-chatgpt-for-excel-and-google-sheets>
- ChatGPT for PowerPoint: <https://help.openai.com/en/articles/20001242-chatgpt-for-powerpoint>
- SharePoint app in ChatGPT: <https://help.openai.com/en/articles/12143177-sharepoint-connectors-on-chatgpt>
- Outlook Email and Calendar apps: <https://help.openai.com/en/articles/12512241-outlook-email-and-calendar-connectors-for-chatgpt>
- Microsoft Teams app: <https://help.openai.com/en/articles/12552368-microsoft-teams-connector-for-chatgpt>

Anthropic

- BAA for commercial customers: <https://support.claude.com/en/articles/8114513-business-associate-agreements-baa-for-commercial-customers>
- HIPAA-ready Enterprise plans: <https://support.claude.com/en/articles/13296973-hipaa-ready-enterprise-plans>
- Claude for Microsoft 365 overview: <https://claude.com/docs/office-agents/overview>
- Claude for Word: <https://claude.com/docs/office-agents/word>
- Claude for Excel: <https://claude.com/docs/office-agents/excel>
- Claude for PowerPoint: <https://claude.com/docs/office-agents/powerpoint>
- Claude for Outlook: <https://claude.com/docs/office-agents/outlook>
- Work across Microsoft 365 apps: <https://claude.com/docs/office-agents/work-across-apps>
- Microsoft 365 connector setup: <https://support.claude.com/en/articles/12542951-set-up-the-microsoft-365-connector>
- Microsoft 365 connector security: <https://support.claude.com/en/articles/12684923-microsoft-365-connector-security-guide>

ANCHOR NETWORKS

Managed IT, security, and practical AI enablement for ABA and behavioral-health organizations

