CARE

WHITEPAPER

From Process Description to Operational Handover

A structured operating model reduces the interpretation work left to a receiving team.

Transition quality depends on what the receiving operator can understand, verify and accept.

AGENTIC CARE

https://ai-managementsystem.com

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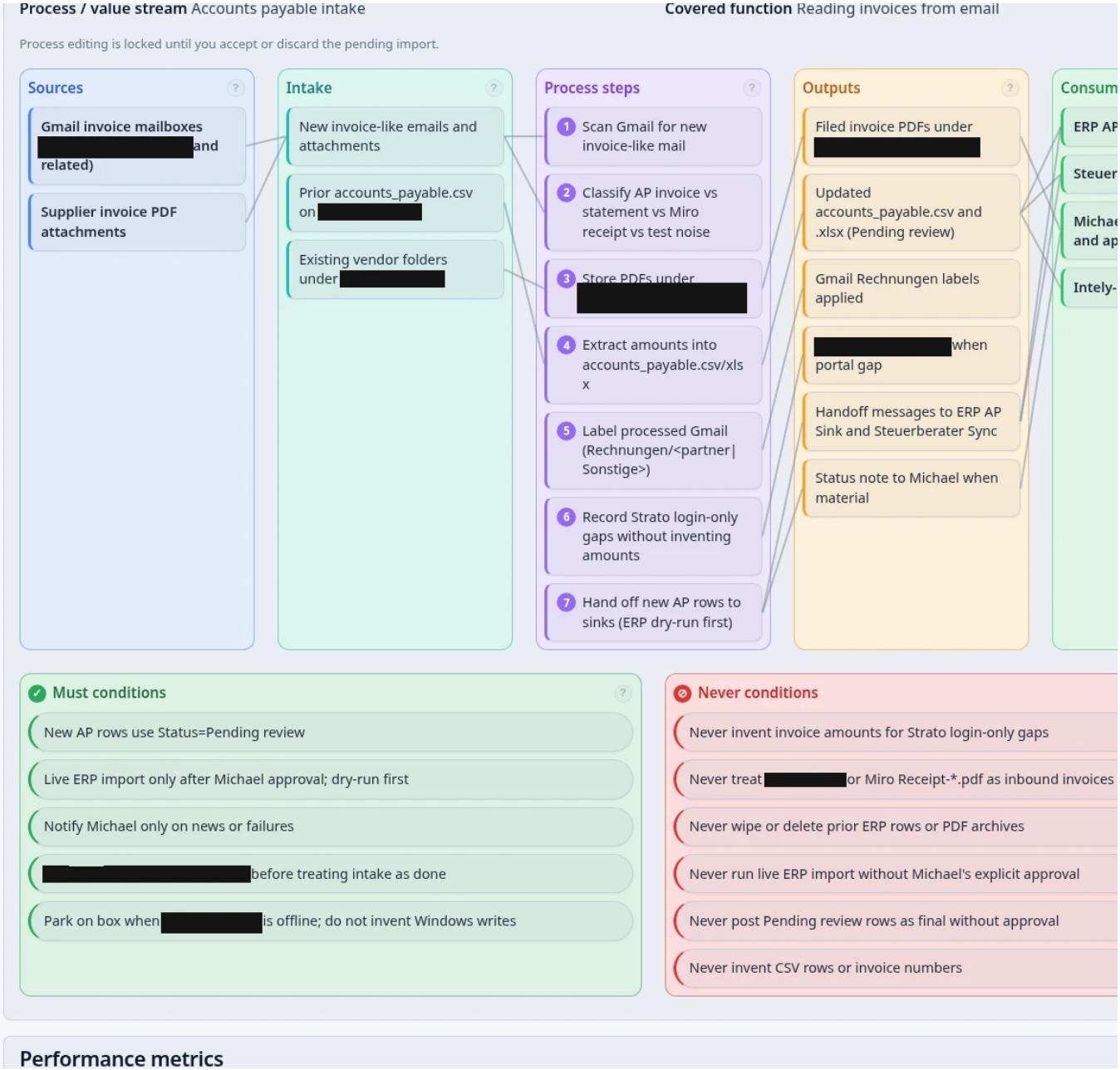
A handover needs more than a workflow diagram

A receiving operator must understand what starts the process, which systems and identities it depends on, what ou decisions require approval, and how errors are handled. Traditional Day 1 materials often omit exceptions that expe handle intuitively.

> **KEY FINDING**
>
> A structured operating model reduces the interpretation work left to a receiving team.

Assemble the visible CARE evidence

The demonstrated AP output contains SIPOC, a detailed SOP with checkpoints, Must/Never conditions, performanc findings, an open-action list and a priority matrix. Taken together, these cover far more than a sequence of ideal-ca name the human authority and affected systems.



Observed CARE SIPOC-style value stream for Accounts payable intake: Gmail sources, seven process steps, outputs inc review AP rows, and consumers including ERP AP Sink and Steuerberater Sync.



ORGANIZATION

Taskboard

- Box workspace [redacted] holds the master AP sheet, vendor PDF folders and dated backups in `_meta/`.
- Agent messaging to AP Sync Orchestrator, ERP AP Sink and Steuerberater Sync.
- Canonical archive: [redacted]. The [redacted].
- Credentials: held in the runtime environment and never written into this SOP.

Inputs and triggers

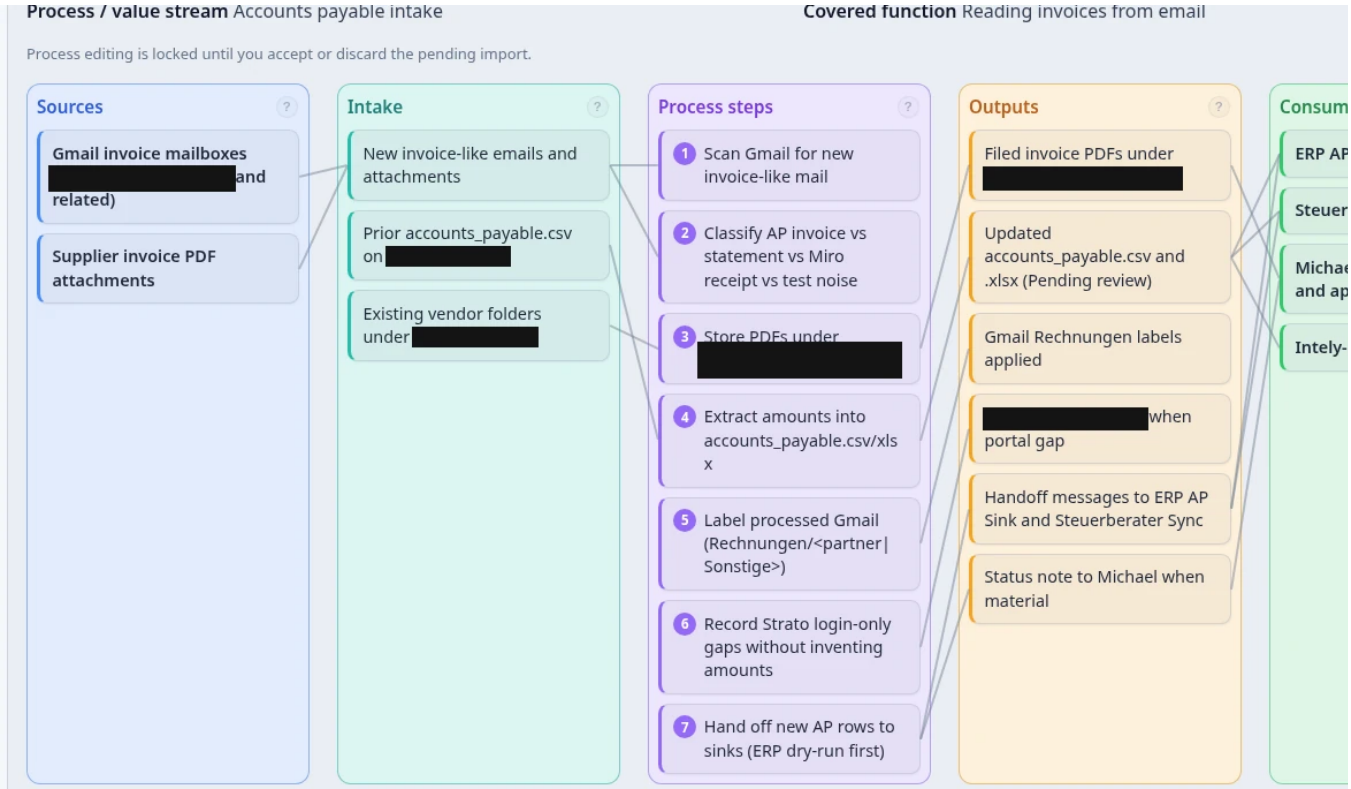
- Scheduled: AP Sync Orchestrator, Mon–Fri, twice daily (morning about 09:19 and afternoon about 15:19 Europe/Berlin). Each run covers the window since the previous run.
- Ad hoc: Michael sends a manual download path on [redacted] (e.g. [redacted]…) or attaches a PDF in chat.
- Inputs: new or unlabeled invoice-like Gmail with PDF attachments; the existing AP sheet and vendor folders; files parked on the box that are waiting for [redacted]

Operating procedure

Title	Action	Checkpoint	Expected outcome
Search Gmail	Search for invoice-like mail after the last run, including forwards. If an email is non-financial (server alert, newsletter, bank postbox notice), ignore it completely and do not report it	Time window set from the previous run	Candidate list with MessageId, sender, date and attachments
Classify and route	AP invoice → AP [redacted] Lohnauswertung → [redacted] (and archive [redacted] only. Statement/non-invoice → [redacted] Miro receipt → [redacted]. Paddle `[TEST]` → [redacted]. Strato login-only → [redacted]	Each item has exactly one route	No payroll, archives or test items in AP
Deduplicate	Check Vendor+InvoiceNumber and MessageId against the sheet. One email can carry several invoices, so check each invoice separately	Every candidate is checked	No duplicate rows
Save PDFs	Save to [redacted]. For manual downloads, copy from [redacted] first	PDF readable	PDF stored under its vendor
Extract and append	Extract vendor, number, date, currency, net, tax and gross. Back up the CSV/XLSX to `_meta/`, append rows with Status= `Pending review`, rebuild the xlsx	Amounts come from the document; empty with a note if absent	Sheet updated, with backup
Label Gmail	Apply `Rechnungen` + partner sublabel (or `Sonstige`) and mark read. Never skip unlabeled invoices	Row written	Mail trail complete
Sync Windows	If [redacted] is online: copy via [redacted]…, check the Windows CSV line count is not above the box copy, make a `.bak`, move into [redacted] (PowerShell syntax). If offline, park on the box and sync on the next run	Line-count check passed	[redacted] matches the box
Report to orchestrator	SendToAgent to AP Sync Orchestrator, priority false: nothing new, rows added (vendor/number/amounts), or the error	Run finished	Orchestrator informed
Hand off	If there are new AP rows: ask ERP AP Sink for a dry-run (live only after Michael approves in ERP AP Sink's own chat), and send supplier invoices to Steuerberater Sync for the [redacted] Never send [redacted] payroll or `[TEST]` items	New rows exist	Sinks informed
Notify Michael	Message Michael only with real results, decisions or blockers. Stay silent on "nothing new" and on non-financial mail	Something material happened	Michael informed only when it matters

Business rules and exceptions

Observed CARE Standard Operating Procedure for Finance Syncing: scheduled and ad-hoc triggers plus a step table co
classify, deduplicate, save PDFs, extract, sync, hand off, and notify.

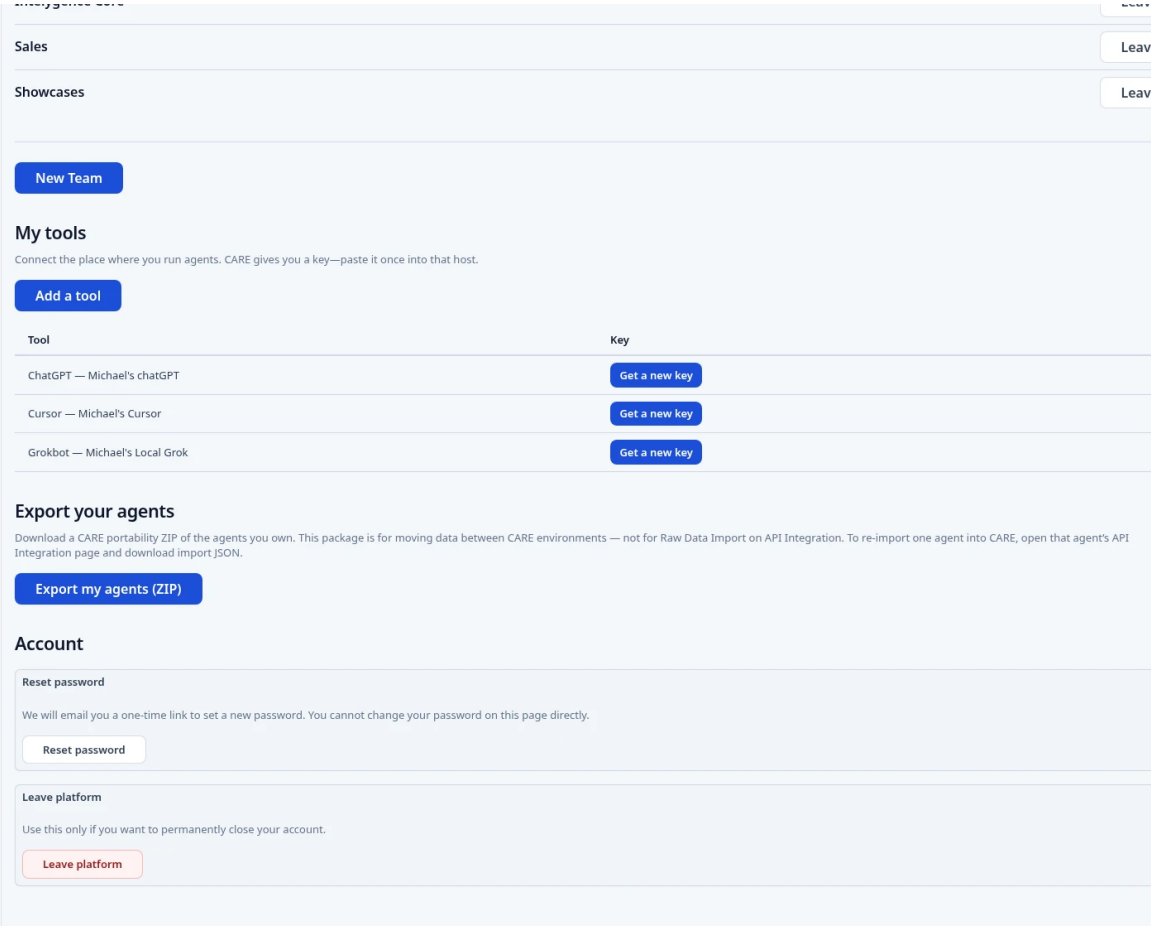


Observed CARE process map showing handoff outputs and consumers: messages to ERP AP Sink and Steuerberater Sy
review/approval by Michael Küsters.

The same package says where the handover is incomplete: automated parity checking does not yet exist, response- undefined, cut-over criteria remain to be agreed, and there is no documented rollback for a wrong import. Those a items rather than reasons to hide the package.

A practical delivery starting point

The receiving team can review the operating definition, verify access and evidence, test the exception paths and ag must be closed before responsibility transfers. CARE has assembled substantial handover material; it has not by tha completed transition acceptance.



Observed CARE export control: Export my agents (ZIP) for portability between CARE environments; the capture shows a completed export package contents.

> **MANAGEMENT IMPLICATION**
>
> Management takeaway: retain the decision and verify the operating evidence before treating a delivered control.

What management can verify

Checkpoint	Management question	Evidence to request
Operations	Supply steps and expected checkpoints	Receiving team can rehearse rc
Authority	Identify owner and approval path	No implicit transfer of decision
Gaps	List outstanding service and recovery issues	Transition plan starts from kno

Where evidence is missing, record the gap and the accountable owner rather than treating the document itself as p

Start with one agent

Use a real agent and review what it produces.

1. the agent to https://ai-managementsystem.com/under-care.
2. it is finished, log into CARE and review its documentation.

Images and text generated with the assistance of ChatGPT by OpenAI.

AGENTIC CARE

Instant AI Management System for your Agents, as a Managed Service.

https://ai-managementsystem.com