

AUTOMATE **Advanced** 45 MIN · UPDATED 2026-09-30

Build a leave-of-absence compliance agent

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Build a Copilot Studio agent that verifies leave requests against policy and flags anything that needs legal or HR review before it's approved.

MICROSOFT 365

Excel

SharePoint

WORKS WITH

Copilot Studio

Business Outcome

Fewer compliance exposures from leave cases that fall outside standard policy going unnoticed.

Workflow Steps

Step 1: Ground the agent in the current policy set

SharePoint

Load your up-to-date leave policy documents (federal/state leave law summaries plus internal policy) into the agent's SharePoint source — leave law varies by jurisdiction, so make sure the right regional version is what's grounding each check.

Step 2: Build the verification agent

Copilot Studio

In Copilot Studio, have the agent take each leave request's details (type, duration, employee location, prior leave used this year) and check them against the applicable policy, returning a pass or a flag with the specific clause cited.

PROMPT

This employee in California is requesting 10 weeks of leave for a new child, having already used 4 weeks of leave this year for a personal medical issue. Check this against our CA-specific leave policy and flag anything that needs HR/legal review before approval.

Step 3: Route every flag to a human, never auto-deny

SharePoint

Configure the flow so every flagged request lands in a dedicated HR/legal review queue with the agent's full reasoning and cited clause attached – never let "flagged" or "pass" translate into an automatic approval or denial.

This agent identifies risk; the actual leave decision, and any resulting legal exposure, stays with a person.

Step 4: Keep a record of every check performed

Excel

Log each request as a row in an Excel Table – employee, leave type, jurisdiction, policy version checked, and the result – rather than relying on the agent's conversation history as the record.

A structured, exportable table is what actually holds up as an audit trail if a leave decision is challenged months later; a chat log is much harder to search and produce.

✓ Check the work

- Confirm the policy version cited matches the employee's actual work location and leave type — jurisdictional mismatches are the most common failure mode.
- Have HR/legal periodically re-review a sample of "passed" (unflagged) requests to catch anything the agent's rules missed.
- Verify the audit log captures enough detail to reconstruct why a decision was made months later.

Expected Outcome

Each leave request checked against policy with a clear pass/flag result and the specific policy clause it was checked against.

Want help rolling this out across your team? **Go to Liminals.Tech** 📄