Insurance Claim Assistant – Technical Specification Document

# Overview

* This document outlines the complete technical specification for the Insurance Claim Assistant built on Salesforce Agentforce. It details the architecture, data model, flows, deployment steps, and user interface design deployed in the Experience Cloud site.

# 1. Objectives

* - Reduce call center volume by automating responses to member inquiries about claim status, denial reasons, and reimbursement timelines.
* - Improve the member experience with self-service options powered by natural language understanding.
* - Demonstrate integration with simulated claims data to support a proof of concept tailored to the healthcare payer industry.

# 2. Salesforce Objects Used

* \*\*Standard Objects:\*\*
* - User
* - EmailMessage
* - Task
* - Case
* \*\*Custom Objects:\*\*
* - Claim\_\_c: Claim\_ID\_\_c, Member\_ID\_\_c, Email\_\_c, Provider\_\_c, Date\_of\_Service\_\_c, Amount\_Billed\_\_c, Amount\_Paid\_\_c, Denial\_Code\_\_c, Status\_\_c
* - Member\_\_c: Member\_ID\_\_c, Email\_\_c, First\_Name\_\_c, Last\_Name\_\_c

# 3. Agent Topics & Flow Structure

* - Get\_Claim\_Status: Verifies Claim ID and Email
* - Member\_Claim\_Lookup: Lists claims for Member ID, then verifies email
* - Verify\_Member\_Email: OTP verification topic
* - Support\_Interaction: Escalates or logs a case

# 4. Flows Implemented

* - Send\_Verification\_Code\_Custom\_Member
* - Verify\_Member\_Code\_Custom
* - Get\_Claim\_Status\_Main
* - Member\_Claims\_List
* - Escalate\_to\_Agent\_or\_Log\_Task

# 5. Agent Actions Configured

* - Send Verification Code Custom Member
* - Verify Member Code Custom
* - Log Member Inquiry
* - Claim Retriever Insights (fallback for PDF-based search)

# 6. Experience Cloud Deployment

* - Created site using Partner Central Template
* - Enabled Copilot component and Omni-Channel routing
* - Configured guest/user profile permissions
* - Tested flows in Lightning runtime and activated via Agentforce

# 7. Screenshot References

- Salesforce App Nav Bar: Custom navigation tabs for Claims, Members, Denial Codes, and Member Inquiries

- Claim\_\_c Record: CLM-00123 linked to John Doe showing denial, provider, and billing info

- Member\_\_c Record: Example profile for John Doe with linked email and contact details

- Denial Code Explanation: CO-50 denial entry with resolution steps

- Member Inquiry Record: Sample inquiry submitted for Sarah Kim, includes topic and verified status

- Support Task Record: Demonstrates case logging with generated reference ID (e.g., CLM-SUP-20255-2703)

* Include screenshots for:
* - Claim\_\_c & Member\_\_c setup
* - Flow diagrams
* - Experience Cloud site agent view
* - Agent topic configs
* - OTP and Claim outputs
* - Escalation and Omni-Channel setup

# 8. Security Layers

* - OTP-based identity verification
* - Disables member switching after verification
* - Input sanitization and permission control

# 9. Improvements & Final Changes

* - Support for multiple claims per Member ID
* - OTP verification added between listing and detail view
* - Escalation and fallback logic deployed

# 10. Future Enhancements

* - Add SMS OTP
* - Household claims linking
* - AI-based routing using denial patterns

# 11. PoC Alignment (from Todd’s Use Case)

* - Claim status, denial, and reimbursement intents implemented
* - Simulated claims data used (e.g., CLM-00123 with CO-50 denial)
* - Natural language support across all main intents

# 12. Sample Data Appendix

* Claim Sample:
* - ID: CLM-00123
* - Name: Jane Doe
* - Date: 03/12/2025
* - Status: Denied
* - Denial Code: CO-50
* Denial Code Sample:
* - Code: CO-50
* - Description: These services are not covered under the current plan