Insurance Claim Assistant – Technical Specification

# 1. Project Overview

The Claims Inquiry Assistant is implemented in Salesforce using Agentforce. It provides self-service capabilities for members to inquire about claim status, denial reasons, reimbursement timelines, and submit support requests. It integrates with custom Salesforce data models and flows, leveraging Agentforce topics, Omni-Channel flows, and OTP verification.

# 2. Objectives

- Enable automated responses to member claim-related questions.

- Minimize dependency on manual call center support.

- Log support tasks when issues can't be resolved by the agent.

- Allow secure access through OTP-based email verification.

# 3. Data Model

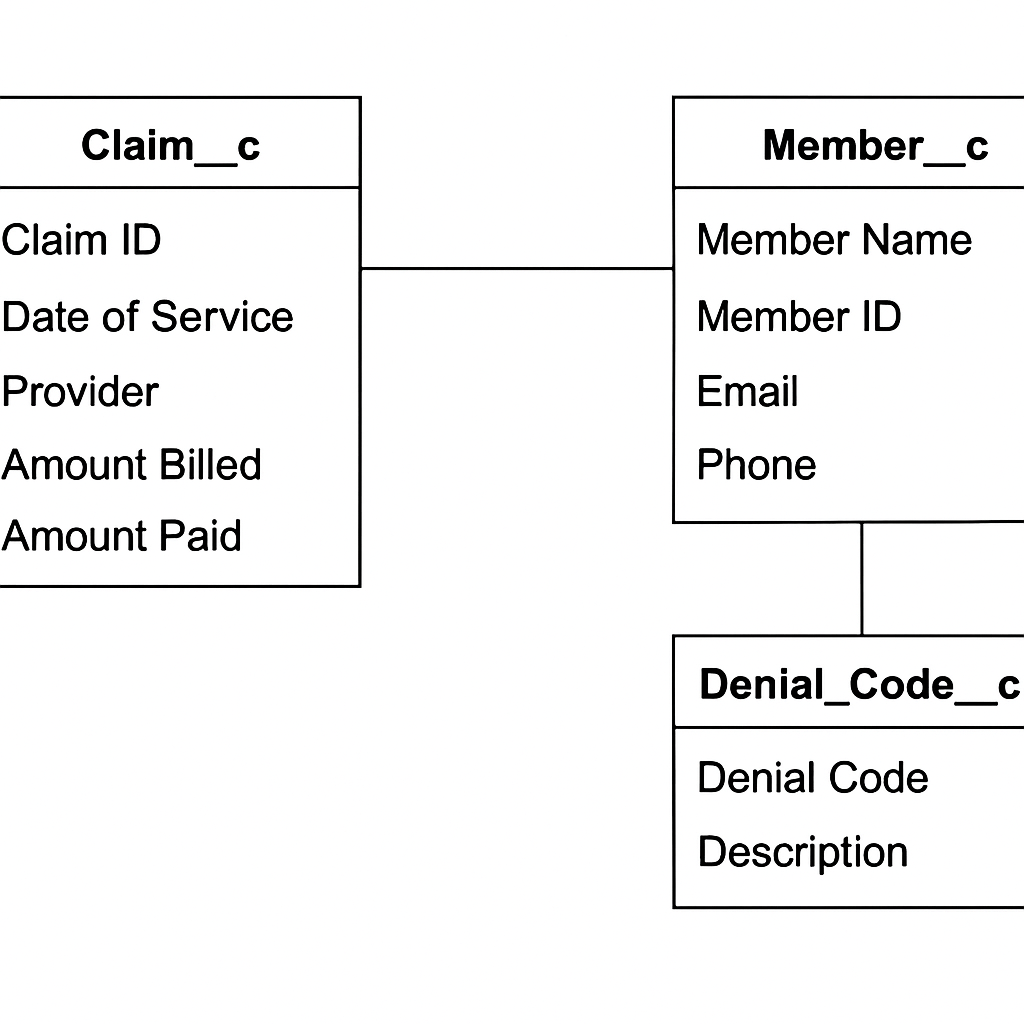
Custom Objects Used:

• Claim\_\_c: Includes Claim\_ID\_\_c, Member\_\_c, Provider\_\_c, Date\_of\_Service\_\_c, Amount\_Billed\_\_c, Amount\_Paid\_\_c, Status\_\_c, Denial\_Code\_\_c.

• Member\_\_c: Includes Member\_ID\_\_c, Email\_\_c, First\_Name\_\_c, Last\_Name\_\_c, DOB, Phone, Gender.

• Denial\_Code\_\_c: Includes Code, Short\_Description, and Resolution\_Steps.

• Member\_Inquiry\_\_c: Captures topic, description, and escalation flag.



📌 Diagram 🡪 Claim\_\_c, Member\_\_c, Denial\_Code\_\_c and their relations.

# 4. Topics Implemented

• Get Claim Status: Checks Claim ID and Email to show claim details.

• Member Claim Lookup: Lists claims for a Member ID; prompts selection.

• Estimate Reimbursement: Calculates and displays reimbursement ETA.

• Denial Reason: Explains denial reason based on Denial Code.

• Member Inquiry: Logs inquiry and checks if escalation needed.

• Support Interaction: Logs support request with user input.

• Support Request Status: Returns status of a previous support task.

• Escalation: Routes to support agent when agent fails to resolve.

# 5. Flows Implemented

• Create\_support\_Task\_vesrion2\_flow: Logs a support task using the agent’s captured inputs.

• Estimate\_Reimbursement\_Date: Returns calculated reimbursement date for a claim.

• Explain\_Denial\_Reason: Fetches steps explaining a denial based on Denial\_Code\_\_c.

• Get\_Support\_Case\_Status: Returns task status using the support reference number.

• Log\_Member\_Inquiry\_Flow: Creates a record of the member’s inquiry for audit/logging.

• Member Inquiry: Alternative helper flow to create Member Inquiry records.

• Send Verification Code Custom Member: Sends an OTP to the member’s email.

• Verify Member Code Custom: Validates the OTP entered by the member.

# 6. Omni-Channel Integration

Omni-Channel flows used for fallback routing and escalation:

• Route to Agent – Escalates to a live agent via queue.

• Route to Queue – Assigns routed records to a preconfigured queue.

# 7. Security Measures

• OTP-based identity verification before displaying claim data.

• Member lock post verification to prevent impersonation.

• Field-level access and permission set enforced on records.

# 8. Deployment Configuration

• Copilot-enabled Agentforce site created in Experience Cloud.

• Agent activated with 8 topics and 10+ flows.

• Guest user permissions and flow access configured.

# 9. Screenshot Placeholders

⬜ Agentforce Topics List

⬜ Agent Action Configuration for Denial Reason, Reimbursement, Claim Status

⬜ OTP Verification Success Screen

⬜ Task Record: CLM-SUP Reference View

⬜ Claim\_\_c and Member\_\_c record view with linked fields

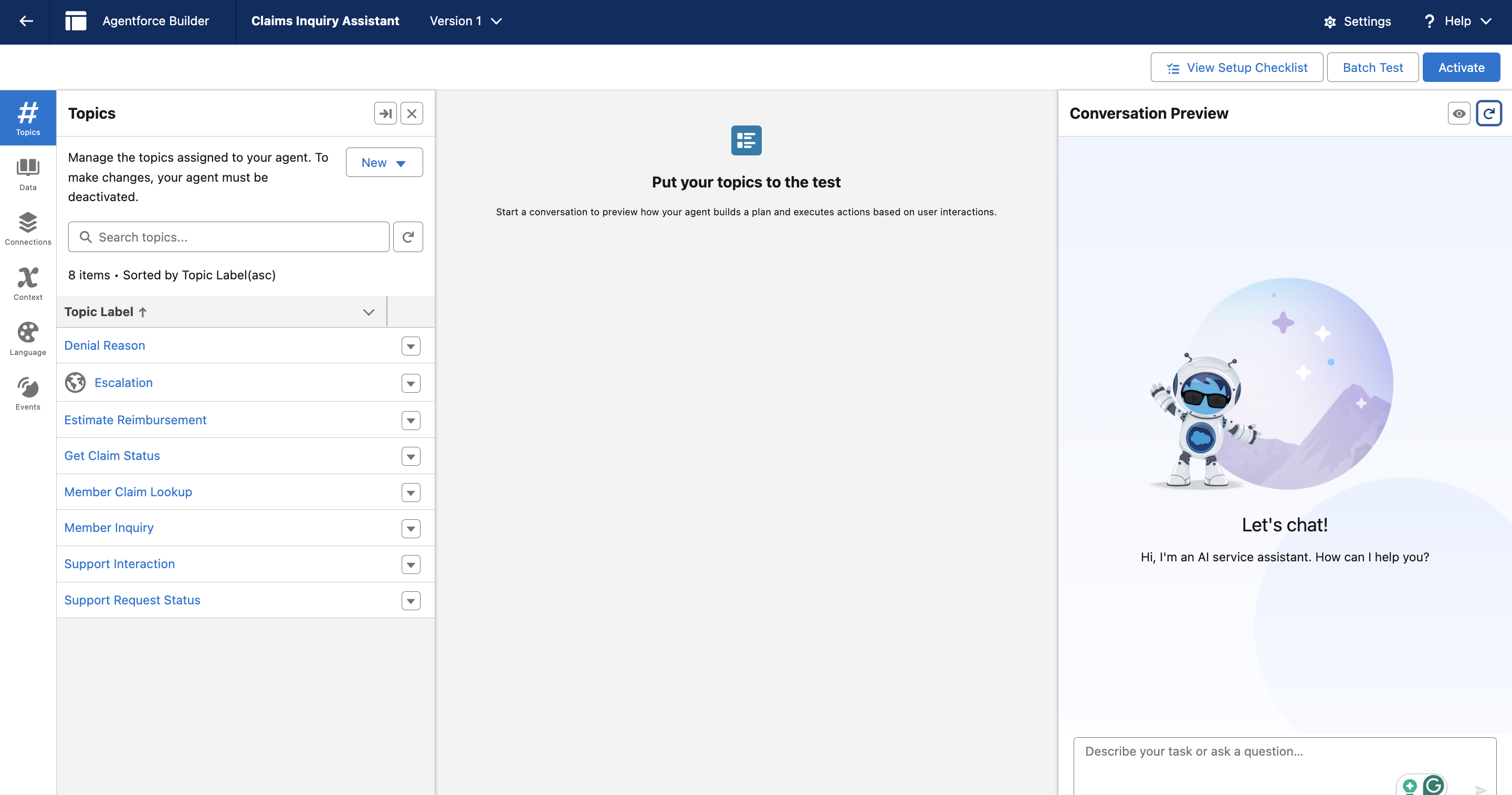
# 10. Future Enhancements

• Add SMS-based OTP as secondary option.

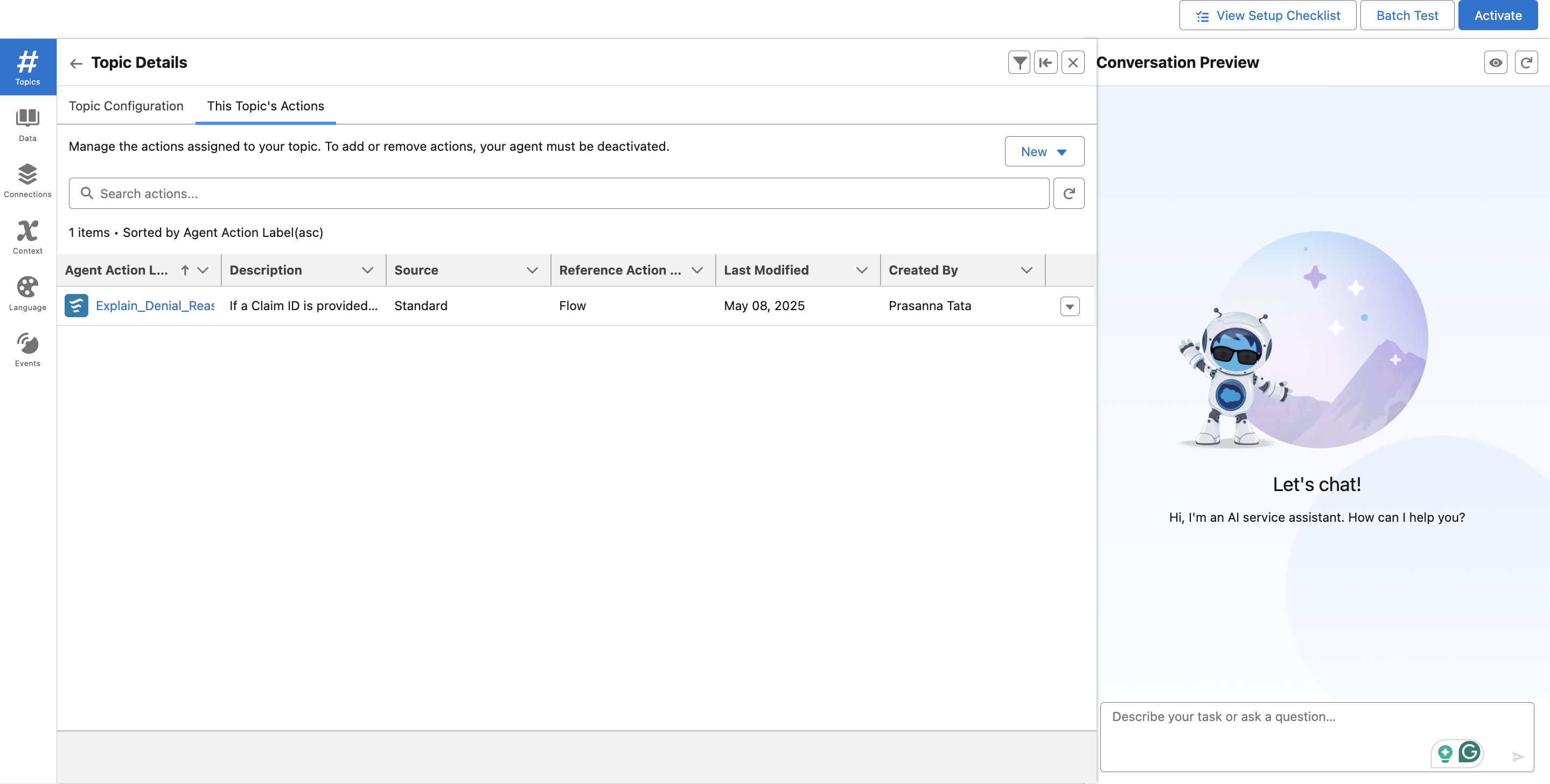
• Link family members under shared insurance (household support).

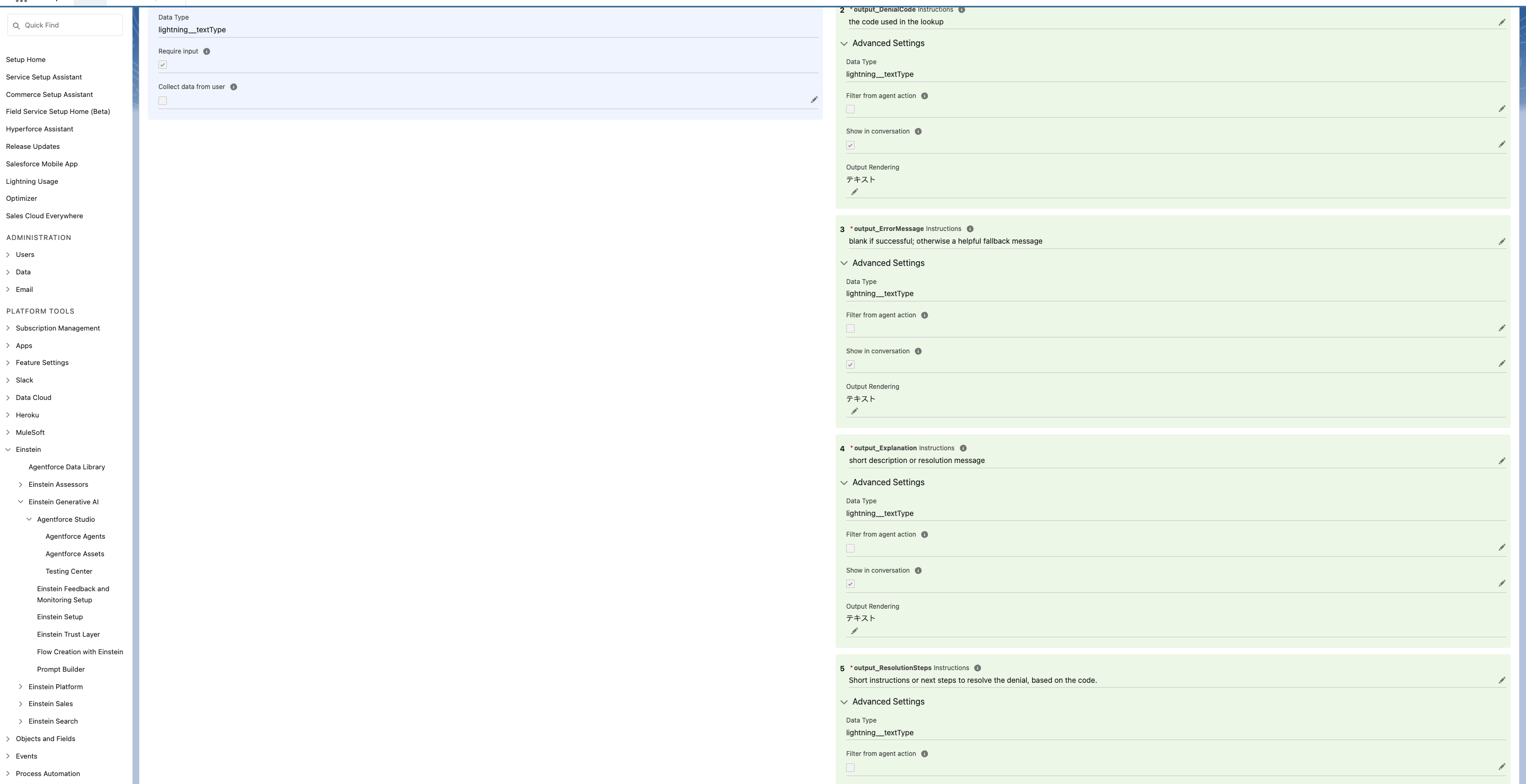
• Integrate predictive routing using claim history or denial patterns.

Implementation



Denial Reason





Estimate\_Reimbursement\_Date  
