

Put members first on the #1 AI CRM for healthcare payers.

Insurance, Claims, and Clinical Data Models

Employ out-of-the-box, customizable data models for payers to analyze and report on member data.

Interoperability

Extend the value of your internal and external health systems with a comprehensive set of HL7 FHIR-aligned APIs, and extensive MuleSoft Direct integrations with data sources like EHR, CMS, and more.

Data Cloud for Health

Ingest structured and unstructured data (PDFs, images) with data kits from EHRs, claims and administrative systems using "Zero Copy" integration—unlocking data without moving it.

Trust & Compliance

Deploy AI with confidence using the Salesforce Trust Layer. Built-in guardrails mask sensitive PII/PHI, ensuring data privacy and HIPAA adherence while utilizing AI.

Health Intelligence (Powered by Tableau)

Move beyond static reporting to predictive insights. Embed analytics directly into provider workflows to visualize referral patterns, track care gap closure rates, and monitor patient risk scores.

Pre-built Agentforce skills for payers

Member Access and Services: Claims Service and Member Coverage Assistance, Suggested Responses for Assessments, Generic Health Document Extraction, Benefits Verification, Provider and Provider Network Summary, Medical History of a Member, Medication and Pre-Call Summary.

"Having that single source of truth helps you master your data and know how to share your data. Only the member or the entity that needs their data can access it."



Brian Cahill, VP, VP, Pharmacy Segment CIO, Humana

Humana.

"Salesforce allows us to give significantly greater individualized care with the right information for our members when they need it."



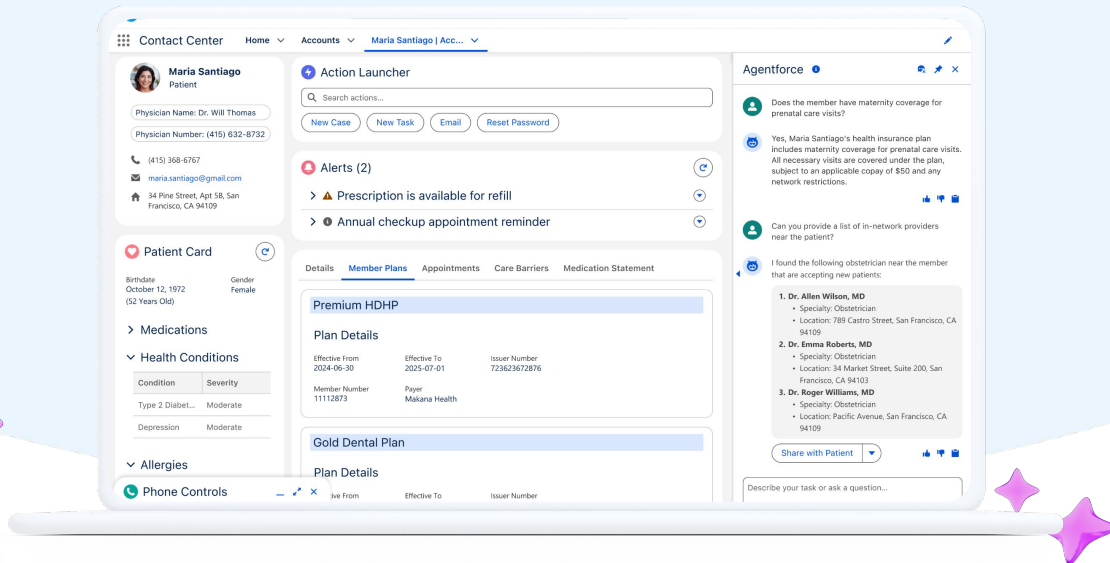
Phil McKoy, CIO, UnitedHealthcare

United Healthcare

Contact us to learn more about Agentforce Health for Payers

salesforce.com/healthcare/cloud/

Payer Innovation for Agentforce Health



Agent powered Contact Center for Health

Resolve inquiries faster with AI by instantly fetching and summarizing real-time claims and benefits details for contact center teams.

Provider Network Management*

Accelerate provider recruitment, onboarding, and contracting to improve access to care. Simplify operations with AI-powered roster mapping and automated credentialing for accurate provider directories.

Integrated Care Management

Improve member care outcomes by assessing care needs with care plan management. Simplify healthcare assessments with AI-suggested assessments and assessment responses, offline mode and auto-save features to prevent data loss.

Medication Review & Management

Manage member medication lists and document recommendations to streamline transitions in care.

Member Timeline View

Get a full and accurate timeline of a member's care journey including medications, care plans, and more.

Referral Management

Streamline intake and reduce leakage with autonomous agents that find the right specialist instantly.

Provider Search and Auto-matching*

With Agentforce, allow members and clinicians to view available providers with enhanced search and filter functions and also automatically match with providers fitting their requirements.

Digital Health Insurance*

Modernize distribution with automated quoting, rating, and enrollment workflows for individual and group benefits.

Utilization Management

Lower costs and speed time to care with guided workflows for prior authorizations, and accelerate approvals with real-time decision support with CRD and DTR, auto-approval workflows, and duplicate request detection.

Document AI

Eliminate manual entry by using AI to extract and digitize clinical data from forms.

HIPAA Compliant Voice Agents*

Scale operations by automating scheduling, assessments, benefits, and care outreach with inbound and outbound* voice agents.

Virtual Care* and Appointment Management

With Intelligent Appointment Management and Virtual Care*, book remote visits and scale digital health engagement to address care disparities, from anywhere.

Member Engagement

Drive engagement and close care gaps with data-driven segmentation and proactive outreach.

*Requires additional license or integrations

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