

Administer Agentforce Health (IND320)

OEM: Salesforce • Code: IND320

COURSE DESCRIPTION

Discover how to increase access to care and build patient trust with Agentforce Health. In this 4-day instructor-led course, learn how to configure personalized Agentforce Health solutions, including appointment management, virtual and home-based care, insurance verification, clinical visit support, and sales and inventory management. Implement custom care plans and programs that account for social determinants and care gaps, use OmniStudio components to automate care management processes, and integrate external systems with Agentforce Health in order to deliver comprehensive, equitable healthcare experiences that improve patient outcomes, meet global compliance standards, and reduce costs.

AUDIENCE PROFILE

- This course is designed for experienced administrators who are responsible for implementing Agentforce Health solutions.
- This is also a great course for partners interested in earning their Health Cloud Accredited Professional credential.

PREREQUISITES

- Students should hold the Salesforce Administrator credential or have at least six months of experience in an administrator role, ideally within the healthcare sector, although this is not required.
- Students should possess working knowledge of OmniStudio components and tools, and demonstrate a solid understanding of foundational Salesforce concepts, including data modeling, user profiles and permission sets, and page layout customizations.
- Complete the required Trailhead prework — "Administer Health Cloud Solutions (IND320) Prework" — before the session starts.

COURSE OBJECTIVES

By the end of this course, participants will be able to:

- Explain core capabilities and benefits of using Agentforce Health.
- Navigate key Agentforce Health features and functionality.
- Create and maintain Agentforce Health user licenses, profiles, and permission sets.
- Reference the Household Data Model to correctly illustrate object relationships.
- Use the Clinical Data Model to ensure Fast Health Interoperability Resources (FHIR) v4.0 compliance.
- Configure personalized Agentforce Health solutions for Payers, Providers, Pharma, and MedTechs.

- Customize assessments, care plans, and care programs based on social determinants, care barriers, and care gaps, among other considerations.
- Use OmniStudio components and tools to automate health operations processes and customize the Agentforce Health user interface.
- Integrate external systems with Agentforce Health.
- Harmonize external system data into Agentforce Health using Salesforce Data Cloud.
- Streamline external system integration processes using Agentforce Health Accelerators.

COURSE OUTLINE

Module 1: Introduction to Agentforce Health

- Define Agentforce Health
- Discover Agentforce Health Solution Components and Features
- Examine Health Industry Use Cases
- Explore Benefits of Implementing Agentforce Health Solutions

Module 2: Agentforce Health for Users

- Enable Necessary Tools and Packages for Agentforce Health Users
- Manage Agentforce Health User Licenses, Profiles, and Permission Sets

Module 3: Agentforce Health Data Modeling

- Implement Custom Person Account Record Types
- Identify Agentforce Health Data Modeling Best Practices
- Reference the Household Data Model to Illustrate Object Relationships
- Build Custom Actionable Relationship Management Graphs
- Apply the Clinical Data Model to Support FHIR v4.0 Compliance

Module 4: Patient 360

- Define Patient 360
- Configure Patient 360
- Build Custom FlexCards to Display Patient Data
- Implement Custom Enhanced Timelines

Module 5: Care Access Improvement

- Configure Provider Search
- Populate Provider Search Using Data Processing Engine
- Monitor Search Data Updates
- Automate Referral Management Processes
- Implement Intelligent Appointment Management
- Enable Virtual Care
- Configure Home Health for Field Clinicians

Module 6: Patient Care Coordination

- Build Custom Assessment Templates Using the Discovery Framework
- Use Social Determinants of Health to Identify Care Barriers
- Construct Care Plan Templates to Support Standardized Care Plans
- Create Integrated Care Plans to Support Assessment-Based Care Plans
- Build Custom Care Plans That Compensate for Care Gaps
- Set Up Care Programs and Enroll Patients

Module 7: Health Insurance Solutions

- Configure Provider Network Management
- Implement Utilization Management Processes
- Automate Benefits Verification

Module 8: Process Automation

- Identify Agentforce Health Process Automation Tools
- Customize the Patient Identity Verification Flow
- Automate Decisions Using Business Rules Engine
- Examine Agentforce Health Expression Sets
- Customize Assessment Flows with OmniScript
- Create Smart Interfaces Using FlexCard States
- Build Custom Forms and Templates Using DocGen

Module 9: Sales and Inventory Management

- Configure Advanced Account Forecasting and Sales Agreements
- Customize Processes to Manage Surgical Case Visits
- Implement Inventory Management

Module 10: System Integrations

- Identify External Systems Commonly Integrated with Agentforce Health
- Review Applicable Integration Standards and Considerations
- Determine Available OOTB Connectors, APIs, Data Mappers, and Integration Procedures
- Harmonize External System Data in Agentforce Health Using Data Cloud
- Use MuleSoft Direct to Integrate with Agentforce Health
- Streamline External System Integrations Using Agentforce Health Accelerators