Deloitte.
Digital | salesforce

Agent Advantage™ for Salesforce

Elevate case management with

Case Worker Assistant

BUSINESS CHALLENGE

Government and public sector agencies are inundated with a continuous stream of complex and sensitive cases. The primary challenge lies in the initial triage and management of this volume. Manual processes for reviewing case files are inherently slow, creating significant bottlenecks and delays. Vital information is often scattered across unstructured documents, emails, and forms, making it difficult to quickly grasp the complete picture. This can lead to inconsistent handling, critical details being overlooked, and a high risk of error, ultimately hindering the agencies' ability to act swiftly and effectively on behalf of the public.

AGENTIC SOLUTION

The caseworker assistant is designed to revolutionize public sector case management. It begins by ingesting new cases, immediately verifying their completeness, and confirming all necessary information and documents are present. The agent then analyzes the content, using advanced reasoning to create a verified, clear, and concise summary that captures the core of the issue. Based on this analysis and predefined instructions, it dynamically determines and suggests the precise next steps required to advance the case. Furthermore, it acts as an interactive resource, allowing users to chat with it to get immediate answers and clarity, facilitating smooth and efficient progression from intake to resolution.

VALUE PROPOSITION

Informed and accelerated decisions for faster, fairer outcomes

Provides data driven insights and suggestions that strengthen and accelerate judgement, reduce processing time to enable the citizens receive timely benefits and support when they need it the most.

Stronger citizen trust through timely and transparent service

Improves citizen experience through faster responses and fairer outcomes building confidence in public services

Reduced administrative burden for empowered workforce

Elevates caseworkers from repetitive administrative tasks to higher value judgment, giving them the capacity and confidence to serve with greater impact .

Adaptable Case Handling

Provides agility by allowing rapid updates to rules and instructions ensuring the system evolves effectively with policy changes

Operational Resilience for scalable, reliable service delivery

Strengthens service delivery by maintaining accuracy and quality even under rising caseloads or shifting demand

AGENT CAPABILITIES

Intelligent case summary
The AI agent generates a concise narrative from the complex case details to accelerate reviewer onboarding .

Workflow guidance
AI agent analyzes the case context and the provided rule book to recommend next best action, empowering agents to resolve cases faster and more effectively.

AI generated communication drafts
AI agent generates personalized customer correspondence from requests for information to supplement official decision notices.
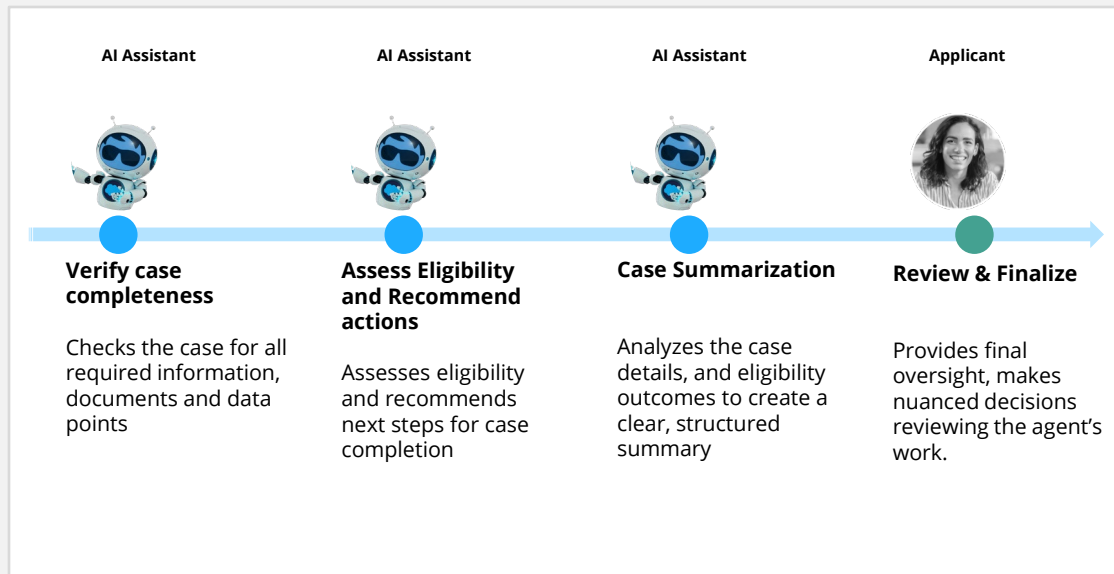
Proactive eligibility triage
AI agent conducts instant preliminary eligibility assessments, highlighting qualifying factors and pinpointing critical gaps in meeting the criteria, before human review.

Document integrity validation
AI agent scans and verifies submissions for completeness flagging discrepancies in real-time to case records.

AI Assistant	AI Assistant	AI Assistant	Applicant
Verify case completeness	**Assess Eligibility and Recommend actions**	**Case Summarization**	**Review & Finalize**
Checks the case for all required information, documents and data points	Assesses eligibility and recommends next steps for case completion	Analyzes the case details, and eligibility outcomes to create a clear, structured summary	Provides final oversight, makes nuanced decisions reviewing the agent's work.

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