Public Sector Solutions

Salesforce, Summer '24

'24

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PUBLIC SECTOR SOLUTIONS DOCUMENTATION

Transform delivery of public services with flexible, secure e-government tools that support both sides of the service counter.

Public employees and administrators manage a staggering number of transactions every day, both online and in person. Your constituents—residents, businesses, other community stakeholders—expect transparent requirements, convenient access, and speedy, knowledgeable service. Agencies working hard to meet these demands look to Public Sector Solutions to modernize and automate critical business processes.

Create intuitive, guided experiences that help constituents understand regulatory requirements and fill out the right forms. Apply intelligent automation to route the resulting forms, supporting documents, applications, fees, and reviews and approvals through all stages of agency oversight.

Turn data into insights for more efficient operations and improved constituent outcomes. When policies change or when disaster strikes, take advantage of flexible tools to update workflows dynamically, marshal your resources, and expedite outreach.

Discover and Explore Public Sector Solutions

See how Public Sector Solutions broadly supports agencies engaged in licensing, permitting, inspections, emergency response, social and human services, grants management, and more.

Salesforce Setup for Public Sector Solutions

Configure Salesforce platform features in Public Sector Solutions.

Security for Public Sector Solutions

Configure user profiles, permissions, sharing settings, and other security features in your Public Sector Solutions org.

OmniStudio for Public Sector Solutions

Install and configure OmniStudio in your Public Sector Solutions org so that you can create guided interactions and rich user experiences without code.

Common Features in Public Sector Solutions

Discover the tools and components that caseworkers, case managers, and others can use to understand constituents and deliver excellent customer service to them.

Licensing and Permitting in Public Sector Solutions

Configure regulatory authorities, business regulatory authorization types, training requirements, and fees to use to issue licenses and permits.

Inspections and Assessments in Public Sector Solutions

Configure and use inspections to evaluate regulatory code compliance and record violations through onsite visits. Configure and use assessments for complex inspections, investigations, evaluations, screenings, and audits, onsite or virtually.

Social Program Management in Public Sector Solutions

Deliver services to improve the well-being of individuals, families, and communities.

Benefit Management in Public Sector Solutions

Help individuals, families, and organizations achieve self-sufficiency through monetary assistance.

Social Insurance

Define social insurance policies that help constituents who experience economic hardship. Enable eligible constituents to enroll into the policies and track contributions. Capture claims, claim items, and claim participants. Record the claim approval status and benefit eligibility, and assign benefits to constituents.

Provider Management in Public Sector Solutions

Capture details about service providers, their facilities, and their specialties in the Provider Management data model. Map the benefits and services that you administer to constituents to the specialties that providers offer. Search for providers and facilities that offer the benefits and services that constituents need, and make referrals. Build an Experience Cloud site that providers can use to process referrals, manage service delivery, and collaborate effectively and transparently with your agencies.

Justice and Investigative Case Management in Public Sector Solutions

Manage all aspects of case proceedings, including civil and criminal proceedings, appeals, mediation, and arbitration, and effectively collaborate with stakeholders to track proceedings from complaint filing to investigations to results and outcomes.

Experience Cloud Sites for Public Sector Solutions

Create Experience Cloud sites where constituents can apply for licenses, permits, benefits, and programs; engage with government services; and gain insight into processes.

CRM Analytics for Public Sector Solutions

Use CRM Analytics to gain intelligent insights that help licensing and permitting agencies improve departmental productivity and constituent satisfaction, and to gain insights into caseloads, case trends, community impact, and caseworker efficiency.

Grantmaking

Streamline the grant management process for both funders and applicants. Built on the Salesforce platform, Grantmaking provides a 360-degree view of stakeholders, helps you manage funding opportunities, includes an online portal for applications, and lets you track award metrics.

Emergency Program Management in Public Sector Solutions

Provide constituents with emergency program information, incident updates, and applications for services and aid during times of crisis.

Employee Experience for Public Sector Solutions

Help government employees be more connected, effective, and productive with centralized, scalable, and secure IT and HR processes.

Accounting in Public Sector Solutions

Track how and where funds are received, paid, and allocated by using Accounting Subledger with Public Sector Solutions. Access and act on insights from financial data, and work with accurate, up-to-date financial projections.

Discover and Explore Public Sector Solutions

See how Public Sector Solutions broadly supports agencies engaged in licensing, permitting, inspections, emergency response, social and human services, grants management, and more.

Whether your agency's charter includes issuing occupational licenses and permits, or conducting safety inspections and enforcement actions, or looking after the welfare and well-being of vulnerable populations, Public Sector Solutions offers a data model, preconfigured components, and business logic that's tailored for delivery of government services.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Get Started with Public Sector Solutions

Discover the myriad ways that Public Sector Solutions transforms the delivery of public services. Create dynamic application forms and publish on an Experience Cloud site for constituents. Design automated approval processes to efficiently review applications. Use dynamic assessments to evaluate applications, and create care plans and referrals to help constituents in need. And get trial org to explore the product and prepare for your implementation.
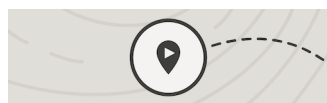
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Trailhead: Get started with Salesforce Public Sector Solutions

Trailhead: Get to Know OmniStudio

Trailblazer Community: Public Sector Solutions

💡 **Tip:** When you're ready to set things up, go to the Guidance Center for personalized help right inside the app. Then, look for **Get Started with Public Sector Solutions**.

Understand What's Included with Public Sector Solutions

Discover how the Salesforce platform, a dedicated data model, and a layer of common components help you to implement a solution that meets your agencies' needs.

Whether you're implementing Public Sector Solutions for a municipality, state or province, or at the federal or national level, every public agency has different requirements for serving constituents with digital tools and workflows. That's why Public Sector Solutions eschews a one-size-fits-all approach. Instead, with Public Sector Solutions, you can combine a variety of components and tools to create a solution that addresses your specific needs.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions
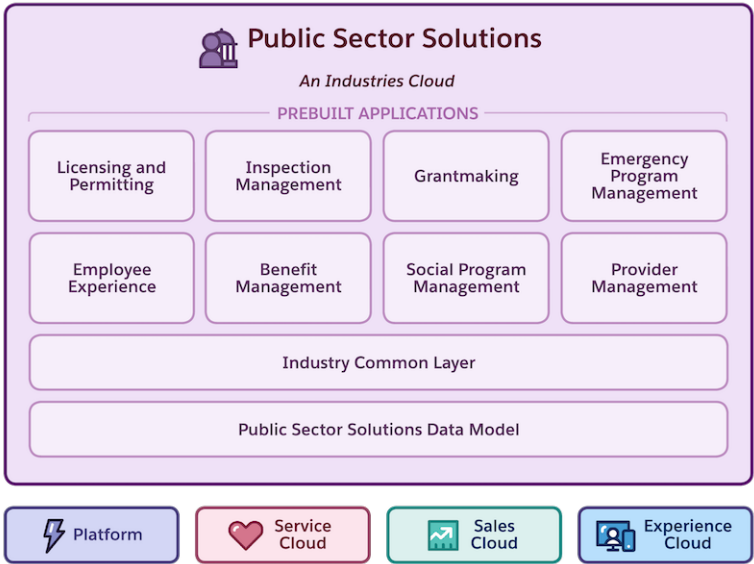
The Salesforce Platform

The cloud-based Salesforce platform, which includes Sales Cloud, Service Cloud, and Experience Cloud, is the foundation of Public Sector Solutions and is included with the product. The platform provides relationship management, case management, collaboration, integration, and data insight capabilities that give you a 360-degree view of constituents so that you can serve, manage, and interact with them more effectively. And it adheres to stringent data security regulations, so you can deploy and scale it quickly, with the flexibility to expand your implementation when and how you want to.

The Data Model

The Public Sector Solutions data model is tailor-made for government agencies. Objects in the data model let you define regulatory agencies, authorization types, and codes; represent constituents as business or person accounts, as appropriate; create entities for visits, complaints, and violations; and much more. Whether you use Public Sector Solutions to issue licenses and permits, conduct inspections and assessments, or manage and disburse social services programs and benefits—or to do all of those things—the Public Sector Solutions data model accommodates your work.

Industry Common Layer

A suite of no-code and low-code components and tools puts the platform and data model to work. OmniStudio, Action Plans, Document Tracking and Approvals, OmniStudio Document Generation, Business Rules Engine, and other components and tools help you to automate traditionally paper-based and cumbersome processes. Use common layer components to create dynamic forms that constituents can access from a public portal, review and approve applications, calculate complex policy decisions, and much more.

The Prebuilt Apps

All of these elements roll up into several prebuilt applications. Each prebuilt app combines specific elements of the platform, the data model, the industry common layer, and automation to serve a different need.

License and Permit Management
Publish dynamic forms on a public portal, where constituents can easily submit and track applications for individual and business licenses and permits. Review and approve applications using automated processes that ensure integrity and consistency across the workflow.

Inspection Management
Conduct and manage inspections and assessments to ensure routine regulatory compliance, issue licenses and permits, and address public complaints.

Social Program Management
Provide timely assistance to individuals and families facing hardship with programs and goals. Assess complaints and referrals and perform investigations to better understand the situation. Intake and screen cases, and develop individualized, comprehensive care plans to help constituents reach positive outcomes.

Benefit Management
Accelerate benefit assistance to individuals and families. Configure an online web page for your agency to help constituents find relevant benefits. Include a pre-screening form to help potential applicants find benefit programs they may be eligible for based on defined criteria. Create online application forms so that constituents can apply for benefits through the online portal, and provide visibility into application statuses, eligibility decisions, and disbursement amounts and frequencies.

Provider Management
Manage networks of service providers and map them to the benefits that your agency manages for streamlined constituent referral. Set up schedules and sessions for each provider facility and track service delivery and constituent participation.

Grantmaking
Track, manage, and disburse grants across the entire funding lifecycle, with effective collaboration among staff, applicants, and program managers.

Emergency Program Management
Quickly prioritize and mobilize resources during a crisis, provide real-time status updates, create and process applications for emergency services, and manage volunteers using your public portal.

Employee Experience
Streamline HR and IT processes with digital forms, create automated processes for service requests, and provide self-service resources for employees in a unified, and scalable workspace.

Implementation and Add-Ons

When you buy Public Sector Solutions, you choose from a variety of configuration options that include one or more prebuilt apps. The configurations grant licenses to use the apps or a combination of apps, on different Salesforce editions and with various usage limits. The configurations also provide differing levels of Service Cloud functionality. You can also choose a Customer Community licensing plan to accommodate the type and volume of usage you need for your public portal.

Round out your Public Sector Solutions implementation with add-ons. For example, get an add-on license for CRM Analytics, which includes prebuilt dashboards that provide predictive analytics so that you can better serve constituents and manage workloads in your agency. Or get an add-on license for Intelligent Document Reader, which uses optical character recognition to extract data from paper-based forms and supplemental documents into Salesforce records. You can also get add-on licenses for Einstein Relationship Insights, for additional calls for Business Rules Engine, and for additional business or individual application forms.

In this way, you can mix and match the various configurations and add-ons to get exactly the functionality you need to serve your constituents effectively, securely, and at scale.

To see the licenses in your org, from Setup, in the Quick Find box, search for and then select **Company Information**. Look at the User Licenses and Permission Set Licenses related lists. To add licenses, contact your Salesforce account executive.

> Note: For usage restrictions that apply to Public Sector Solutions, see Contractual Restrictions for Sales Cloud, Service Cloud, and Sales & Service Cloud (CRM) and the Product Terms Directory.

SEE ALSO:

Public Sector Solutions Products: User, Feature, and Permission Set Licenses

Public Sector Solutions Data Model

Understand the relationships between objects in Public Sector Solutions.

Public Sector Solutions uses a suite of standard Salesforce objects to structure and store data related to licensing and permitting, inspections and assessments, case and program management, benefit management, grantmaking, and other features. To better understand how features work, it helps to look at the data models, which are graphical representations of collections of objects and their relationships. For data models of Public Sector Solutions features, see our developer documentation.

SEE ALSO:

Developer Guide: Public Sector Solutions Standard Objects

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Person Accounts in Public Sector Solutions

Use person accounts to represent constituents who apply for licenses, permits, programs, benefits, grants, and services.

Person accounts store information about individuals by combining some fields from the Account and Contact objects into one record. This single record provides a customizable and simplified user experience for working with data about constituents. Person accounts provide some specific benefits, such as duplicate management and single-step sharing. Use the Person Account record type to represent constituents who are individual people, and business accounts to represent businesses. You can also associate individuals with multiple businesses using Account Contact Relation. The person account model uses the standard Account object to hold the details about a person.

Object	Standard or Custom	Purpose	Record Types
Account	Standard	• Represents all aspects of the person. Data includes personhood details, such as birth date or tax ID number, and dealings with your organization, such as review frequency or service tier • Related to cases, individual applications, public complaints	Person account

SEE ALSO:

Set Up Contacts to Multiple Accounts

Set Up Person Accounts in Public Sector Solutions

Junction Objects in Public Sector Solutions

Understand how Public Sector Solutions uses junction objects to create many-to-many relationships between objects.

A junction object establishes a many-to-many relationship between two Salesforce objects. This connection links each record of one object to multiple records from another object and vice versa. For example, the Business Regulatory Authorization Type junction object connects one or more Business Types to one or more Regulatory Authorization Types.

Public Sector Solutions includes the junction objects listed here out of the box, though you can create your own junction objects to meet the needs of your agency.

Junction Object	Relates	Maps	Defines
Authorization Application Asset	Asset and Authorization Application	An asset with an application	Asset-based applications
Authorization Application Place	Location and Authorization Application	A location with an application	Location-based applications. For example, an application for a parking lot permit.
Business Regulatory Authorization Type	Business Type and Regulatory Authorization Type	A license or a permit with an authorization activity	Licenses for different authorization activities. For example, licenses for operating a salon.
Business Regulatory Authorization Type Dependency	A parent and dependent Business Regulatory Authorization Type	A parent business regulatory authorization type with a dependent business regulatory authorization type	The relationship between two business regulatory authorization type
Custody Item Relation	Custody Item and Case or Case Proceeding	A custody item with a case or case proceeding	The relationship between evidence and cases or case proceedings
Custody Item Regulatory Code Violation	Custody Item and Regulatory Code Vilation	A custody item with a regulatory code violation	Regulatory code violations related to evidence
Violation Type Assessment Indicator	Violation Type and Assessment Indicator Definition	A type of violation with an assessment indicator definition	The violation type enforced on a business that fails an assessment indicator definition during an inspection

Junction Object	Relates	Maps	Defines
Regulatory Code Assessment Indicator	Regulatory Code and Assessment Indicator Definition	A regulatory code with an assessment indicator definition	The regulatory code measured by an assessment indicator definition. For example, while evaluating an assessment indicator definition about the display of a cosmetology license in a salon, the inspector can check the related regulatory code: Title Chapter 10, Division 3, Article 10.7397 of the regulatory board states that every licensee must display the license in a conspicuous place in their place of business or employment.

To connect records using a junction object:

1. From the App Launcher, find and open the junction object you want to use, and then click **New**.

2. Select the records that you want to connect.

3. Save your changes.

SEE ALSO:

Create a Many-to-Many Object Relationship

Get a Public Sector Solutions Trial Org

Get hands-on experience with Public Sector Solutions in a full-featured trial experience.

Trial orgs are intended for proof of concept and guided self-exploration. They expire in 30 days. Public Sector Solutions trial orgs include:

- Pre-enabled Public Sector Solutions features
- Experience Cloud
- Public Sector Mobile Inspection
- Grantmaking
- Salesforce Maps
- Salesforce Scheduler
- Shield
- CRM Analytics for Public Sector Solutions

To get a Public Sector Solutions trial org:

1. Do one of the following.

    - Get a Public Sector Solutions learning trial. The learning trial is a fully configured org that includes sample data.
    - Get a Public Sector Solutions base trial. The base trial is an unconfigured org with only the necessary licenses and permissions. Use a base trial for proof-of-concept projects or general testing.

- Get a Public Sector Solutions prerelease trial. The prerelease trial includes features in the upcoming release and is only available during sandbox preview.

2. Enter your contact and other details, read and agree to the service agreement, and click **Next** as prompted.

3. Click **Submit** or **Start My Free Trial**.

After your org is created, look for an email with login details.

Submit a Public Sector Solutions Case with Salesforce Support

Get help when you experience technical difficulties with Public Sector Solutions.

Before you open a support case, grant login access to your org to Salesforce Customer Support. For instructions, see Grant Login Access. Then, make sure you have all of the pertinent information about the issue so that you can complete the submission form.

1. Log in to Salesforce Help.

2. Select the **Contact Support** or **My Cases** tab, and then click **Create a Case**.

3. Enter these details.

    a. For Subject, enter `Public Sector Solutions` and provide a brief summary of the issue. For Government Cloud customers, enter `Government Cloud: Public Sector Solutions` and provide a brief summary of the issue.

    b. For Description, enter the name of the affected product and feature, expected outcomes, and any error messages that you received. List the names of affected objects and records, and include links to them.

    > **⊘ Important:** For timely support, describe the steps to reproduce the issue.

    c. For Collaborators, enter the names or email addresses of people in your org who require case updates.

    d. Optionally, upload supporting screenshots or other files.

4. Select **Create Case**.

5. To review the status of your case, log in to Salesforce Help, click **My Cases**, and then select the case number.

6. To attach supporting files to an open case, on the Activity tab of the case page, click 🔗, upload your file, and then click **Add Comment**.

Salesforce Setup for Public Sector Solutions

Configure Salesforce platform features in Public Sector Solutions.

Set Up an Organization-Wide Email Address in Public Sector Solutions
Define organization-wide email addresses for user profiles so that users can send email from Public Sector Solutions without using their own email address.

Set Up Person Accounts in Public Sector Solutions
To store information about constituents from the Account and Contact objects as Person Accounts, enable Person Accounts in Setup.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To view cases:
- Read on Cases

To create cases:
- Create on Cases

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Set Up Contacts to Multiple Accounts in Public Sector Solutions

Allow users to relate a constituent's contact record to more than one account so that you can more accurately and flexibly track their relationships.

Turn on Chatter Feed Tracking in Public Sector Solutions

Enable Chatter feed tracking so that users and constituents can collaborate and stay informed about applications, pending tasks, and workflow processes.

Enable Notes in Public Sector Solutions

Turn on Salesforce Notes so that inspectors, case workers, and others can use it to write down their findings.

Set Up Salesforce Calendar in Public Sector Solutions

Set up Salesforce Calendar so that compliance officers can schedule visits for inspectors and case workers, who can manage visits as calendar events.

Configure Application Record Types for Public Sector Solutions Usage Tracking

Keep an eye on costs by creating and using application record types to track how many applications you process for constituents.

Set Up an Organization-Wide Email Address in Public Sector Solutions

Define organization-wide email addresses for user profiles so that users can send email from Public Sector Solutions without using their own email address.

When you set up org-wide email addresses for profiles, users with these profiles can select their own email address or the organization-wide email address when they send email from Public Sector Solutions. They receive replies at the same address.

1. From Setup, in the Quick Find box, search for and select **Organization-Wide Addresses**.

2. To manage organization-wide addresses, use the available options.

To use an organization-wide address, send an email from Public Sector Solutions and choose the organization-wide address in the From field.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To modify organization-wide addresses:
- Modify All Data

Set Up Person Accounts in Public Sector Solutions

To store information about constituents from the Account and Contact objects as Person Accounts, enable Person Accounts in Setup.

🛇 **Important:** You can't turn off Person Accounts after they're enabled. Before enabling Person Accounts, use a sandbox to preview how they affect your Salesforce org.

1. From **Setup**, in the Quick Find box, search for and select **Person Accounts**.
2. Acknowledge the implications of using person accounts.
3. Verify that the Account object has at least one record type.
4. Verify that user profiles that have Read permission on Accounts also ohave Read permission on Contacts.
5. Set the org-wide default sharing for Contacts to **Controlled by Parent** or set the sharing settings for Accounts and Contacts to **Private**.
6. Turn on Person Accounts.
   Salesforce creates the person account record type. If needed, create additional record types for Person Accounts.
7. Assign the person account record type to user profiles.

SEE ALSO:
Person Accounts in Public Sector Solutions
Assign Record Types and Page Layouts in the Enhanced Profile User Interface
Person Accounts

Set Up Contacts to Multiple Accounts in Public Sector Solutions

Allow users to relate a constituent's contact record to more than one account so that you can more accurately and flexibly track their relationships.

By default, a contact record is related to one account, but there are myriad reasons to relate a constituent's contact record to multiple accounts in Public Sector Solutions. For example, a constituent may apply for multiple licenses or permits for different business (and person) accounts. Or, if you use party relationship groups, you must relate contacts to multiple accounts to make constituents members of a group or household.

For these scenarios and others, enable Contacts to Multiple Accounts so that you can relate one contact—a person account—to multiple accounts without creating duplicate records. When Contacts to Multiple Accounts is enabled, the account in the Account Name field on the contact record is the contact's primary account. The relationship between the contact and its primary account is a direct relationship. All other accounts that are related to the contact are indirect relationships.

Turn on Contacts to Multiple Accounts

First, turn on Contact to Multiple Accounts.

1. From Setup, in the Quick Find box, enter `Account Settings`, and then select **Account Settings**.

2. Click **Edit**.

3. In Contacts to Multiple Accounts Settings, select **Allow users to relate a contact to multiple accounts**.

4. Save your changes.

Add the Related Contacts Related List to the Account Page Layout

Next, make it easy for users to see related contacts or group members on an account record page.

📝 Note: Related Contacts is only available as an account related list when Contacts to Multiple Accounts is enabled.

1. From Setup, in Object Manager, click **Account**.

2. Click **Page Layouts** and then click **Account Layout**.

3. In the palette, click **Related Lists**.

4. Drag **Related Contacts** to Related Lists in the layout.

5. Save your changes.

SEE ALSO:

Contacts to Multiple Accounts

Manage Party Relationship Groups in Public Sector Solutions

Turn on Chatter Feed Tracking in Public Sector Solutions

Enable Chatter feed tracking so that users and constituents can collaborate and stay informed about applications, pending tasks, and workflow processes.

With Chatter feed tracking, users can follow updates to records in a feed on the record page. For example, enable feed tracking on the Business License Application, Individual Application, and Regulatory Code Violation objects so that application reviewers can easily see updates to license and permit applications and to violations that are found during inspections. Constituents can use the Chatter feed on your public portal to seek more information from a reviewer or a compliance officer.

📝 Note: By default, Chatter feed tracking is enabled for the Case Owner and Priority fields on Cases, another object whose records are helpful for Public Sector Solutions users to follow. If desired, customize which Cases fields are tracked.

1. From Setup, in the Quick Find box, enter `Feed Tracking` and then select **Feed Tracking**.

2. In the list of objects, select **Business License Application**.

3. Select **Enable Feed Tracking**.

4. Select up to 20 fields to track.

5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To view the feed tracking Setup page:
* View Setup and Configuration

To customize fields tracked in feeds:
* Customize Application

6. Repeat for Individual Application, Regulatory Code Violation, and any other objects that meet your needs.

SEE ALSO:

Salesforce Chatter

Chatter in Experience Cloud Sites

Enable Notes in Public Sector Solutions

Turn on Salesforce Notes so that inspectors, case workers, and others can use it to write down their findings.

1. From Setup, in the Quick Find box, enter `Notes` and then select **Notes Settings**.

2. Select **Enable Notes**.

3. Save your work.

EDITIONS

Available in: Lightning Experience

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USER PERMISSIONS

To enable Notes:
- View Setup and Configuration AND Customize Application

Set Up Salesforce Calendar in Public Sector Solutions

Set up Salesforce Calendar so that compliance officers can schedule visits for inspectors and case workers, who can manage visits as calendar events.

Enable Calendar Visits in Public Sector Solutions

Turn on visits for Salesforce Calendar so that compliance officers, inspectors, and case workers can use Calendar to schedule and manage visits as calendar events.

1. From Setup, in the Quick Find box, enter `Visit Settings`, and then select **Visit Calendar Settings**.
2. Enable **Add Visits to Salesforce Calendar**.

Add User Lists to Calendar Views in Public Sector Solutions

Set up user lists that compliance officers can use to check the availability of inspectors and case workers before assigning them visits.

1. From Setup, in the Quick Find box, enter `Activity Settings`, and then select **Activity Settings**.
2. Select **Add user lists to calendar views in Lightning Experience**.
3. Click **Submit**.

Create User List Views for Calendars

Create user lists to see team calendars for better visibility into who is assigned visits.

1. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
2. Click **Create New View**.
3. Enter a view name, specify filter criteria, and select fields to display.
4. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To enable Visit Calendar Settings:
- Customize Application

To add user lists to Calendar views:
- Customize Application AND Modify All Data

To create custom list views:
- Create and Customize List Views

Configure Application Record Types for Public Sector Solutions Usage Tracking

Keep an eye on costs by creating and using application record types to track how many applications you process for constituents.

Costs associated with using Public Sector Solutions depend on the number of applications you process, so it's important to keep track of the number to reduce surprises. Configuring application record types involves mapping your usage type with the application type and record type. For example, in a licensing and permitting scenario, business license applications might have the record types Fire Permit and Building Permit. For Emergency Program Management, a business license application record type might be Reopening Permit.

By default, Public Sector Solutions maps record types to the Public Sector Application Forms (License and Permit Management) application type unless you specifically map them to another usage type, such as Benefit Assistance, Composable Case Management, or Others (Emergency Program Management). So if you're using both the License and Permit Management and the Emergency Program Management apps and you don't configure application record types for usage tracking, all processed applications are counted under License and Permit Management, which can drive up your costs.

To track usage-based pricing, define application record types for business and individual license applications for the License and Permit Management and Emergency Program Management apps.

1. From Setup, in the Quick Find box, search `Usage Based Pricing` and then select **Usage Based Pricing**.

2. Click **New Application RecordType Config**.

3. For Label, enter a descriptive name for the record.

4. Select the Application Usage Type that represents what you're configuring. For example, for licensing and permit management, select **Public Sector Application Forms**.

5. For Object Name, select **Business License Application** or **Individual Application**.

6. For Record Type Name, enter the name of a Business License Application or Individual Application record type.

7. Save your changes.

SEE ALSO:

Configure Application Record Types for Grantmaking

Security for Public Sector Solutions

Configure user profiles, permissions, sharing settings, and other security features in your Public Sector Solutions org.

Set Up User Profiles for Public Sector Solutions
Create profiles for the intake officers, application reviewers, inspectors, and other employees who use Public Sector Solutions.

Create Roles for Public Sector Solutions Users
Define roles for users to control their access to org data based on job responsibilities and the reporting structure of your agency.

Create Users for Public Sector Solutions

Create user records for the intake officers, inspectors, reviewers, and other department and agency employees who use Public Sector Solutions.

View and Assign Permission Sets in Public Sector Solutions

Understand permission sets in Public Sector Solutions and how to assign them to users.

View and Assign Permission Set Licenses in Public Sector Solutions

Understand permission set licenses in Public Sector Solutions and how to assign them to users.

Understand Compliance in Public Sector Solutions

Learn how Public Sector Solutions conforms with government standards for data security.

Protect Sensitive Data with Salesforce Shield

Safeguard sensitive data, comply with industry regulations, monitor usage, and prevent malicious activity while allowing full functionality in Public Sector Solutions.

Set Up User Profiles for Public Sector Solutions

Create profiles for the intake officers, application reviewers, inspectors, and other employees who use Public Sector Solutions.

Set up profiles to define how users access and interact with objects and data in your org. To streamline profile creation, clone an existing profile and then customize permissions in the new profile. For example, clone the Standard User profile to create Compliance Officer, Intake Officer, Inspection Manager, and Inspector profiles.

> **Note:** When configuring profiles, some admins prefer to work in the enhanced profile user interface while others prefer the original profile user interface. You can switch between the two in Setup, on the User Management Settings page. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles` and then select **Profiles**.

2. For the Standard User profile, click **Clone**.

3. For Profile Name, enter text to identify the type of user. For example, enter `Reviewer` or `Compliance Manager`.

4. Save your changes.

5. Customize permissions for the profile as desired, and save your changes.

You can now create users based on this profile.

SEE ALSO:

Profiles

View and Assign Permission Sets in Public Sector Solutions

EDITIONS

Available in: Lightning Experience

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USER PERMISSIONS

To create user profiles:
- Manage Profiles and Permission Sets

Create Roles for Public Sector Solutions Users

Define roles for users to control their access to org data based on job responsibilities and the reporting structure of your agency.

Configure roles to limit access to only the records, reports, and other data that users need to complete the tasks required by their position. For example, create user roles for these personas:

- Compliance Officer
- Inspection Manager
- Inspector
- Intake Officer
- Application Reviewer

To configure access that corresponds to the reporting structure of your organization, use role hierarchies. Each role can view, edit, and report on all data owned by or shared with roles below them in the hierarchy. For example, set the Inspector role to report to the Inspection Manager, and the Inspection Manager to report to the Compliance Officer.

SEE ALSO:

Controlling Access Using Hierarchies

Create Users for Public Sector Solutions

Create user records for the intake officers, inspectors, reviewers, and other department and agency employees who use Public Sector Solutions.

1. From Setup, in the Quick Find box, enter `Users` and then select **Users**.

2. Click **New User**.

3. Specify details for the user, paying close attention to these fields.

   - Enter the user's name and email address, and a unique username in the form of a email address. By default, the username is the same as the email address. The username must be unique across all Salesforce orgs, including trial and Sandbox orgs.

   - For User License, select **Salesforce**.

   - Select a Role. If you're not using roles in your org, select **None Specified**.

   - For Profile, select an appropriate value, such as **Reviewer** or **Compliance Manager**.

   - Under Locale Settings, specify the correct Time Zone for the user.

4. If you're ready for the person to start using Public Sector Solutions, select **Generate new password and notify user immediately**. Salesforce emails the user's login name and a temporary password to the user.

5. Save your changes.

View and Assign Permission Sets in Public Sector Solutions

Understand permission sets in Public Sector Solutions and how to assign them to users.

Permission sets give users access to objects and fields, custom metadata, and other app and system settings. Some permission sets include permission set licenses, which extend the functionality of a Salesforce user license and provide access to features and tools. Users need both the appropriate permission sets and permission set licenses to work in Public Sector Solutions.

The Salesforce platform, which underlies Public Sector Solutions, provides many base permission sets. Public Sector Solutions provides additional permission sets. The sets that are available in your org depend on the product solution and add-ons that you purchase. If you have questions about the permission sets in your org, contact your Salesforce account executive.

To see the permission sets in your org, from Setup, in the Quick Find box, search for and then select **Permission Sets**. The included permission set license shows in the right column. Click any permission set label to view the set's details.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To view permission sets:
- View Setup and Configuration

To assign permission sets:
- Assign Permission Sets

To assign a permission set:

1. From Setup, in the Quick Find box, search for and then select **Users**.

2. Select a user.

3. In the Permission Set Assignments related list, click **Edit Assignments**.

4. Select the permission set or sets that you want to assign, and then click **Add**.

5. Save your changes.

   When you assign a permission set to a user, they're automatically assigned the included permission set license.

📝 **Note:** Depending on your licenses, you may have permission sets for Business Rules Engine, Document Generation, or OmniStudio with "Designer" in the label. To assign users run-time or standard-user permissions, clone the Designer permission set and change the Object Permissions to Read on the cloned version. Then, assign the read-only permission set to users. For more information,

see Create a Custom Permission Set, Set Up DocGen Standard User Permission Sets Winter '23 or Earlier, and Setup OmniStudio Standard User Permission Sets.

SEE ALSO:

Clone and Customize Managed Permission Sets

Create a Permission Set Group

View and Assign Permission Set Licenses in Public Sector Solutions

Permission Sets

OmniStudio Permission Sets Licenses

View and Assign Permission Set Licenses in Public Sector Solutions

Understand permission set licenses in Public Sector Solutions and how to assign them to users.

Permission set licenses extend the functionality of a Salesforce user license and provide access to features and tools. Some permission set licenses are associated with a permission set, and when you assign the permission set to a user, you automatically assign the permission set license. Other permission set licenses are assigned directly to a user. Users need both the appropriate permission sets and permission set licenses to work in Public Sector Solutions.

The Salesforce platform, which underlies Public Sector Solutions, provides many base permission set licenses. Public Sector Solutions provides additional permission set licenses. The licenses that are available in your org depend on the product solution and add-ons that you purchase. For example, if you purchase Public Sector Foundation Advanced, which is based on Service Cloud, you'll have all of the standard Service Cloud permission set licenses as well as the permission set licenses provided by your Public Sector solution.

For a list of all Public Sector Solutions permission set licenses, see Public Sector Solutions Products: User, Feature, and Permission Set Licenses.

To see and assign permission set licenses in your org:

1. From Setup, in the Quick Find box, search for and then select **Company Information**.

2. Select the **Permission Set Licenses** related list and, if desired, click **Go to list** to see the complete list.

Permission Set Licenses						Permission Set Licenses Help ?
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date	Enabled for Integrations
Action Plans	Active	80	1	79	11/25/2023	☐
Actionable Relationship Center	Active	20	1	19	11/25/2023	☐
Benefit Assistance For Communities	Active	20	1	19	11/25/2023	☐
Benefit Disbursement	Active	20	0	20	11/25/2023	☐
Budget Management User	Active	20	0	20	11/25/2023	☐
Business Milestones and Life Events Access	Active	20	0	20	11/25/2023	☐
Business Rules Engine Designer	Active	20	1	19	11/25/2023	☐
Business Rules Engine Runtime	Active	20	2	18	11/25/2023	☐
Business Rules Engine Runtime for Communities	Active	20	1	19	11/25/2023	☐
Care Plans	Active	40	1	39	11/25/2023	☐
Show 10 more » | Go to list (37) »						

3. Click any license name to see its details and assign it to users.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To view permission set licenses:
- View Setup and Configuration

To assign permission set licenses:
- Manage Users

SEE ALSO:

View and Assign Permission Sets in Public Sector Solutions

Permission Set Licenses

Understand Compliance in Public Sector Solutions

Learn how Public Sector Solutions conforms with government standards for data security.

As governments adopt cloud technologies to store and manage data, Salesforce provides compliance with various security and privacy standards. For Public Sector Solutions, compliance for United States government agencies is achieved through our Government Cloud offerings, which have been granted FedRAMP authorization. In the European Union, the Salesforce Hyperforce EU Operating Zone provides local storage and processing options as well as security measures that reduce regulatory risk and protect consumer data.

SEE ALSO:

Compliance in Public Sector Solutions

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Protect Sensitive Data with Salesforce Shield

Safeguard sensitive data, comply with industry regulations, monitor usage, and prevent malicious activity while allowing full functionality in Public Sector Solutions.

Shield Platform Encryption

Encrypt your most sensitive data at rest with Platform Encryption. Protect personally identifiable information (PII) and sensitive, confidential, or proprietary data. Meet external and internal data compliance policies while keeping critical app functionality, such as search, workflow, and validation rules. Keep full control over encryption keys, and set encrypted data permissions to protect sensitive data from unauthorized users.

Event Monitoring

Event Monitoring gives you access to detailed performance, security, and usage data for all your Salesforce apps. Every interaction is tracked and accessible via API, so you can view it in the data visualization app of your choice. See who is accessing critical business data when and from where they're getting access. Understand user adoption across your apps. Troubleshoot and optimize performance to improve end-user experience. Event Monitoring data can be easily imported into any data visualization or application monitoring tool like Analytics, Splunk, or New Relic.

SEE ALSO:

[Strengthen Your Data's Security with Shield Platform Encryption](#)

Trailhead: Event Monitoring

EDITIONS
Available in: Salesforce Classic and Lightning Experience
Available as an add-on subscription in: **Enterprise**, **Performance**, and **Unlimited** Editions. Requires purchasing Salesforce Shield. Available in **Developer** Edition at no charge for orgs created in Summer '15 and later.

OmniStudio for Public Sector Solutions

Install and configure OmniStudio in your Public Sector Solutions org so that you can create guided interactions and rich user experiences without code.

[OmniStudio Installation Prerequisites for Public Sector Solutions](#)

Prepare to add the OmniStudio managed package to Public Sector Solutions so that you can create guided interactions and other rich user experiences without code.

[Install OmniStudio into Public Sector Solutions](#)

Install the OmniStudio managed package into your Public Sector Solutions org.

[Download the Public Sector Solutions Process Library Packages](#)

Download collections of OmniStudio components and other assets to get started automating common workflows in Public Sector Solutions.

[Import and Activate Process Package OmniStudio Components in Public Sector Solutions](#)

Make the OmniScripts, Integration Procedures, Omnistudio Data Mappers, and Flex Cards in the Public Sector Solutions process packages available in your org.

[Deploy Process Package Lightning Web Components to Public Sector Solutions](#)

After importing process packages into Public Sector Solutions, use Visual Studio Code to deploy a package's Lightning web components to your org.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Create and Customize OmniScript Application Forms

Use OmniScripts to create dynamic forms that constituents complete on your public portal to apply for licenses, permits, programs, and services.

OmniStudio Installation Prerequisites for Public Sector Solutions

Prepare to add the OmniStudio managed package to Public Sector Solutions so that you can create guided interactions and other rich user experiences without code.

OmniStudio is a managed package that contains components built on the Salesforce platform that you can use to create applications and workflows with data from both Public Sector Solutions and external sources. To help keep your org up to date, you can opt in to receive automatic push updates to the OmniStudio package. OmniStudio is required to use Document Generation, Business Rules Engine, and Decision Explainer in Public Sector Solutions.

OmniStudio includes:

OmniScripts

Design flexible, responsive interactions that give constituents a guided path for completing a business process.

Integration Procedures

Read and write data between Salesforce and external systems.

FlexCards

Show contextual information in an at-a-glance format and provide access to relevant tasks to act on the data.

Omnistudio Data Mappers

Read, transform, and write Salesforce data.

The Salesforce Industries Process Library offers sample OmniStudio and other assets to help you quickly create automated workflows. After you install OmniStudio, download and install the Public Sector Solutions process libraries to get started configuring key workflows for your users.

Before installing OmniStudio, complete these prerequisites.

- Make sure that your org doesn't already have OmniStudio installed. From Setup, search for and then select **Installed Packages**. If you have OmniStudio, don't install it again.

- Make sure you have the OmniStudio Admin, OmniStudio Runtime for Communities, and OmniStudio User permission set licenses. To see your permission set licenses, from Setup, in the Quick Find box, search for and select **Company Information**.

- Complete the required steps to prepare your org for OmniStudio. See Prepare to Install the OmniStudio Package.

- Deploying Lightning web components from the Public Sector Solutions process libraries requires that you use Visual Studio Code and Salesforce Developer Experience (DX). If you're unfamiliar with the Salesforce DX environment, complete the Quick Start: Lightning Web Components project and the Lightning Web Components Basics module in Trailhead before you install the process libraries.

SEE ALSO:

OmniStudio Basics

Salesforce Industries Automatic Upgrade

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Install OmniStudio into Public Sector Solutions

Install the OmniStudio managed package into your Public Sector Solutions org.

Every OmniStudio release has a unique download link. After the package installs, complete the required post-installation tasks.

1. Log out of all Salesforce orgs.

2. Go to the OmniStudio Release Summary for Installation and Upgrade for a link to the current managed package installer.

3. Click the URL for the current OmniStudio package, or copy and paste it into your browser.

4. Log in to your Public Sector Solutions org.

5. Select **Install for All Users** and then click **Install**.

6. On the Approve Third-Party Access page, select the SSL Encrypted box for both websites, select **Yes, grant access to these third-party web sites**, and then click **Continue**.

7. When you receive an email indicating that the installation was successful, click **Done**.

8. Complete the post-installation tasks for the current release. For details, see OmniStudio Release Summary for Installation and Upgrade documentation.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS
To install packages: • Download AppExchange Packages

Download the Public Sector Solutions Process Library Packages

Download collections of OmniStudio components and other assets to get started automating common workflows in Public Sector Solutions.

Salesforce Industries offers *process libraries*, which are packages of OmniStudio components and other assets that you can use to automate common workflows. The Public Sector Solutions process library includes OmniScripts, Integration Procedures, Omnistudio Data Mappers, Lightning web components, and other assets that automate workflows such as applying for business licenses or permits, assessing fees for regulatory violations, and submitting public complaints. Download the processes, install them, and customize them for your needs.

To get the Public Sector Solutions process libraries:

1. Go to the Public Sector Solutions process library on GitHub.

   📝 Note: These virtual processes and digital assets are Non-SFDC Applications and not part of your Services under your Master Subscription Agreement with Salesforce or any of its affiliates. They are provided as-is and not supported by Salesforce.

2. Do one of the following.

   • To get all of the assets, click **Code** and select **Download ZIP**.

   • To get a specific asset, click it and then select **Download**.

   📝 Note: Every JSON or ZIP has a corresponding PDF readme that describes the process, scenarios for using it, and a list of its contents. Click a PDF to view or download it.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

3. Import the package components and, if the package includes Lightning web components, deploy the Lightning web components to your org.

SEE ALSO:

Import and Activate Process Package OmniStudio Components in Public Sector Solutions

Make the OmniScripts, Integration Procedures, Omnistudio Data Mappers, and Flex Cards in the Public Sector Solutions process packages available in your org.

1. From the App Launcher, find and select **OmniStudio**.

2. From the app navigation menu, select **OmniScripts**.

3. Click **Import**.

4. Browse to locate the JSON file for the process package. Click **Open** and then click **Next**.

5. To select the items to import, follow the prompts. You can select any or all of the components in the package, including OmniScripts, Integration Procedures, Data Mappers, FlexCards, and Expression Sets.

6. If you plan to customize the components, click **Activate Later**. To use them as is, click **Activate Now**.

   🛑 Important: In some cases, components must be activated in a specific order. Before activating components, on GitHub, check the readme for the process package to see activation sequence considerations. Also, to deploy OmniStudio components to an Experience Cloud site, they must be activated. You can activate an OmniStudio component at any time from the component's quick action menu on a list view page, or from the highlights panel of the component itself.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To import and activate OmniStudio components:
- OmniStudio Admin

Deploy Process Package Lightning Web Components to Public Sector Solutions

After importing process packages into Public Sector Solutions, use Visual Studio Code to deploy a package's Lightning web components to your org.

To deploy the Lightning web components in Public Sector Solutions process packages to your org, use Visual Studio Code and Salesforce Developer Experience (DX). If you're unfamiliar with the Salesforce DX environment, complete the Quick Start: Lightning Web Components project and the Lightning Web Components Basics module in Trailhead before continuing.

1. In Visual Studio Code, create a project and import the Lightning web components that you downloaded from the Public Sector Solutions Process Library into it.

2. Make sure that the runtimeNamespace in the component's .js-meta.xml file and the import package name in the component's .js file use the namespace prefix for the OmniStudio package in your org. To find the namespace prefix for your OmniStudio package, from Setup, search for `Installed Packages` and then select **Installed Packages**. In the Installed Packages table, look at the Namespace Prefix column for OmniStudio.

If necessary, in Visual Studio Code, edit the runtimeNamespace and namespace prefix in your Lightning web component files.

3. Connect your Visual Studio Code project to your Public Sector Solutions org. To authorize your org from the command palette, select **SFDX:Authorize an Org**. To complete the authorization process, select the URL to log in and enter your credentials.

4. To deploy the project files from the command palette, select **SFDX: Deploy this Source to Org**. To deploy a single file, right-click it and select **SFDC: Deploy Source to Org**.

5. To verify that the Lightning component is in your org, from Setup, in the Quick Find box, enter `Lightning Components` and then select **Lightning Components**.

SEE ALSO:

Deploy Lightning Web Components

Create and Customize OmniScript Application Forms

Use OmniScripts to create dynamic forms that constituents complete on your public portal to apply for licenses, permits, programs, and services.

Create Dynamic Application and Intake Forms Using OmniScript

Create guided application and intake forms for Public Sector Solutions constituents that ask questions based on previous responses.

Automatically Add Account Data to Application Forms

Speed constituents through application forms by automatically populating fields with data from their account and business profile in Public Sector Solutions.

Allow Applicants to Upload Supporting Files and Images

Allow Public Sector Solutions constituents to upload supporting documents, such as proof of identity or proof of address, with their applications.

Allow Applicants to Save Forms for Later

Give applicants the option to save a partially completed OmniScript form on an Experience Cloud site and return later to finish it.

Save Form Data to an Application Record

Create Omnistudio Data Mappers to save data from completed OmniScript forms to a business license application or other record in Public Sector Solutions.

Attach a Completed Form PDF to an Application Record

Allow reviewers to see completed forms as a PDF attached to a business license application or other record in Public Sector Solutions.

Add OmniScript Forms to an Experience Cloud Site

Add the OmniScript Lightning component to a Public Sector Solutions site so that constituents can complete online applications using dynamic forms.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Create Dynamic Application and Intake Forms Using OmniScript

Create guided application and intake forms for Public Sector Solutions constituents that ask questions based on previous responses.

OmniScript, part of the OmniStudio suite of automation services, components, and objects, lets you create complex, dynamic web forms with little or no code. Simply drag interactive elements from a Build panel onto an OmniScript canvas, arrange them as desired, and configure properties that define how the element shows, what it does, and how it works. Elements can include a wide array of question input types as well as Omnistudio Data Mappers, which draw on data from your Public Sector Solutions org, and other actions and functions. OmniScripts can even include other OmniScripts. Use OmniScripts to create guided user experiences including application and intake forms for licenses, permits, services, benefits, and grants.

Here's an example of how to create an OmniScript form that conditionally shows a question based on an applicant's response to a previous question.

1. From the App Launcher, find and select **OmniStudio**.

2. From the app navigation menu, select **OmniScripts**.

3. Click **New**.

4. Enter a Name, Type, Language, and Subtype for the OmniScript.

5. Expand Step 1 and drag a **Radio** element from the Inputs section of the Build panel onto the page. Name it `BusinessLegalStructure`.

6. In the Properties panel, for Field Label, enter `What is your business's legal structure?`.

7. Under Options, add these value-label pairs.

Value	Label
Corporation	*Corporation*
Nonprofit	*Not for profit*
Partnership	*Partnership*
Unknown	*I don't know*

8. Drag a **Formula** element onto the page and name it `exprShowBusinessLegalStructureCorporationType`.

9. In the Properties panel, for Expression, enter `CONTAINS(%BusinessLegalStructure%, "Corporation")`.

10. Drag a **Radio** element onto the page and name it `BusinessLegalStructureCorporationType`.

11. In the Properties panel, under Conditional View, select **Show element if true** and define the condition **exprShowBusinessLegalStructureCorporationType** is **Equal To** `true`.

12. Preview your form.

SEE ALSO:

Automatically Add Account Data to Application Forms

Speed constituents through application forms by automatically populating fields with data from their account and business profile in Public Sector Solutions.

To make business license applications easier for constituents to complete, link their applications to their account and business profile. Then, use Data Mappers to automatically populate application fields with relevant data, such as the business structure and tax ID number. For individual applications such as for permits or benefits, link applications to the person account record to populate application fields with data such as the constituent's address and contact details.

Start by creating your Data Mappers: one that automatically creates an account for first-time applicants when they submit their application, and one creates a business profile. Create two other Data Mappers that extract account and business profile data for returning applicants. Then, add the Data Mappers to the OmniScript form.

Create Omnistudio Data Mappers to Create an Account and Business Profile from an Application

Create Data Mappers that automatically create an account and business profile for first-time applicants when they submit a business license application on your Experience Cloud site.

1. In the OmniStudio app, select **Omnistudio Data Mappers** from the app navigation menu and then click **New**.

2. Enter these details.

   a. For Data Mapper Interface Name, enter `New Account from Application`.

   b. For Interface Type, select **Load**.

   c. For Input Type, select **JSON**.

   d. For Output Type, select **sObject**.

3. Click **Save** and then click **Add Object**.

4. Select **Account**.

5. Click **Fields**.

6. (Optional) Paste your OmniScript JSON into the Input JSON panel. To copy the JSON, go to the OmniScript form and click **Preview**. On the Data JSON tab, click 📋 .

7. Map input JSON paths from the OmniScript form to fields on the domain object (Account).
   OmniStudio saves the Data Mapper automatically.

8. When you're done, repeat these steps to create a Data Mapper called New Business Profile from Application, and map the OmniScript JSON data to fields on the Business Profile domain object.

Create Omnistudio Data Mappers to Get Account and Business Profile Data for Applications

Create Data Mappers that populate business license application fields with account and business profile data for returning applicants.

1. In the OmniStudio app, select **Omnistudio Data Mappers** from the app navigation menu and then click **New**.

2. Enter these details.

   a. For Data Mapper Interface Name, enter `Get Account Data for Applications`.

   b. For Interface Type, select **Extract**.

     c. For Input Type, select **JSON**.

     d. For Output Type, select **JSON**.

3. Click **Save**.

4. Click **Add Extract Step**.

5. Define the initial extraction.

     a. From the list of objects, select **Account**.

     b. For Extract Output Path, enter *Account*.

     c. For Filter, specify **ID =** *InputId*.

6. On the Output tab, map the account fields that you want to extract to your OmniScript JSON. For help see Data Mapper Extract Output in the OmniStudio Help.
OmniStudio saves the Data Mapper automatically.

7. When you're done, repeat these steps to create a Data Mapper called Get Business Profile Data for Applications, and map the Business Profile fields that you want to extract to your OmniScript JSON.

Add the Omnistudio Data Mappers to an OmniScript Application Form

Add a question to an OmniScript application to identify first-time applicants. Then, use the load Data Mappers to create an account and business profile for first-time applicants, and use the extract Data Mappers to add account and business profile data for returning applicants.

1. In the OmniStudio app, select **OmniScripts** from the app navigation menu.

2. Create or select an inactive OmniScript application form from the list view.

3. Add or select a step to ask the applicant whether they've previously applied. Then, in the Build panel, expand the Inputs section and drag a **Radio** element to the step in the canvas.

4. Specify the element's properties, including a Name and Field Label. For example, for Name, enter *First-time Applicant* and for Field Label enter *Have you previously applied for a license for this business?*

5. Add two options for the element, one whose Value-Label pair is *Yes*, and one whose Value and Label are *No*.

6. Add logic and elements to call your extract and load Data Mappers in the OmniScript.

     a. If the applicant selects Yes, use the Data Mapper Extract Action element to call the extract Data Mappers that populate application fields with data from the applicant's account and business profile. In the Properties panel of the Data Mapper Extract Action element, for Data Mapper Interface, select **Get Account Data for Applications**. Add a second Data Mapper Extract Action that calls Get Business Profile Data for Applications.

     b. If the license applicant selects No, use the Data Mapper Post Action element to call the load Data Mappers that create an account and business profile when the application is submitted. In the Properties panel of the Data Mapper Post Action element, for Data Mapper Interface, select **New Account from Application**. Add a second Data Mapper Post Action that calls New Business Profile from Application.

OmniStudio saves the OmniScript automatically.

SEE ALSO:

Create the Script Structure

Omnistudio Data Mappers

Omnistudio Data Mapper Load Overview

Omnistudio Data Mapper Extract Overview

Allow Applicants to Upload Supporting Files and Images

Allow Public Sector Solutions constituents to upload supporting documents, such as proof of identity or proof of address, with their applications.

To enable constituents to upload supporting files for their applications, include a File or Image input element in your OmniScript form. By default, OmniStudio uploads files and images to Content Documents (Salesforce Files), but you can attach them to parent records, such as business license or benefit applications, if you prefer. Files and images can be up to 2 GB.

> 📝 **Note:** Experience Cloud site guest users need permission to upload files and images. From Setup, in the Quick Find box, search for `Salesforce Files` and then select **General Settings**. Click **Edit**, select **Allow site guest users to upload files**, and save your change.

1. In the OmniStudio app, select **OmniScripts** from the app navigation menu and then select an inactive OmniScript application form from the list view.

2. Add or select a step for uploading supporting documents.

3. In the Build panel, expand the Inputs section and drag a **File** or **Image** element to the step in the canvas.
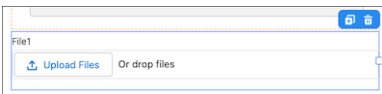
4. Specify the element's properties, including a Name and Field Label.

5. To attach uploaded files to the application, for Content Parent Id, enter the ID of the object associated with the application form. For example, enter the object ID for business license applications. You can also enter a comma-separated list of IDs.

> 📝 **Note:** Every Salesforce object has a three-character ID. To determine the ID of an object, open a record and look in the browser's URL field. After the object name parameter is an 18-character string that represents the record ID. The first three characters of the string are the object ID. For example, the URL

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create OmniScript forms:
- OmniStudio Admin

https://[domain]/lightning/r/BusinessLicenseApplication/0f0RN000000004IYAQ/view shows that the object ID for business license applications is 0f0.

SEE ALSO:

Upload Files and Images in OmniScripts

File Properties

Image Properties

File Visibility and Sharing in Experience Cloud Sites

Allow Applicants to Save Forms for Later

Give applicants the option to save a partially completed OmniScript form on an Experience Cloud site and return later to finish it.

It's the lucky constituent who goes online to apply for a license, permit, or benefit and has the time and all of the information they need to complete the form in one sitting. So give applicants the ability to save a partially completed application and return to it later to finish it. That way, they can bookmark links, launch a saved instance from an object page, or email the link to someone.

To allow applicants to save for later, first configure the Save for Later option in your OmniScript form. Then add the Vlocity LWC OmniScript Wrapper component to your Experience Cloud site so that applicants can access the saved form. Finally, if desired, configure where the saved OmniScript launches in Public Sector Solutions by mapping URLs of saved OmniScripts to custom fields on the OmniScript Saved Sessions object.

When the applicant saves the form for later from the Experience Cloud site, OmniStudio saves the snapshot of the OmniScript in the OmniScript Saved Session object. In addition, Public Sector Solutions creates a record on the Preliminary Application Reference object that looks up to the applicant and the application. The Preliminary Application Reference record also points to the OmniScript Saved Session record through the OmniScriptInstanceId attribute on the Saved Application URL field. After the applicant submits the form, the final version is saved as a business license application or individual application record.

Turn On the Save for Later Option

Enable the Save for Later option on your OmniScript forms.

1. In OmniStudio, select the OmniScript form.

2. In the Setup panel, under Save Options, select **Allow Save for Later**.

3. Configure the options, such enabling autosave and specifying the number of days until the saved form expires. For details, see Configure Save Options.

4. (Optional) Configure where saved OmniScript forms (or instances) launch in Public Sector Solutions by mapping instance URLs to custom fields on the OmniScript Saved Session object. For instructions, see Map Saved Instance URLs to Custom Fields.

5. Preview, test, and activate the OmniScript.

Make Saved OmniScripts Available on Your Constituent Portal

Now, make saved OmniScript forms available to applicants on your Experience Cloud site.

1. From Setup, in the Quick Find box, search for `Digital Experiences` and then select **All Sites**.

2. Next to your site name, click **Builder**.

3. Create or go to the page where you want applicants to access their saved OmniScript form.

4. Click ⚡, and drag the **Vlocity LWC OmniScript Wrapper** component onto the content area of the page.

5. For LWC OmniScript Name, enter `c:` followed by the component name of your OmniScript. The component name includes the Type, SubType, and Language of your OmniScript, without spaces.

   📝 Note: To access saved OmniScript forms on your portal, Experience Cloud site members need read and edit access for the File Based OmniScript Name field on the OmniScript Saved Sessions object. For information on granting object permissions to Experience Cloud site users, see Customize the Customer Community Profile for Your Constituent Portal.

SEE ALSO:

Launch OmniScripts in Communities from URLs

Save Form Data to an Application Record

Create Omnistudio Data Mappers to save data from completed OmniScript forms to a business license application or other record in Public Sector Solutions.

Map the data submitted in OmniScript application forms to Salesforce objects such as Business License Application or Individual Application. Then you can use business automation, approval processes, Business Rules Engine, Decision Explainer, and other features in Public Sector Solutions to review and approve them.

To save data from submitted OmniScript forms to Salesforce objects, first create a load Data Mapper to update the relevant objects with the data. Then, add a Data Mapper Post Action to your OmniScript form to write the data to the objects using the load Data Mapper.

1. In the OmniStudio app, select **Omnistudio Data Mappers** from the app navigation menu and then click **New**.

2. Enter these details.

   a. For Data Mapper Interface Name, enter `Save to Business License Applications`.

   b. For Interface Type, select **Load**.

   c. For Input Type, select **JSON**.

   d. For Output Type, select **sObject**.

3. Click **Save**, and then click **Add Object**.

4. Select **BusinessLicenseApplication**.

5. Click **Fields**.

6. (Optional) Paste your OmniScript JSON into the Input JSON panel. To copy the JSON, go to the OmniScript form and click **Preview**. On the Data JSON tab, click 📋 .

7. On the BusinessLicenseApplication tab, click ⊕ .

8. Map input JSON paths from the OmniScript to the domain object (Business License Application) fields.

   OmniStudio saves your work automatically.

When you're done, tell your OmniScript form to update the business license applications using a Data Mapper Post Action element.

9. Select **OmniScripts** from the app navigation menu and then select an inactive OmniScript application form from the list view.

10. From the Build panel, drag the **Data Mapper Post Action** element to the bottom of the OmniScript canvas.

11. In the properties panel, for Data Mapper Interface, select **Save to Business License Applications**.

SEE ALSO:
Omnistudio Data Mapper Load Overview
Object Field Mapping
Omnistudio Data Mapper Post Action

Attach a Completed Form PDF to an Application Record

Allow reviewers to see completed forms as a PDF attached to a business license application or other record in Public Sector Solutions.

To attach a completed OmniScript form as a PDF to a record in Public Sector Solutions, first create a Data Mapper to transform and map the OmniScript data to PDF. Then, add the PDF Action to your OmniScript to create the PDF and attach it to a record.

1. In the OmniStudio app, select **Omnistudio Data Mappers** from the app navigation menu and then click **New**.

2. Enter these details.

   a. For Data Mapper Interface Name, enter `Create PDF from Application`.

   b. For Interface Type, select **Transform**.

   c. For Input Type, select **JSON**.

   d. For Output Type, select **PDF**.

3. Click **Save**, and then select the **Transforms** tab.

4. (Optional) Expand the **Input JSON** panel and paste your OmniScript JSON. To copy the JSON, go to the OmniScript form and click **Preview**. On the Data JSON tab, click 📋 .

5. Click **Quick Match**.

6. Map input JSON nodes to output PDF fields.

   OmniStudio saves your work automatically.

   When you're done, tell your OmniScript form to create a PDF using the Data Mapper.

7. Select **OmniScripts** from the app navigation menu and select an inactive OmniScript application form from the list view.

8. From the Build panel, drag **PDF Action** to the bottom of the OmniScript canvas.

9. In the properties panel, for Attachment Parent Id, enter the ID of the object associated with the application form. For example, enter the object ID for business license applications.

   > 📝 Note: Every Salesforce object has a three-character ID. To determine the ID of an object, open a record and look in the browser's URL field. After the object name parameter is an 18-character string that represents the record ID. The first three characters of the string are the object ID. For example, the URL https://[domain]/lightning/r/BusinessLicenseApplication/0f0RN000000004IYAQ/view shows that the object ID for business license applications is 0f0.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create OmniScript forms:
- OmniStudio Admin

To create Omnistudio Data Mappers:
- OmniStudio Admin

10. Under Send Transformations, for Pre-Transformation Data Mapper Interface, select your **Create PDF from Application** Data Mapper. OmniStudio saves the OmniScript automatically.

SEE ALSO:

> Create an Omnistudio Data Mapper Interface to Map OmniScript Data to a PDF
>
> Map OmniScript Fields to a PDF
>
> Add a PDF Action to an OmniScript

Add OmniScript Forms to an Experience Cloud Site

Add the OmniScript Lightning component to a Public Sector Solutions site so that constituents can complete online applications using dynamic forms.

1. From Setup, in the Quick Find box, search for `Digital Experiences` and then select **All Sites**.

2. Next to your site name, click **Builder**.

3. Create or go to the page where you want to add an OmniScript form.

4. Click ⚡, and drag the **OmniScript** component onto the content area of the page.

> 📝 **Note:** If you don't see the OmniScript component, check your Content Security Policy level. You may need to change it from Strict to Relaxed. For information, see Select a Security Level in Experience Builder Sites.

5. To identify which OmniScript to use in the component, in the properties panel, select the Type, SubType, and Language that you specified when you created the OmniScript form.

6. Repeat to add other forms to your site as necessary.

7. Preview your changes and publish them when you're finished.

SEE ALSO:

> Create an OmniScript Type and SubType
>
> Launching OmniScript from a Community or Lightning Record Page

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create, customize, and publish Experience Cloud sites:
- View Setup and Configuration AND Create and Set Up Experiences

Common Features in Public Sector Solutions

Discover the tools and components that caseworkers, case managers, and others can use to understand constituents and deliver excellent customer service to them.

Public Sector Solutions provides a collection of components, tools, and other features that help caseworkers and other employees more efficiently address concerns and issues that constituents raise. These tools provide context for your interactions with constituents and put useful, actionable tasks at your fingertips. All of the tools can be customized, so they're useful in many scenarios, from helping the constituent who has a question about a business license application or a social service benefit entitlement, to assisting the constituent who contacts you to file a complaint or report a child welfare concern. Public Sector Solutions even provides a selection of these useful tools on a dedicated account Lightning record page to help you get started using these tools to resolve constituent service issues. Customize the page as desired to suit your agency's needs. The sky's the limit.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Get to Know the Industry Common Layer in Public Sector Solutions

Gain an understanding of the components that Public Sector Solutions uses to streamline and automate common program functions at public sector agencies.

Configure and Use the Account Page for Service Representatives in Public Sector Solutions

Efficiently resolve constituents' issues with an account Lightning record page that includes useful information and tools for caseworkers and service representatives.

Configure and Use Action Launcher in Public Sector Solutions

Give users easy access to the screen flows, OmniScripts, and quick actions that they use the most in one convenient component.

Configure and Use Action Plans in Public Sector Solutions

Create plans to complete tasks that are required for business processes such as application reviews and approvals.

Configure and View Graphical Representations of Constituent Relationships

Understand the relationships among constituents by viewing them in interactive graphs with the Actionable Relationship Center in Public Sector Solutions.

Configure and Use Audit Trail in Public Sector Solutions

Detect potential fraud and prevent identity theft by monitoring and analyzing constituent identity verification records in Public Sector Solutions.

Business Rules Engine in Public Sector Solutions

Automate policy decisions and calculations with Business Rules Engine.

Compliant Data Sharing in Public Sector Solutions

Increase collaboration between internal and external users and maintain compliance with regulations and policies associated with the handling of confidential or sensitive information.

Decision Explainer with Public Sector Solutions

Use Decision Explainer to provide transparency into business rule calculations.

Set Up Document Checklist Items in Public Sector Solutions

Turn on document checklists, assign permissions, customize page layouts, and configure document types to store data extracted from documents submitted by constituents.

Configure and Use Identity Verification in Public Sector Solutions

Use a flow to verify a constituent's identity before sharing private information over the phone or through another engagement channel.

Use Intelligent Document Automation in Public Sector Solutions

Simplify and centralize document management processes and reduce manual data entry.

Configure and Use Interaction Summaries in Public Sector Solutions

Give caseworkers, case managers, and other users the ability to capture and manage interaction notes by using interaction summaries. Users can create interaction notes on cases, care plans, benefits, goals, complaints, referrals, and accounts.

Configure and View a Constituent's Life Events

Understand constituents' personal history by capturing significant events and milestones in their lives with the Life Events or Business Milestones component in Public Sector Solutions.

Create Custom Documents with OmniStudio Document Generation in Public Sector Solutions

Create reports, certificates, letters, and other official documents for constituents from OmniStudio templates.

Use Outcome Management to Create and Measure Your Public Sector Solutions Impact Strategy

Evaluate whether the programs that you offer to constituents achieve their intended outcomes, and take action based on data-driven insights.

Manage Party Relationship Groups in Public Sector Solutions

Define groups of individuals, such as households or trusts, and use them to deliver support services that are tailored to the group.

Record Aggregation in Public Sector Solutions

Aggregate one object's records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access information from both objects.

Configure and Use Record Alerts in Public Sector Solutions

Don't keep constituents waiting. Get notified that you need to act on a record to process an application or address a constituent concern.

Configure and Use Service Process Studio in Public Sector Solutions

Create robust start-to-finish processes to automate agencies' responses to service requests from constituents, from intake to resolution.

Configure and Use Timeline in Public Sector Solutions

Give caseworkers and other users a chronological view of a constituent's interactions with your agencies. With a timeline, caseworkers can see all past interactions, cases, complaints, referrals, and care plans with a constituent. Visualize the information chronologically, and click any event to see more information and related details.

Get to Know the Industry Common Layer in Public Sector Solutions

Gain an understanding of the components that Public Sector Solutions uses to streamline and automate common program functions at public sector agencies.

The industry common layer in the Public Sector Solutions architecture provides tools and components to automate many of the processes that underlie service delivery. Before you implement Public Sector Solutions, make sure that you understand what these components are and what they do. That way, you can build on a solid foundation that meets your immediate goals and allows you to easily scale to include new ones. For example, start with automating the processing of licensing and permitting applications, and later add support for the digital delivery of programs and benefits.

Most public sector agencies generally share a common workflow: intake, assessment, delivery, and monitoring. While the details of each phase of the workflow differ depending on each agency's mission, the components in the common layer streamline processes for all agencies and departments, in every phase.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

> **Note:** Remember, we're exploring only the industry common layer here. Public Sector Solutions provides a wealth of other features that support constituent-centric service delivery, including business process automation, tailored data models, and the deep and rich extensibility and customizability of the Salesforce platform itself.

Intake

Intake is all about receiving and processing applications and their supporting documentation. OmniStudio is critical in this phase of the public sector workflow. Use OmniScripts to create application and intake forms that constituents experience as dynamic, guided flows on your Experience Cloud site. Public Sector Solutions provides several templates to get you started, including for license applications, referral intake, and documenting public complaints. Customize the templates or create your own OmniScripts that use Omnistudio Data

Mappers to make applications and intake forms easier for constituents to complete. For example, use an Omnistudio Data Mapper to populate application fields with relevant data, such as a constituent's address and contact details.

📝 **Note:** You can include any OmniScript flow or OmniStudio component in a Lightning web component on your portal. For example, include a FlexCard that shows constituent details and lets them start an OmniScript flow to update their personal information.

After applications and intake forms are submitted, use industry common layer components to automate review and approval processes. Here are some examples.

- Document Checklist Items route submitted documents to appropriate reviewers for approval.
- Intelligent Document Automation routes scanned documents to the appropriate queue for review and approval.
- Action Launcher lets you quickly start a referral or complaint intake, or start another common task.
- Action Plans track the steps of the review and approval process and help users stay on top of to-do items.
- Record Alerts notify reviewers when an application needs action.
- Business Rules Engine determines policy decisions and program eligibility and calculates benefit amounts.
- Decision Explainer gives reviewers insight into policy decisions and eligibility determinations.
- A Data Mapper and the OmniScript PDF Action attach completed forms to application records as PDF files.

Assessment

Intake ▸ **Assessment** ▸ Delivery ▸ Monitoring

Approvals and eligibility determinations often involve more than routing and reviewing documents. Licenses and permits often require onsite inspections, while program and benefit determinations require offline or virtual assessments. To help you determine constituent eligibility for programs and services, Public Sector Solutions offers dynamic assessments, which are based on Discovery Framework. Discovery Framework is a data model of objects that let you collect data through OmniScript forms and validate whether the data complies with your policies.

But Discovery Framework is just the beginning. To help you assess constituent eligibility for programs, benefits, and other services, use these industry common layer features.

- Action Plans define assessment tasks.
- OmniStudio Integration Procedures map and store data from assessment responses to Salesforce objects.
- Action Launcher lets you quickly email a constituent with a follow-up or clarifying question, log a call, or start another common task.
- Party Relationship Groups let you make support determinations for households and other groups of constituents, not just individuals.
- Life Events show at a glance the significant events in a constituent's life.
- Actionable Relationship Center (ARC) shows relationships among constituents on an interactive graph.
- Timeline shows a chronological view of a constituent's interactions with your agencies.
- Identity Verification ensures that you're communicating with the intended constituent or their authorized representative before you share private or sensitive information.
- Interaction Summaries let you record detailed notes of meetings and conversations.

Delivery

Intake ▸ Assessment ▸ **Delivery** ▸ Monitoring

Business process automation in Public Sector Solutions streamlines when and how you notify constituents about approvals (and rejections). Still, many components in the industry common layer are relevant to the delivery of services to constituents. Here are some examples.

- Decision Explainer shares the reasoning for policy decisions and eligibility determinations with constituents.
- OmniStudio Document Generation lets you quickly, accurately, and consistently create documents such as official correspondence, certificates, grant award letters, contracts, and inspection reports.
- OmniScript flows allow constituents to appeal determinations.

Monitoring

Delivering service isn't a one-and-done affair. Caseworkers and case managers must continually engage with constituents to field questions and check on their progress. And constituents must reapply and recertify for licenses, permits, grants, and benefits, as well as notify agencies of changes to their circumstances that affect program eligibility.

For all of these tasks, use these industry common layer features.

- The account Lightning record page for service representatives includes the Timeline, Action Launcher, Record Alerts, and Interaction Summaries components so that users can stay on top of relevant information and tasks in one place.
- Identity Verification and Audit Trail ensure you're always communicating with the intended constituent, and show a list of engagement records.
- Service Process Studio creates complex processes that automate responses to service requests from constituents.
- Intelligent Document Automation tracks and archives documents shared with constituents.
- Decision Explainer preserves decision logs and audit application data.
- OmniScript flows allow constituents to renew, recertify, and start the whole cycle over again.

Which Component Should I Use?

The components in the industry common layer in Public Sector Solutions are also used in other Salesforce Industries clouds. To learn more about the components and how to set them up, use the links in this table. Keep in mind that detailed documentation for some of these components is provided in other parts of Salesforce Help.

	Intake	Assessment	Delivery	Monitoring
Action Launcher on page 43	☑	☑		☑
Action Plans on page 44	☑	☑		☑
Actionable Relationship Center on page 44		☑		
Audit Trail on page 45	☑			☑
Business Rules Engine on page 45	☑		☑	☑

	Intake	Assessment	Delivery	Monitoring
Decision Explainer on page 46	☑		☑	
Decision Tables	☑		☑	
Discovery Framework on page 148		☑		
Document Checklist Items on page 47	☑	☑		
Identity Verification on page 48	☑	☑	☑	☑
Intelligent Document Automation on page 48	☑			☑
Interaction Summaries on page 51		☑		☑
Life Events on page 56		☑		☑
OmniStudio on page 23	☑	☑	☑	☑
OmniStudio Document Generation on page 57		☑	☑	☑
Record Alerts on page 70	☑			☑
Service Process Studio on page 70				☑
Timeline on page 71		☑		☑

* An add-on license is required.

Configure and Use the Account Page for Service Representatives in Public Sector Solutions

Efficiently resolve constituents' issues with an account Lightning record page that includes useful information and tools for caseworkers and service representatives.

Learn About the Page

Public Sector Solutions provides a Lightning record page that's designed to help caseworkers and others stay on top of relevant information and tasks so they can answer questions and resolve issues that constituents bring to their attention. The page, which is included in the Public Sector: License and Permit Management and Public Sector: Inspection Management apps, applies to both business and person accounts. It includes these components.

Enable the Page

Turn on the account Lightning record page that offers useful components for caseworkers and service representatives.

Customize the Page

Edit component properties and reposition, add, and remove components on the account Lightning record page for service representatives.

Learn About the Page

Public Sector Solutions provides a Lightning record page that's designed to help caseworkers and others stay on top of relevant information and tasks so they can answer questions and resolve issues that constituents bring to their attention. The page, which is included in the Public Sector: License and Permit Management and Public Sector: Inspection Management apps, applies to both business and person accounts. It includes these components.

- The Account card shows the account name, address, and phone number. Person accounts also include age and email (1).
- The Timeline shows related events, including cases, care plans, goal assignments, benefit assignments, and interaction summaries. Select a date range for the items in the Timeline, filter events by type, and change the sort order. To view details, click any item (2).
- Use the Action Launcher to quickly start relevant service actions, such as logging a call, creating a case, or creating a task (3).
- The Alerts component shows a list of pending record alerts for the account, which you can dismiss or snooze (4).
- A tabbed Lightning web component shows complete account details, relevant related lists, and interaction summaries of meetings and conversations (5).

The page is all about taking action. Jot down notes from a call by creating an interaction summary. Create a care plan from the Timeline. Or open a case from the Action Launcher. Customize the properties of the components and which components show on the page to suit your agencies' needs.

Enable the Page

Turn on the account Lightning record page that offers useful components for caseworkers and service representatives.

1. From Setup, in the Quick Find box, search for `Public Sector` and then select **Service Excellence Settings**.

2. To create and manage service features, click the toggle .
   Public Sector Solutions enables the account Lightning record page for service representatives and creates a Timeline for it. The page appears by default for all business account records. To show the page by default for person accounts, complete these additional steps.

3. From the App Launcher, find and select **Accounts**. Then, open any person account record.

4. Click ⚙ and select **Edit Page**.

5. In the properties panel, rename the page. For example, for Label, enter `Account Record Page for Service`.

6. Save the page and, when prompted, click **Activate**.

7. Click **Assign as Org Default** and then click **Close**.

The account Lightning record page for service representatives is now the default for both business and person accounts. Because it's the org default, the page shows for accounts for all Public Sector Solutions apps.

Customize the Page

Edit component properties and reposition, add, and remove components on the account Lightning record page for service representatives.

💡 Tip: To preserve the default account Lightning record page for service representatives in case you want to use it again, make your updates to a copy of it: From Setup, in Lightning App Builder, click **Clone** next to Account Record Page for Service. Then, click **Edit** and make your changes to the copy. When you're done, remember to assign your new version of the page as the org default.

1. On any account record page, click ⚙ and select **Edit Page**.

2. To change which events show in the Timeline, select it on the page canvas and then, in the properties panel, under Timeline Configuration, click Select. Drag items to add or remove them from the list.

To customize the Timeline further, edit it in Setup. Deactivate the Timeline, make your changes, and reactivate it. For more information, see Set Up a Timeline in Public Sector Solutions.

3. To change the actions that appear in the Action Launcher, select it on the page canvas and then, in the properties panel, select a deployment.

4. To change the position of a component on the page, in the page canvas, drag it to a different location.

5. To remove a component, select it and then click 🗑 .

6. To add a component, select it in the Components panel and drag it to the page canvas.

7. Save your changes.

Configure and Use Action Launcher in Public Sector Solutions

Give users easy access to the screen flows, OmniScripts, and quick actions that they use the most in one convenient component.

Help intake agents, application reviewers, caseworkers, and others work efficiently by putting frequently used actions in the Action Launcher Lightning web component, which you can add to any record detail page. For example, add the complaint intake flow, the referral intake flow, and the Email and Log a Call quick actions to Person Account pages. Caseworkers can quickly start connecting a constituent to an assistance program, document phone conversations, and send an email to the constituent in context while working with the constituent's person account record.

SEE ALSO:

Action Launcher

Configure and Use Action Plans in Public Sector Solutions

Create plans to complete tasks that are required for business processes such as application reviews and approvals.

Action Plans contain sets of tasks or checklist items that you can use to track and automate processes with repeatable steps. You can assign each task a priority, a deadline, and an owner, making it easy to collaborate among reviewers, inspectors, caseworkers, and other Public Sector Solutions users. Create Action Plan Templates with tasks for recurring processes, and then assign and customize the plans as necessary. Use action plans for application review steps, meeting preparation, and follow-up tasks from meetings and engagements with constituents. Use them to define and track these tasks:

- Assessment tasks, questions, and signature tasks for inspections and dynamic assessments
- Due diligence tasks such as collecting audited financials from grant recipients
- Volunteer tasks for emergency program management
- Employee onboarding requirements
- Tasks associated with determining benefit eligibility

SEE ALSO:

[Action Plans](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up and use Action Plans:
- ActionPlans

Configure and View Graphical Representations of Constituent Relationships

Understand the relationships among constituents by viewing them in interactive graphs with the Actionable Relationship Center in Public Sector Solutions.

Build graphs that show relevant constituent relationships from standard and custom objects, including Party Relationship Groups, and show the graphs in the ARC Relationship Graph component on any record page. Customize graph nodes, show fields from multiple objects on a node, and add actions to nodes so that users can easily view, edit, delete, and create records when they engage with constituents. See record details of any node in the graph in the ARC Record Details Panel component, and see key fields in a header in the ARC Highlights Panel component.

When a caseworker opens an account record, the ARC graph provides a comprehensive snapshot of the constituent. The caseworker can drill down into the records related to the constituent, and then filter and sort the records to see only the information they need. For example, they can customize the graph to show only high-priority cases from the last two months, and then quickly review the care plans related to each high-priority case.

SEE ALSO:

[Actionable Relationship Center (ARC)](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up Actionable Relationship Center:
- ARC Access

Configure and Use Audit Trail in Public Sector Solutions

Detect potential fraud and prevent identity theft by monitoring and analyzing constituent identity verification records in Public Sector Solutions.

With Audit Trail, intake agents or customer service representatives can see the engagement interaction records that are created when someone verifies a constituent's identity by using the Identity Verification flow. See lists of engagement interaction records by date range and select any record to view its details, including the overall status, verification questions, and verification status for each question.

📝 **Note:** Answers to verification questions are hidden to protect constituent privacy.

SEE ALSO:

    Audit Trail

Business Rules Engine in Public Sector Solutions

Automate policy decisions and calculations with Business Rules Engine.

Business Rules Engine comprises a suite of services, components, and objects that perform calculations and automate policy decisions. For example, use Business Rules Engine to automatically determine whether applicants qualify for unemployment insurance, small business loans, business licenses, or other public sector programs and services. Create business rules to automate the calculation of qualified benefit amounts, application fees, or other amounts based on input criteria.

The key elements of Business Rules Engine are expression sets and decision matrices.

Expression Sets
    Expression sets perform a series of calculations using matrix lookups and user-defined variables and constants. Specifically, expression sets call decision matrices, which are tables that allow you to implement complex rules in a systematic, readable way.

Decision Matrices
    Decision matrices match input values to a table row and return the row's output values. Expression sets and decision matrices accept JSON input from, and return JSON output to, OmniScripts.

Optionally, after you set up your business rule, use Decision Explainer to gain insights into the results of automatic calculations.

SEE ALSO:

    Business Rules Engine

    Decision Explainer with Public Sector Solutions

Compliant Data Sharing in Public Sector Solutions

Increase collaboration between internal and external users and maintain compliance with regulations and policies associated with the handling of confidential or sensitive information.

Use compliant data sharing to extend access to specific records that would otherwise be private, without the need for complex code. For internal users, define participant roles for each parent entity, and configure the level of default access that each participant should have. Provide Experience Cloud users with the ability to collaborate on certain records. Assign or remove access for specific participant groups and roles as needed, and track participant access for compliance.

For example, give grantmakers access to manage budget, funding award, and individual application records, and share these records with other internal participants based on their role. To streamline application completion, give grantseekers the ability to add participants to a grant application so they can update details of the application, such as the requested amount.

You can use compliant data sharing to manage access to these objects in Public Sector Solutions:

- Account
- Budget
- Custom objects
- Funding Awards
- Funding Opportunity
- Individual Application
- Interaction
- Interaction Summary
- Opportunity

To extend user access to other Public Sector Solutions entities, configure sharing settings.

SEE ALSO:

[Compliant Data Sharing](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions with Public Sector Solutions

USER PERMISSIONS

To grant compliant data sharing access to internal users:
- Configure Compliant Data Sharing

To add or update participants, assign participant roles, and manage participant status:
- Use Compliant Data Sharing

Decision Explainer with Public Sector Solutions

Use Decision Explainer to provide transparency into business rule calculations.

Decision Explainer is a collection of setup objects that provide insight into why a business rule generated a specific result. Decision Explainer helps public sector agencies ensure compliance, detect fraud, and provide equitable distribution of benefits.

For example, use Decision Explainer to understand the expression sets in Business Rules Engine calculations for:

- Individual and business application fees
- Unemployment benefits
- Housing loan eligibility checks

SEE ALSO:

[Decision Explainer](#)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Set Up Document Checklist Items in Public Sector Solutions

Turn on document checklists, assign permissions, customize page layouts, and configure document types to store data extracted from documents submitted by constituents.

Use document checklists to route documents submitted by constituents through approval workflows.

1. Turn on document checklists.

   a. From Setup, in the Quick Find box, enter `Document Checklist Settings`, and then select **Document Checklist Settings**.

   b. Turn on **Checklist Items with Attachments**.

2. Assign the Document Checklist permission set to users who work with checklist documents and items. For example, assign the permission set to intake officers who process business license applications. For instructions, see View and Assign Permission Sets in Public Sector Solutions on page 19.

   To allow constituents to constituents to upload document checklist items from an Experience Cloud site, grant Read access to the Document Checklist Item object on the profile you're using for site members.

3. Add Document Checklist Items to the related lists on application page layouts.

   a. From Setup, in Object Manager, select **Business License Application**.

   b. Click **Page Layouts** and then select the layout.

   c. In the palette, click **Related Lists**.

   d. Drag **Document Checklist Items** from the palette to the Related Lists section of the page.

   e. Save the layout.

   f. Repeat for the Individual Application object.

4. Create document types for checklist items and to use for reporting.

   a. From Setup, in the Quick Find box, enter `Document Type`, and then select **Document Type**.

   b. Click **New Document Type**.

   c. Enter a Label, such as `Business License Application`, and then press Tab to automatically populate the Name field.

   d. Select **Is Active** and, optionally, enter a description.

   e. Save your work.

SEE ALSO:

Document Tracking and Approvals

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up Document Tracking and Approvals:
- System Administrator profile

Configure and Use Identity Verification in Public Sector Solutions

Use a flow to verify a constituent's identity before sharing private information over the phone or through another engagement channel.

Before sharing benefit details or other sensitive and private information with a constituent, make sure that Public Sector Solutions representatives confirm who they're talking to. With Identity Verification, use a flow to verify the identity of individuals who initiate an engagement in person, though a phone call, over Open CTI, or by using a messaging session. Agents can even verify the identity of an authorized representative, such as a constituent's spouse or legal guardian.

By default, agents can verify a constituent or their representative's account name, birth date, phone number, and postal code. You can also customize identity verification flows with your own processes and questions. Add the flow to engagement interaction or voice call record pages, or to the utility bar of one of the Public Sector Solutions Lightning apps, so agents can start it easily from wherever they're working. Every verification generates an engagement interaction record, which is used to create an audit trail.

SEE ALSO:

    Identity Verification

    Service Cloud Channels

    Create and Customize Lightning Experience Record Pages

    Add a Utility Bar to Lightning Apps

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up Identity Verification flows:
- Customize Application AND Industry Service Excellence

To use Identity Verification flows:
- Industry Service Excellence

Use Intelligent Document Automation in Public Sector Solutions

Simplify and centralize document management processes and reduce manual data entry.

Process applications and their supporting documents more efficiently—and accurately—by extracting and storing data from constituent-submitted documents in one place. Use document checklist items to help ensure that constituents submit required supporting documentation for their applications.

Create a Document Checklist Item

To encourage constituents to submit required supplemental documents, create document checklist items that help them manage file uploads and approvals. Here's how to create a document checklist item for a business license application.

1. Open the business license application that you want to create a document checklist item for.

2. In the Document Checklist Items related list, click **New**.

3. Enter a name for the checklist item.

4. If you use document types, select the appropriate document type.

5. (Optional) Under File Pertains To, specify the contact or user related to the file.

6. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create a Document Checklist Item:
- Document Checklist

To add Document Checklist Items to an Action Plan Template:
- Document Checklist, ActionPlans

To work with received documents:
- Document Checklist

Add a Document Checklist Item to an Action Plan Template

Make document processing workflows more consistent by using action plan templates that contain document checklist items. When you add a document checklist item to an action plan template, it's automatically added to action plans that are created from the template.

1. From the App Launcher (⣿), find and select **Action Plan Templates**.

2. Click **New**.

3. Enter a name and a description for the template.

4. For Action Plan Type, select **Industries**.

5. For Target Object select **Lead**.

6. Save your changes.

7. On the newly created action plan template, click **New Document Checklist Item** and select a document type, such as Business License Application.

8. If desired, create additional document checklist items.

9. Review your document checklist items, and then publish the template.

   🛑 Important: You can't change an action plan template after it's published. To make changes, create a new template and remove the published one.

Use Document Data to Create an Application

Relate pages from received documents to application or other record.

1. From the App Launcher, find and select **Received Documents**.

2. Select a document.

3. On the record detail page, click the quick action menu and then select **Transform Document**.

4. In the Transform Document window, select the pages that contain the data you need.

   - Select **All Pages**, or select **Custom** and specify the pages to include.
   - Select the box below a page thumbnail to include it.

5. To rotate a page, below its thumbnail, click ⟳ .

6. To attach the document to a record, for Associated Record, select an object and then search for and select a record.

7. Select document checklist items for the document.

8. Save your work.

SEE ALSO:

    Set Up Document Checklist Items in Public Sector Solutions

    Set Up Intelligent Document Automation Users

    Work with Action Plans and Templates

Configure and Use Interaction Summaries in Public Sector Solutions

Give caseworkers, case managers, and other users the ability to capture and manage interaction notes by using interaction summaries. Users can create interaction notes on cases, care plans, benefits, goals, complaints, referrals, and accounts.

Interaction summaries in Public Sector Solutions provide a single guided flow that enables users to take detailed notes of meetings and conversations with constituents or case participants. The flow provides rich text formatting and a large note-taking canvas that make it easy to effectively capture information, add action items or next steps, list attendees, attach relevant files, and share the notes with other users. They can also categorize notes with interest tags so that it's easy to search for and filter summaries to find notes from previous interactions.

The interaction notes guided flow to create and edit interaction notes uses these two OmniScripts: AdvancedNotes/AddNote and AdvancedNotes/InterestTag. The flows are activated and work out of the box. If desired, clone and customize them as per your requirements.

Set up interaction summaries for users to create and edit notes, and to publish them. You can also set up an approval process for users to review and approve their interaction notes before they publish them. A published note locks the related interaction summary and prevents further edits. Say, for example, that a caseworker writes an interaction note of a conversation with a client. The caseworker can publish the note to preserve the integrity of the interaction summary so that the note can be used as a witness statement or as evidence in a legal investigation.

Set Up Interaction Summaries

Enable interaction summaries and enhanced notes interface. Add the Interaction Summaries component to the Lightning record page of relevant objects, such as Case. Then, give users access to interaction summaries, enable interest tags, and configure field-level security on the Interaction Notes Published field so that users can publish the notes.

Create Interest Tags

To relate interest tags to notes, create tag categories, and then create interest tags in those categories.

Capture Interaction Notes

Take meeting notes; record attendees, the interaction date and time, and other details; add tags; upload documents; and share notes with other users by using a single guided flow.

Publish Interaction Notes

Publish notes in interaction summaries to prevent further edits. For example, publish an interaction note to protect the integrity of your official documentation of a key witness interview. The note can then serve as evidence in an investigation.

SEE ALSO:

Interaction Summaries (Financial Services Cloud)

Set Up Interaction Summaries

USER PERMISSIONS	
To set up and use Interaction Summaries:	Interaction Summary
To configure sharing settings for interactions and interaction summaries:	Interaction Summary AND Customize Application
To access participant management and advanced configuration for compliant data sharing:	Compliant Data Sharing Manager
To configure interest tags:	Interaction Summary AND Customize Application
To create a permission set:	Manage Profiles and Permission Sets
To assign a permission set to users:	Assign Permission Sets

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Enable interaction summaries and enhanced notes interface. Add the Interaction Summaries component to the Lightning record page of relevant objects, such as Case. Then, give users access to interaction summaries, enable interest tags, and configure field-level security on the Interaction Notes Published field so that users can publish the notes.

Enable Interaction Summaries and Enhanced Notes

Enable caseworkers and other users to capture and share notes of meetings and conversations with clients in an efficient and compliant manner.

1. From Setup, in the Quick Find box, enter `Interaction Summary`, and then, under Program and Case Management Settings, select **Interaction Summary Settings**.

2. Turn on **Interaction Summary**.

3. Turn on **Enhanced Interaction Note Interface**.

   The enhanced interaction note interface is the guided flow that enables users to seamlessly create meeting notes; add interaction details, attendees, and interest tags; and share the notes with other users.

Add the Interaction Summaries Component to a Lightning Record Page

Add the Interaction Summaries component to the Lightning record page of relevant objects so that it's easy for caseworkers and others to access.

Here's how to add the Interaction Summaries component to the Lightning record page of the Case object.

1. From the App Launcher, find and select **Cases**.

2. Select a case.

3. Click ⚙ , and then select **Edit Page**.

4. Select the Tabs component on the page canvas and, in the properties panel, click **Add Tab**.

5. Click the new tab's label and select **Custom**.

6. Enter a name, such as `Interaction Summary`, and then click **Done**.

7. From the Components panel, drag **Interaction Summaries** to the new tab on the canvas.

8. In the properties panel, for Lookup Field, select **Related Record**.

   The component uses the Lookup Field value to populate the interaction summary records on the component. The Lookup Field values can vary for different objects. For example, on Account, select Account or Partner Account.

Give Users Access to Interaction Summaries

Allow users to control access to interaction summaries so that they can collaborate effectively with other users.

When working with cases, care plans, complaints, and other objects, constituent privacy is important. Here are the default access settings for interaction summaries:

- The org-wide default sharing setting for interaction summaries is Private for both internal and external access. As a result, by default, interaction summaries are available only to the users who create them.

- The Grant Access Using Hierarchies option is enabled for interactions and interaction summaries. As a result, users in a role hierarchy have access to interactions and interaction summaries for all users who are below them in the hierarchy, which potentially gives too many people access to private constituent data.

Expand user access by updating the org-wide sharing setting for interaction summaries, or by creating sharing rules on interaction summaries.

Restrict user access by enabling parent object-level access, or by configuring compliant data sharing on interactions and interaction summaries.

Parent object-level access

Provide users access to interaction summaries based on the permission level of the parent object that the interaction summaries look up to. For example, caseworkers with access to a case get access to all of the related interaction summaries.

> 📝 Note: You can disable access based on the parent object at any time.

Compliant data sharing

Configure compliant data sharing for the Interaction and Interaction Summary objects to control user access to interaction summaries. Make sure that you first create a permission set that's based on the Complaint DataSharing license, and assign it to the users. Then, disable the settings for role hierarchy–based sharing for the Interaction and Interaction Summary objects, which disables the Grant Access Using Hierarchies option for the objects.

After you configure compliant data sharing, the interaction note interface shows the options to share the note with other users.

- To enable parent object-level access:

  1. From Setup, in the Quick Find box, enter `Interaction Summary` and then, under Program and Case Management Settings, select **Interaction Summary Settings**.

  2. Turn on **Interaction Summary Custom sharing provider**.

- To configure compliant data sharing.

  1. From Setup, in the Quick Find box, search for and then select **Permission Sets**.

  2. Click **New**.

  3. Enter `Compliant Data Sharing Manager` as the label, and then press Tab to automatically populate the API Name.

  4. For License, select **Compliant DataSharing**.

  5. Save your changes.

The newly created permission set needs some additional system permissions, so add those permissions now.

6. Click **System Permissions** and then click **Edit**.

7. Turn on **Use Compliant Data Sharing** and click **Save**.

   Now, assign the permission set to the users, such as caseworkers.

8. In the Quick Find box, enter `Users`, and then select **Users**.

9. Under the Full Name column, select the name of the user, and click **Permission Set Assignments | Edit Assignments**.

10. Move the **Compliant Data Sharing Manager** and **Interaction Summary** sets from the Available Permission Sets list to the Enabled Permission Sets list, and save your changes.

11. In the Quick Find box, enter `Interaction Summary` and then, under Program and Case Management Settings, select **Interaction Summary Settings**.

12. Disable **Role Hierarchy-Based Sharing for Interaction Summary**, **Role Hierarchy-Based Sharing for Interactions**, and **Interaction Summary Custom sharing provider**.

13. In the Quick Find box, enter `Compliant Data Sharing`, and then select **Object Enablement Settings**.

14. Turn on compliant data sharing for CRM users for **Interaction**.

   To share an interaction and to access the Interaction Participant object, ensure that compliant data sharing is enabled for the Interaction object.

15. Turn on compliant data sharing for CRM users for **Interaction Summary**.

   To share an interaction summary and to access the Interaction Summary Participant object, ensure that compliant data sharing is enabled for the Interaction Summary object.

16. Select **Participant Roles** and then create participant roles with default access levels, as required.

   For example, create a role named Notes Publisher with read/write access for the Interaction Summary parent object, and create another role named Notes Reviewer that has read-only access to the Interaction Summary parent object.

Enable Topics and Interest Tags

For users to relate interest tags to interaction notes, first enable topics for objects. Then give users permission to create, edit, and delete interest tags and tag categories. Finally, enable interest tags.

📝 Note: Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Topics`, and then select **Topics for Objects**.

2. Select **Interaction Summary**, and then select **Enable Topics**.

3. Save your work.

4. In the Quick Find box, enter `Profiles`, and then select **Profiles**.

5. Click the profile name for users who work with interaction summaries, such as caseworkers, and then click **Edit**.

6. In System Permissions, select these permissions: Assign Topics, Create Topics, Delete Topics, Edit Topics, and Merge Topics.

7. Save your changes.

8. Turn on interest tags.

   a. In the Quick Find box, enter `Interest Tags`, and then select **Interest Tags**.

    b. Turn on **Interest Tags**.

Specify Interaction Notes Field-Level Security

To allow selected user profiles to publish notes, update field-level security for the Interaction Note Published field on the Interaction Summary object.

> 📝 Note: If your Public Sector Solutions org was created before Summer '24, before continuing, add the Interaction Notes Published field to the Interaction Summary object's page layout.

1. From the object management settings for Interaction Summary, select **Fields & Relationships**.

2. Select **Interaction Note Published**.

3. Select **Set Field-Level Security**.

4. Select **Visible** for all applicable user profiles, such as Standard User.

5. Save your changes.

SEE ALSO:

    Customize Page Layouts

    Sharing Settings

    Compliant Data Sharing

Create Interest Tags

To relate interest tags to notes, create tag categories, and then create interest tags in those categories.

You can also create and assign interest tags while you create an interaction note, or from the Interaction Summary tab, by clicking 🏷 for an interaction summary record.

1. Create interest tag categories.

    a. From the App Launcher, find and select **Tag Categories**.

    b. Click **New**.

    c. Enter a category name. For example, enter `Confidentiality`.

    d. Enter a description.

    e. If you're creating a second-level or third-level tag category, select a parent category.

    f. For Level, enter `1`, `2`, or `3`.

    g. Select an icon to represent the tag category.

    h. To activate the new category, select **Is Active**.

    i. Save your changes.

    j. Repeat these steps to create additional tag categories.

2. Create interest tags.

    a. From the App Launcher, find and select **Interest Tags**.

    b. Click **New**.

    c. Enter a tag name. For example, enter `Internal`.

    d. Enter a description.

    e. Select a tag category.

    f. Save your changes.

SEE ALSO:

    Create Tag Categories

    Create Interest Tags

Capture Interaction Notes

Take meeting notes; record attendees, the interaction date and time, and other details; add tags; upload documents; and share notes with other users by using a single guided flow.

For every interaction note that you create, Salesforce creates corresponding interaction and interaction summary records.

Here's how to create notes related to a case.

1. From the App Launcher, find and select **Cases**.

2. Select a case.

3. On the Interaction Summaries tab, click **New Interaction Note**.

4. Enter notes and next steps.

5. Optionally, attach supporting documents for the interaction.

6. Enter a name for the interaction, and select the interaction type.

7. Optionally, add interest tags and attendees.

8. Select users or user groups with whom you want to share the note, and select the type of access they have.

    The Share with Users section is available only if the admin has configured compliant data sharing for interactions and interaction summaries.

9. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create and edit interaction notes:
- Interaction Summary

    AND

    OmniStudio User

Publish Interaction Notes

Publish notes in interaction summaries to prevent further edits. For example, publish an interaction note to protect the integrity of your official documentation of a key witness interview. The note can then serve as evidence in an investigation.

Ask your admin to set up an approval process for stakeholders to review notes and, if approved, automatically publish them.

You can publish an interaction note only if:

Your profile has read-write access to the Interaction Note Published field on the Interaction Summary object.

OR

Another user grants you read-write access to the interaction note when they share it with you.

Here's how to publish an interaction note related to a case.

1. From the App Launcher, find and select **Cases**.

2. Select a case.

3. On the Interaction Summaries tab, select an interaction summary.

4. For Interaction Note Published, select **Yes**.

5. Save your changes.

SEE ALSO:

> Set Up an Approval Process

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To publish interaction notes:
- Interaction Summary

  AND

  OmniStudio User

Configure and View a Constituent's Life Events

Understand constituents' personal history by capturing significant events and milestones in their lives with the Life Events or Business Milestones component in Public Sector Solutions.

Capture and visualize key events in a constituent's life, such as graduation, getting married, having a baby, and changing jobs, using Life Events. Use the details to inform care plans and other services to support positive outcomes for constituents.

For information on how to set up and use life events, see Events and Milestones in the Financial Services Cloud documentation. Although it's written for financial services professionals, the instructions apply to Public Sector Solutions, too.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions and the Events and Relations Map add-on

Create Custom Documents with OmniStudio Document Generation in Public Sector Solutions

Create reports, certificates, letters, and other official documents for constituents from OmniStudio templates.

Public agencies generate all kinds of documents for constituents: inspection reports, permit certificates, letters of compliance or infractions, and other official communications such as court date reminders and changes to program qualifications or eligibility status.

With OmniStudio Document Generation (formerly Foundation Document Generation) you can generate these custom documents quickly, accurately, and consistently. OmniStudio Document Generation merges content from text-based files, such as Microsoft Word and PowerPoint files, with data from any standard or custom object to produce custom .docx, .pptx, and .pdf files. Templates define the structure, content, and format of the generated documents, and allow you to use data tokens, conditional logic, and tabulation to build complex, customized content. Templates can even accept JSON data from Salesforce or external data sources to include in documents. OmniStudio documents can be generated using client-side or server-side processing.

SEE ALSO:

  OmniStudio Document Generation

  Client-Side and Server-Side OmniStudio Document Generation Compared

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up OmniStudio Document Generation:
- Doc Gen Designer

To use OmniStudio Document Generation:
- Docgen Designer Standard User

Use Outcome Management to Create and Measure Your Public Sector Solutions Impact Strategy

Evaluate whether the programs that you offer to constituents achieve their intended outcomes, and take action based on data-driven insights.

Use Outcome Management with Public Sector Solutions to define your strategy for affecting change, and then collect data, track progress, and evaluate the effectiveness of the programs that you offer based on actionable data. For example, see how many unhoused people receive shelter through a housing grant, and adjust the program or grant amount for improved results. Or track the academic progress of children enrolled in publicly funded early childhood learning and development programs.

With Outcome Management, track whether the programs you run achieve their intended outcomes, and ensure that your programs are being delivered as planned.

SEE ALSO:

  Outcome Management

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Manage Party Relationship Groups in Public Sector Solutions

Define groups of individuals, such as households or trusts, and use them to deliver support services that are tailored to the group.

Organize and track relationships among people by using purpose-built standard objects and guided flows. Create and use party relationship groups, also called group membership, to more effectively deliver programs and services. For example, map the relationships among the family members of a household for a constituent who receives a benefit. Or map the relationships for a case participant, their household, their employer, and their household's health insurance provider.

SEE ALSO:

[Group Membership and Households](#)

Record Aggregation in Public Sector Solutions

Aggregate one object's records and associate them with the record of an unrelated object to consolidate information and make it easy for users to access information from both objects.

When caseworkers review benefit applications, to help determine eligibility, they often want to check the benefits that are already assigned to the members of the household. Sounds simple, but because benefit assignments aren't directly related to party relationship groups, the caseworker has to navigate through the connecting objects to find the information: They go to the party relationship group's parent account, select a group member from the Related Contacts related list, and then view the Benefit Assignments related list on the group member's person account record page. The caseworker repeats the process to see the benefits that are assigned to each member of the party relationship group.

Make it easy for caseworkers and others to find information from two unrelated objects by using record aggregation. With record aggregation, you aggregate the records of one object (such as benefit assignment) and associate them with the relevant record of another, unrelated object (such as party relationship group). To view only a subset of records (such as benefit assignments for a specific benefit program), apply filters to aggregate only the records that matter to users. Users can see the aggregated records in the Record Aggregation Results related list on a party relationship group record page or on the Record Aggregation Results list view page, and make decisions more quickly based on the information.

To set up record aggregation, first identify the object whose records you want to aggregate (benefit application, in our example), and the unrelated object (party relationship group, in our example) that you want to associate with the aggregated records. Create a record aggregation definition component, which is an instance of a metadata type, and deploy it to your org. Then, configure and run a Data Processing Engine definition to perform the join operations, aggregate the records, and store the results in the Record Aggregation Result object. Each result maps one aggregated record to a record in the unrelated object. Finally, add the Record Aggregation Results related list to the party relationship group record page, so the information is easy to find. You can create multiple record aggregation definition components, and create them for any two unrelated objects, not just benefit application and party relationship group.

Note: Set up record aggregation either from within Salesforce or by using Metadata API. For instructions on how to set up record aggregation in Salesforce, see [Rollup Definitions for Record Rollups](#). If you set up record aggregation by using Metadata API and you're not familiar with Metadata API, see [Understanding Metadata API](#) before continuing.

[Set Up Record Aggregation](#)

Create a record aggregation definition component that specifies the objects and the join conditions. Deploy the component using a package.xml manifest. Then, generate a Data Processing Engine definition ID for the configuration and run the definition periodically to aggregate records.

View Aggregated Records

See aggregated records on a list view or in a related list for a party relationship group.

Set Up Record Aggregation

Create a record aggregation definition component that specifies the objects and the join conditions. Deploy the component using a package.xml manifest. Then, generate a Data Processing Engine definition ID for the configuration and run the definition periodically to aggregate records.

Create the Record Aggregation Definition Component

Create an XML file that defines a record aggregation definition component, which is an instance of a metadata type.

Create the Record Aggregation Definition Manifest File

To deploy your record aggregation definition component, create a package.xml manifest file that contains it.

Deploy the Record Aggregation Definition Component

Create a ZIP file that contains your record aggregation definition component and package.xml manifest, and then deploy it to your org by using Metadata API.

Generate the Data Processing Engine Definition for Record Aggregation

Make a REST API request to generate the Data Processing Engine definition that you need to aggregate the records.

Run the Data Processing Engine Definition to Aggregate Records

Use a scheduled flow to periodically run a Data Processing Engine definition that aggregates records and updates aggregation results.

Add the Record Aggregation Result Related List to the Party Relationship Group Page Layout

If you are associating aggregated records from an unrelated object with party relationship groups, help users find the aggregated data by making the Record Aggregation Results related list available on the Party Relationship Group page layout.

> EDITIONS
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Create the Record Aggregation Definition Component

Create an XML file that defines a record aggregation definition component, which is an instance of a metadata type.

Specify these elements in the record aggregation definition component XML file.

RecordAggregationDefinition

Identifies the object that contains the records to aggregate (aggregateFromObject) , and the object to associate with the aggregated records (aggregateToObject). Specifies the displayName, description, aggregationType (Record), and status (Active) for the definition.

recordAggregationObject

Specifies an object (associatedObject) in the aggregation sequence that includes the aggregate-to object, the aggregate-from object, and the objects that connect them. The expression in filterLogic specifies the order in which recordAggregationObjectFilters are applied to an object's records. If you define two or more filters for an object but don't specify the filterLogic, the filters are applied by using a logical AND expression.

recordAggregationObjectFilter

Specifies a filter applied to a recordAggregationObject's records. The expression consists of the field (associatedObjectField), the operator, and the value that the field's data is compared with. Each filter also has a sequenceNumber to use to build a logical expression of filters.

> EDITIONS
>
> Available in: Lightning Experience
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recordAggregationJoinCondition

> Specifies the fields (joinField and relatedJoinField) for each pair of connecting objects, the navigation sequence of the objects (navigationSequenceNumber), and the type of the join (Intermediate). You can specify up to six record aggregation join conditions in a record aggregation definition component.

The XML file is structured like this.

```xml
<?xml version="1.0" encoding="UTF-8"?>
<RecordAggregationDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <aggregateFromObject><!--The API name of the aggregate-from
object--></aggregateFromObject>
    <aggregateToObject><!--The API name of the aggregate-to object--></aggregateToObject>

    <status><!--The status of the definition: Active, Inactive, or Draft--></status>
    <aggregationType>Record</aggregationType> <!--The aggregation type must be Record-->
    <description><!--A description of the aggregation instance--></description>
    <displayName><!--The display name of the aggregation instance--></displayName>
    <recordAggregationObject>
        <associatedObject><!--The API name of the aggregate-to object--></associatedObject>

        <masterLabel><!--The label for the first record aggregation object--></masterLabel>

        <developerName><!--The API name of the first record aggregation
object--></developerName>
        <filterLogic><!-- The logical expression for the order in which multiple filters
are applied--></filterLogic>
        <recordAggregationJoinCondition>
            <joinField><!--The API name of the join field on the object associated with
the record aggregation object--></joinField>
            <navigationSequenceNumber>1</navigationSequenceNumber> <!--The sequence number
 begins at 1-->
            <relatedJoinField><!--The API name of the join field on the related record
aggregation object's associated object--></relatedJoinField>
            <relatedRecordAggregationObject><!--The API name of the related record
aggregation object--></relatedRecordAggregationObject>
            <type>Intermediate</type>
        </recordAggregationJoinCondition>
        <recordAggregationObjectFilter>
          <associatedObjectField><!--The field to use to filter
records--></associatedObjectField>
          <operator><!--The way to compare the associatedObjectField field data with the
value--></operator>
          <value><!--The reference value to compare with the associatedObjectField field
data--></value>
          <sequenceNumber>1</sequenceNumber>
        </recordAggregationObjectFilter>
        <recordAggregationObjectFilter>
       <associatedObjectField><!--The field to filter records by--></associatedObjectField>

        <operator><!--The way to compare the associatedObjectField field data with the
value--></operator>
        <value><!--The reference value to compare the associatedObjectField field data
with--></value>
          <sequenceNumber>2</sequenceNumber>
        </recordAggregationObjectFilter>
```

```
            ...
    </recordAggregationObject>
    <recordAggregationObject>
        <associatedObject><!--The API name of the next object in the
sequence--></associatedObject>
        <masterLabel><!--The label for the second record aggregation object--></masterLabel>

        <developerName><!--The API name of the second record aggregation
object--></developerName>
        <recordAggregationJoinCondition>
            <joinField><!--The API name of the join field on the object associated with
the record aggregation object--></joinField>
            <navigationSequenceNumber>2</navigationSequenceNumber>
            <relatedJoinField><!--The API name of the join field on the related record
aggregation object's associated object--></relatedJoinField>
            <relatedRecordAggregationObject><!--The API name of the related record
aggregation object--></relatedRecordAggregationObject>
            <type>Intermediate</type>
        </recordAggregationJoinCondition>
        <recordAggregationObjectFilter>
            <associatedObjectField><!--The field to filter records
by--></associatedObjectField>
            <operator><!--The way to compare the associatedObjectField field data with the
value--></operator>
            <value><!--The reference value to compare with the associatedObjectField field
data--></value>
            <sequenceNumber>1</sequenceNumber>
        </recordAggregationObjectFilter>
    </recordAggregationObject>
                .
                .
                .
    <recordAggregationObject>
        <associatedObject><!--The API name of the aggregate-to object--></associatedObject>

        <masterLabel><!--The label for the last record aggregation object--></masterLabel>

        <developerName><!--The API name of the last record aggregation
object--></developerName>
    </recordAggregationObject>
</RecordAggregationDefinition>
```

Save the XML file with the name <component-name>.RecordAggregationDefinition.

📝 Note: Make sure that every record aggregation definition component has a unique XML filename.

👁 Example: Here's an example of a record aggregation definition component that aggregates party incomes and associates them with party relationship groups. The component includes filters to select party incomes that are active, monthly, and associated with the primary member of a party relationship group that represents a household.

```
<?xml version="1.0" encoding="UTF-8"?>
<RecordAggregationDefinition xmlns="http://soap.sforce.com/2006/04/metadata">
    <aggregateToObject>PartyRelationshipGroup</aggregateToObject>
    <aggregateFromObject>PartyIncome</aggregateFromObject>
    <status>Active</status>
```

```xml
<aggregationType>Record</aggregationType>
<description>Aggregate head of household's income to household</description>
<displayName>Party Income to Party Relationship Group</displayName>
<recordAggregationObject>
    <associatedObject>PartyRelationshipGroup</associatedObject>
    <masterLabel>Party Relationship Group Object</masterLabel>
    <developerName>PartyRelationshipGroupObject</developerName>
    <recordAggregationJoinCondition>
        <joinField>Account</joinField>
        <navigationSequenceNumber>1</navigationSequenceNumber>
        <relatedJoinField>Account</relatedJoinField>

<relatedRecordAggregationObject>AccountContactrelationObject</relatedRecordAggregationObject>

        <type>Intermediate</type>
    </recordAggregationJoinCondition>
    <recordAggregationObjectFilter>
      <associatedObjectField>Type</associatedObjectField>
      <operator>Equals</operator>
      <value>Household</value>
      <sequenceNumber>1</sequenceNumber>
    </recordAggregationObjectFilter>
</recordAggregationObject>
<recordAggregationObject>
    <associatedObject>AccountContactRelation</associatedObject>
    <masterLabel>Account Contact Relation Object</masterLabel>
    <developerName>AccountContactRelationObject</developerName>
    <recordAggregationJoinCondition>
        <joinField>Contact</joinField>
        <navigationSequenceNumber>2</navigationSequenceNumber>
        <relatedJoinField>Party</relatedJoinField>

<relatedRecordAggregationObject>PartyIncomeObject</relatedRecordAggregationObject>
        <type>Intermediate</type>
    </recordAggregationJoinCondition>
    <recordAggregationObjectFilter>
      <associatedObjectField>IsPrimaryMember</associatedObjectField>
      <operator>Equals</operator>
      <value>true</value>
      <sequenceNumber>1</sequenceNumber>
    </recordAggregationObjectFilter>
</recordAggregationObject>
<recordAggregationObject>
    <associatedObject>PartyIncome</associatedObject>
    <masterLabel>Party Income Object</masterLabel>
    <developerName>PartyIncomeObject</developerName>
    <filterLogic>1 AND 2</filterLogic>
    <recordAggregationObjectFilter>
      <associatedObjectField>IncomeFrequency</associatedObjectField>
      <operator>Equals</operator>
      <value>Monthly</value>
      <sequenceNumber>1</sequenceNumber>
    </recordAggregationObjectFilter>
    <recordAggregationObjectFilter>
```

```
            <associatedObjectField>IncomeStatus</associatedObjectField>
            <operator>Equals</operator>
            <value>Active</value>
            <sequenceNumber>2</sequenceNumber>
        </recordAggregationObjectFilter>
    </recordAggregationObject>
</RecordAggregationDefinition>
```

Create the Record Aggregation Definition Manifest File

To deploy your record aggregation definition component, create a package.xml manifest file that contains it.

1. In a text editor, create a file named `package.xml`.

2. Copy and paste this XML content to the file.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>RecordAggregationDefinition</name>
    </types>
    <version>60.0</version>
</Package>
```

3. Save the file.

SEE ALSO:

Trailhead: Package.xml Metadata Management

Salesforce Metadata API Developer Guide: Build a Package.xml Manifest

Deploy the Record Aggregation Definition Component

Create a ZIP file that contains your record aggregation definition component and package.xml manifest, and then deploy it to your org by using Metadata API.

1. On your local file system, create a folder named `RecordAggregationConfig`.

2. Inside `RecordAggregationConfig`, create a folder named `RecordAggregationDefinitions`.

3. Move your `package.xml` manifest file to the `RecordAggregationConfig` folder.

4. Move your record aggregation definition component XML file to the `RecordAggregationDefinitions` folder.

5. Compress the contents of the `RecordAggregationConfig` folder into a ZIP file named `RecordAggregationConfig.zip`.

6. Deploy `RecordAggregationConfig.zip`.

   - For instructions on how to deploy by using a file-based call, see deploy().

   - For instructions on how to deploy by making a REST request, see Deploy Metadata with Apex Testing Using REST.

👁 **Example:** This sample request deploys a Record Aggregation Definition component using the `RecordAggregationConfig.zip` file.

```
curl https://host/services/data/v60.0/metadata/deployRequest
 -X POST -H 'Authorization: Bearer token' -F 'json={
     "deployOptions" :
         {
         "allowMissingFiles" : false,
         "autoUpdatePackage" : false,
         "checkOnly" : false,
         "ignoreWarnings" : false,
         "performRetrieve" : false,
         "purgeOnDelete" : false,
         "rollbackOnError" : false,
         "runTests" : null,
         "singlePackage" : true,
         "testLevel" : "NoTestRun"
         }
     };type=application/json; charset=US-ASCII' -F
'upload=@RecordAggregationConfig.zip;type=application/zip;
charset=US-ASCII'
```

Here's the response to the request. The status shows that the deployment is pending:

```
{
  "id": "0AfRM000001vWU60AM",
  "validatedDeployRequestId": null,
  "deployOptions": {
    "checkOnly": false,
    "runTests": null,
    "testLevel": "NoTestRun",
    "singlePackage": true,
    "allowMissingFiles": false,
    "performRetrieve": false,
```

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To deploy a record aggregation definition component:

- Record Aggregation Access

```json
    "autoUpdatePackage": false,
    "rollbackOnError": false,
    "ignoreWarnings": false,
    "purgeOnDelete": false,
    "runAllTests": false
  },
  "deployResult": {
    "id": "0AfRM000001vWU60AM",
    "messages": null,
    "retrieveResult": null,
    "success": false,
    "checkOnly": false,
    "ignoreWarnings": false,
    "rollbackOnError": false,
    "status": "Pending",
    "numberComponentsDeployed": null,
    "numberComponentsTotal": null,
    "numberComponentErrors": null,
    "numberTestsCompleted": null,
    "numberTestsTotal": null,
    "numberTestErrors": null,
    "details": null,
    "createdDate": null,
    "startDate": null,
    "lastModifiedDate": null,
    "completedDate": null,
    "errorStatusCode": null,
    "errorMessage": null,
    "stateDetail": null,
    "createdBy": null,
    "createdByName": null,
    "canceledBy": null,
    "canceledByName": null,
    "done": false,
    "runTestsEnabled": false,
    "runTestResult": null
  }
}
```

This sample request checks the status of the deployment request.

```
curl https://host/services/data/v60.0/metadata/deployRequest/0AfRM000001vWU60AM -X GET
 -H 'Authorization: Bearer token'
```

Here's the response confirming that the component was deployed successfully.

```json
{
  "id": "0AfRM000001vWU60AM",
  "validatedDeployRequestId": null,
  "deployOptions": null,
  "deployResult": {
    "id": "0AfRM000001vWU60AM",
    "messages": null,
    "retrieveResult": null,
    "success": true,
```

```
    "checkOnly": false,
    "ignoreWarnings": false,
    "rollbackOnError": false,
    "status": "Succeeded",
    "numberComponentsDeployed": 1,
    "numberComponentsTotal": 1,
    "numberComponentErrors": 0,
    "numberTestsCompleted": 0,
    "numberTestsTotal": 0,
    "numberTestErrors": 0,
    "details": {
      "componentFailures": [],
      "componentSuccesses": [],
      "retrieveResult": null,
      "runTestResult": null,
      "allComponentMessages": []
    },
    "createdDate": "2023-08-08T09:49:37.000+0000",
    "startDate": "2023-08-08T09:49:39.000+0000",
    "lastModifiedDate": "2023-08-08T09:49:42.000+0000",
    "completedDate": "2023-08-08T09:49:42.000+0000",
    "errorStatusCode": null,
    "errorMessage": null,
    "stateDetail": null,
    "createdBy": "005RM000002ho0G",
    "createdByName": "Admin User",
    "canceledBy": null,
    "canceledByName": null,
    "runTestsEnabled": false,
    "runTestResult": null,
    "done": true
  }
}
```

Generate the Data Processing Engine Definition for Record Aggregation

Make a REST API request to generate the Data Processing Engine definition that you need to aggregate the records.

To generate the Data Processing Engine definition ID, send a request to

`/services/data/v60.0/connect/record-aggregation/dpe-generation`.

Our example uses cURL, an open-source tool, to send the request. Before you begin, get your access token as described in Set Up Authorization.

In a Terminal window, enter this command, in this format, on one line.

```
curl https://host/services/data/v60.0/connect/record-aggregation/dpe-generation -X POST
-H 'Authorization: Bearer token' -H "Content-Type: application/json"-d '{}'
```

After the request succeeds, you receive a response in this format.

```
{
  "code": "200",
  "dpeIds": [
    "alphanumeric-ID"
  ],
  "isSuccess": true,
  "message": "DPE Generated Successfully"
}
```

The dpeId is the ID of the Data Processing Engine definition. Note this ID so that you can run the DPE definition to aggregate records.

The DPE definition is generated subject to the Data Processing Engine limits.

SEE ALSO:

Salesforce REST API Developer Guide: Send REST Requests with cURL

Data Processing Engine Limits

Run the Data Processing Engine Definition to Aggregate Records

Use a scheduled flow to periodically run a Data Processing Engine definition that aggregates records and updates aggregation results.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **New Flow**.

3. Select **Start From Scratch** and then click **Next**.

4. In the New Flow window, select **Schedule-Triggered Flow**.

5. Click **Create**.

6. In the Start element, click **Set Schedule**.

7. In the Set a Schedule window, enter a start date, start time, and the frequency.

8. Close the Set a Schedule window.

9. Add the Action element to the canvas.

   a. In the canvas, hover over ○ and click ⊕.

   b. Select **Action**.

10. In the Category section, select **All Actions**.

11. For Action, select **Run Record Aggregation Batch Processing Definition**.

12. Enter an API Name and a Label for the Action element.

13. (Optional) Enter a description.

14. For Execution Reference ID, enter the ID of the Data Processing Engine definition that you generated. Alternatively, enter the ID of the Record Aggregation Definition component that you deployed.

15. Save and activate the flow.

    The definition runs based on the schedule you set. After the definition runs, track its progress and status by using Monitor Workflow Services.

Add the Record Aggregation Result Related List to the Party Relationship Group Page Layout

If you are associating aggregated records from an unrelated object with party relationship groups, help users find the aggregated data by making the Record Aggregation Results related list available on the Party Relationship Group page layout.

1. From Setup, in Object Manager, select **Party Relationship Group**.

2. Select **Page Layouts**, and then click **Party Relationship Group Layout**.

3. In the palette, click **Related Lists**.

4. Drag **Record Aggregation Result** to the Related Lists area of the layout.

5. Save your changes.

View Aggregated Records

See aggregated records on a list view or in a related list for a party relationship group.

With record aggregation you can easily view data from two unrelated objects. For example, if benefit assignment records are aggregated and associated with a party relationship group, then when you review a benefit application, you can quickly check the benefits that are already assigned to the members of the household. Similarly, if party income records are aggregated and associated with party relationship groups, then you can easily see the income for every member of the group, and make informed decisions about benefit eligibility.

Your Salesforce administrator creates a record aggregation definition component, or instance, for every object whose records they aggregate and associate with an unrelated object. View aggregated records on the Record Aggregation Results list view page or in the Record Aggregation Results related list on a party relationship group record page.

To view record aggregation results:

1. From the App Launcher, find and select **Record Aggregation Results**.

   The list view shows record aggregation results for all the record aggregation instances in your org.

2. To see only the results for a particular record on an associated object:

   a. Click ▼ , and then click **Add Filter**.

   b. For Field, select **Aggregate To Record**. For Operator, select **Equals**. For value, enter the ID of the aggregate-to record.

   To determine the record ID, open a record and look in the browser's URL field. After the object name parameter is an 18-character string that represents the record ID. For example, in the URL
   `https://[domain]/lightning/r/PartyRelationshipGroup/0wKDo0000004C93MAE/view`, the record ID is `0wKDo0000004C93MAE`.

3. To see only the results for a particular record aggregation instance:

   a. Click ▼ , and then click **Add Filter**.

   b. For Field, select **Record Aggregation Definition**. For Operator, select **Equals**. For value, enter the ID of the record aggregation definition component.

   If you don't know the IDs for the record aggregation definition components in your org, ask your Salesforce administrator.

4. To see record aggregation results on a party relationship group record page:

   a. From the App Launcher, find and select **Party Relationship Groups**.

   b. Go to the **Record Aggregation Results** related list.

Configure and Use Record Alerts in Public Sector Solutions

Don't keep constituents waiting. Get notified that you need to act on a record to process an application or address a constituent concern.

Stay apprised of application, case, and other records that need attention from a Public Sector Solutions service representative with Record Alerts. The Record Alert component shows caseworkers, application reviewers, and other users when they need to act on a record. It provides a description of the alert and organizes alerts by categories, such as type, priority, and severity. Users can dismiss or snooze alerts

Public Sector Solutions supports record alerts on person accounts, business accounts, and individual applications.

SEE ALSO:

Record Alerts

Configure and Use Service Process Studio in Public Sector Solutions

Create robust start-to-finish processes to automate agencies' responses to service requests from constituents, from intake to resolution.

With Service Process Studio, you can design complex processes that automate the process of responding to service requests from constituents. Use data attributes, OmniScript forms, Apex classes, and record-triggered flows to create automation to quickly and reliably process service requests, such as updating a constituent's address. You can even use integration definitions to use data from external systems in your service processes.

SEE ALSO:

Service Process Studio

Configure and Use Timeline in Public Sector Solutions

Give caseworkers and other users a chronological view of a constituent's interactions with your agencies. With a timeline, caseworkers can see all past interactions, cases, complaints, referrals, and care plans with a constituent. Visualize the information chronologically, and click any event to see more information and related details.

How Timeline Works in Public Sector Solutions

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

Set Up a Timeline in Public Sector Solutions

Configure interactive timelines that provide access to information about constituents.

Add Timeline to a Record Page

To let your Public Sector Solutions users see the Timeline and its data, add it to a Lightning record page.

Add Timeline to Your Experience Cloud Site

To let people use Timeline without logging in to Public Sector Solutions, add it to your Experience Cloud site.

How Timeline Works in Public Sector Solutions

A timeline lets users see data from objects as a sequence of events happening over time. You determine what information shows on the timeline by choosing the base (or primary) object and the related objects. You can use standard objects or custom objects.

A user's profile permissions determine access to timelines. You can assign a user multiple timeline configurations.

For example, a user profile may have access to timelines that represent business license applications, individual permit applications, inspections, and cases.

Before you start configuring a timeline, identify your requirements. At a minimum, decide which objects are required for the timeline and the information you want it to show.

Set Up a Timeline in Public Sector Solutions

Configure interactive timelines that provide access to information about constituents.

1. From Setup, in the Quick Find box, enter `Timeline`, and then select **Timeline**.

2. Turn on **Timeline Configuration**.

    📝 Note: Enabling Timeline is a one-time task. After you enable Timeline in your org, you can't disable it.

3. Click **New Timeline**.

    a. Enter a name for the timeline.

    b. Enter an API name for the timeline, or accept the name that's automatically generated.

    c. Select an object that serves as the basis for the timeline.

    You can base your timeline on any Salesforce object (standard or custom). You can add related objects to the timeline later.

    For example, to see a constituent's case history on a timeline, select the Case object.

    📝 Note: If you use a custom object on your timeline, ensure that it displays correctly by making sure it has a custom tab. See Create a Custom Object Tab for more information.

    d. Click **Save**.

4. On the Global Settings page, turn **Show Age** on to show how old a record of the base or primary object was when an event occurred, along with the date of the event.
    For example, you can see the age of a case based on when it was created.

5. If you chose to show age along with the timestamp, choose the field to use for calculating age.

    To see the age of a case, select the Created Date field.

6. Click **Next**.

7. On the Timeline Related Objects page, click **Add Related Object**.

    a. Select a related object (standard or custom) that contains information you want to display on the timeline.

    You can add up to five related objects per base object. If an object has record types, you can select up to three record types by default. Contact Salesforce Support if you want to increase the record type limit to five.

b. Select the field that associates the related object with the base timeline object, then click **Next**.

If a related object has only one lookup to the base object, then the field is auto-selected and can't be changed.

> 📝 Note: Enhanced Timeline doesn't support encrypted fields. Make sure any field you choose isn't encrypted.

c. Add conditions for showing records on the timeline. You can add conditions only for indexed fields. Then click **Next**.
For example, you can show tasks that aren't canceled or deferred.

d. Select the Title, Subtitle, Timestamp, and Summary Field fields for the timeline events, and select whether to let users create records from the timeline. Then click **Next**.

Every event on a timeline has a title, an optional subtitle, a timestamp, and an optional summary, which are sourced from fields in the related object.

Title

You can use something like a Subject field. For example, "In-Home Aide."

Subtitle

You can use something like a Description field. For example, "In-home support needed for quality of life."

Timestamp

Select a field that's likely to have a value. You can only use fields that are indexed, such as Created Date. See Indexes for information on how to create custom indexes on other fields. The timestamp appears alongside the event on the timeline. Events without a timestamp don't appear on the timeline.

Summary Field

Select a field that contains the summary that you want to show on Timeline. You can select only the string, text, and text area fields. Users, for example contact center agents, can read the summary to get a quick overview of an event and provide personalized support to customers. To see the Summary Field field, see Enable Summary. If you don't select a field, the summary card doesn't appear on Timeline.

If you select **Let users create records from timeline**, users with the required permissions can click **New** to create a record directly from the timeline.

e. Select the fields and related lists that you want to show on the timeline, and then click **Add**.

The selected Summary Field field isn't available for selection on the Fields tab.

8. To save the timeline and make it available for use, click **Activate**.

9. Preview the timeline you've configured by selecting a base object record in the View Timeline On field.
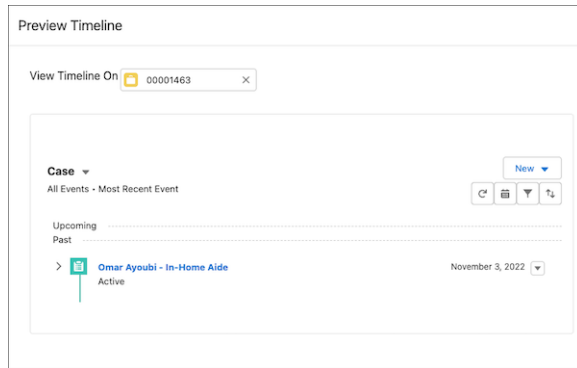
Add Timeline to a Record Page

To let your Public Sector Solutions users see the Timeline and its data, add it to a Lightning record page.

1. Go to the record page of the object on which you created a timeline.

2. Select the gear icon on the top-right corner of the page and then click **Edit Page**.

3. Drag the Timeline component to the editable content area.

4. To select the timeline configurations you want to make available to users, click **Select** in the component properties panel.

   Only active timeline configurations are available for selection.

5. In the Timeline window, select the required configurations and then click **OK**.

   You can select up to 5 timeline configurations.

6. Save and activate your changes.

Add Timeline to Your Experience Cloud Site

To let people use Timeline without logging in to Public Sector Solutions, add it to your Experience Cloud site.

1. From Setup, in the Quick Find box, enter `All Sites` and select **All Sites**.

2. Click **Builder** for the site in which you want to add Timeline.

   You can add Timeline to only those sites that support record detail pages.

3. Select the required record page from the Home menu.

4. Drag the **Timeline** component from the Components menu to the relevant content area.

5. In the Timeline properties panel, click **Select…**.

6. In the Timeline window, select the required configurations and then click **OK**.

   You can select up to five configurations.

7. Publish your changes.

Licensing and Permitting in Public Sector Solutions

Configure regulatory authorities, business regulatory authorization types, training requirements, and fees to use to issue licenses and permits.

📹 Watch a video

📖 Dive deeper into Salesforce Help.

- Portal Setup for Constituent Access to Services
- Build a License and Permit Portal
- Case Proceedings
- CRM Analytics for Public Sector Solutions

⛰ Use Trailhead to build and test your skills.

- Licensing, Permitting, and Inspections Data Model in Public Sector Solutions
- Licensing, Permitting, and Inspections with Public Sector Solutions

Download and Install the Licensing and Permitting Process Packages

Download and install process libraries that contain components for automating licensing and permitting workflows in Public Sector Solutions.

Licensing and Permitting Prerequisites

Before you set up licensing and permitting in Public Sector Solutions, complete the prerequisites.

Understand Regulatory Compliance in Public Sector Solutions

Learn about the regulatory objects that support licensing and permitting.

Configure Regulatory Authorizations in Public Sector Solutions

Configure regulatory authorities and authorization types for the licenses and permits that your agencies issue to businesses and individual constituents.

Configure License Training Requirements in Public Sector Solutions

Set up the training courses, course offerings, and exams that individuals must complete to qualify for professional and occupational licenses.

Configure Regulatory Transaction Fees in Public Sector Solutions

Set up fees associated with license and permit applications, and with inspections and regulatory code violations.

Approval Process for Licensing and Permitting

Configure automation features to allow intake agents, compliance officers, and other users to quickly and efficiently review and approve applications for licenses, permits, programs, and services.

Automatically Calculate Application Fees

Use Business Rules Engine to automatically calculate processing fees associated with business license applications.

Automatically Create a Fee for an Inspection or Enforcement Action

Build automation that creates a regulatory transaction fee from an inspection visit or a violation enforcement action in Public Sector Solutions.

Provide Insights into Policy Decisions in Public Sector Solutions

Quickly view the reasoning behind Business Rules Engine determinations and calculations.

Issue a License

After all reviews and inspections are completed and approved, issue a license to a constituent in Public Sector Solutions.

Build a License and Permit Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where constituents can apply for licenses and permits, and view and manage their applications, inspections, and fees.

Download and Install the Licensing and Permitting Process Packages

Download and install process libraries that contain components for automating licensing and permitting workflows in Public Sector Solutions.

Public Sector Solutions provides OmniScript flows and components that automate these licensing and permitting workflows. Some components are available directly in Public Sector Solutions; others are not built-in and require that you download them from GitHub.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Flow	Description	Available Directly in Public Sector Solutions	Requires GitHub Download and Install
ApplyforBusinessAuthorization	An application that constituents can complete on an Experience Cloud site to apply for a business license. The flow saves submitted forms as business license application records.	Yes	No
ApplyforIndividualAuthorization	An application that constituents can complete on an Experience Cloud site to apply for individual authorizations. The flow saves submitted forms as individual license application records.	No	Yes
AssessYourLicenseorPermitNeeds	A form that constituents can complete on an Experience Cloud site to get information on regulatory details, processes, and links to apply.	Yes	No

Flow	Description	Available Directly in Public Sector Solutions	Requires GitHub Download and Install
FileAComplaint	A form that constituents can use on an Experience Cloud site to file a complaint against a business or individual in the community.	Yes	No
SearchforLicenseorPermitHolder	A form that constituents can use on an Experience Cloud site to verify the qualifications of a business or individual.	No	Yes
ViolationFee_DataPack	An integration procedure that lets you automatically create a regulatory transaction fee for a violation enforcement action.	No	Yes

To get the packages on GitHub and add them to your org:

1. Go to the Public Sector Solutions process library.

> 📝 **Note:** These virtual processes and digital assets are Non-SFDC Applications and not part of your Services under your Master Subscription Agreement with Salesforce or any of its affiliates. They are provided as-is and not supported by Salesforce.

2. Download the files that you need.

- ApplyforIndividualAuthorization.zip
- SearchforLicenseorPermitHolder.zip
- ViolationFee_DataPack.json

3. For a list of the components that are included in the package, view or download the package's PDF readme.

4. Import the OmniStudio components and deploy the packages' Lightning web components to your org.

Licensing and Permitting Guided Flow Components
Review the OmniStudio components that are included directly in Public Sector Solutions for licensing and permitting guided flows.

SEE ALSO:
Import and Activate Process Package OmniStudio Components in Public Sector Solutions
Deploy Process Package Lightning Web Components to Public Sector Solutions

Licensing and Permitting Guided Flow Components

Review the OmniStudio components that are included directly in Public Sector Solutions for licensing and permitting guided flows.

Assess Your License or Permit Needs Flow Components

Component	Type
LicensingAndPermitting/Prescreening	OmniScript
DRCreatePreliminaryApplicationRecord	Omnistudio Data Mapper

Business Authorization Application Flow Components

Component	Type
LicensingAndPermitting/BusinessLicenseApplication	OmniScript
LicensingAndPermitting/Salon	OmniScript
DRBusinessAccountProfileInfo	Omnistudio Data Mapper
DRCreatePreliminaryApplicationReference	Omnistudio Data Mapper
DRCreateSalonLicenseApplication	Omnistudio Data Mapper
DRGetApplicationId	Omnistudio Data Mapper
DRGetBusinessActivityAuthorizationTypeId	Omnistudio Data Mapper
DRGetBusinessLicenseApplicationWasReturned	Omnistudio Data Mapper
DRGetContactForUser	Omnistudio Data Mapper
DRGetRegulatoryFee	Omnistudio Data Mapper
DRUpdateBLA	Omnistudio Data Mapper
DRUpdateIsSubittedPAR	Omnistudio Data Mapper
SalonLicenseForm	Omnistudio Data Mapper
TransformCalculatedFeeOutput	Omnistudio Data Mapper
UpdatePremAppRefCustom	Omnistudio Data Mapper
BLA_Fillable_PDF_v3_pdf	Fillable PDF form template

File a Complaint Flow Components

Component	Type
LicensingAndPermitting/PublicComplaint	OmniScript

Component	Type
LicensingAndPermitting/SearchAccount	Integration Procedure
PSSCreateLicensePermitComplaint	Omnistudio Data Mapper
PSSGetBusinessLicensesForIndividualAccount	Omnistudio Data Mapper
PSSGetLicensePermitComplaintName	Omnistudio Data Mapper
PSSGetLicensesForBusinessAccount	Omnistudio Data Mapper
ConfirmLicenseAndPermitComplaintSubmission	FlexCard

Licensing and Permitting Prerequisites

Before you set up licensing and permitting in Public Sector Solutions, complete the prerequisites.

Make sure that your org is ready for licensing and permitting before you start configuring regulatory authorizations, license training requirements, and regulatory transaction fees.

1. Set up useful related lists on the pages related to licensing and permitting. For example:

    a. On the account page layout, add the Assets, Associated Locations, Business Licenses, Notes & Attachments, and Public Complaints related lists.

    b. On the business license application and individual application layouts, add the Approval History, Authorization Application Asset, Authorization Application Place, Regulatory Transaction Fees, and Visits related lists.

    c. Add the Business Regulatory Authorization Types related list to the business type and regulatory authorization type layouts.

    📝 Note: This is not an exhaustive list. You can also update page layouts later, when a particular related list is required.

2. Give admins and users who configure regulatory authorizations and training requirements, and who issue licenses and permits, access to the objects they need to work with. Assign them the Public Sector Access permission set.

After completing these tasks, configure regulatory authorizations, license training requirements, and regulatory transaction fees.

📝 Note: In addition to manually creating records for licensing and permitting regulatory objects, you can speed the work by bulk-importing data. Use Data Loader to read, extract, and load data from CSV files or from a database connection.

SEE ALSO:

Customize Page Layouts with the Enhanced Page Layout Editor

View and Assign Permission Sets in Public Sector Solutions

About Data Loader

Understand Regulatory Compliance in Public Sector Solutions

Learn about the regulatory objects that support licensing and permitting.

Regulatory Authorization Model

Government agencies issue licenses and permits to ensure that businesses and individuals adhere to the legal and regulatory requirements that pertain to the activities they perform. Public Sector Solutions provides a comprehensive regulatory framework that defines all of the compliance standards related to licenses and permits for the industries and constituents that you serve. You can also set up compliance standards and assessment measures for inspections that aren't associated with a license or permit, such as code enforcement inspections.

The regulatory compliance framework includes the departments or agencies responsible for monitoring compliance, the regulatory codes that outline the specific compliance requirements, and the criteria that inspectors and reviewers use to assess compliance and report noncompliance.

Regulatory Authorization Objects

Use these objects to set up your regulatory framework.

Regulatory Authority

Represents the issuing agency or department that defines and enforces regulatory requirements for a category of licenses, permits, and/or independent inspections.

Regulatory Authorization Type

Represents a license or permit required for a specific business type.

Business Type

Defines a category of a business and the types of activities it performs.

Business Regulatory Authorization Type

Maps a regulatory authorization type to a business type.

Business Regulatory Authorization Type Dependency

Defines a dependency relationship between multiple business regulatory authorization types and the order in which they're issued.

Regulatory Code

Defines a specific standard of compliance established by the regulatory authority.

Business License Application

Stores applicant information related to a request for a business license, including the relevant business type and regulatory authorization type.

Individual Application

Stores information related to an applicant's request for a license or permit.

Regulatory Code Assessment Indicator

Defines a specific measure that inspectors use to assess compliance with a regulatory code.

Regulatory Transaction Fee

Represents a fee associated with a regulatory action, such as an application fee, inspection fee, or fee resulting from a violation.

Regulatory Transaction Fee Item

Contains information about a regulatory transaction fee.

Regulatory Entity Relationships

This diagram shows how the regulatory objects relate to one another.
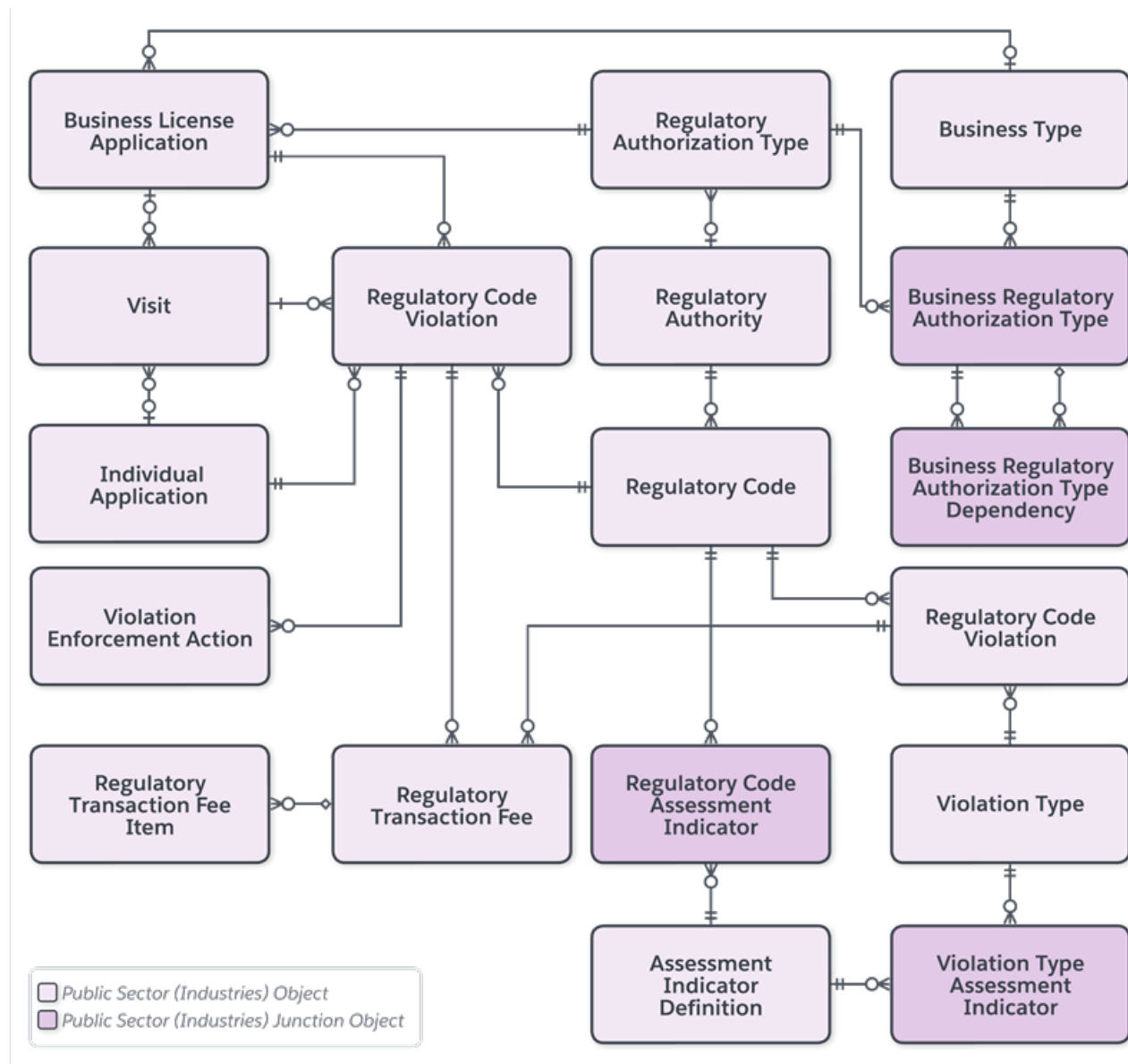
SEE ALSO:

Application and Authorization Data Model

Configure Regulatory Authorizations in Public Sector Solutions

Configure Regulatory Authorizations in Public Sector Solutions

Configure regulatory authorities and authorization types for the licenses and permits that your agencies issue to businesses and individual constituents.

Create Regulatory Authorities

Create records to represent the agencies and departments that have the authority to issue licenses and permits in Public Sector Solutions.

Create Regulatory Authorization Types

Define the types of licenses and permits that agencies and departments issue in Public Sector Solutions.

Create Business Types

Define the types of businesses and authorization activities that need a license or a permit in Public Sector Solutions.

Create Record Types for License and Permit Applications

Create record types so that you can then give business license and individual applications distinct application statuses, categories, and approval processes in Public Sector Solutions.

Create a Business Profile

Capture information about the business or individual on a license or permit application by using a business profile in Public Sector Solutions.

Create Business Regulatory Authorization Types

Map business types to regulatory authorization types by defining business regulatory authorization types in Public Sector Solutions.

Create Business Regulatory Authorization Type Dependencies

Establish relationships between business regulatory authorization types in Public Sector Solutions.

Show Required Permits for a Business Type

Show your users the licenses and permits, including dependencies, that are required for any type of business in Public Sector Solutions.

Create Regulatory Authorities

Create records to represent the agencies and departments that have the authority to issue licenses and permits in Public Sector Solutions.

Regulatory authorities are government departments or agencies that are responsible for licensing, regulating, and providing oversight to specific industries and occupations, protecting consumers, and ensuring public safety and standards. Examples of regulatory authorities are the Department of Motor Vehicles, which issues driver's licenses, and the Board of Barbering & Cosmetology, which issues licenses for hair salons, manicure establishments, and estheticians.

To create a regulatory authority:

1. From the App Launcher, find and select **Regulatory Authorities**.
2. Click **New**.
3. Enter a name. For example, enter `Board of Barbering & Cosmetology.`
4. Enter a description. For example, enter `Regulates the individuals who provide barbering, cosmetology, and electrology services and the establishments in which the services are performed.`
5. Save your changes, or save them and create another regulatory authority.

Create Regulatory Authorization Types

Define the types of licenses and permits that agencies and departments issue in Public Sector Solutions.

Regulatory authorization types represent the types of licenses and permits required for a specific business type or individual. They give businesses and individuals regulatory authorization. Examples of regulatory authorization types are salon establishment license, sign permit, physician license, and vehicle registration.

To create a regulatory authorization type:

1. From the App Launcher, find and select **Regulatory Authorization Types**.

2. Click **New**.

3. Enter a name. For example, enter `Salon Establishment License`.

4. Select a regulatory authorization category. For example, select **License**.

5. Save your changes, or save them and create another regulatory authorization type.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create regulatory authorization types:
- Public Sector Access

Create Business Types

Define the types of businesses and authorization activities that need a license or a permit in Public Sector Solutions.

Business types represent a category of business and the activities that the business performs. Examples of business types are salon, restaurant, and dentist. Each type of business requires the appropriate licenses and permits.

To create a business type:

1. From the App Launcher, find and select **Business Types**.

2. Click **New**.

3. Enter a name. For example, enter `Salon`.

4. Optionally, select an industry.

5. Select an authorization activity type. For example, select **Business**.

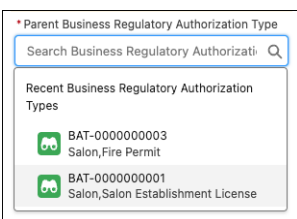6. Save your changes, or save them and create another business type.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create business types:
- Public Sector Access

Create Record Types for License and Permit Applications

Create record types so that you can then give business license and individual applications distinct application statuses, categories, and approval processes in Public Sector Solutions.

As a best practice, create record types whose names correspond to your license and permit types.

1. From the object management settings for business license application or individual application, go to **Record Types**.

2. Click **New**.

3. For Existing Record Type, select **Master**.

4. Enter a record type label, and then press Tab to automatically populate the record type name.

5. Enter a description.

6. Select **Active**.

7. Select the profiles that have access to the record type. To enable the record type for all profiles, select **Make Available** in the profile table header.

8. Select the profiles for which the record type is the default. To make it the default record type for all profiles, select **Make Default** in the profile table header.

9. Click **Next**.

10. Specify the page layout that shows for records of this type.

    - To apply one page layout for all profiles, select **Apply one layout to all profiles**, and then select the layout.

    - To apply different page layouts based on profiles, select **Apply a different layout for each profile**, and then select the layout for each profile.

11. Save your changes, or save them and create another record type.

To edit the picklist values for the record type, click the record type label, and then click **Edit** for the Application Status, Application Tier, Application Type, or Category picklist.

Create a Business Profile

Capture information about the business or individual on a license or permit application by using a business profile in Public Sector Solutions.

Create a business profile by associating a business account and other business details such as business tax identifier. Any business license application for a business is available in business account's related list.

📝 Note: Public Sector Solutions creates person accounts for individuals who self-register on an Experience Cloud site. You can see all individual applications in the person account related list.

1. From the App Launcher, find and select **Business Profiles**.

2. Click **New**.

3. Select a business account.

4. Enter a business tax identifier and a business operating name.

5. Select a business structure.

6. Save your changes, or save them and create another business profile.

Create Business Regulatory Authorization Types

Map business types to regulatory authorization types by defining business regulatory authorization types in Public Sector Solutions.

Business regulatory authorization types map a business type, such as a salon, to a required regulatory authorization type, such as a salon establishment license. The relationship establishes the licenses or permits that a business requires. In this example, a salon business license.

To create a business regulatory authorization type:

1. From the App Launcher, find and select **Business Regulatory Authorization Types**.

2. Click **New**.

3. Select a business type. For example, select **Salon**.

4. Select a regulatory authorization type. For example, select **Salon Establishment License**.

5. Save your changes, or save them and create another business regulatory authorization type.

Create Business Regulatory Authorization Type Dependencies

Establish relationships between business regulatory authorization types in Public Sector Solutions.

Many businesses require multiple licenses and permits to operate. Create business regulatory authorization type dependencies to define relationships and dependencies among required licenses and permits. Parent licenses or permits are issued before child licenses or permits.

For example, after a salon receives a business license, then it applies for a fire permit. A salon also needs a sign permit, but the sign permit is independent of the business license and fire permit, and the constituent can apply for it at any time.

To create a business regulatory authorization type dependency:

1. From the App Launcher, find and select **Business Regulatory Authorization Type Dependencies**.

2. Click **New**.

3. Enter the name of the dependency record. Use a colon or other syntax to show the relationship. For example, enter *Salon Establishment License: Fire Permit*.

4. For Parent Business Regulatory Authorization Type, search for and then select the first required business regulatory authorization type. For example, select **Salon,Salon Establishment License**.

💡 **Tip:** By default, the fields on the New Business Regulatory Authorization Type Dependency page search for the record name, which is BAT- followed by a 10-digit numeric string, such as `BAT-0000000001`. To see a descriptive business regulatory authorization type name in the search field, create a custom text formula field on the Business Regulatory Authorization Type object. For the formula, enter `BusinessTypeIdentifier.Name & "," & RegAuthTypeIdentifier.Name`. Save the field, and then add it to the object's default search layout list of selected fields.

5. For Dependent Business Regulatory Authorization Type, select the second business regulatory authorization type to apply for. For example, select **Salon,Fire Permit**.

6. Save your changes, or save them and create another business regulatory authorization type dependency.

SEE ALSO:

Create Custom Fields

Customize Search Layouts

Show Required Permits for a Business Type

Show your users the licenses and permits, including dependencies, that are required for any type of business in Public Sector Solutions.

To show compliance officers, inspectors, and other Public Sector Solutions users a list of the licenses and permits required for a business type, add the Permit Lightning web component to the business type page layout.

1. From the App Launcher, find and select **Business Types**.

2. Select a record.

3. Click ⚙ , and then select **Edit Page**.

4. Drag the **Permits** component to the page canvas.

5. Save and activate the page.

The component shows a list of all the permits that are required for the business type. Users can search for a specific license or permit and then select it to see its details.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To view business types and regulatory authorization types:
- Public Sector Access

To edit Lightning pages in Lightning App Builder:
- Customize Application
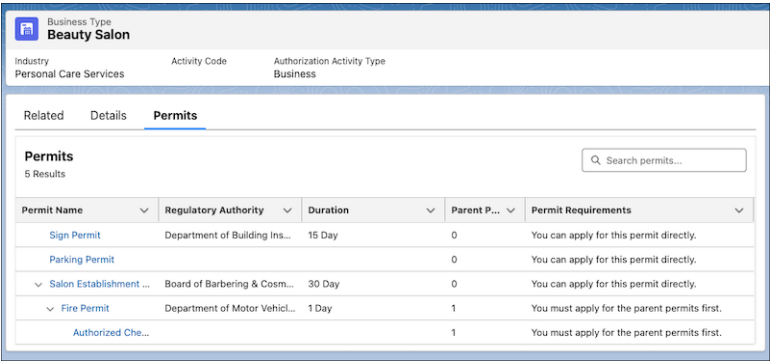
The Permits component is included on the Permits page in the Licenses And Permits Experience Cloud site template. Constituents can use the component to search for the list of required permits, and their dependencies, for any business type.

SEE ALSO:

[Show Permit Requirements on the Constituent Portal](#)

Configure License Training Requirements in Public Sector Solutions

Set up the training courses, course offerings, and exams that individuals must complete to qualify for professional and occupational licenses.

To issue professional or occupational licenses, many regulatory authorities require that licensees first complete a course of study or pass an exam. Licensing tests assess a test taker's knowledge of the health and public safety measures that protect consumers within their scope of practice. The tests ensure that licensees understand the basic skills required to work safely and not harm a consumer. For example, barbers and hair stylists must pass a written examination. Certified public accountants, licensed clinical social workers, pharmacists, registered dental hygienists, and other professionals must complete board-approved education courses and pass an examination.

In Public Sector Solutions, these objects represent training and testing requirements for professional and occupational licenses.

Training Course

A course that's required for an individual to complete to qualify for an occupational or professional license. Includes the course name, a description, and total credits and hours.

Course Offering

An instance of a training course, including its name, a description, the location, and the start and end dates.

Examination

Information about authorized examinations that qualify an individual for a professional or occupational license or permit, including the name, description, and status.

Training Course Participant

A training course completed by a person. Includes details such as the participant's name, the course offering ID, the name of the institution that offered the training, and the result.

Person Education

Information about the professional education for a person who's applying for a professional or occupational license or permit. Includes the person's contact ID, the name of the degree and the educational institution, the education level, graduation date, and status.

Person Examination

Information about an examination taken by a person who's applying for a professional or occupational license or permit. Includes the person's contact ID, the name of the exam and the institution that offered the exam, and the result, score, completion date, and effective to and from dates.
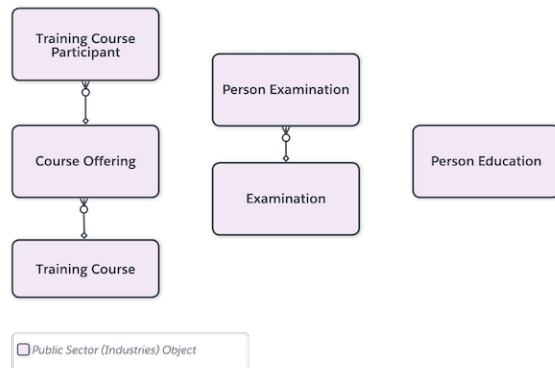
Here's how to create training course, course offering, and examination records in Public Sector Solutions.

📝 **Note:** Training courses, course offerings, and examinations are good candidates for bulk data import. See About Data Loader.

Create a Training Course

Define the training courses that are required for professional and occupational licenses and permits.

1. From the App Launcher, find and select **Training Courses**.

2. Click **New**.

3. Enter a name and, optionally, a description for the course. For example, for Name, enter `Dental Anatomy`. For Description, enter `Overview of dental anatomy, including the primary and permanent dentitions, normal facial and intraoral anatomy, and the anatomy of the periodontium.`

4. For Status, select **Active**.

5. Enter the total credits and hours for the course.

6. Save your changes.

Create a Training Course Offering

Create an instance of a training course with a specific location and dates.

1. From the App Launcher, find and select **Course Offerings**.

2. Click **New**.

3. Enter a name and, optionally, a description for the course. For example, for Name, enter `Dental Anatomy Spring 2023`.

4. Select a location, or create one.

5. Enter the start and end dates and times for the course offering.

6. For Course Name, select the training course related to the offering. For example, select **Dental Anatomy**.

7. Save your changes, or save them and create another course offering.

Create an Examination

Define the exams that are required for professional and occupational licenses and permits.

1. From the App Launcher, find and select **Examinations**.

2. Click **New**.

3. Enter a name and, optionally, a description for the examination. For example, for Name, enter `Registered Dental Hygienist Clinical Examination`.

4. For Status, select **Active**.

5. Save your changes.

To fully enable licensing training functionality in Public Sector Solutions, tie the objects to applications on your Experience Cloud site. Customize the OmniScript individual license application template or create an OmniScript form that requires applicants to provide training course, course offering, and examination details. Use an Omnistudio Data Mapper to create training course participant and person examination records, or person education records, upon submission. See Create and Update Data from OmniScripts.

Configure Regulatory Transaction Fees in Public Sector Solutions

Set up fees associated with license and permit applications, and with inspections and regulatory code violations.

> 📝 **Note:** To view the Regulatory Transaction Fees related list on application record pages, non-admin users require the Public Sector Access and Industries Visit permission sets. See the knowledge article Non-admin users can't access Regulatory Transaction Fee related list.

Line items can include an application fee, additional fee, or inspection fee. When a constituent applies for a license, information such as the authorization category, the authorization type, and establishment size are used to calculate the fee line items.

Create a Fee for an Application

Create a regulatory transaction fee for a business license or individual application.

1. On the business license application or individual application record page, on the Regulatory Transaction Fees related list, click **New**.

2. Select an account.

3. Specify the status of the fee.

4. Provide comments if you want to explain the context of the fee.

5. Set the date and time from when the transaction fee is applicable.

6. Set the date and time that the fee is due.

7. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To access business license application or individual application records:
- Public Sector Access

To access regulatory transaction fee records:
- Public Sector Access

To create regulatory transaction fee items:
- Public Sector Access

Create Fee Line Items

Break a regulatory transaction fee into multiple line items with individual amounts.

1. On the related list of a business license application or individual application record page, select a regulatory transaction fee.

2. From the Regulatory Transaction Fee Items related list, click **New**.

3. Name your regulatory transaction fee item.

4. Enter the fee amount.

5. Optionally, add comments to describe the fee item.

6. Save your changes.

Approval Process for Licensing and Permitting

Configure automation features to allow intake agents, compliance officers, and other users to quickly and efficiently review and approve applications for licenses, permits, programs, and services.

Salesforce business automation tools and processes streamline review and approval workflows, such as for license and permit applications. Automated approval processes help ensure that applications are approved consistently and accurately, that approval steps are routed quickly and seamlessly to reviewers, and that opportunities for errors are minimized.

First, create a path to guide reviewers through your approval process. Paths provide a visual representation of each step of the approval process, based on application statuses.

Then, create a queue to distribute and assign submitted applications to the next available reviewer, and create an approval process that includes the steps to complete to approve a submitted application.

Finally, show reviewers items that are waiting for approval in a convenient component, and give reviewers quick access to useful information on application record pages by configuring the Hierarchical View component.

> **Note:** Some tools and processes in the application approval workflow require record types for license applications. Before continuing, make sure that you've created them. See Create Record Types for License and Permit Applications.

Create a Path for Application Approvals
Keep reviewers focused and on task by creating a path for application approvals in Public Sector Solutions.

Create a Queue for Application Reviewers
Share the workload by creating a queue so that reviewers can access applications that are ready to be processed in Public Sector Solutions.

Create an Approval Process for Applications
Create an approval process to automate the review of licenses, permits, and other applications in Public Sector Solutions.

Show Reviewers a List of Items to Approve in Public Sector Solutions
Add the Items to Approve component to a Lightning page so that reviewers can quickly find and act on approval requests.

Give Reviewers a Unified View of a Business or Applicant's Records
Give users a complete view into the records that are related to a license or permit application, a public complaint, or an account by using the Hierarchical View component.

Manage Approvals in Public Sector Solutions
Respond to approval requests and understand how to manage the stages of an approval process.

Create a Path for Application Approvals

Keep reviewers focused and on task by creating a path for application approvals in Public Sector Solutions.

A path provides a visual representation of a business process. Create a path based on application statuses and add it to application record pages so that reviewers can see the current stage of the approval process and mark an application status as complete.

1. From Setup, in the Quick Find box, enter `Path Settings`, and then select **Path Settings**.

2. If necessary, click **Enable**.

3. Click **New Path**.

4. Specify the path details.

    a. For Path Name, enter a unique name, and then press Tab to automatically populate the API reference name. For example, enter `Salon Establishment License`.

    b. For Object, select the object that the path is based on. For example, select **Business License Application**.

    c. Select a record type.

    d. For Picklist, select **Application Status**.

5. Click **Next**.

6. Select the fields and enter guidance to show for each step of the process.

7. Click **Next**.

8. Activate the path, and then click **Finish**.
   Now, add the path to business license application record pages.

9. From Setup, in the Quick Find box, enter `Lightning`, and then select **Lightning App Builder**.

10. Select your business license application record page layout, and then click **Edit**.

11. Drag the **Path** component to the page canvas just below the highlights panel.

12. Save and activate the page.

13. Optionally, configure paths for the Individual Application, Regulatory Code Violation, and Public Complaint objects.

SEE ALSO:

[Guide Users with Path](#)

Create a Queue for Application Reviewers

Share the workload by creating a queue so that reviewers can access applications that are ready to be processed in Public Sector Solutions.

Create a queue and add members to it based on user roles. For example, create a queue for application reviewers who complete the initial steps of the approval process, such as checking that supporting documentation is included. If desired, create multiple queues, such as a queue for compliance officers who complete onsite inspections for license applications. During an approval process, the queue owns the application record, and any member of the queue can take action to complete a step of the approval process.

1. From Setup, in the Quick Find box, enter `Queues`, and then select **Queues**.

2. Click **New**.

3. For **Label**, enter `Application Reviewers`, and then press Tab to automatically populate the queue name.

4. To email members when an application enters the queue, select **Send Email to Members**.

5. Add **Business License Application** to the list of selected objects.

6. For Queue Members, search for and select the roles to assign to the queue. For example, add **Role: Intake Officer** and **Role: Reviewer** to Selected Members.

7. Save your changes.

To enable queue members to receive and respond to email notifications, create an email template for the notifications, and enable email approval responses on the Process Automation Settings page in Setup.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create or change queues:
- Customize Application AND Manage Public List Views

For information on routing and monitoring queues, see the Service Cloud documentation.

SEE ALSO:

Create an Approval Process for Applications

Create an approval process to automate the review of licenses, permits, and other applications in Public Sector Solutions.

For new applications, create an approval process that assigns an application to your reviewer queue. The approval process also includes the steps required to approve or reject the application, and the actions to be taken when an application is approved or rejected.

> 📝 **Note:** The OmniScript business license application template that Public Sector Solutions provides, automatically creates a business license application record when a constituent submits an application on an Experience Cloud site. If you're not using the OmniScript business license application template that comes with Public Sector Solutions, build an OmniScript that uses an Omnistudio Data Mapper to create a business license application or an individual application record when the application is submitted. For more information, see Create and Update Data from OmniScripts.

You can create approval processes for any type of application review.

Before you begin:

If your Public Sector Solutions org was created before the Spring '24 release and you're creating an approval process for any of these objects, add the Approval History related list to the object's page layout.

- Benefit Assignment
- Business License Application
- Care Plan
- Care Plan Template
- Course Offering
- Goal Assignment
- Individual Application
- Inspection Assessment Indicator
- Omni Assessment Task
- Person Examination
- Preliminary Application Reference
- Public Complaint
- Regulatory Authorization Type Product
- Regulatory Code
- Regulatory Code Violation
- Violation Enforcement Action

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create approval processes:
- Customize Application

To access the Business License Application and Individual Application objects:
- Public Sector Access

Here's how to create a basic approval process for a business license application for a beauty salon. For more information, see Approval Processes.

1. From Setup, in the Quick Find box, enter `Approval`, and then select **Approval Processes**.

2. In Manage Approval Processes For, select **Business License Application**.

3. Click **Create New Approval Process**, and then select **Use Jump Start Wizard**.

4. Enter a name for the approval process, and then press Tab to automatically populate the unique API name.

   For example, enter `Salon Establishment License Approval Process`.

5. In Specify Entry Criteria, select **criteria are met**. Then, specify the criteria.

   a. In Field, select **Business License Application: Record Type**.

   b. Select **equals** as the operator.

   c. Select a record type as the value.

   For example, select **Salon Establishment License**.

6. In Select Approver, select **Automatically assign to queue**. Then, select your reviewer queue.

7. Save your changes.

8. Click **View Approval Process Detail Page**.

9. Define the approval steps.

   For example, add a step for completing an onsite inspection.

   a. On the Approval Steps related list, click **New Approval Step**.

   b. Enter a name and then press Tab to automatically populate the unique API name.

   For example, enter `Inspection`.

   c. In Step Number, specify where the step goes in the sequence of steps.

   For example, enter `2`.

   d. Click **Next**.

   e. Select **All records should enter this step**, and then click **Next**.

   f. In Select Approver, select **Automatically assign to queue**, and then select the queue.

   For example, select **Application Reviewers**.

   g. Select **Perform all rejection actions for this step AND all final rejection actions. (Final Rejection)**.

   h. Save your work, and return to the approval process detail page to review what you created.

10. Define the final approval actions.

    For example, update the business license application to the Approved status.

    a. On the Final Approval Actions related list, click **Add Existing**.

    b. In Choose Action Type, select **Field Update**.

    c. Add **Field Update: Reset Returned Field** to the Selected Actions list.

    d. Save your changes.

    e. On the Final Approval Actions related list, click **Add New**, and then select **Field Update**.

    f. In Name, enter `Application Approved`, and then press Tab to automatically populate the unique API name.

    g. In Field to Update, select **Application Status**.

    h. In Picklist Options, click **A specific value**, and then select **Approved**.

    i. Save your changes.

11. Define the final rejection actions.

For example, update the business license application record to indicate that it was returned to the applicant.

    a. On the Final Rejection Actions related list, click **Add New**, and then select **Field Update**.

    b. In Name, enter `Set Returned Field`, and then press Tab to automatically populate the unique API name.

    c. In Field to Update, select **Returned to Applicant**.

    d. In Checkbox Options, select **True**.

    e. Save your changes.

The constituent can address the issue that caused the rejection of the application, and reapply. Create an initial submission action to clear the Returned to Applicant field so that the resubmitted application can be reviewed.

12. On the Initial Submission Actions related list, click **Add New**, and then select **Field Update**.

13. In Name, enter `Reset Returned Field`, and then press Tab to automatically populate the unique API name.

14. In Field to Update, select **Returned to Applicant**.

15. In Checkbox Options, select **False**.

16. Save your changes.

17. Create additional steps to suit your business needs, and then activate the approval process.

SEE ALSO:

    Set Up an Approval Process

    Trailhead: Approval Process for Public Sector Solutions

Show Reviewers a List of Items to Approve in Public Sector Solutions

Add the Items to Approve component to a Lightning page so that reviewers can quickly find and act on approval requests.

To help reviewers get started on approval processes for applications, add the Items to Approve component to a Lightning page that's convenient. For example, add the component to the home page of the Public Sector: Licenses and Permits app.

1. From Setup, in the Quick Find box, enter `Lightning`, and then select **Lightning App Builder**.

2. Select **Home Page Default**, and then click **Edit**.

3. Drag the **Items to Approve** component to the page canvas.

4. Save your changes and activate the page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To edit pages in Lightning App Builder:
- Customize Application

Give Reviewers a Unified View of a Business or Applicant's Records

Give users a complete view into the records that are related to a license or permit application, a public complaint, or an account by using the Hierarchical View component.

Hierarchical View is a Lightning web component that provides a structured, cascading view of related lists. Add the component to a record page to save users from having to successively click through related records and navigate multiple tabs to gain context for a constituent and their license and permit applications. You can also use Hierarchical View to show caseworkers all of the investigations, violations, and enforcement actions for a complaint or account so that they can more easily make decisions about case proceedings and benefits. With the Hierarchical View component, you can show up to four levels of related lists in a single, unified view.

The Hierarchical View component supports these objects.

- Account
- Assessment Indicator Value
- Assessment Task
- Authorization Application Place
- Authorization Location Access Schedule
- Business License Application
- Individual Application
- Inspection Assessment Indicator
- Public Complaint
- Regulatory Code Violation
- Regulatory Transaction Fee
- Regulatory Transaction Fee Item
- Violation Enforcement Action
- Visit
- Custom objects, except custom objects that contain polymorphic lookup fields

Say, for example, that you want application reviewers to see a unified view of records related to business license applications. Business license applications typically require an inspection visit to ensure regulatory code compliance. At the visit, the inspector records regulatory code violations, which result in violation enforcement actions such as regulatory transaction fees. For this scenario, create a hierarchical view on business license applications that shows these ordered, nested related lists:

- the application's related visits
- each visit's related code violations
- each code violation's related enforcement actions
- each enforcement action's related fees

First, make sure that each object has the necessary related list on its record pages, and that each related list shows the fields that you want in the hierarchical view. For example, make sure that business license application pages have a Visits related list, and that visit pages have a Regulatory Code Violations related list. For instructions, see Customize Page Layouts with the Enhanced Page Layout Editor and Customize Related Lists.

Then, add the Hierarchical View component to a Lightning record page and define the levels of the hierarchy. Here's how to create a unified hierarchical view on business license applications.

1. In the License and Permit Management app, from the app navigation menu, select **Business License Applications**.

2. Select a record.

3. Click ⚙ , and then select **Edit Page**.

4. Select a tabbed component such as the component with the Related and Details tabs, and in the properties panel, click **Add Tab**.

5. Make it a custom tab and, for Custom Label, enter a name. For example, enter `Unified View`.

6. Select the tab and drag the **Hierarchical View** component to it.
   Now, define up to four levels of related lists to show in the component.

   🛑 **Important:** For each level, you can select only related lists that are on the page layout of the object on the next-highest level.

7. Select an object for the first level of the hierarchy. For a business license application, for example, select **Visits**.

8. Select an object for the second level of the hierarchy. For a business license application, for example, select **Regulatory Code Violations**.

9. Select objects for the third and fourth levels of the hierarchy. For a business license application, for example, select **Violation Enforcement Actions** and **Regulatory Transaction Fees**.

10. Enter the number of records to display for the first three levels of the hierarchy.

11. Save your changes and activate the page.

SEE ALSO:

    Understanding Relationship Fields and Polymorphic Fields

Manage Approvals in Public Sector Solutions

Respond to approval requests and understand how to manage the stages of an approval process.

Respond to Approval Requests

Open an item to approve, review the application's details, and approve, reject, or reassign an approval request.

1. On the home page, in the Items to Approve component, select a business license application or an individual application.

2. To check the application's supporting documents, on the application record page, in the Files related list, click an attached file.

> 📝 Note: If you don't see the Files related list—or any of the other tabs or related lists we mention here—ask your admin to add the missing element to the application page layout.

3. To check application-related records such as visits, regulatory code violations, and enforcement actions, go to the **Unified View** tab.

4. To create a visit, on the Visits related list, click **New**. Or, if your admin has configured it, click the **Create Visit** quick action button.

5. To check place or asset details, go to the Authorization Application Places or Authorization Application Assets related list.

6. In the Items to Approve component, use the Approve, Reject, and Reassign quick action buttons to respond to the approval request.

Understand Approval Process Stages

Application approval processes typically involve multiple stages in which different reviewers each sign off on part of the process. Reviewers can reject an application and give comments explaining reasons for a rejection, which an applicant can use to address and resubmit the application. Use application statuses to move an application through a multistage approval process. For example:

- When a license application is submitted, your admin can configure an automated process that sends the application for approval with Reviewer 1. At this point, the application status is **Submitted**.

- The first reviewer examines the application for inconsistencies and approves it. The status of the application changes to **Intake Complete**, and the application is added to the next reviewer's approval requests.

- The second reviewer verifies the supported documents and finds they're complete. The application status changes to **Ready for Inspection**, and the application is added to the compliance officer's approval requests.

- The compliance officer creates an inspection visit and assigns it to an inspector. The inspector visits the business premises and conducts the inspection. When the inspector finishes and approves the application, the application status changes to **Approved**.

- The approver issues a license and the application status changes to **Issued**.

SEE ALSO:
   Respond to an Approval Request
   Manage Multiple Approval Requests

Automatically Calculate Application Fees

Use Business Rules Engine to automatically calculate processing fees associated with business license applications.

Configure a decision matrix and expression set to determine an application fee amount based on the authorization category and type that the constituent enters in the OmniScript license application form. For example, automatically charge a base fee of $100 for a barber's license application and $150 for a salon establishment license application.

Create Decision Matrices for an Application

Create a decision matrix that calculates a fee for an application.

A decision matrix is a table that includes input values in one column and output values in another column. When an expression set calls a decision matrix, it finds the table row that matches the input values, and returns that row's output values. It's easy to change conditions in a decision matrix so that your agencies and departments can keep pace with ever-changing rules and policies.

Now that we've created an application form for our constituent to request a license for her in-home salon, it's time to create the decision matrices for the business rule that will determine the application fee. We create decision matrices to calculate a basic application fee and a premium (percentage-based) fee.

1. From the App Launcher (⦂⦂⦂), find and select **Business Rules Engine**.

2. From the app navigation menu, select **Lookup Tables**.

3. Click **New**, select **Decision Matrix**, and then click **Next**.
   First, let's create the matrix used to calculate the base fee.

4. For Name, enter *CMBase Fee*, and for Type, select **Standard**.

5. Save your work.

6. On the record page for your new decision matrix, on the Related tab, click version 1 of the matrix.

7. Add columns to define your input and output data. Use this table to create a decision matrix and name it *CMBase Fee*, to calculate a base fee based on values that the constituent enters in the AuthorizationCategory and AuthorizationType fields of the license application form.

Input Data		Output Data
AuthorizationCategory (Text)	**AuthorizationType (Text)**	**BaseFee (Currency)**
License	Barber's License	100
License	Salon Establishment License	150
Permit	Temporary Promo Event Permit	50

8. Create another decision matrix and call it `CMPremiumFee`, to calculate a premium, percentage-based fee based on values that the constituent enters in the AuthorizationCategory and Application Category fields of the application form.

Input Data		Output Data
AuthorizationCategory (Text)	**Application Category (Text)**	**PercentageFee (Percent)**
License	Special	20
Permit	Special	30

Build an Expression Set for the Business Rule

Create an expression set that calculates a fee for an application using a lookup table and variables.

Expression sets are the calculation engine of business rules. They consist of a series of steps, connected in a logical flow, built from variables, constants, and decision matrices.

Configuring an expression set is a multistep process. First, you create a usable version of your expression set. Then, you create variables and constants for inputs, outputs, and values that are used by and passed between the steps. Next, you add a logical sequence of steps that perform calculations or evaluate conditions using variables, constants, and decision matrices. After you've created a flow, you simulate your expression set with test values to verify that it's working as expected and then, finally, you activate the expression set.

Let's create an expression set now that calculates the application fee for our salon-owner constituent based on the values they enter in the application form and the conditions defined in our decision matrices.

1. From the App Launcher (⠿), find and select **Business Rules Engine**.

2. Click the app navigation menu and select **Expression Sets**.

3. Click **New**.

4. For Name, enter `Fee_Calculation`, and then save your work.

5. On the record page for your new expression set, on the Related tab, clicks the action menu for the expression set version and select **Open in Expression Set Builder**.

6. Create the variables for the expression set.

    a. Click ⣿ ≡ , and then click **Add Resource**.

    b. Specify these options.

        a. For Resource Type, select **Variable**.

        b. For Name, enter `Base_Fee`.

        c. For Data Type, select **Currency**.

        d. For Default Value, enter `0`.

    c. Click **Done And New**.

    d. Specify these options.

        a. For Resource Type, select **Variable**.

        b. For Name, enter `CMBaseFee_BaseFee`.

        c. For Data Type, select **Currency**.

       d. For Default Value, enter *0*.

    e. Click **Done And New**.

    f. Specify these options.

       a. For Resource Type, select **Variable**.

       b. For Name, enter *Premium_Fee*.

       c. For Data Type, select **Currency**.

       d. For Default Value, enter *0*.

    g. Click **Done And New**.

    h. Specify these options.

       a. For Resource Type, select **Variable**.

       b. For Name, enter *CMPremiumFee_PercentageFee*.

       c. For Data Type, select **Percent**.

       d. Click **Done**.

7. Add elements to the expression set to calculate the base fee.

    a. Click ⊕ in the Expression Set canvas and select **Lookup Table**. In the Lookup Table Details field, search for and select **CMBaseFee**. Then, click 🔳 and name the element *Get Base Fee*.

    b. Click ⊕ in the Expression Set canvas and add a **Calculation** element after the Get Base Fee step. For Formula, enter *CMBaseFee_BaseFee*. For Output Variable, select **Base_Fee**. In the Element Details panel, name the calculation *Set Base Fee* and select **Include in Output**.

8. Add a Conditional Group to the expression set to calculate the premium fee.

    a. Click ⊕ in the canvas and add a **Conditional Group** element after the Set Base Fee step.

    b. In the placeholder Condition element, click in the expression field, add **ApplicationCategory**, and complete the expression by adding *== 'Special'*. Be sure to include spaces around the operator. The final expression looks like this: *ApplicationCategory == 'Special'*.

    c. Click ⊕ after the Condition and add a **Lookup Table** to the Conditional Group. Search for and select **CMPremiumFee**.

    d. Click ⊕ after the Decision Matrix and add a **Calculation** to the Conditional Group. For Formula, enter *Base_Fee * CMPremiumFee_PercentageFee*. For Output Variable, select **Premium_Fee**. In the Element Details panel, name the calculation element *Compute Premium Fee* and select **Include in Output**.

9. Save your work.

Before activating your expression set, run simulations with default and custom test input variables. If the expression set doesn't work as expected, edit the elements and simulate again. When you're satisfied, activate it.

SEE ALSO:

    Decision Matrices

    Expression Sets

Automatically Create a Fee for an Inspection or Enforcement Action

Build automation that creates a regulatory transaction fee from an inspection visit or a violation
enforcement action in Public Sector Solutions.

Create a Decision Matrix to Calculate a Fee for an Inspection or Enforcement Action

Create a decision matrix that calculates a regulatory transaction fee from an inspection visit or a
violation enforcement action.

Use Business Rules Engine to automatically calculate fees associated with inspections or enforcement
actions. First, set up a decision matrix that contains input values in one column and output values
in another column. When an expression set calls the decision matrix, it finds the table row that
matches the input values, and returns that row's output values. For example, set a base fee for each
zip code that you serve in a lookup table.

1. From the App Launcher (⠿) find and select **Business Rules Engine**.

2. Click the app navigation menu and select **Lookup Tables**.

3. Click **New**, and then select **Decision Matrix**.

4. Click **Next**.

5. Specify these details.

    a. For Name, enter *Base_Application_Fee*.

    b. For Type, select **Standard**.

6. Save your work.

7. On the record page of the decision matrix, on the Related tab, select version 1 of the matrix.

8. To define your input and output data, add columns to the matrix.

    a. Click **Add Column**. For Column Header, enter *ZipCode*, for Header Type select **Input**, and for Data Type select **Number**.

    b. Click **Add Column**. For Column Header, enter *BaseFee*, for Header Type select **Output**, and for Data Type select **Currency**.

    c. Click **Done**.

9. Add these input and output data values in separate rows of the matrix.

Input Data	Output Data
Zip Code (Number)	**BaseFee (Currency)**
73933	$116
49448	$153
18195	$85
85215	$118
72366	$163
07305	$142

Input Data	Output Data
Zip Code (Number)	**BaseFee (Currency)**
11581	$82
43027	$112

10. Activate the decision matrix.

Build an Expression Set to Calculate a Fee for an Inspection or Enforcement Action

Create an expression set that calculates regulatory transaction fees using a lookup table and variables.

In the expression set, configure a step to call the input and output values in a decision matrix. Create variables to assign values for additional fees and other parameters. Then, configure calculations that use the lookup table and variables to calculate an additional fee and a total fee.

For example, create an expression set to calculate a base fee using the zip code of the establishment, an additional fee based on the number of seats in the establishment, and a total fee that combines the two fees.

Create an Expression Set

Create the expression set to perform fee calculations based on the lookup table inputs and outputs and other parameters.

1. From the App Launcher (⠿) find and select **Business Rules Engine**.

2. Click the app navigation menu and select **Expression Sets**.

3. Click **New**.

4. For Name, enter *Application_Fee*.

5. For Usage Type, select **Default**.

6. Save your work.

Create Expression Set Resources

Create variables and constants to store values for calculations.

1. On the record page for your new expression set, select version 1 of the expression set.

2. Click ▤ , and then click **Add Resource**.

3. Specify these options.

    a. For Resource Type, select **Variable**.

    b. For Resource Name, enter *Base_Fee*.

    c. For Data Type, select **Currency**.

    d. For Decimal, enter *0*.

4. Click **Done And New**.

5. Specify these options.

    a. For Resource Type, select **Variable**.

    b. For Resource Name, enter *Additional_Fee*.

    c. For Data Type, select **Currency**.

    d. For Decimal, enter *0*.

6. Click **Done and New**.

7. Specify these options.

    a. For Resource Type, select **Variable**.

    b. For Resource Name, enter *Total_Fee*.

    c. For Data Type, select **Currency**.

    d. For Decimal, enter *0*.

8. Click **Done and New**.

9. Specify these options.

    a. For Resource Type, select **Variable**.

    b. For Resource Name enter *Seating_Capacity*.

    c. For Data Type, select **Number**.

    d. For Decimal, enter *0*.

10. Click *Done and New*.

11. Specify these options.

    a. For Resource Type, select **Constant**.

    b. For Resource Name enter *Seating_Capacity_Base_Fee*.

    c. For Data Type, select **Currency**.

    d. For Decimal, enter *0*.

    e. For Default Value, enter *$25*.

12. Click **Done**.

Configure a Lookup Table Element

Add a Lookup Table element to call inputs and outputs from a decision matrix.

1. Click ⊕ in the Expression Set canvas and select **Lookup Table**. In the Lookup Table Details field, search for and select
Base_Application_Fee. Then, click 🔳 and name the element *Get Base Fee*.

2. In the Set Base Fee element, select **Map Variables**.

3. Expand **Output Variables**.

4. For Action, select **Map**, and then search for and select **Base_Fee**.

5. Click **Done**.

6. In the Element Details panel, name the lookup table element *Set Base Fee* and select **Include in Output**.

Configure Calculation Elements

Add Calculation elements to calculate the additional fee based on seating capacity and the total fee.

1. Click ⊕ after the Decision Matrix and add a Calculation element.

2. For Formula, enter `Seating_Capacity * Seating_Capacity_Base_Fee`.

3. For Output Variable, enter `Additional_Fee`.

4. In the Element Details panel, name the calculation element `Compute Additional Fee` and select **Include in Output**.

5. Click ⊕ in the canvas and add a Calculation element after the Compute Additional Fee step.

6. For Formula, enter `Base_Fee + Additional_Fee`.

7. For Output Variable, enter `Total_Fee`.

8. In the Element Details panel, name the calculation element `Compute Total Fee` and select **Include in Output**.

9. Save your work.

   Before activating your expression set, run simulations with default and custom test input variables. For example, enter a number for seating capacity and enter a zip code that's listed in the decision matrix, and click **Simulate**. If the expression set doesn't work as expected, edit the elements and simulate again. When you're satisfied, activate it.

SEE ALSO:

Decision Matrices

Expression Sets

Provide Insights into Policy Decisions in Public Sector Solutions

Quickly view the reasoning behind Business Rules Engine determinations and calculations.

Give Public Sector Solutions reviewers insights into fee calculations, eligibility determinations, and benefit calculations so they can share the rationale behind application decisions with constituents. For example, consider the constituent who applied for a permit to open a salon at their residence. They're thrilled when they're granted the permit, but they notice that they were charged more than the base fee documented on the city's permitting website, so they call to ask about the discrepancy. With Decision Explainer, the application reviewer can see the application's history, the expression set that was used to evaluate it, and tell the constituent why they were charged an additional fee.

To set up Decision Explainer, create the records for each object and business rule, and give application reviewers access to decision logs on application record pages. Use these Decision Explainer objects to store and locate the metadata associated with every business rule.

Create Application Subtype Definitions

Define the types of applications used in your Decision Explainer entities, such as a licensing application or a permit application.

Create Business Process Type Definitions

Define the types of business processes that are applied in your Public Sector Solutions rule, such as approving an application for an individual or for a business.

Create Explainability Action Definitions

Define where the metadata for your Decision Explainer business rules are stored in Public Sector Solutions.

Create Explainability Action Versions

Define and store versions of the explainability actions used by your Decision Explainer business rules in Public Sector Solutions.

Integrate Business Rules Engine with Decision Explainer

Make your form and business rule available to Decision Explainer so that reviewers in Public Sector Solutions can access decision logs.

Add the Decision Explainer Log History Component to Application Record Pages

Add the Decision Explainer Log History component to the appropriate Lightning record pages so that application reviewers can see an application's decision explanations.

Share Decision Explanations with Constituents

Give constituents insights into the reasoning behind application decisions in your Public Sector Solutions Experience Cloud site.

Create Application Subtype Definitions

Define the types of applications used in your Decision Explainer entities, such as a licensing application or a permit application.

1. From Setup, in the Quick Find box, enter `Decision Explainer`, and then select **Application Subtype Definition**.

2. Click **New Application Subtype Definition**.

3. For Label, enter a name and then press Tab to autopopulate the Developer Name. For example, enter `Licensing and Permitting`.

    📝 Note: The developer name for application subtype definitions is limited to 10 characters. If your label is too long, write a shorter one, or delete some characters from the auto-populated developer name. Try to keep them similar. Keep in mind that every developer name must be unique.

4. Optionally, enter a Description.

5. From the Application Usage Type field, select the application's domain that best defines the application's subtype. For example, select **Explainability Service**.

6. Save your changes, or save them and create another application subtype definition.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up Decision Explainer entities:
- Decision Explainer Service Access

Create Business Process Type Definitions

Define the types of business processes that are applied in your Public Sector Solutions rule, such as approving an application for an individual or for a business.

1. From Setup, in the Quick Find box, enter `Decision Explainer`, and then select **Business Process Type Definition**.

2. Click **New Business Process Type Definition**.

3. For Label, enter a name and then press Tab to autopopulate the Developer Name. For example, enter `License Application`.

    📝 Note: The developer name for application subtype definitions is limited to 10 characters. If your label is too long, write a shorter one, or delete some characters from the auto-populated developer name. Try to keep them similar. Keep in mind that every developer name must be unique.

4. Optionally, enter a Description.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set up Decision Explainer entities:
- Decision Explainer Service Access

5. From the Application Usage Type field, select the application's domain that best defines the application's subtype. For example, select **Explainability Service**.

6. Save your changes, or save them and create another business process type definition.

Create Explainability Action Definitions

Define where the metadata for your Decision Explainer business rules are stored in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter *Decision Explainer*, and then select **Explainability Action Definition**.

2. Click **Explainability Action Definition**.

3. For Label, enter a name and then press Tab to autopopulate the Developer Name. For example, enter *License Fee Calculation*.

4. For Business Process Type, click 🔍 and select the business process type definition for this explainability action definition.

5. For Application Type, select the type of application for which you want to generate an explainability log. For example, select **Public Sector**.

6. For Action Log Schema Type, select the type of action log schema you want to use for the application. For example, select **Expression Set**. The default value is Other.

7. Optionally, enter a Description.

8. For Application Subtype, click 🔍 and select the application subtype definition for this explainability action definition.

9. Save your changes, or save them and create another explainability action definition.

Create Explainability Action Versions

Define and store versions of the explainability actions used by your Decision Explainer business rules in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter *Decision Explainer*, and then select **Explainability Action Version**.

2. Click **New Explainability Action Version**.

3. For Label, enter a name. For example, enter *License Fee Calculation v1*.

4. Select **Active** to make this action version available for use.

   📝 Note: You can't edit or delete active explainability action version records.

5. For Explainability Action Definition, click 🔍 and select the explainability action definition for this explainability action version. One explainability action definition can have multiple explainability action versions.

6. Optionally, enter a Description.

7. Save your changes, or save them and create another explainability action version.

Integrate Business Rules Engine with Decision Explainer

Make your form and business rule available to Decision Explainer so that reviewers in Public Sector Solutions can access decision logs.

With Business Rules Engine, you can automate the calculation of fees based on certain factors. For example, a salon must pay an application fee for a new business license. The application fee amount may vary depending on the zip code of the establishment, the number of chairs in the salon, or a combination of these factors.

To automate fee calculation with Business Rules Engine, set up decision matrices to store the base fee amounts for each factor, such as zip code and chair quantity. Then, configure an expression set to calculate the total fee based on the input parameters.

When the constituent submits the application, an expression set action step in the OmniScript invokes the expression set, which automatically determines the fee by processing the input data through the conditions and calculations in your expression set.

Decision Explainer then creates a log that provides the reasoning behind the fee calculation.

> **Note:** The ApplyforBusinessAuthorization process package is available in your org after you install the OmniStudio package, which includes sample OmniScripts and expression sets for application fee calculations.

To invoke the expression set that calculates the fee, add an expression set action step to the OmniScript.

1. In the OmniStudio app, from the app navigation menu, select **OmniScripts**.

2. Select the OmniScript version for your application.

3. Click **New Version**.

4. Add an Expression Set Action step.

   a. In the Build panel, expand **Actions**.

   b. Drag an **Expression Set Action** directly below the Set Values step that sets the input data for the expression set.

   c. In the Properties panel, name the expression set action. For example, enter `GetLicenseFeeExplanation`.

5. In the Properties panel of the expression set action, add a key value pair.

   a. Under Remote Options, select **+ Add New Key/Value Pair**.

   b. For Key, enter `explainabilitySpecName`.

   c. For Value, enter the dev name provided in the explainability action definition record that calculates the license fee. For example, enter `License_Fee_Calculation`.

   > **Note:** You can't edit the properties of an active OmniScript.

   OmniStudio saves your work automatically.

SEE ALSO:

Automatically Create a Fee for an Inspection or Enforcement Action

Add the Decision Explainer Log History Component to Application Record Pages

Add the Decision Explainer Log History component to the appropriate Lightning record pages so that application reviewers can see an application's decision explanations.

The Decision Explainer Log History component shows the date and time, expression set name, and version number for each decision. Reviewers can click the action menu for any log entry and choose **View Details** to see the variables, values, and formulas that the expression set used to calculate the decision.

To add the Decision Explainer Log History component to application Lightning record pages:

1. From Setup, in Object Manager, click the object whose layout you want to edit. For example, click **Business License Application**.

2. Click **Lightning Record Pages** and then click the page layout name. For example, click **Business License Application Record Page**.

3. Click **Edit**.

4. Drag **Decision Explainer Log History** from the Components panel to the Lightning page canvas and position it where you want it to appear.

5. If desired, use the properties panel to add filter logic to control when the component appears on the page. For more information, see Dynamic Lightning Pages.

6. Save your changes and exit Lightning App Builder.

7. Repeat to add the Decision Explainer Log History component to individual application Lightning record pages.

SEE ALSO:

Show Rule Explanations to Users

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To edit Lightning record pages:
- Customize Application

Share Decision Explanations with Constituents

Give constituents insights into the reasoning behind application decisions in your Public Sector Solutions Experience Cloud site.

Share your reasoning for decisions with constituents for these objects.

- Individual Application
- Business License Application
- Account

Add the Explainability Action Log component to the application pages in your portal so that constituents can see the explanations for their application status.

1. From Setup, in the Quick Find box, search for `Digital Experiences` and select **All Sites**.

2. Click **Builder** for your site.

3. Go to the record detail page for the Individual Application object.

4. Click ⚡, scroll to the **Explainability Action Log**, and drag it to the editable content region of the page.

5. Repeat these steps to add the Explainability Action Log component to the Business License Application or Account page.

6. Publish your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions and the Decision Explainer CC add-on

USER PERMISSIONS

To create, customize, and publish an Experience Cloud site:
- View Setup and Configuration AND Create and Set Up Experiences

Issue a License

After all reviews and inspections are completed and approved, issue a license to a constituent in Public Sector Solutions.

1. From the App Launcher, find and select **Business Licenses**.

2. Click **New**.

3. Enter the name, period start, and period end details for the license.

4. For Identifier, enter a unique identification number for the license.

5. For Organization, select the business owner or individual who holds the license.

6. Enter regulatory authorization type and business type details.

7. Save your changes.

   See licenses for a business on the Business Licenses related list on the account record. Constituents can access the license on your public portal.

Build a License and Permit Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where constituents can apply for licenses and permits, and view and manage their applications, inspections, and fees.

To help you build a license and permit portal for your constituents, Public Sector Solutions provides a site template with preconfigured pages. In addition to a home page and pages for login, self-registration, changing a password, and forgotten passwords, the Licenses And Permits Experience Cloud site template includes these pages:

- Assess your License or Permit Needs
- Apply for a License or Permit
- Renew a License or Permit
- Permits
- Search for License or Permit Holder
- File a Complaint
- My Complaints
- My Applications and Licenses
- View Inspection History

Public Sector Solutions also provides Lightning web components to use on some of the pages. For example, add a component that allows constituents to apply for a license or permit to the Apply for a License or Permit page. The components are available from the Public Sector Solutions process library on GitHub.

Finally, create or customize pages to show applicants their inspection history, fee payment history, and application approval history; their application records; their complaints; and permit requirements for business types.

License and Permit Site Prerequisites

Before you create a license and permit site from the Experience Cloud site template, complete the prerequisites.

Create an Experience Cloud Site from the Licenses and Permits Template

Use a template to create an Experience Cloud site where constituents can apply for licenses and permits, file complaints, view their inspection history, and more.

Add License and Permit Components to Site Pages

Give constituents the ability to apply for licenses and permits, renew licenses and permits, file complaints, and more by adding dedicated Lightning components to your Experience Cloud site.

Configure the View Inspection History Page

Use the Inspection History component to show constituents the details of inspections associated with their business.

Configure the View Fee Payment History Page

Give constituents insight into the regulatory transaction fees associated with their applications and inspections.

Show License, Permit, Application, and Application Draft Records on Tabs

Show constituents lists of their issued licenses and permits as well as their application records on your Experience Cloud site.

Show the Approval History on Application Pages

Let constituents easily see which applications were approved or rejected by adding a related list to application pages on your license and permit site.

Show Permit Requirements on the Constituent Portal

Show the permits that are required for a business type, including details about permit dependencies.

Show Complaints on the License and Permit Site

Show constituents a list of complaints that they've filed.

License and Permit Site Prerequisites

Before you create a license and permit site from the Experience Cloud site template, complete the prerequisites.

Org Setup

Start by completing some basic configuration tasks.

1. Create Regulatory Authorities.

2. Download and Install the Licensing and Permitting Process Packages.

General Site Setup

Complete the setup tasks that apply to all Experience Cloud sites.

1. Review and understand Experience Cloud licenses. See Experience Cloud User Licenses, Industries Object Access by Community License, and Public Sector Solutions Products: User, Feature, and Permission Set Licenses.

2. Enable Digital Experiences.

3. Set up templates for your welcome email and other communications to site members. See Create an Email Template in Lightning Experience.

4. Configure optional Service Cloud features such as embedded chat and Salesforce Knowledge. See Embedded Chat and Create a Knowledge Base with Salesforce Knowledge.

5. For additional site setup tasks, see Experience Cloud Site Setup Checklist.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Customize the Customer Community Profile for Site Users

Clone and customize the Customer Community Plus User profile to grant Experience Cloud site
users access to required objects and data.

Every Salesforce org includes standard profiles that you can assign to users so that they have access
to the features and objects they need to use the site. Clone and customize the profile that
constituents use when they log in to your Experience Cloud site so that they have access to features
and objects they need to apply for licenses, permits, and benefits.

> **Note:** Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface.
> You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile
> User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. Next to the Customer Community Plus User profile, click **Clone**.

3. Enter a name for the profile, such as `License and Permit Site User`, and save your changes.

4. Select **System Permissions** and then click **Edit**.

5. Select these options.

   - **Access Activities**
   - **Discovery Framework Platform User**
   - **Edit Tasks**
   - **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**
   - **Grant community users access to LPI features**
   - **Grant users access to Industries Interaction Calculation features**
   - **Provides access to Public Sector data for Community users**
   - **Provides site users with access to Decision Explainers features and APIs**
   - **Run Decision Matrices**
   - **Run Decision Tables**
   - **Run Expression Sets**
   - **View Roles and Role Hierarchy**

6. Save your changes.

7. Select **App Permissions**, and then click **Edit**.

8. Select **Run Flows**, and then save your changes.

9. Select **Object Settings**, and then click **Edit**.

10. Set permissions based on your needs, using the table as a guide.

Table 1: Object Settings for Licensing and Permitting

Object	Access Level
Accounts	Read, Create, Edit
Action Plans	Read, Create, Edit
Action Plan Templates	Read
Assessments	Read, Create, Edit

Object	Access Level
Assessment Indicator Definitions	Read
Assessment Questions	Read, Create
Assessment Question Responses	Read, Create, Edit
Assessment Question Sets	Read, Create
Assessment Question Versions	Read, Create
Assessment Tasks	Read
Assessment Task Content Documents	Read
Assessment Task Definitions	Read
Assessment Task Indicator Definitions	Read
Assessment Task Orders	Read
Assets	Read, Create, Edit
Business Licenses	Read
Business License Applications	Read, Create, Edit
Business Profiles	Read
Business Regulatory Authorization Types	Read
Business Regulatory Authorization Type Dependencies	Read
Business Types	Read
Calculation Procedures	Read
Calculation Procedure Steps	Read
Calculation Procedure Variables	Read
Calculation Procedure Versions	Read
Care Plan Templates	Read
Cases	Read, Create, Edit
Complaint Cases	Read, Create, Edit
Contacts	Read, Create, Edit
Course Offerings	Read
Decision Matrices	Read
Decision Matrix Columns	Read
Decision Matrix Rows	Read
Decision Matrix Versions	Read

Object	Access Level
Documents	Read
Document Checklist Items	Read, Create, Edit, Delete
Expression Sets	Read
Expression Set Step Relationships	Read
Expression Set Versions	Read
Individuals	Read
Individual Applications	Read, Create, Edit
Inspection Types	Read
Locations	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
OmniScript Saved Sessions	Read, Create, Edit, Delete
Omni UI Cards	Read
Person Education	Read, Create
Polygon	Read
Preliminary Application References	Read, Create, Edit
Public Complaints	Read, Create, Edit
Received Documents	Read, Create
Regulatory Authorities	Read
Regulatory Authorization Types	Read
Regulatory Authorization Type Products	Read
Regulatory Codes	Read
Regulatory Code Assessment Indicators	Read
Regulatory Code Violations	Read
Regulatory Transaction Fees	Read, Create

Object	Access Level
Regulatory Transaction Fee Items	Read, Create
Training Courses	Read
Training Course Participants	Read, Create
Visits	Read

11. Save your changes.

12. Select **Custom Settings Definitions**, and then click **Edit**.

13. Add **Benefit Recertification Flow** to the Enabled Custom Setting Definitions list.

14. Save your changes.

Create Experience Cloud Site Users

To allow constituents to access your Experience Cloud site, enable them as customer users and
assign them the Customer Community Plus license and the License and Permit Site User profile.

Ensure that the user who owns a constituent's person account is assigned a role. If necessary, before
you begin, create and assign a role to the user.

1. From the App Launcher, find and select **Accounts**, and then click a constituent's person account.

2. Click ▾ , and then select **Enable Customer User**.

3. On the user record page, enter an email address and a unique username in the form of an email address. By default, the username
is the same as the email address.

4. (Optional) Change the system-generated nickname for the user. The nickname is the user's display name in an Experience Cloud
site.

5. For User License, select **Customer Community Plus**.

6. For Profile, select **License and Permit Site User**.

7. Deselect **Generate new password and notify user immediately** so that the user doesn't receive a password until you activate
your Experience Cloud site.

8. Save your changes.

Create a Permission Set for License and Permit Site Members

Create and assign a permission set to Experience Cloud site members so that they have access to
licensing and permitting features in your Public Sector Solutions constituent portal.

Constituents who use your Experience Cloud site to apply for licenses and permits must be members
who sign in to the site and are assigned the required permissions and permission set licenses.

The permission set license that's required for accessing licensing and permitting features, Licensing
and Permitting Management For Communities, doesn't include the associated permission set.
Create a permission set for the license and assign the permission set to site members so that they
can apply for licenses and permits from your public portal.

1. From Setup, in the Quick Find box, search for and then select **Permission Sets**.

2. Click **New**.

3. For Label, enter `Community and Licensing` and then press Tab to automatically populate the API Name.

4. For License, select **Licensing and Permitting Management For Communities**.

5. Save your changes.

   The Licensing and Permitting Management For Communities permission set needs some additional system permissions, so add those permissions now.

6. Click **System Permissions** and then click **Edit**.

7. Turn on all of the user permissions.

8. Save your changes.

   Finally, assign the permission set to members of your licensing and permitting Experience Cloud site.

9. From Setup, in the Quick Find box, search for and then select **Users**.

10. Click a user.

11. Click **Permission Set Assignments**, and then click **Edit Assignments**.

12. Select the permission set that you created `Community and Licensing`, and then click **Add**.

13. Save your changes.

   When you assign a permission set to a user, they're automatically assigned the included permission set license.

SEE ALSO:

Create a Permission Set Associated with a Permission Set License

Add Members to Your Experience Cloud Site

Configure Sharing Settings for Public Sector Solutions

Review and edit the org-wide default sharing settings for the objects that Public Sector Solutions uses to determine the level of access that users have to each others' data.

1. From Setup, in the Quick Find box, enter `Security`, and then select **Sharing Settings**.

2. Click **Edit**.

3. Set organization-wide defaults based on your needs, using the table as a guide.

USER PERMISSIONS

To edit org-wide default sharing settings:
- Manage Sharing

Object	Default Internal Access	Default External Access
Account and Contact	Public Read, Write	Public Read Only
Asset	Controlled by Parent	Controlled by Parent
Activity	Controlled by Parent	Private
Action Plan	Public Read, Write	Private
Action Plan Template	Public Read, Write	Private
Assessment	Public Read Only	Public Read Only
Assessment Envelope	Public Read Only	Public Read Only

Object	Default Internal Access	Default External Access
Assessment Indicator Definition	Public Read, Write	Public Read Only
Assessment Indicator Value	Public Read, Write	Public Read Only
Assessment Question	Public Read Only	Public Read Only
Assessment Question Assignment	Public Read Only	Public Read Only
Assessment Question Response	Public Read Only	Public Read Only
Assessment Question Set	Public Read Only	Public Read Only
Assessment Task	Public Read, Write	Public Read Only
Assessment Task Definition	Public Read, Write	Public Read Only
Authorization Application Asset	Public Read, Write	Private
Authorization Application Place	Public Read, Write	Private
Business License	Public Read Only	Public Read Only
Business License Application	Public Read, Write	Private
Business Regulatory Authorization Type Dependency	Public Read Only	Public Read Only
Business Type	Public Read Only	Public Read Only
Calculation Procedure	Public Read Only	Public Read Only
Case	Public Read, Write, Transfer	Public Read Only
Course Offering	Public Read Only	Public Read Only
Decision Matrix	Public Read Only	Public Read Only
Document Checklist Item	Public Read Only	Public Read Only
Examination	Public Read Only	Public Read Only
Expression Set	Public Read Only	Public Read Only
Individual Application	Public Read, Write	Public Read Only
Inspection Type	Public Read Only	Public Read Only
Location	Public Read Only	Public Read Only
Omni Assessment Task	Public Read, Write	Public Read Only
Omni DataPack	Private	Private
Omni Data Transformation	Public Read Only	Public Read Only
Omni Electronic Signature Template	Public Read Only	Public Read Only
Omni Process	Public Read Only	Public Read Only

Object	Default Internal Access	Default External Access
Omni Process Assessment Question Version	Public Read, Write	Public Read Only
Omni Process Transient Data	Public Read Only	Public Read Only
OmniScript Saved Session	Public Read Only	Public Read Only
Omni UI Card	Public Read Only	Public Read Only
Person Education	Public Read, Write	Private
Person Examination	Public Read, Write	Private
Polygon	Public Read Only	Public Read Only
Preliminary Application Reference	Public Read, Write	Public Read Only
Public Complaint	Public Read, Write	Private
Regulatory Authority	Public Read Only	Public Read Only
Regulatory Authorization Type	Public Read Only	Public Read Only
Regulatory Code Violation	Public Read, Write	Public Read Only
Regulatory Transaction Fee	Public Read, Write	Private
Training Course	Public Read Only	Public Read Only
User	Public Read Only	Public Read Only
Violation Type	Public Read Only	Public Read Only
Visit	Public Read, Write	Public Read Only

4. Save your changes.

After completing these prerequisites, create the site from the template and customize the pages.

SEE ALSO:

Sharing Settings

Create an Experience Cloud Site from the Licenses and Permits Template

USER PERMISSIONS

To create, customize, and publish an Experience Cloud site:

Create and Set Up Experiences

AND

View Setup and Configuration

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

To customize an Experience Cloud site:	Be a member of the site AND Create and Set Up Experiences
To publish an Experience Cloud site:	Be a member of the site AND Create and Set Up Experiences
To edit app and system permissions in profiles:	Manage Profiles and Permission Sets
To edit object and field permissions in profiles:	Manage Profiles and Permission Sets AND Customize Application

Use a template to create an Experience Cloud site where constituents can apply for licenses and permits, file complaints, view their inspection history, and more.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Click **New**.

3. Select the **Licenses And Permits** template, and then click **Get Started**.

4. Enter a site name.

5. Complete the URL. The string you enter is appended to the Experience Cloud site domain that you created when you enabled Digital Experiences. For example, if your site domain is `CosvilleGov.my.site.com`, and for URL you enter `licenses`, then your site URL is `CosvilleGov.my.site.com/licenses`.

6. Click **Create**.

7. Add members to the site.

   a. In the Administration workspace, click **Members**.

   b. Under Select Profiles, for Search, select **Customer**.

   c. Move **Constituent Portal User** to the Selected Profiles list.

   d. Save your changes.

8. (Optional) Customize the pages for your needs, preview the site, and activate and publish it when you're ready. See Build and Customize Your Experience Cloud Site.

Set Up Self-Registration for Your Site

Configure your Experience Cloud site to create person accounts for visitors who self-register.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your site name, click **Workspaces**.

3. Select **Administration** and then select **Login & Registration**.

4. Under Registration Page Configuration, select **Allow customers and partners to self-register**.

5. Select the self-registration page type.

6. To ensure that Salesforce creates a person account for each self-registering visitor, under Assign users to a profile and account, leave the Account field empty.

7. Save your changes.

Assign Permissions to Your Site's Guest User Profile

Allow unauthenticated users to access your site to find benefits that they're eligible for and to file complaints.

> 📝 **Note:** Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From the All Sites page in Setup, next to your site name, click **Builder**.

2. Click ⚙.

3. On the General tab, select **Guest users can see and interact with the site without logging in**.

4. Under Guest User Profile, click the profile name.

5. Select **System Permissions**, and then click **Edit**.

6. Select these options.

    - **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**
    - **Grant community users access to LPI features**
    - **Grant users access to Industries Interaction Calculation features**

7. Save your changes, and then select **Object Settings**.

8. Set these permissions.

Object	Access Level
Accounts	Read, Create
Account Brands	Read
Cases	Read
Contacts	Read
Decision Matrices	Read
Decision Matrix Columns	Read
Decision Matrix Rows	Read
Decision Matrix Versions	Read
Expression Sets	Read
Expression Set Versions	Read
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni UI Cards	Read
Public Complaints	Read, Create

9. Save your work.

Add License and Permit Components to Site Pages

Give constituents the ability to apply for licenses and permits, renew licenses and permits, file complaints, and more by adding dedicated Lightning components to your Experience Cloud site.

Add components from the Public Sector Solutions process library to the pages in the Licenses And Permits Experience Cloud site template.

1. From Setup, in the Quick Find box, enter *Digital Experiences*, and then select **All Sites**.

2. Click **Builder** for your licenses and permits site.

3. To add the Assess Your License or Permit Needs Lightning web component:

   a. From the Pages menu, select **Assess your License or Permit Needs**.

   b. Click ⚡ and, from the Custom Components section, drag **LWC LicensingAndPermitting/Prescreening** to the page.

   > 📝 Note: If the licensing and permitting components don't show in the Components panel, adjust your security level. See Select a Security Level in Experience Builder Sites.

4. To add the Business Authorization Lightning web component:

   a. From the Pages menu, select **Apply for a License or a Permit**.

   b. Click ⚡ and, from the Custom Components section, drag **LWC LicensingAndPermitting/BusinessLicenseApplication** to the page.

5. To add the Individual Authorization Lightning web component:

   a. From the Pages menu, select **Renew a License or a Permit**.

   b. Click ⚡ and, from the Custom Components section, drag **LWC LicensingAndPermitting/NewDoctorsLicense** to the page.

6. To add the Search for License or Permit Holder Lightning web component:

   a. From the Pages menu, select **Search for License or Permit Holder**.

   b. Click ⚡ and, from the Custom Components section, drag **LWC LicensingAndPermitting/LicenseSearch** to the page.

7. To add the File a Complaint Lightning web component:

   a. From the Pages menu, select **File a Complaint**.

   b. Click ⚡ and, from the Custom Components section, drag **LWC LicensingAndPermitting/PublicComplaint** to the page.

SEE ALSO:

Download the Public Sector Solutions Process Library Packages

Import and Activate Process Package OmniStudio Components in Public Sector Solutions

Deploy Process Package Lightning Web Components to Public Sector Solutions

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

  Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

Configure the View Inspection History Page

Use the Inspection History component to show constituents the details of inspections associated with their business.

With the Inspection History component, constituents can track activities related to inspections of their business on your Experience Cloud site. The Inspection History component shows information about why an inspection was scheduled, the inspector's observations from the visit, and any violations or enforcement actions for the constituent to address.

The Licenses And Permits Experience Cloud template that comes with Public Sector Solutions includes a View Inspection History page with the component. If you use the template for your site, you're all set. If desired, you can customize the labels of many of the fields that appear in the Inspection History component, including for violation enforcement actions and regulatory code violations.

⊘ **Important:** Changes that you make to violation enforcement action and regulatory code violation field names for the Inspection History component also change the field names as they appear on object record pages in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter `User Interface`, and then select **Rename Tabs and Labels**.

2. Click **Edit** for the Regulatory Code Violations or Violation Enforcement Actions object.

3. Click **Next**.

4. Enter new field labels, and save your changes.

The changes take effect on your site the next time you publish an update.

SEE ALSO:

Rename Object, Tab, and Field Labels

Configure the View Fee Payment History Page

Give constituents insight into the regulatory transaction fees associated with their applications and inspections.

Create a custom site page based on list views of regulatory transaction fees in your org. Public Sector Solutions includes an All Regulatory Transaction Fees list view; create additional list views of paid transaction fees and due transaction fees. Then, create a View Fee Payment History page on your licenses and permits site that uses all three list views to show constituents transaction information about fees associated with their applications and inspections.

Create List Views for Regulatory Transaction Fees

First, create a list view of upcoming regulatory transaction fees that are due, and a list view of past fees that are paid.

1. From the App Launcher (:::), find and select **Regulatory Transaction Fees**.

2. Click ⚙, and then click **New**.

3. For List Name, enter `Due Regulatory Transaction Fees`, and then press Tab to autopopulate the list API name.

4. Save your changes.
   On the list view page, specify the fields to show in the view.

5. Click ▼.

   a. Click **Filter by Owner**, select **All regulatory transaction fees**, and then click **Done**.

   b. Click **Add Filter**. For Field, select **Status**, for Operator select **equals**, and for Value select **Due**. Then click **Done**.

   c. Save your work.

6. Create another list view that displays records of regulatory transaction fees that have been paid.

   a. Name the list `Paid Regulatory Transaction Fees`.

   b. For Filter by Owner, select **All regulatory transaction fees**.

   c. Add a filter, and for Field, select **Status**, for Operator select **equals**, and for Value select **Paid**.

Create the View Fee Payment History Site Page

Now, create the site page that shows constituents the regulatory transaction fees based on the list views.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Click **Builder** for your licenses and permits site.

3. Click ⚙, and then select **New Page**.

4. Select **Standard Page**, select **Flexible Layout**, and then click **Next**.

5. For Name, enter `View Fee Payment History`, and then click **Create**.

   The URL and API name are automatically generated.

   Now, add Lightning components to the page.

6. Click ⚡, and then drag the **Rich Content Editor** component to the canvas.

7. Click **Edit Content**.

8. Enter a page title and brief description. Format the text as desired. For example, for the title, enter `View Fee Payment`
`History` in bold text. On a new line, enter the description `View transactions grouped by their status,`
`or view a list of all transactions. Click a transaction to see its details.`.

9. Click ⚡, and then drag the **Tabs** component to the canvas under the component with the title and description.

10. In the Tabs properties panel, rename Tab 1 `Due`, rename Tab 2 `Paid`, and rename Tab 3 `All Transactions`.
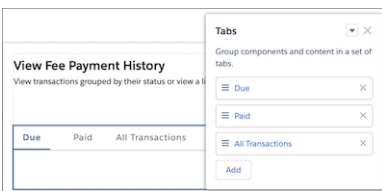
Next, add the regulatory transaction fee list views to the tabs.

11. Select the **Due** tab, and then drag the **Record List** component to the canvas.

12. In the Record List properties panel, for Object Name, select **Regulatory Transaction Fee**, and for Filter Name, select **Due Regulatory Transaction Fees**. Specify other options as desired.
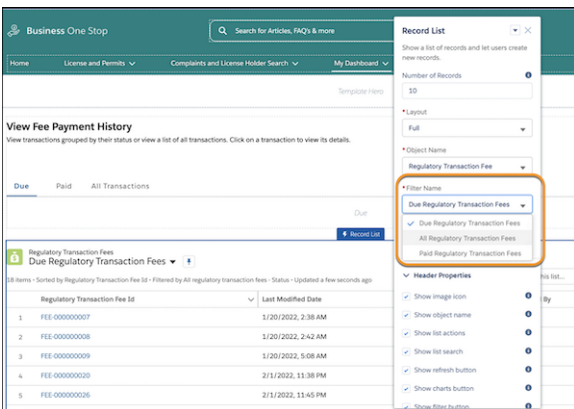
13. Select the **Paid** tab, and then drag the **Record List** component to the canvas.

14. In the Record List properties panel, for Object Name, select **Regulatory Transaction Fee**, and for Filter Name, select **Paid Regulatory Transaction Fees**. Specify other options as desired.

15. Select the **All Transactions** tab, and then drag the **Record List** component to the canvas.

16. In the Record List properties panel, for Object Name, select **Regulatory Transaction Fee**, and for Filter Name, select **All Regulatory Transaction Fees**. Specify other options as desired.
Now that the page is configured, add it to the site navigation menu.

17. Select the **Theme Navigation Menu** component. In the properties panel, click **Edit Default Navigation**, and then click **Add Menu Item**.

18. Name the menu item `View Fee Payment History`. For Type, select **Site Page**, and for Page, select **View Fee Payment History**.

19. Specify other options based on your needs, drag to position your menu item as desired, and save your menu.

20. Preview the page, test your site navigation, and publish your changes when you're ready.

SEE ALSO:

Record List

Show License, Permit, Application, and Application Draft Records on Tabs

Show constituents lists of their issued licenses and permits as well as their application records on your Experience Cloud site.

Customize the My Applications and Licenses page in the Licenses And Permits site template to include tabs that show constituents their issued licenses and permits, their submitted application records, and their draft applications.

The lists of license, permit, and application records on the site are based on list views in your org. Before you configure the record lists on your site, make sure that you have list views in your org that filter records by owner for the Business License, Business License Application, Individual Application, and Preliminary Application Reference objects. See Create or Clone a List View in Lightning Experience.

> 📝 **Note:** The My Applications and Licenses page is named View License and Permit Status in the site navigation menu.

1. In Experience Builder for your licenses and permits site, go to the **My Applications and Licenses** page.

2. Drag the **Tabs** component to the page.

3. Select the first tab and, in the properties panel, rename it `My Licenses and Permits`.

4. Drag the **Record List** component to the tab.

5. Specify the record list properties.

    a. For Object Name, select **Business License**.

    b. For Layout, select **Full**.

    c. For Filter Name, select **My Business Licenses**.

6. Select the second tab and rename it `Business Applications.`

7. Drag the **Record List** component to the tab.

8. Specify the record list properties.

    a. For Object Name, select **Business License Application**.

    b. To include the Application Status field in the list, for Layout, select **Full**.

    c. For Filter Name, select **My Business License Applications**.

9. Configure the third tab.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To customize or publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

  Be a member of the site AND an experience admin, publisher, or builder in that site

    a. Rename it `Individual Applications`.

    b. Add the **Record List** component to the tab.

    c. Select the **Full** layout and the **Individual Application** object.

    d. For Filter Name, select **My Individual Applications**.

10. Configure a fourth tab.

    a. Name it `Draft Applications and Assessments`.

    b. Add the **Record List** component to the tab.

    c. Select the **Full** layout and the **Preliminary Application Reference** object.

    d. For Filter Name, select **Draft Preliminary Application References**.

11. Preview your changes and publish them to the site when you're ready.
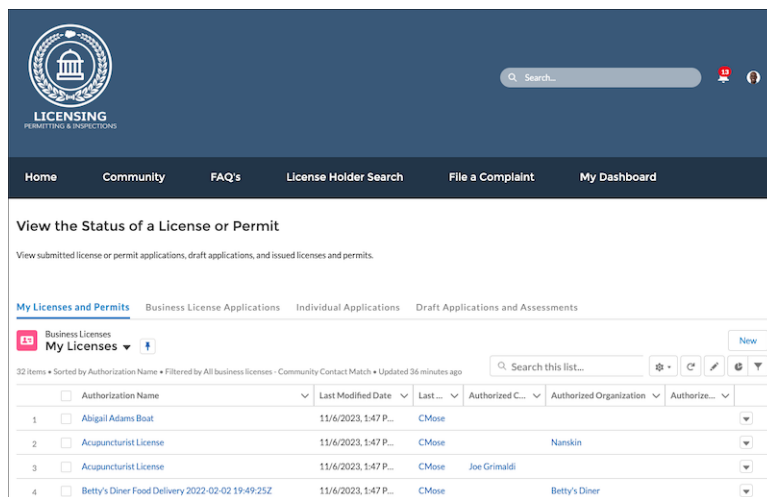
Show the Approval History on Application Pages

Let constituents easily see which applications were approved or rejected by adding a related list to application pages on your license and permit site.

On your site, the Approval History component shows the Approval History related list from the business license application or individual application record page. Before you configure your site to show constituents their approval history, make sure that you add the related list to those record pages. Also, include the Comments field as one of the first selected fields on the list. That way, constituents see the approver's comments in the Approval History component on the site. See Customize Page Layouts with the Enhanced Page Layout Editor.

1. In Experience Builder for your licenses and permits site, click ⚙, and then select **Advanced**.

2. Select **Show all components**.

3. Close the Settings window.

4. From the Pages menu, select **New Page**, and then select **Object Pages**.

5. Select **Business License Application**, click **Create**, and then click **Create** again.

6. Drag the **Related List - Single** component on to the page.

7. In the Related List - Single properties panel, for Related List, select **Approval History**.

8. Repeat to create an individual application detail site page, and add the Approval History component to it.

9. Preview your changes and publish them to the site when you're ready.

Approval History (3)				
Step Name	**Date**	**Status**	**Assigned To**	
Final Review	12/10/2020, 9:17 PM	Approved	Final Review Queue	▼
Initial Review	12/10/2020, 9:11 PM	Approved	Initial Review Queue	▼
Approval Request Submitt...	12/3/2020, 8:29 AM	Submitted	Donisha Smith	▼
			View All	

Show Permit Requirements on the Constituent Portal

Show the permits that are required for a business type, including details about permit dependencies.

The Permits page that's provided with the Licenses And Permits site template allows constituents to search for and see the licenses and permits that are required for different types of businesses. It includes the Permits component, which shows a list of all business regulatory authorization types and dependencies defined in your Public Sector Solutions org. No site configuration is required for the Permits page, although you can customize its title and description in the Rich Content Editor. To include the Permits component on another site page, drag it to that page from the Components panel.

SEE ALSO:

[Show Required Permits for a Business Type](#)

Show Complaints on the License and Permit Site

Show constituents a list of complaints that they've filed.

The My Complaints Experience Cloud site page uses a list view from the Public Complaint object to show constituents the complaints that they've filed. Before you configure the site page, create a My Complaints list view in Public Sector Solutions.

1. In Experience Builder for your licenses and permits site, go to the **My Complaints** page.

2. Drag the **Record List** component to the content area of the page.

3. Specify the record list properties.

   a. For Object Name, select **Public Complaint**.

   b. For Layout, select **Full**.

   c. For Filter Name, select **My Complaints**.

4. Preview your changes and publish them to the site when you're ready.

Inspections and Assessments in Public Sector Solutions

Configure and use inspections to evaluate regulatory code compliance and record violations through onsite visits. Configure and use assessments for complex inspections, investigations, evaluations, screenings, and audits, onsite or virtually.

Watch a video

Dive deeper into Salesforce Help.
- Licensing and Permitting
- Manage Complaints
- Case Proceedings
- CRM Analytics for Public Sector Solutions

Use Trailhead to build and test your skills.
- Licensing, Permitting, and Inspections Data Model in Public Sector Solutions
- Licensing, Permitting, and Inspections with Public Sector Solutions
- Inspections with Public Sector Solutions
- Dynamic Assessments with Public Sector Solutions

Explore system architecture and diagrams.

- [Regulatory Area, Fees, and Enforcement Data Model](#)
- [Visits, Inspections, and Dynamic Assessments Data Model](#)

Public Sector Solutions provides two frameworks to help you to determine whether an applicant qualifies for a business license, permit, program, or benefit: inspections and assessments.

Inspections

Inspections are designed to evaluate regulatory compliance, such as whether a business meets fire or heath and safety regulations. They use a fixed set of questions and typically involve an onsite visit by an inspector or compliance officer to verify that the site or business conforms to regulatory codes and required safety measures. Inspectors use checklists and action plans to guide them through assessment questions and tasks on their onsite visit. When observed, inspectors record violations and violation enforcement actions. Inspections are best suited for straightforward compliance evaluations or assessments that use a list of questions that don't need conditional logic or edits.

Dynamic Assessments

Dynamic assessments, which are based on Discovery Framework, are designed for more detailed and complex evaluations. Dynamic assessments use objects that define OmniScript-based assessment tasks, which you can group and relate to assessment criteria, or indicators. Add omni assessment tasks to an action plan template to create an inspection checklist and ensure that inspections are completed correctly, consistently, and completely. You can also use Discovery Framework objects to create assessment questions for OmniScript forms, which you can use to conduct assessments over the phone or virtually, not just onsite. Because OmniScript forms use conditional logic and dependencies, they provide more flexibility and control than inspections. Dynamic assessments are an ideal way for caseworkers and others to:

- Screen public complaints or investigate cases and determine a plan of action
- Conduct inspections and audits for grant sites
- Assess a constituent's needs for care plans or benefits
- Measure a constituent's progress toward a care plan goal
- Assess whether to start a referral process
- Assess employee performance or support needs

[Inspections in Public Sector Solutions](#)

Configure inspections for onsite visits to check for regulatory code compliance, record results, and create violations.

[Conduct Inspections in Public Sector Solutions](#)

Conduct inspections by using the Inspection Management desktop or mobile app.

[Dynamic Assessments in Public Sector Solutions](#)

Design dynamic assessments that give inspectors, caseworkers, and compliance officers flexibility and control over inspections, investigations, and evaluations.

[Conduct Dynamic Assessments in Public Sector Solutions](#)

Use the Inspection Management app to conduct Dynamic Assessments.

[Manage Complaints in Public Sector Solutions](#)

Review public complaints related to inspections and assessments, see their supporting documents, and schedule a visit to investigate the concern.

Inspections in Public Sector Solutions

Configure inspections for onsite visits to check for regulatory code compliance, record results, and create violations.

Inspections Prerequisites

Before you set up inspections in Public Sector Solutions, complete the prerequisites.

Create Regulatory Code Records

Define regulatory codes, or sets of rules that are required to ensure safety and quality for the issuance of certain licenses and permits, in Public Sector Solutions.

Create Assessment Indicator Definitions

Define the conditions that inspectors evaluate to ensure code compliance.

Create Assessment Task Definitions

Group assessment indicator definitions into assessment task definitions for inspectors to use during a site visit.

Configure an Assessment Question Status to Automatically Create a Violation

Configure the Fail picklist value on the Assessment Question Status field to automatically create a regulatory code violation record.

Create Action Plan Templates for Inspection Visits in Public Sector Solutions

Create a template that includes all of the tasks required for a specific type of inspection in Public Sector Solutions. Use the template to create an action plan of that type for a specific inspection visit.

Create Inspection Types

Represent the various types of inspections required to issue licenses and permits.

Create Violation Types

Represent the various types of violations recorded during inspections for license and permit applications.

Add an Action to Create Visits from Application Record Pages

Add the Create Visit button to business and individual license application pages to easily create a visit for an inspection.

Customize the Visit Lightning Record Page

Help inspectors, compliance officers, and caseworkers conduct efficient visits with a custom Lightning record page that includes essential actions, important details, and useful tabs and related lists.

Create a Mobile Signature Lightning Record Page

Create a Signature Task record page for inspectors to use to capture a signature on a mobile device at the end of an inspection visit.

Create an Inspection Visit in Public Sector Solutions

Create visits with associated action plan templates, and assign visits to an inspector.

Inspections Prerequisites

Before you set up inspections in Public Sector Solutions, complete the prerequisites.

Prepare your org before you start to configure regulatory codes, assessment indicators, inspection and violation types, and other inspection entities.

1. Set up useful related lists on the pages related to inspections. For example:

   a. On the regulatory code layout, add the Regulatory Code Assessment Indicators and Regulatory Code Violations related lists.

    b. On the violation type layout, add the Regulatory Code Violations and Violation Type Assessment Indicators related lists.

    c. On the assessment indicator definition layout, add the Assessment Indicator Defined Value and Regulatory Code Assessment Indicators related lists.

    d. On the assessment task definition layout, add the Assessment Indicator Definition, Notes, and Files related lists.

    e. On the visit layout, add the Action Plans, Assessment Tasks, Files, Notes & Attachments, Regulatory Code Violations, and Regulatory Transaction Fees related lists.

> 📝 **Note:** This is not an exhaustive list. You can always update page layouts later, when a particular related list is required.

2. Give inspectors the ability to add notes to visits and assessment tasks. On the visit page layout and on the assessment task page layout, add **New Note** to the Salesforce Mobile and Lightning Experience Actions list.

3. Give admins and users who configure regulatory codes, assessment indicator and assessment task definitions, and other inspection entities access to the objects they need to work with. Assign them the Public Sector Access or Public Sector Field Access permission set, and the Industries Visit permission set.

4. Give users who conduct inspections or visits the Industries Visit, Public Sector Access, or Public Sector Field Access permission set.

5. Make sure that you've created regulatory authorities on page 83.

After completing these tasks, configure regulatory codes, assessment indicators, inspection and violation types, and other inspection entities.

> 📝 **Note:** In addition to manually creating records for regulatory codes and other inspections entities, you can speed the work by bulk-importing data. Use Data Loader to read, extract, and load data from CSV files or from a database connection.

SEE ALSO:

    Customize Page Layouts with the Enhanced Page Layout Editor

    View and Assign Permission Sets in Public Sector Solutions

    About Data Loader

Create Regulatory Code Records

Define regulatory codes, or sets of rules that are required to ensure safety and quality for the issuance of certain licenses and permits, in Public Sector Solutions.

Regulatory codes are rules or standards defined by a local, state or regional, or national government body that has the authority to issue licenses or permits. Examples of regulatory codes are:

- Barbers are required display their professional license in a conspicuous location at their place of employment, as regulated by a state board of barbering and cosmetology.

- Restrooms in restaurants must be vented to the outside by means of an openable, screened window, air shaft, or exhaust fan, consistent with the requirements of local building codes, as regulated by a state department of public health.

- Dispensaries shall establish an identification and sign-in/sign-out procedure for personnel, suppliers, and visitors, and shall maintain a record of all authorized individuals who are not employees who enter the licensed premises, as regulated by a state department of cannabis control

Code compliance is required for many business, professional, and occupational license applications. When someone applies for a license that's governed by regulatory codes, inspectors visit the site to determine whether it complies.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create regulatory code records:
- Public Sector Access OR Public Sector Field Access

To create a regulatory code:

1. From the App Launcher, find and select **Regulatory Codes**.

2. Click **New**.

3. Enter a name, subject, and description. Typically, the name is the code number, the subject is a brief description, and the description is the body of the code. For example:

   - For Name, enter `Article 10.7397`.

   - For Subject, enter `Display of License`.

   - For Description, enter `Every licensee shall display the license in a conspicuous place in his or her place of business or place of employment.`

4. For Type, select Title, Chapter, or Section. For example, select **Section**.

5. Specify the effective dates for the code.

6. To relate a code section to a chapter, or to relate a chapter to a title, search for and select a parent code.

7. Select a regulatory authority. For example, select **Board of Barbering & Cosmetology**.

8. Enter the URL of an external resource that provides more information about the regulatory code.

9. Save your changes, or save them and create another regulatory code.

Create Assessment Indicator Definitions

Define the conditions that inspectors evaluate to ensure code compliance.

Assessment indicator definitions represent the conditions that inspectors check to determine whether a business or site complies with regulatory codes. Assessment indicator definitions are included in checklists of tasks that inspectors complete during an onsite visit to evaluate code compliance. Assessment indicator definitions can be yes-or-no questions (Boolean), picklists, text, or other field types. Relate each assessment indicator definition to its applicable regulatory code so that inspectors can check the code when they're evaluating the assessment indicator criteria on a site visit. Examples of assessment indicator definitions are.

- Is the license for each barber at the establishment displayed in a conspicuous place?

- Are the restrooms properly vented?

- What is the sign-in procedure for visitors?

To create an assessment indicator definition:

1. From the App Launcher, find and select **Assessment Indicator Definitions**.

2. Click **New**.

3. Enter a name. For example, enter `Is the license for each barber at the establishment displayed in a conspicuous place?`

4. Select an indicator field type. For example, select **Boolean**.

   > 📝 Note: Use multi-select picklists to capture multiple options for one regulatory code. For example, create a multi-select picklist assessment indicator definition to record a list of prohibited chemicals stored in the public areas of a salon.

5. Save your changes.

6. For multi-select picklist assessment indicator definitions, create defined values.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create assessment indicator definitions:
- Public Sector Access OR Public Sector Field Access OR Industries Visit

To create assessment indicator defined values:
- Industries Visit

To create regulatory code assessment indicators:
- Public Sector Access OR Public Sector Field Access

    a. On the assessment indicator definition record page, go to the Assessment Indicator Defined Value related list.

    b. Click **New**.

    c. Enter a value and sequence. For a picklist to capture chemicals stored in a public area, for example, for Value, enter `Bleach`, and for sequence enter `1`.

    d. Save your changes.

    Next, relate a regulatory code to the assessment indicator definition.

7. On the assessment indicator definition record page, go to the Regulatory Code Assessment Indicators related list.

8. Click **New**.

9. Search for and select the regulatory code that applies to the assessment indicator definition. For example, for the assessment indicator definition Is the license for each barber at the establishment displayed in a conspicuous place?, select **Article 10.7397**.

10. Save your changes.

Create Assessment Task Definitions

Group assessment indicator definitions into assessment task definitions for inspectors to use during a site visit.

When an inspector conducts an onsite inspection, they use an Action Plan that includes a checklist of assessment tasks to complete. Create assessment task definitions to represent groups of tasks or questions for an inspector to complete, and relate the assessment task definitions to assessment indicator definitions.

To create an assessment task definition:

1. From the App Launcher, find and select **Assessment Task Definitions**.

2. Click **New**.

3. Enter a name and, optionally, a description. For example, for Name, enter `Salon Establishment`.

4. For Assessment Task Definition Task Type, select **Inspection Checklist**.

5. Save your changes.
Next, relate the task to the applicable assessment indicator definition.

6. On the assessment task definition's Assessment Indicator Definition related list, click **Add**.

7. Search for and select an assessment indicator definition. For example, select **Is the license for each barber at the establishment displayed in a conspicuous place?**

8. For Display Order, enter a number for the definition in the sequence of tasks to check.If you specify a display order for all but one definition, the item without the display order becomes the first task to complete during a visit.

9. Save your changes.

Configure an Assessment Question Status to Automatically Create a Violation

Configure the Fail picklist value on the Assessment Question Status field to automatically create a regulatory code violation record.

Inspection assessment indicators capture the inspector's responses to assessment indicator definitions. They connect assessment tasks (the tasks or questions in an inspector's checklist) with assessment indicator definitions (the criteria the inspector uses to evaluate code compliance).

By default, on the Inspection Assessment Indicator object, the Assessment Question Status picklist field includes the values Pass, Fail, NA, and Issue. To help inspectors quickly create regulatory code violations, define the Fail value as a violation so that when an inspector selects it, Public Sector Solutions automatically creates a regulatory code violation record for the assessment indicator.

1. From Setup, in Object Manager, select **Inspection Assessment Indicator**.

2. Click **Fields & Relationships**, and then click **Assessment Question Status**.

3. In Assessment Question Status Picklist Values, click **New**.

4. For picklist value, enter *Fail*, and then click **Save**.

5. Click **Edit** for the newly created picklist value Fail, and then select **Violation**.

6. Save your changes.

SEE ALSO:

> Add or Edit Picklist Values

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To change picklists:
- Customize Application

Create Action Plan Templates for Inspection Visits in Public Sector Solutions

Create a template that includes all of the tasks required for a specific type of inspection in Public Sector Solutions. Use the template to create an action plan of that type for a specific inspection visit.

Create the Action Plan Template

Create an action plan template that includes tasks to complete on an inspection visit. For example, create action plan templates for health and safety, food safety, cannabis dispensary establishment, salon establishment, other types of inspections.

1. From the App Launcher, find and select **Action Plan Templates**.

2. Click **New**.

3. Enter a name for the template. For example, enter *Salon Establishment.*

4. For Target Object, select **Visit**.

5. For Action Plan Type, select **Assessment Execution**.

6. Save your changes.

Add Assessment Task Definitions to the Template

Add assessment task definitions for the tasks that inspectors need to complete on the visit.

1. On the action plan template record page, click **Add Assessment Task Definition**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create an action plan template for an inspection:
- Industries Visit

> <img> **Note:** You can't add assessment task definitions to a published action plan template.

2. Search for and select an assessment task definition. For example, select **Salon Establishment**.

3. To define the task sequence, enter a number for the display order.

   The task without a display order number is considered the first task when you specify a sequence for the other tasks.

4. To make the task mandatory, select **Is Required**.

5. Save your changes.

Add a Signature Task to the Template

Add a task to the action plan template to capture a signature at the end of the visit.

1. On the action plan template record page, click **New Signature Task**.

2. Enter a name and, optionally, a description for the signature task.

3. To make the task mandatory, select **Required**.

4. Save your changes.

Publish the Template

Publish the inspection action plan template so that your users can use it to create action plans for specific visits.

1. On the action plan template record page, click **Publish Template**.

SEE ALSO:

  Relate an Action Plan Template to a Visit

Create Inspection Types

Represent the various types of inspections required to issue licenses and permits.

Create inspection types to correspond with your inspection action plan templates, such as for health and safety, food safety, cannabis dispensary establishment, salon establishment, and other types of inspections.

1. From the App Launcher, find and select **Inspection Types**.

2. Click **New**.

3. Enter a name. For example, enter `Salon Establishment Inspection`.

4. Search for and select an action plan template. For example, select **Salon Establishment**.

5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create inspection types:
- Public Sector Access OR Public Sector Field Access

Create Violation Types

Represent the various types of violations recorded during inspections for license and permit applications.

Violation types represent the ways in which a business or site fails to comply with a regulatory code. On a site visit, as an inspector goes through their assessment tasks, they record the conditions that reflect regulatory code violations. Every violation type has a type and a severity. Examples of violation types include:

- No professional license displayed for a barber in a salon establishment
- Storage of chemical supplies in public restroom
- Failure to keep plumbing fixtures clean and free from cracks and disrepair

By default, for Type, Public Sector Solutions includes the picklist values Health and Safety, Electrical, and Building. The Severity field includes the picklist values Issue, Minor Violation, and Major Violation. If desired, before you create violation types, customize or create Type or Severity values. See Add or Edit Picklist Values.

To create a violation type:

1. From the App Launcher, find and select **Violation Types**.

2. Click **New**.

3. Enter a name. For example, enter `No identifiable professional license on display`.

4. Select a type. For example, select **Building**.

5. Select a severity. For example, select **Minor Violation**.

6. Save your changes.
   Next, relate the violation type to an assessment indicator.

7. On the violation type record page, go to the Violation Type Assessment Indicators related list.

8. Click **New**.

9. Search for and select the assessment indicator definition that corresponds to the violation type. For example, select **Is the license for each barber at the establishment displayed in a conspicuous place?**

10. Save your changes.

Add an Action to Create Visits from Application Record Pages

Add the Create Visit button to business and individual license application pages to easily create a visit for an inspection.

1. From Setup, in Object Manager, select **Business License Application**.
2. Under Buttons, Links, and Actions, click **New Action**.
   a. For Action Type, select **Create Record**.
   b. For Target Object, select **Visit**.
   c. For Label, enter `Create Visit`, and then press Tab to automatically populate the name.
3. Save your changes.
4. Add the Create Visit quick action to the business license application page layout.
   a. Select **Page Layouts**.
   b. Select a business license application layout.
   c. Select **Mobile & Lightning Actions**, and then drag the Create Visit quick action into the Salesforce Mobile and Lightning Experience Actions section.
   d. Save your work.
5. Repeat to create a Create Visit quick action on individual application pages.

SEE ALSO:

> Compact Layouts

Customize the Visit Lightning Record Page

Help inspectors, compliance officers, and caseworkers conduct efficient visits with a custom Lightning record page that includes essential actions, important details, and useful tabs and related lists.

Public Sector Solutions includes these Lightning components to enable inspectors, compliance officers, and caseworkers to conduct inspection visits.

Inspection Actions
Shows Start Visit and End Visit buttons as well as the time elapsed for the inspection.

Inspection Details
Shows fields from the Visit object, including Location Name, Scheduled Time, Person to Visit, Address, and Inspection Type.

Inspection Tab Container
Includes tabs for Tasks, Notes, and Details as well as a progress ring.

> 📝 Note: The landing page of the Public Sector: Inspection Management mobile app is not customizable.

Create two custom visit Lightning record pages, one for the desktop and one for mobile, that include the components. The desktop version supports a unified hierarchical view of records related to license and permit applications, public complaints, and accounts. The mobile version is designed solely for inspectors in the field and doesn't include the Hierarchical View component.

Customize the Visit Lightning Record Page for the Desktop

Add the inspection components to a visit Lightning page that also supports a unified hierarchical view.

1. From Setup, in Object Manager, select **Visit**.

2. Click **Lightning Record Pages** and then click **Visit Record Page**.

3. Click **Edit**.

4. Drag the **Inspection Details** component to the page canvas. With the component selected, in the Properties pane, review the Inspection Details Fields. Click **Select** to add or remove fields.

5. Drag the **Inspection Actions** component to the page canvas.

6. Drag the **Inspection Tab Container** component to the page canvas. If you don't want to show the progress ring on the page, in the Properties pane, deselect **Show progress ring**.

7. Drag the **Related List - Single** component to the page canvas. With the component selected, in the Properties pane, for Related List, select **Regulatory Code Violations**.

8. Save your changes and activate the page. Assign it as the org default for desktop.

Customize the Visit Lightning Record Page for Mobile

Create a version of the visit Lightning page that contains only the components that inspectors need to conduct a visit, and make it the default page for phone.

1. From Setup, in Object Manager, select **Visit**.

2. Click **Lightning Record Pages** and then click **Visit Record Page**.

3. Click **Clone**.

4. In the page properties, change the label to *Visit Page Mobile*.

5. Remove any elements that inspectors don't need. For example, remove the highlights panel, and if it's on the page, remove the Hierarchical View component.

   📝 **Note:** Keep the Regulatory Code Violations related list component.

6. Save your changes and activate the page. Assign it as the org default for phone.

SEE ALSO:

Give Reviewers a Unified View of a Business or Applicant's Records

Inspections Prerequisites

Create and Configure Lightning Experience Record Pages

Create a Mobile Signature Lightning Record Page

Create a Signature Task record page for inspectors to use to capture a signature on a mobile device at the end of an inspection visit.

1. From Setup, in the Quick Find box, enter `Lightning App Builder`, and then select **Lightning App Builder**.

2. Click **New**, select **Record Page**, and then click **Next**.

3. Enter a descriptive label. For example, enter `Inspector Signature Task Page`.

4. For Object, search for and select **Signature Task**.

5. Click **Next**.

6. Select a page template that's supported on phone and tablet. For example, select **Header and One Region**.

7. Click **Done**.

8. Drag the **Record Signature** component to the page canvas.

9. In the properties pane, for Acknowledgment Text, enter the text that the signer affirms with their signature.

10. Optionally, show the date, time, and signer name on the page.

11. Save and activate the page.

Create an Inspection Visit in Public Sector Solutions

Create visits with associated action plan templates, and assign visits to an inspector.

Create a Visit

Create visits for inspectors from a related list on the license application or public complaint record page, or from a Visits list view page.

1. In the Inspection Management app, go to the license application record related to the inspection.

2. On the Visits related list, click **New**.

3. For Place, select the location or address for the inspector to visit.

4. Select the visit priority and account.

5. For Parent Visit, select a previous visit related to this visit.

6. For Context, select an application or a complaint.

7. For Visit Type, search for and select an inspection type.

8. Specify the planned start and end times for the visit.

9. Provide any special instructions to the inspector.

10. For Visitor, select **People** and then select the name of the inspector that you want to assign for this visit.

11. Save your changes.

Relate an Action Plan Template to a Visit

Relate an inspection action plan template to a specific inspection visit.

1. On a visit record page, on the Action Plans component, click **New Plan**.

2. Enter a name.

3. Search for and select the published action plan template that you want to assign to the visit.

4. Click **Next**.

5. Select the tasks that you want to add to the inspection.

6. Save your changes.

   Inspection assessment indicator records are created for the inspection.

Now that you've created a visit, add it to an inspector's calendar. For instructions, see Events and Calendars. Select the visit record in the Related To field of the event.

Conduct Inspections in Public Sector Solutions

Conduct inspections by using the Inspection Management desktop or mobile app.

Conduct an Inspection by Using the Mobile App

Use the Public Sector Solutions Inspection Management app on a mobile device to conduct an inspection visit.

Conduct an Inspection by Using the Desktop App

Use the Public Sector Solutions Inspection Management app in a desktop browser to conduct an inspection visit.

Create Violation Enforcement Actions

Create enforcement actions, such as a citation for failing to properly display an establishment license.

Conduct an Inspection by Using the Mobile App

Use the Public Sector Solutions Inspection Management app on a mobile device to conduct an inspection visit.

To use the Public Sector: Inspection Management mobile app, make sure that your device meets the Technical Requirements for Phones or the Technical Requirements for Tablets.

Start an Inspection Visit

Start your visit on the mobile app.

1. In the Salesforce mobile app, tap **Menu** > **App Launcher** > **Public Sector: Licensing, Permitting, and Inspection** > **Public Sector: Inspection Management**.

2. Review the inspections that are scheduled for you for the current day.

   - To filter the visits, tap ▼, and then filter by priority, status, or date.

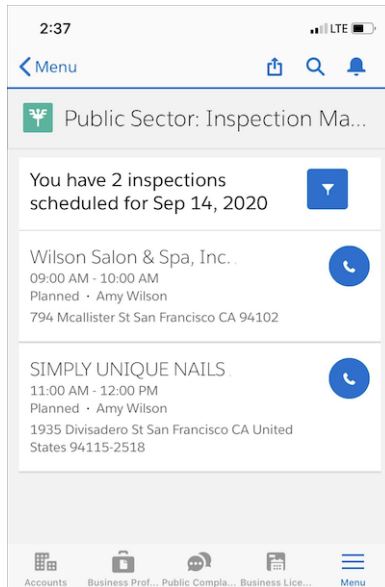   - To sort the visits, tap ▼, and then sort by date and time or priority.

3. Tap a visit.

4. Take any of these actions.

    •   To see the tasks to complete for the inspection, tap **Tasks**.

    •   To see visit and task notes, tap **Notes**.

    •   To see special instructions, details related to the inspection, and account information for the applicant, tap **Details**.

5. To begin the inspection, tap **Start Visit**.

Complete Inspection Tasks

Complete the tasks in the checklist on the mobile app.

1. On the visit page, tap **Tasks**.

2. Complete the checklist.

    •   Enter or select values for inspection questions and results. Depending on how your administrator has configured assessment indicator statuses, some results, such as Fail, automatically create a regulatory code violation. Or, on the Regulatory Code Violations related list, tap **New**.

    •   To read the applicable regulatory code, tap **View Regulatory Codes**.

    •   To add images to support your observations, tap **Upload Files**.

    •   To take notes, tap **More** and then tap **Add Notes**. You can take notes for a visit and for a task.

    •   If required, record your signature or the signature of the appropriate contact.

End an Inspection Visit

End a visit on the mobile app.

1. On the visit page, tap **End Visit**, and then tap **Complete Visit**.
    After you end the visit, you can start another one.

Conduct an Inspection by Using the Desktop App

Use the Public Sector Solutions Inspection Management app in a desktop browser to conduct an inspection visit.

Start an Inspection Visit

Start your visit in the desktop app.

1. In the Public Sector: Inspection Management app, from the app navigation menu, select **Scheduled Inspections**.
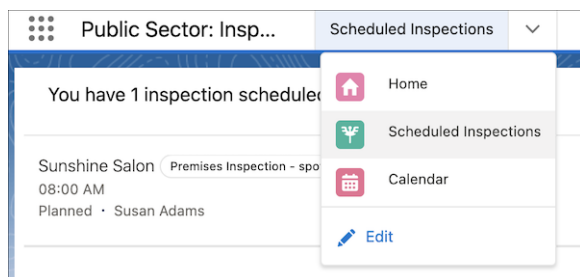
2. Review the inspections that are scheduled for you for the current day.

- To filter the visits, click ▼ , and then filter by priority, status, or date.
- To sort the visits, click ▼ , and then sort by date and time or priority.

3. Select a visit.

4. Take any of these actions.

- To see the tasks to complete for the inspection, go to the **Tasks** tab.
- To see visit and task notes, go to the **Notes** tab.
- To see special instructions, details related to the inspection, and account information for the applicant, go to the **Details** tab.

5. To begin the inspection, click **Start Visit**.
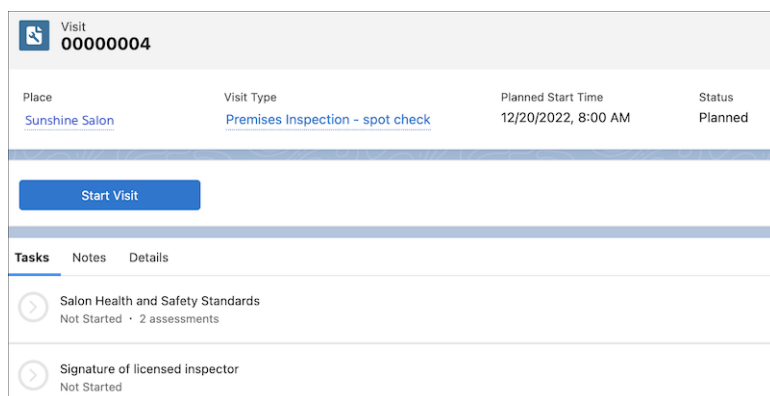
Complete Inspection Tasks

Complete the tasks in the checklist in the desktop app.

1. On the visit page, go to the **Tasks** tab.

2. Complete the checklist.

- Enter or select values for assessment questions and results. Depending on how your administrator has configured assessment indicator statuses, some results, such as Fail, automatically create a regulatory code violation. Or, on the Regulatory Code Violations related list, click **New**.
- To read the applicable regulatory code, click **View Regulatory Codes**.
- To add images to support your observations, click **Upload Files**.
- To take notes, click the **New Note** quick action.
- If required, record your signature or the signature of the appropriate contact.

End an Inspection Visit

End a visit in the desktop app.

1. On the visit page, click **End Visit**, and then click **Complete Visit**.
   After you end the visit, you can start another one.

Create Violation Enforcement Actions

Create enforcement actions, such as a citation for failing to properly display an establishment license.

After an inspection visit is complete, a compliance officer can follow up and create enforcement actions for regulatory code violations that the inspector found.

1. In the Public Sector: Inspection Management app, from the app navigation menu, find and select **Visits**.

2. Select a completed inspection visit.

3. On the Regulatory Code Violations related list, select a record.

4. On the Violation Enforcement Actions related list, click **New**.

5. Select a type. For example, select **Citation** or **Citation warning**.

6. Enter the date that the enforcement action was created and, optionally, the due date.

7. Save your changes.

Dynamic Assessments in Public Sector Solutions

Design dynamic assessments that give inspectors, caseworkers, and compliance officers flexibility and control over inspections, investigations, and evaluations.

Inspecting a business or residence for the issuance of a license or permit is a complex process. To confirm that a business or residence meets regulatory code requirements involves more than checking off a series of sequential boxes on a form.

With Dynamic Assessments, design detailed assessment questions and tasks that include conditional logic and dependencies. Ensure that every inspection that your agency conducts is complete, thorough, and considers all applicable safety and legal requirements and regulations.

For example, consider the constituent who applies for a permit to open a salon. As part of the business license application process, an inspector conducts a site visit to make sure that the salon meets various safety requirements, such as having fire extinguishers on the premises. The number of fire extinguishers that the salon needs, however, depends on how large the establishment is. Dynamic Assessments guide the inspector through a series of questions and tasks that incorporate these types of dependencies to ensure that the site is inspected completely and accurately and that violations are identified.

Dynamic Assessments can be performed for these objects:

- Account
- Business License Application
- Care Plan
- Case
- Contact
- Custody Item
- Custom objects
- Funding Award
- Funding Award Requirement
- Individual Application
- Program
- Public Complaint
- Visit

Dynamic Assessments are based on Discovery Framework, which is a data model of objects that let you collect data through OmniScript forms and validate whether the data complies with your policies.

To set up Dynamic Assessments, complete the prerequisites, including turning on Discovery Framework. Then, create assessment questions and add them to Omni Assessment Tasks. Next, create an OmniScript with conditional logic for the Omni Assessment Tasks. Finally, relate the Omni Assessment Tasks to an action plan template, and create an action plan for a specific record, such as a business license application, based on the template. Inspectors, caseworkers, and compliance officers complete the assessment tasks during an inspection, investigation, or evaluation.

> **Note:** You can't export and deploy dynamic assessments from one org to another.

Dynamic Assessments Prerequisites

Before you set up Dynamic Assessments in Public Sector Solutions, complete the prerequisites.

Create Assessment Question Categories

Group assessment questions into categories for different needs.

Create Assessment Questions

Create assessment questions to include in your inspection checklist.

Relate Assessment Questions to Regulatory Codes

Allow inspectors in the field to see the regulatory code that are related to assessment questions.

Relate Assessment Questions to Violation Types

Allow inspectors to record violations related to assessment questions when they perform assessment tasks.

Create an Omni Assessment Task

Store assessment questions and the OmniScript logic that sequences them in an omni assessment task.

Add Assessment Questions to an Omni Assessment Task

Create an OmniScript form that contains the assessment questions in an omni assessment task.

Build and Activate the OmniScript for an Omni Assessment Task

Define the OmniScript logic for the questions in the omni assessment task.

Create an Action Plan Template for a Dynamic Assessment

Capture repeatable assessment tasks in an action plan template that you can easily reuse with standard types of inspections, investigations, and evaluations in Public Sector Solutions.

Create an Action Plan for a Dynamic Assessment

Create an action plan from an action plan template that uses omni assessment tasks for a specific inspection, investigation, or evaluation in Public Sector Solutions.

Dynamic Assessments Prerequisites

Before you set up Dynamic Assessments in Public Sector Solutions, complete the prerequisites.

After completing these prerequisite tasks, configure assessment questions, omni assessment tasks, OmniScripts, and actions plans for Dynamic Assessments.

Turn on Discovery Framework

Dynamic Assessments use Discovery Framework, a data model for efficiently collecting and managing OmniScript form data. Turn on Discovery Framework so that you can use Dynamic Assessments in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under Assessments, select **General Settings**.

2. Turn on Discovery Framework.

Configure Permissions

Create an Industries Assessment permission set with specific permissions for Dynamic Assessments. Then assign it and other required permissions to users.

1. [Create a Permission Set Associated with a Permission Set License](#). Name it `Industries Assessment`, and for License, select **Industries Assessment**.

2. Save your changes.

3. Click **System Permissions**, and then click **Edit**.

4. Enable **Discovery Framework Platform User**.

5. Save your changes.

   Now, assign the permission set and other required permissions to anyone who sets up Dynamic Assessments.

6. In the Quick Find box, enter `Users`, and then select **Users**.

7. Click the name of a user with the System Administrator profile. For example, click your name.

8. Click **Permission Set Assignments**, and then click **Edit Assignments**.

9. Add these permission sets to the Enabled Permission Sets list: **Action Plans**, **Dynamic Assessment Access**, **Industries Assessment**, and **OmniStudio Admin**.

   📝 Note: Assign standard users who access action plans for dynamic assessments the Action Plans and Industries Visit permission sets.

10. Save your work.

Update the Assessment Question Version Page Layout

Add the Regulatory Code Uses and Version Type Uses related lists to the Assessment Question Version page layout.

1. From Setup, in Object Manager, select **Assessment Question Version**.

2. Click **Page Layouts**, and then click **Assessment Question Version Layout**.

3. In the panel, click **Related Lists**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To enable Discovery Framework:
- Customize Application

To create and assign permission sets:
- View Setup and Configuration AND Assign Permission Sets

To edit page layouts:
- Customize Application

To edit Lightning pages in Lightning App Builder:
- Customize Application

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4. Drag **Regulatory Code Uses** and **Violation Type Uses** to the Related Lists.

5. Save your work.

Add the Assessments Component to Lightning Pages

Show the Assessments component on Lightning pages for business license applications, individual applications, care plans, public complaints, custody items, visits, and other relevant objects. Here's how to add it to the care plans page.

1. From Setup, in Object Manager, select **Care Plan**.

2. Under Lightning Record Pages, select **Care Plan Record Page**.

3. For Lightning Page Detail, click **Edit**.

4. On the page canvas, select the Tabs component and, in the Tabs properties panel, click **Add Tab**.

5. Select the new tab element and, for Tab Label, select **Assessments**.

6. Click **Done**.

7. Select the Assessments tab on the page canvas and drag **Assessment List** from the Components list to the Assessments tab.

8. Save your changes and activate the record page.
   In addition, show assessment questions on omni assessment task record pages.

9. In Object Manager, select **Omni Assessment Task**.

10. Under Lightning Record Pages, select **Omni Assessment Task Record Page**.

11. For Lightning Page Detail, click **Edit**.

12. On the page canvas, select the Tabs component and, in the Tabs properties panel, click **Add Tab**.

13. Select the new tab element and, for Tab Label, select **Assessments**.

14. Click **Done**.

15. Select the Assessments tab on the page canvas and drag **Omni Process Assessment** from the Components list to the Assessments tab.

16. Save your changes and activate the page.

Create Assessment Question Categories

Group assessment questions into categories for different needs.

Assessment questions are categorized for use in different scenarios. Categories are implemented using a picklist field on the Assessment Question object. By default, Public Sector Solutions includes the categories Demographic and Financial. A couple of additional categories are useful, so let's add them now.

1. From Setup, in Object Manager, select **Assessment Question**.

2. Click **Fields & Relationships** and then click **Category**.

3. In the Category Picklist Values section, click **New**.

4. On separate lines, enter the Category values `Inspection` and `Complaint Observations`.

5. Optionally, add other Category values that make sense for your organization.

6. Save your changes.

Create Assessment Questions

Create assessment questions to include in your inspection checklist.

Let's create an assessment question for the fire safety portion of our salon inspection.

1. Click ⠿ and search for and then select **Assessment Questions**.

2. Click **New**.

3. Specify these details.

   a. For Name, enter *Fire Extinguishers* and then press Tab to autopopulate the Developer Name.

      Ensure that the length of Developer Name is less than 64 characters.

   b. For Data Type, select **Radio**.

      Public Sector Solutions supports assessment questions of these data types in OmniScripts: Checkbox, Date, Datetime, Decimal, Integer, Multiselect, Select, Text, Textarea, Time, and Radio. Select only one of these data types.

   c. For Category, select **Inspection**.

   d. Enter the Question Text. For our example, enter *Are there fire extinguishers?*

   e. Enter Response Values Yes and No on separate lines, for our example.

      Response Values is required for the data types Radio, Radio Group, Select, and Multi-select.

   f. To make the question available to OmniScript, select **Active**.

   g. Optionally, complete the other fields on the New Assessment Question page based on your needs.

4. Save your assessment question.

To change an assessment question, you can edit the assessment question itself, or any assessment question version. On the record page, click ✎ for any editable field. When you edit an assessment question, you can change the Name, Developer Name, Data Type, Category, Related Question, and Formula Response Data Type. When you edit an assessment question version, you can change the Name, Question Text, Description, Active status, Response Values, Help Text, Option Source Response Value, and Additional Information.

Relate Assessment Questions to Regulatory Codes

Allow inspectors in the field to see the regulatory code that are related to assessment questions.

After creating assessment questions, relate them to the relevant regulatory code by creating a regulatory code use record. Regulatory code use records act as a junction between a set of assessment questions and the applicable regulatory code. When you relate assessment questions to regulatory codes, the codes appear with the questions in the omni assessment task, so inspectors can access and review the related code while performing the task. And if there's a violation, the constituent can view the applicable regulatory code and see the regulatory authority, as well, from your Experience Cloud site.

1. Click ⠿ and search for and then select **Assessment Questions**.

2. Select the assessment question that you want to relate to a code. For example, click **Fire Extinguishers**.

3. On the Assessment Question Versions related list, select the active question version.

4. On the Regulatory Code Uses related list, click **New**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create assessment questions:
- Industries Assessment

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create regulatory code use records:
- Dynamic Assessment Access

5. For Regulatory Code, search for and select the appropriate code. To create a regulatory code, click **New Regulatory Code**.

6. Save your changes.

SEE ALSO:

   Create Regulatory Code Records

Relate Assessment Questions to Violation Types

Allow inspectors to record violations related to assessment questions when they perform assessment tasks.

Relate assessment questions to violation types by using a violation type use record. The violation type use record acts as a junction between a set of assessment questions and the applicable violation type. When you relate assessment questions to violation types, the violation types show with your assessment questions when you build the OmniScript for your omni assessment task, so inspectors can record violations that they observe while performing the task.

To relate an inspection assessment question to a violation type:

1. Click ⁝⁝⁝ and search for and then select **Assessment Questions**.

2. Select the assessment question that you want to relate to a violation type. For example, select **Fire Extinguishers**.

3. On the Assessment Question Versions related list, select the active question version.

4. On the Violation Type Uses related list, click **New**.

5. For Violation Type, search for and select the appropriate code. To create a violation type, click **New Violation Type**.

6. Save your changes.

SEE ALSO:

   Create Violation Types

Create an Omni Assessment Task

Store assessment questions and the OmniScript logic that sequences them in an omni assessment task.

With Dynamic Assessments, omni assessment tasks store both the assessment questions and the OmniScript logic that sequences the questions for inspectors and caseworkers conducting inspections, investigations, and evaluations. The task stores the information using an OmniScript form, and by setting the status of an omni assessment task to Is Defined, you can use it multiple times.

Let's create an omni assessment task that inspectors can use to check the health and safety protocols at a beauty salon.

1. Click ⦂⦂⦂ and search for and then select **Omni Assessment Tasks**.

2. Click **New**.

3. For Name, enter *Salon Health & Safety Check.*

4. For Status, select **Is Defined**.

5. Specify other options based on your needs.

6. Save your changes.

Next, add assessment questions to the task in an OmniScript form.

Add Assessment Questions to an Omni Assessment Task

Create an OmniScript form that contains the assessment questions in an omni assessment task.

> 📝 **Note:** You can add up to 50 assessment questions to an omni assessment task.

1. Click ⦂⦂⦂ and search for and then select **Omni Assessment Tasks**.

2. Select the omni assessment task to which you want to add assessment questions. For example, select **Salon Health & Safety Check**.

3. Click **Create OmniScript**.

4. Specify these details.

   a. For Name, enter *Salon Safety Check*.

   b. For Language, select **English**.

   c. For Type, enter *Inspection*.

   d. For Sub Type, enter *Safety*.

5. Under Salon Safety Check, define steps for each aspect of the safety check task. For our example, we want a step to check for ventilation and a step to check the number of fire extinguishers.

   a. Click ✎ for the Untitled Step placeholder and rename it *Ventilation*.

   b. Click **Add Step**, and then click ✎ for the new Untitled Step and rename it *Fire Extinguishers*.

6. Search for your assessment questions in any of these ways.

   - Enter a keyword in the Search Assessment Questions field. For example, search for *Health*.

   - Click in the Question Set field to search for and select assessment questions from a specific question set.

   - Select a Category to see and select assessment questions from a specific category, such as **Inspection**.

7. Drag a question from the search results list to a step. Or, select one or more questions and click **Add Questions to Step** to add them to a specific step. To create and add new questions directly from your OmniScript form, click **New Assessment Question**.

OmniStudio saves your work automatically.

Build and Activate the OmniScript for an Omni Assessment Task

Define the OmniScript logic for the questions in the omni assessment task.

Add conditional logic to your omni assessment task's OmniScript to show inspectors and caseworkers certain assessment questions based on answers to previous questions. For our salon fire safety inspection, for example, if the answer to the question, "What is the area of the establishment?" is greater than 500 square feet, then inspectors see the question, "Are there fire extinguishers?" Otherwise, the fire extinguisher assessment question doesn't show in the omni assessment task.

Let's build the OmniScript logic for the assessment questions in an omni assessment task.

1. On the Create OmniScript page for the omni assessment task, after adding assessment questions to steps, click **Build OmniScript**.

2. Define the conditional logic.

   a. Select a question. For example, select **Are there fire extinguishers?**

   b. In the Properties pane, expand the **Conditional View** section.

   > 📝 Note: You can't edit the properties of an active OmniScript.

   c. Under View Condition, select **Show Element if True**.

   d. In the Edit Show Hide Rules dialog, specify these options.

      a. Select **All Conditions Are Met**.

      b. For Field, select **Area_of_Establishment**.

      c. For Operator, select **Greater Than**.

      d. For Value, enter `500`.

   e. Save your rule.

3. Configure the OmniScript to save custom field values on assessments when a user conducts a dynamic assessment.

   a. Select the **Save-Responses** step, and in the Properties pane, expand the **Remote Properties** section.

   b. Under Remote Options, in Key, enter the custom field by using this syntax: `Assessment.fieldname`. For example, `Assessment.AccountId__c`.

   > 📝 Note: The custom field names must match the developer names of the Assessment object fields. For example, Assessment.Name.

   c. (Optional) Enter a value.

   > 📝 Note: Only these data types are supported as Remote Option values: Date, Checkbox, Currency, Email, Lookup Relationship, Percent, Phone, Picklist, Number, Text, TextArea, and TextArea (Long).

4. Click **Preview**. Then, run simulations to check the rule.

   a. For the question, "What is the area of the establishment under use?" enter `499`, and the assessment task ends.

b. For the question, "What is the area of the establishment under use?" enter *501*. OmniScript shows the question, "Are there fire extinguishers?"

5. When you're satisfied that your OmniScript works correctly, on the OmniScript page, click **Activate Version**.

Create an Action Plan Template for a Dynamic Assessment

Capture repeatable assessment tasks in an action plan template that you can easily reuse with standard types of inspections, investigations, and evaluations in Public Sector Solutions.

Here's how to create an action plan template for a fire safety inspection that uses omni assessment tasks.

1. Click ⠿ and search for and then select **Action Plan Templates**.

2. Click **New**.

3. Specify these details.

    a. For Name, enter *Salon Safety Check*.

    b. For Action Plan Type, select **Assessment Execution**.

    c. For Target Object, select **Business License Application**.

    d. To allow other users to add to your action plan, select **Let users add items to action plans**.

4. Save your changes.

Now, add your omni assessment task to the template.

5. Click **New Generic Assessment Task**.

6. Specify these details.

    a. For Generic Assessment Task Type, select the default option, **Omni Assessment Task**.

    b. For Generic Assessment Tasks, search and select an omni assessment task. For example, select **Salon Health & Safety Check**.

    c. To specify the task's sequence, for Display Order, enter a number.

    d. To make the assessment task mandatory, select **Is Required**.

7. Save your changes.

8. If desired, to add tasks to the action plan template, click **New** and then select **Generic Assessment Task**. Specify the task details and save your changes.

9. When you're ready to use the template, click **Publish Template**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

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USER PERMISSIONS

To create action plan templates:
- Action Plans

To add omni assessment tasks to an action plan template:
- Dynamic Assessment Access

Create an Action Plan for a Dynamic Assessment

Create an action plan from an action plan template that uses omni assessment tasks for a specific inspection, investigation, or evaluation in Public Sector Solutions.

To use an action plan template, relate it to an action plan for a specific record, such as a business license application. Here's how to create an action plan, based on the safety check action plan template, for the inspection required for our salon's business license application.

1. Click ⋮⋮⋮ and search for and then select the object that you want to relate to the action plan. For example, select **Business License Applications**.

2. Select an application.

3. On the Action Plans component, click **New Plan**.

4. Specify these details.

    a. For Name, enter *Salon Safety Check*.

    b. Select a Start Date.

    c. For Action Plan Template, select a template. For example, select **Salon Safety Check**.

5. Click **Next**.

6. Review the required tasks and save the action plan.

Conduct Dynamic Assessments in Public Sector Solutions

Use the Inspection Management app to conduct Dynamic Assessments.

Dynamic Assessments guide you through a series of omni assessment tasks whose steps incorporate conditional logic, so you ask the right questions and conduct complete, thorough, and accurate inspections.

Dynamic Assessments can be performed for inspections, investigations, or evaluations related to:

- Accounts
- Business license applications
- Care plans
- Cases
- Contacts
- Custody items
- Custom objects
- Funding awards
- Funding award requirements
- Individual applications
- Programs
- Public complaints
- Visits

To complete a Dynamic Assessment, simply complete the omni assessment tasks for the record in the Inspection Management app. Here's how to complete a Dynamic Assessment for a business license application.

1. In the Public Sector: Inspection Management app, click the app navigation menu and select **Business License Applications**.

2. Select an application.

3. In the Assessments tab, click the first omni assessment task that you'd like to perform.

4. Answer the questions in the task.

5. Click **Next** to advance through all the questions until the assessment is complete.
   If your Public Sector Solutions admin has configured it, regulatory code violations are generated when your constituent fails an inspection assessment indicator. To see if code violation records were created, look at the Regulatory Code Violations related list on the application record page.

6. To see responses to assessment questions, do either of the following.

   a. Click ⣿ and search for and then select **Assessments**. Select an assessment and on the Related tab, see Assessment Question Responses.

   b. On the record page for the business license application, care plan, or complaint, on the Assessments tab, click an assessment task to see the Assessment Question Responses.

Manage Complaints in Public Sector Solutions

Review public complaints related to inspections and assessments, see their supporting documents, and schedule a visit to investigate the concern.

When a constituent reports a concern in the community, record information about the concern in a public complaint record. To streamline the process of collecting the information, set up a public complaint guided intake flow.

The public complaint record includes the details of the reported issue and any supporting documents or images. Depending on your configuration, the complaint record can also include related regulatory code violations and violation enforcement actions. Schedule a visit from the complaint record so that an inspector can investigate the concern.

1. From the App Launcher, find and select **Public Complaint**.

2. From a list view, select a complaint.

3. To view the attachments for the complaint, from the Files related list, select a file.

4. If your admin has configured it, check related information such as visits, regulatory code violations, and violation enforcement actions from a single tab in the complaint record.

5. If necessary, create a visit: Click the action menu for Visits and select **New**.

6. Select the appropriate Status for the complaint.

SEE ALSO:

[Document a Constituent Concern by Using a Public Complaint Guided Intake](#)

Social Program Management in Public Sector Solutions

Deliver services to improve the well-being of individuals, families, and communities.

Social Program Management modernizes and streamlines the everyday functions that government agencies perform to maintain safe, healthy, and thriving communities. A unified system, purpose-built tools, and automated workflows enhance service delivery and coordination of care by removing common administrative silos and roadblocks.

Social Program Management supports four primary use cases.

SOCIAL PROGRAM MANAGEMENT

Human Resources
- Complaint and Discrimination
- Talent and Learning Plan

Legal and Compliance
- Justice and Investigative Case Management
- Legal Assistance
- Complaint Management

Business Support
- Training and Skilling
- Business Support Plan

Social Care
- Child Welfare Aid to Families
- Elder Care and Support Services
- Disability Support Services
- Employment Services

Social Care

Social Program Management includes tools specially designed to improve delivery of aid to constituents who experience hardship, such as unemployment, homelessness, or domestic issues.

Configure programs and benefits that align with the services your agency offers, and set up goals, tasks, and care plans that caseworkers can assign to constituents to guide them toward positive outcomes and self-sufficiency. Help constituents stay on track with automated, personalized communication and notifications.

Create and customize a portal where constituents can view information about available services, determine their eligibility, and apply for needed assistance. Create referrals to connect constituents to programs offered by external agencies, and manage inbound referrals to enroll constituents into the programs that your agency administers.

Human Resources

Use Social Program Management to process public complaints related to inequity, discrimination, harassment, or safety concerns in the workplace. Deliver training programs to help constituents acquire necessary skills to enter the workforce or advance their careers, and provide job placement and career counseling services.

Legal and Compliance

For cases that involve civil and criminal legal processes, record and track details and events related to the case, including associated violations, participants, proceedings, assessments, and investigations.

Business Support

Create business support plans and provide essential coaching and training programs, such as investment support, IT and technical skills development and role-based training, to help businesses reach goals, better select areas of investment, and upskill staff.

Social Program Management focuses on non-financial services related to social care. To learn about financial assistance solutions in Public Sector Solutions, see Benefit Management.

Social Program Management Prerequisites

Before you set up social program management in Public Sector Solutions, complete the prerequisites.

Programs, Goals, and Benefits in Public Sector Solutions

Create programs to help ensure that the basic needs of individuals, households, and communities are met. Define high-level and intermediate goals for care plans, and define and assign benefits to help constituents achieve these goals.

Care Plans in Public Sector Solutions

Create customized care plans to support constituents and make them self-sufficient.

Social Well-Being Concerns in Public Sector Solutions

Create and use OmniScript guided flows to document concerns reported by constituents about someone's well-being as public complaint and case records.

Case Referrals in Public Sector Solutions

Deliver services and support to constituents by referring them to service providers within or outside of your organization.

Social Program Management Prerequisites

Before you set up social program management in Public Sector Solutions, complete the prerequisites.

Enable Program and Case Management Settings

Turn on the org settings so that you can create and edit programs, benefits, goals, and care plans.

1. In Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Care Plan Settings**.
2. Turn on Create and manage care plans.
3. Select **Program and Benefit Management Settings**, and turn on Create and manage your programs, benefits, and goals.

Configure Permissions

Assign anyone who sets up and works with social program management these permissions.

- ActionPlans
- Advanced Program Management
- Care Plans Access
- Case Referral
- Complaints Management Access
- Industries Assessment
- Program and Benefit Management Access

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To enable program and benefit management settings:
- Customize Application

To assign permission sets:
- Assign Permission Sets

For information on how to create the Industries Assessment permission set, see "Configure Permissions" in Dynamic Assessments Prerequisites on page 150. Also see View and Assign Permission Sets in Public Sector Solutions.

Programs, Goals, and Benefits in Public Sector Solutions

Create programs to help ensure that the basic needs of individuals, households, and communities are met. Define high-level and intermediate goals for care plans, and define and assign benefits to help constituents achieve these goals.

👁 **Example:** Create a program for child welfare, define a top-level goal such as family reunification, and intermediate goals such as financial stability and emotional stability in the care plan. Assign benefits such as resume workshop, interview training, parenting with love, and anger management to achieve these goals.

Create a Program

Create a program to deliver a service that promotes the well-being of constituents.

Create Goal Definitions

Define the milestones and the expected results that you want constituents to achieve.

Define Benefits and Benefit Types for Programs

Define benefits and group them into benefit types for use in programs, care plans, and care plan templates.

Define Benefit Schedules and Sessions in Public Sector Solutions

Create a benefit schedule that can have one or more benefit sessions. Set up one-time sessions or recurring sessions based on the needs of the participants.

Add the Benefit Disbursements Component to the Care Plan or Benefit Assignment Lightning Record Page

Make the Benefit Disbursements component available to users on relevant Lightning record pages.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Create a Program

Create a program to deliver a service that promotes the well-being of constituents.

Create programs such as job readiness, youth development, refugee settlement, housing services, and child welfare. Under each program, assign and track the benefits to eligible constituents.

1. Click ⋮⋮⋮ and then search for and select **Programs**.

2. Click **New**.

3. Specify these details.

   a. Enter a name for the program. For example, enter `Child Welfare`.

   b. For Status, select **Active**.

   c. Enter a start date.

   d. Enter a summary. For example, enter `Ensure children have safe, permanent homes and promote the well-being of children and their families.`

4. Save your changes.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions
>
> **USER PERMISSIONS**
>
> To create a program:
> - Program and Benefit Management Access

Create Goal Definitions

Define the milestones and the expected results that you want constituents to achieve.

Organize goals into a structured hierarchy of top goals and intermediate goals. Use the top goal to define the ultimate desired result, and the intermediate goals to track milestones toward achieving the top goal. For example, for a care plan that addresses child welfare in a family, the top goal is family reunification for a household. To achieve this top goal, define the intermediate goals financial stability and emotional stability.

When you add a top goal to a care plan template, its underlying intermediate goals and their associated benefits are automatically included.

1. Click :::: and then search for and select **Goal Definitions**.

2. Click **New**.

3. Specify these details.

    a. Enter a name for the top goal. For example, enter *Family Reunification.*

    b. For Status, select **Active**.

    c. Enter a description. For example, enter *Reunite the family within six months.*

    d. For Type, select **Top Goal**.

4. Click **Save & New**.

5. Specify these details.

    a. Enter a name for the intermediate goal. For example, enter *Emotional Stability.*

    b. For Status, select **Active**.

    c. Enter a description. For example, enter *Parents achieve emotional stability through anger management and family counseling.*

    d. For Parent Goal, select the **Family Reunification**.

    e. For Type, select **Intermediate Goal**.

6. Save your changes.

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EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create goal definitions:
- Care Plans Access

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Define Benefits and Benefit Types for Programs

Define benefits and group them into benefit types for use in programs, care plans, and care plan templates.

Programs, care plans, and care plan templates can include benefits. Benefits are services that are available to constituents and can help them reach their goals. Benefits can be applied to an individual or to a group, and they must be associated with a program.

For a program, care plan, or care plan template that focuses on child welfare, a benefit might be for the parent or guardian to attend a parenting with love course, which would help them achieve the goal of family stability. Another benefit might be family counseling.

All benefits have a related benefit type. First, create the benefit type and then create the benefit.

1. Click ⠿ and then search for and select **Benefit Types**.

2. Click **New**.

3. Specify these details.

   a. For Benefit Type Name, enter *Parenting with Love.*

   b. For Process Type, select **Public Sector**.

   c. Optionally, enter a description of the benefit type.

   d. For Category, select **Child Welfare**.

4. Save your changes.

5. Click ⠿ and then search for and select **Benefits**.

6. Click **New**.

7. Specify these details.

   a. For Benefit Name, enter *Family Counseling*.

   b. For Benefit Type, search for and select **Parenting with Love**.

   c. For Program, search for and select the relevant program, such as **Child Welfare**. Or, create a program.

   d. Select the **Active** checkbox.

   Benefits must be active in order to relate them to a goal and to be available to use with care plans that aren't created from a template. If a benefit is changed to inactive after it's assigned to a goal, however, it still shows as related to the goal.

   e. For Goal Definition, search for and select **Family Reunification**.

   f. Optionally, enter other details for the benefit, such as a date range, minimum and maximum amounts, and a benefit frequency. For example, give a training course a 10-week date range and a maximum benefit amount of $1,000. These values are used to populate the default benefit assignment.

8. Save your changes.

Define Benefit Schedules and Sessions in Public Sector Solutions

Create a benefit schedule that can have one or more benefit sessions. Set up one-time sessions or recurring sessions based on the needs of the participants.

A benefit session is an instance or occurrence within a benefit schedule. A schedule can have one or more benefit sessions based on the benefit selected. For a Parenting with Love workshop, a one-day benefit session could be sufficient. But an anger management course could require multiple sessions. You can add participants to all benefit sessions in a schedule or to selected sessions.

You can choose from a set of recurrence frequency options like weekly, biweekly, monthly, quarterly, half yearly, and yearly to schedule recurring sessions. To schedule a benefit that has only one session, or a benefit with daily sessions, you must choose the right combination of options on the benefit schedule.

When you create a benefit schedule record using the guided flow, a benefit session record is created for every occurrence in the benefit schedule.

1. From the App Launcher, find and select **Benefit**.

2. Choose a benefit, such as **Parenting with Love**, and click **New Benefit Schedule**.

3. Specify these details. Let's use Parenting with Love as our example.

   a. For Name, enter `Parenting with Love`.

   b. For Benefit Quantity, enter `1`, considering one benefit session of Parenting with Love runs for one day.

   c. Specify details such as first session date, session start and end time, and session recurrence frequency.

   d. For Benefit Schedule Ends, to specify an end date for the benefit, click **On** and select the last session date. Alternatively, click **After** and enter the number of sessions.

   e. For First Session Start Time and Session End Time, select `11 am` and `5 pm`, respectively.

4. To preview the benefit sessions, click **Next**.

5. Save your work.

Add the Benefit Disbursements Component to the Care Plan or Benefit Assignment Lightning Record Page

Make the Benefit Disbursements component available to users on relevant Lightning record pages.

1. From the App Launcher, find and select **Care Plans**.

2. Select a care plan record.

3. Click ⚙ and select **Edit Page**.

4. Select the Tabs component on the page canvas and, in the Tabs properties panel, click **Add Tab**.

5. Click the new tab's label and select **Custom**.

6. Enter a name, such as `Benefit Disbursements`, and click **Done**.

7. Select the **Benefit Disbursements** tab on the page canvas and drag **Manage Benefit Disbursement** from the Components panel to it.

8. Save your changes and activate the record page.

9. If desired, repeat these steps to add the Manage Benefit Disbursement component to the benefit assignment Lightning record page.

Care Plans in Public Sector Solutions

Create customized care plans to support constituents and make them self-sufficient.

Asking for help isn't easy for anyone. Many people don't know where to turn when they experience health, housing, personal safety, and other crises that government agencies can assist with. Fortunately, Public Sector Solutions offers care plans, which caseworkers can use to assist constituents in crisis and resolve issues in the community.

Care plans contain goals to help constituents achieve a milestone or outcome, and benefits that help them get there. For a child whose parents are ill or unstable, a care plan can be used to locate a foster home for the child. For a constituent who experiences mobility issues due to an injury, a care plan can provide access to free public transportation, weekly food delivery, or home care assistance.

Among other things, caseworkers can use care plans to help constituents who are experiencing:

- Poverty
- Homelessness
- Disability
- Unemployment
- Food insecurity
- Reentry to the community after serving time in prison

Oftentimes, the need for a care plan arises when a constituent other than the person who needs help contacts a government agency. For example, a constituent sees their elderly neighbor driving erratically and is concerned for their health and wellbeing. In Public Sector Solutions, you can create care plans for cases related to these reports, which are stored as public complaint records. And either you as a Public Sector Solutions administrator, or a case manager to whom you assign permissions, can create care plan templates for different assistance scenarios. When a caseworker investigates the issue or concern, they can create a care plan based on a template, and customize it for each individual case. You can also create individual, one-off care plans for any case as needed. This documentation focuses on how

to set up and use care plan templates with cases created based on public complaints. Create care plan templates that include goals and benefits for different assistance scenarios.

To use care plans, an intake officer creates the public complaint record, and then a case manager creates and prioritizes a case to investigate the concern. The caseworker takes over from there, conducting a dynamic assessment and creating a care plan for the case based on the appropriate care plan template.

Create a Care Plan Template

Include benefits and goals in a care plan template so that you can easily reuse the items to connect constituents with standard types of services and support.

Add the Care Plan Related List to the Case Page Layout

Make it easy for intake officers and others to access care plans for the cases they manage.

Add Custom Fields to a Care Plan Guided Flow

Build care plans tailored to your needs by adding custom fields.

Create Tasks for Care Plans with Action Plan Templates

Help keep case participants accountable and on track by adding tasks to the benefits and goals in a care plan.

Give Caseworkers Access to Goal Assignments and Benefit Assignments Related to Care Plans

Allow caseworkers to effectively collaborate on cases by granting them access to goal assignment and benefit assignment records related to care plans.

Create a Care Plan for a Case

Create custom care plans based on care plan templates to help your constituents reach their specific goals.

Use a Flow to Enroll Participants in Benefit Sessions from Care Plans

Add participants to individual benefit sessions according to their availability and preferences.

Track Attendance and Disbursements for Benefit Participants

Assess the effectiveness of a program or care plan by recording and tracking attendance.

View and Manage Care Plans

Keep care plans current so that they stay relevant to you and to your constituents.

Create a Care Plan Template

Include benefits and goals in a care plan template so that you can easily reuse the items to connect constituents with standard types of services and support.

A care plan template is a blueprint that contains benefits and goals. Use a care plan template to connect a constituent with services, help them get other types of support, and set milestones for constituents to improve their circumstances. Create care plan templates to address personal safety, health and well-being, and other issues. Assign a template to a case and customize the care plan for a particular constituent's needs.

1. Click ⣿ and search for and then select **Care Plan Templates**.

2. Click **New**.

3. Specify these details.

   a. Enter a Name.

   b. Optionally, enter a Description.

   c. For Status, select **Draft**.

> 📝 **Note:** Don't publish your care plan template until you add goals and benefits.

4. Save your work.

   Now, add goals and benefits to the template.

5. Click the **Related** tab.

6. On the Care Plan Template Goal related list, add goals.

   - To add one goal, click **New**. Select a goal definition, set the priority, and save your changes.
   - To add multiple goals, click **Add Goals**. Search for and select the goal definitions. Adjust the priority as desired, and save your changes.

7. On the Care Plan Template Benefit related list, add benefits.

   - To add one benefit, click **New**. Select a benefit, set the priority, and save your changes.
   - To add multiple benefits, click **Add Benefits**. Search for and select the benefits. Adjust the priority as desired, and save your changes.

8. To see the hierarchical structure of the goal definitions and benefits, click the **Preview** tab.

   When you're satisfied with the care plan template, publish it.

   > 📝 **Note:** You can't edit a care plan template after it's published.

9. On the Details tab, for Status, click ✏️ and select **Published**.

10. Save your changes.

SEE ALSO:

Create Goal Definitions

Define Benefits and Benefit Types for Programs

Add the Care Plan Related List to the Case Page Layout

Make it easy for intake officers and others to access care plans for the cases they manage.

If the page layout you're using for cases doesn't include a Care Plans related list, add it.

1. From Setup, in Object Manager, click **Case**.

2. Select Case Page Layouts and then click **Case Layout**.

3. In the palette, click **Related Lists**.

4. Drag **Care Plans** to Related Lists in the layout.

5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To edit page layouts:
- Customize Application

To access care plan objects and features:
- Care Plans Access

Add Custom Fields to a Care Plan Guided Flow

Build care plans tailored to your needs by adding custom fields.

To add a custom field to the care plan guided flow, create the field on one of these objects:

- Benefit Assignment
- Care Plan
- Goal Assignment

1. From Setup, in Object Manager, click **Care Plan**, **Goal Assignment**, or **Benefit Assignment**..
2. Click **Fields & Relationships**, then click **New**.
3. Select the type of field, then click **Next**.
4. Enter a field label, and then press Tab to autopopulate the field name.
5. Configure the field details, and then click **Next**.
6. For field-level security, make the fields visible to applicable profiles.
7. Click **Next**.
8. Select the Dynamic Forms-enabled Lightning record pages that should include the field, then click **Next**.

   If you don't have any Dynamic Forms-enabled Lightning record pages for the object, this step doesn't appear.
9. Add the field to one or more page layouts.
10. Save your changes, or click **Save & New** to create another field.

SEE ALSO:

   [Create Custom Fields](#)

Create Tasks for Care Plans with Action Plan Templates

Help keep case participants accountable and on track by adding tasks to the benefits and goals in a care plan.

Allow caseworkers to easily assign and manage tasks for a care plan. Create an action plan template that contains repeatable tasks for benefit assignments, goal assignments, or care plans. Then, associate the action plan template to the appropriate benefit, goal definition, or care plan template. You can assign tasks to case participants, caseworkers, and case managers. Tasks include things like signing up for counseling, attending each session, and reporting progress back to caseworkers. Caseworkers see the tasks when they create care plans based on a care plan template, and can easily update task statuses when they meet with constituents.

Here's how to create an action plan template with a task that requires a parent who is receiving counseling for anger management to submit feedback to the caseworker every week.

1. From the App Launcher, find and select **Action Plan Templates**.

2. Click **New**.

3. Specify these details.

    a. For Name, enter *Tasks for Parent Counseling Benefit.*

    b. For Action Plan Type, select **Industries**.

    c. For Target Object, select **Benefit Assignment.**

    d. To allow other users to add to your action plan, select **Let users add items to action plans**.

4. Save your changes.

    Now, add tasks to the template.

5. On the Action Plan Template record page, on the Items related list, click **New Task**.

6. Specify these details.

    a. For Subject, enter *Parent submits weekly feedback.*

    b. For Days, enter 7.

    c. For Priority, select **Normal**.

    d. For Task Assignment, leave the default **Action Plan Creator** selected.

7. Save your changes.

8. Click **Publish Template**. Next, connect your action plan template to the appropriate benefit.

9. From the App Launcher, find and select **Action Plan Template Assignments**.

10. Click **New**.

11. On the Action Plan Template Assignment Details page, specify these details.

    a. For Associated Object, select **Benefits** and then search for and select the appropriate benefit. For example, select **Parent Counseling**.

    b. If you created an action plan template for goal assignments, select **Goal Definitions**. If you created an action plan template for care plans, select **Care Plan Templates**. Then, search for and select the appropriate goal definition or care plan template.

    c. For Action Plan Template Version, select your action plan template. For example, select **Tasks for Parent Counseling Benefit**.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create action plan templates for benefit assignments, care plans, or goal assignments:

- ActionPlans

    AND

    Care Plans Access OR Program and Benefit Management Access

Give Caseworkers Access to Goal Assignments and Benefit Assignments Related to Care Plans

Allow caseworkers to effectively collaborate on cases by granting them access to goal assignment and benefit assignment records related to care plans.

When working with care plans, constituent privacy is important. By default, organization-wide default sharing settings for goal assignment and benefit assignment records are private for both internal and external access, which means they're only available to the caseworker who created them. Although you can expand access to goal assignment and benefit assignment records by changing the sharing settings for those objects, using a sharing rule, or granting access through role hierarchies, these approaches grant too much access: They potentially give too many people access to private constituent data.

Instead, provide users access to goal assignment and benefit assignment records based on the permission level of the parent care plan—or business license application or individual application—that the goal assignment and benefit assignment records look up to. That way, caseworkers can access all of the related care plan records for a constituent's case, and they can easily collaborate or transfer cases among each other.

This table shows the permissions that Public Sector Solutions provides when you give users access to benefit assignment and goal assignment records based on their access to the parent record.

Permissions for Parent Record (Care Plan, Business License Application, or Individual Application)	Permissions for Benefit Assignment and Goal Assignment Records
Read	Read
Read and Write	Read, Write, and Delete

Public Sector Solutions can query up to 100,000 parent records in an org.

Here's how to give caseworkers access to goal assignment and benefit assignment records based on their access to the parent record.

📝 Note: You can disable access based on parent records at any time.

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Program and Benefit Management Settings**.
2. Under Program and Benefit Management, turn on Allow users to access all benefit assignment and goal assignment records when the user has access to the benefit assignment and goal assignment's parent records.

Create a Care Plan for a Case

Create custom care plans based on care plan templates to help your constituents reach their specific goals.

1. From the App Launcher, find and select **Cases**.

2. From a list view, select a case record.

3. On the Care Plans related list, click **Add**.

4. Specify these details.

   a. Enter a Name. For example, enter `Healthy Household`.

   b. For Participant, select the primary individual associated with the case.

   c. For Care Plan Template, search and select a care plan template. For example, select **Child-Friendly Household**.

   > 📝 Note: You can only select published care plan templates.

   d. For Status, select **Proposed**.

   e. Optionally, specify a Start Date and End Date.

5. Click **Next**.

   The Assign Care Plan Template window shows the benefits and goals associated with the care plan template.

6. Optionally, to search for and add other goal definitions and benefits to the care plan, click **Add**. To remove a goal or benefit, click 🗑 .

7. Click **Next**.

8. For each benefit or goal, for Enrollee, select a case participant. To enroll additional case participants, click **Add Enrollee**.

9. Add more information to your benefits and goals as needed. For example, add a benefit amount or completion percentage for a time-bound goal.

10. Click **Next**.

11. To see a summary of the goals and benefit assignments, click the **Preview** tab.

12. Review the care plan details and save your work.

After you save the care plan, you can edit it. For example, you can add and remove enrollees, and change goals and benefits.

Use a Flow to Enroll Participants in Benefit Sessions from Care Plans

Add participants to individual benefit sessions according to their availability and preferences.

Enroll participants into sessions using the guided flow from care plans or from the care plan and benefit assignment record pages.

Here's how to do it using the flow from care plans.

1. From the App Launcher, find and select **Care Plans**.

2. Select a care plan record and click **Edit Care Plan**.

3. Click **Next**.

4. Click **Add** and select **Benefit**.

5. Search for the benefit, select the box next to its name, and click **Select**.

6. Click **Add**.

7. If desired, add another benefit. Otherwise, click **Next**.

8. Make sure that the benefit is selected. If necessary, locate and select it in the hierarchy view panel, under **Goal Definitions and Benefits**.

9. Make sure the care plan participant is enrolled in the benefit. If necessary, click **Add Enrollee** to add them.

    a. For Enrollee, select an account.

    b. Optionally, enter other details for the benefit and then click **Save**.

10. Under **Disbursed Benefits**, click **Enroll**.

11. To enroll the participants, select the benefit sessions, and then click **Done**.

12. Save your work.

Track Attendance and Disbursements for Benefit Participants

Assess the effectiveness of a program or care plan by recording and tracking attendance.

Benefits are disbursed to help participants achieve their goals and make them self-sufficient. Assess the effectiveness of programs and care plans by analyzing the attendance for a session. Track attendance and actual units of benefit disbursements delivered to participants. Determine the participants' engagement, identify trends, and adjust upcoming sessions, and consider changes for similar benefits.

Benefit assignment and benefit disbursement records are created for every participant that you the participants' engagement, identify trends, adjust upcoming sessions, and consider changes for similar benefits.

Benefit assignment and benefit disbursement records are created for every participant that you add to a benefit schedule or a benefit session. Track attendance from a care plan or benefit assignment record page.

Here's how to track attendance and disbursed quantity for a participant from a care plan record page.

1. From the App Launcher, find and select **Care Plans**.

2. Select a care plan record.

3. Click the tab that displays sessions. For example, click **Benefit Disbursements**.

4. In the disbursed benefit for the enrollee, select the appropriate status.

View and Manage Care Plans

Keep care plans current so that they stay relevant to you and to your constituents.

1. From the App Launcher, find and select **Care Plans**.

2. From a list view, select a care plan.

3. On the care plan record detail page, do any of these things.

   a. To check the status of tasks, on the Details tab, look at Task Job Status. If the task isn't created, review the reason and try again.

   b. To see upcoming and overdue tasks, go to the Activity panel.

   c. To add a task, on the Activity panel, click **New Task**. Enter a Subject and Due Date, and assign the task to the appropriate case participant or caseworker. To add or change benefits, goals, or tasks in the plan, or to change enrollees, click **Edit Care Plan**.

   d. To update the status of several tasks at once, on the Tasks for Benefits, Goals and Care Plan page of the Edit Care Plan window, click **Quick Update**. Then, change the Priority, Status, or Due Date for any task.

Social Well-Being Concerns in Public Sector Solutions

Create and use OmniScript guided flows to document concerns reported by constituents about someone's well-being as public complaint and case records.

In Public Sector Solutions, register concerns reported by constituents as public complaints. When constituents report concerns around someone's health, safety, or well-being, including child welfare concerns, a caseworker or intake officer creates a public complaint record that includes details about the issue. The public complaint record serves as the basis of a related case record, which is used to investigate the issue and to which a care plan is assigned.

Set Up Complaint Intake Guided Flows for Social Well-Being Concerns

Efficiently gather and process information on health, safety, and well-being concerns that are reported by constituents, including child welfare concerns.

Configure Case and Complaint Participants

Define roles and statuses for case and complaint participants in Public Sector Solutions.

Document a Constituent Concern by Using a Public Complaint Guided Intake

Use a guided flow to collect details from a constituent who reports an incident of concern about an individual's well-being, including child welfare concerns.

Document a Constituent Concern in a Public Complaint Record

Create records to document incidents, events, or concerns reported by constituents about someone's well-being.

Create a Case Related to a Public Complaint

Create a case to investigate and follow up on a concern recorded as a public complaint in Public Sector Solutions.

Design and Conduct Dynamic Assessments on Cases Related to Constituent Concerns

Investigate the concerns raised in a public complaint by conducting a dynamic assessment on the related case in Public Sector Solutions.

Set Up Complaint Intake Guided Flows for Social Well-Being Concerns

Efficiently gather and process information on health, safety, and well-being concerns that are reported by constituents, including child welfare concerns.

Use OmniScript flows to easily create and edit public complaint records that document reported health, safety, or well-being concerns that need to be investigated, and to create a case to investigate the complaint.

SPCM/AddAllegation

Capture details when a constituent reports a health, safety, or well-being concern for another member of the community. The flow lets the intake officer capture all of the information that the reporter can initially provide, and creates a public complaint record with the details of the incident, including participants and allegations.

SPCM/AddComplaintParticipants

Use the Add Participant button on the Complaint Participants related list to add participants to a public complaint record.

SPCM/ComplaintIntake

Use the Add Allegation button on the Assessments related list to add an allegation to a public complaint record.

SPCM/CreateNewCase

Use the Add Case button on the public complaint record to quickly create a case based on the complaint.

SEE ALSO:

OmniScripts

Trailhead: OmniScripts

Social Well-Being Complaint Intake Guided Flows Components

Review the OmniStudio components that Public Sector Solutions uses in the social well-being complaint intake guided flows.

Component	Type
SPCM/AddAllegation	OmniScript
SPCM/AddComplaintParticipants	OmniScript
SPCM/ComplaintIntake	OmniScript
SPCM/CreateNewCase	OmniScript
AddComplaintParticipants	Omnistudio Data Mapper
PSSComplaintCreateCaseAndComplaintCase	Omnistudio Data Mapper

Component	Type
PSSComplaintCreateCaseParticipant	Omnistudio Data Mapper
PSSComplaintCreateCaseParticipantFromPublicComplaint	Omnistudio Data Mapper
PSSComplaintCreateComplaintParticipants	Omnistudio Data Mapper
PSSComplaintCreateInteractionSummary	Omnistudio Data Mapper
PSSComplaintCreatePublicComplaint	Omnistudio Data Mapper
PSSComplaintFetchComplaintParticipants	Omnistudio Data Mapper
PSSComplaintGetAccountRecordsForTypeAhead	Omnistudio Data Mapper
PSSComplaintGetCaseID	Omnistudio Data Mapper
PSSComplaintGetComplaintCaseID	Omnistudio Data Mapper
PSSComplaintGetPublicComplaintId	Omnistudio Data Mapper
PSSComplaintCreateAccountAndContact	FlexCard
PSSComplaintParticipants	FlexCard
GetAccountsAndContacts.apxc	Apex class

Social Well-Being Complaint Intake Guided Flows Prerequisites

Before you set up the social well-being complaint intake guided flows in Public Sector Solutions, complete the prerequisites.

1. Enable OmniStudio Runtime.

   a. From Setup, in the Quick Find box, enter `OmniStudio Settings`, and then select **OmniStudio Settings**.

   b. Disable Managed Package Runtime.

2. Enable person accounts. See Set Up Person Accounts in Public Sector Solutions.

3. Assign these permissions to admins who set up the social well-being complaint guided flows.

   - Industries Assessment
   - OmniStudio Admin
   - Public Sector Access

4. Assign these permissions to anyone who uses the flows.

   - ActionPlans
   - Complaint Management Access
   - Dynamic Assessment Access
   - Industries Assessment
   - Interaction Summary
   - Public Sector Access

- Public Sector Field Access

Create Questions to Capture Allegation Details

Create questions to capture information about reported allegations to use in a complaint intake guided flow.

Create assessment question categories such as Safety, Health, Transportation, Noise, and Infrastructure, and then create assessment questions to collect information about each allegation category.

For instructions, see Create Assessment Question Categories and Create Assessment Questions.

Create an OmniScript for Each Allegation Category

Use a streamlined intake flow to document concerns reported by constituents, to capture information about the parties involved, and to record additional allegations.

Create an OmniScript for each allegation category that you created.

1. From the App Launcher, find and select **Assessment Questions**.

2. Click **Select Questions**.

3. Search for the questions that you want to include in the OmniScript.

   If necessary, use the Question Set or Category picklists to filter questions based on assessment question sets or assessment categories.

4. Drag the questions onto the New OmniScript canvas.

5. Name each step.

6. Specify the OmniScript details.

   a. Enter a descriptive name, such as *Safety Allegation*.

   b. Select a type and subtype.

      The type and subtype are only for reference.

   c. Select the language for the OmniScript.

7. To allow the complaint intake guided flow to use the OmniScript, select **Reusable**.

8. Click **Build OmniScript**.

9. Open the OmniScript and click **Activate Version**.

Customize the Complaint Intake OmniScript Template

Add allegation types to the Complaint Intake OmniScript guided flow template.

1. From the App Launcher, find and select **OmniScripts**.

2. Click **SPCM/Complaint Intake**, and then click **Complaint Intake (Version 1)**.

3. Expand the **NewComplaint** step, scroll down to Allegation, and then select **Type of Allegation**.

4. For each allegation type, in the Properties panel, under Options, add your allegation types and subtypes, such as `Safety`.

5. For each allegation category, select the allegation element, and then change the Expression formula to look for the corresponding allegation category. For example, add the CONTAINS(%Type%,'Safety') condition. Rename the formula appropriately. For example, name it `isSafety`.

6. In the Build panel, select the allegation OmniScripts that you created earlier and add them to the canvas after the NewComplaint step.

7. Add a conditional statement to link the allegation OmniScript to an allegation type check. For example, create the statement (isSafety = true AND isWorkflowEnded = false).

8. Update the SaveAllegation1 step to capture the response of the allegation OmniScript.

   a. Select the save response step, and in the Send/Response Transformations properties, in the Send JSON Path field, enter the allegation OmniScript step name, such as `checkSafety`.

   b. Rename SaveAllegation1 to reflect the allegation type. For example, name it `SaveSafetyResponse`.

9. After setting up all of the allegations that you want to capture during intake, review and activate the OmniScript.

Add the New Guided Intake Button to the Public Complaint List View

Enable intake agents to start guided intake flows from public complaint list views.

1. From Setup, in Object Manager, select **Public Complaint**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

   a. For Label, enter *New Guided Intake* and then press Tab to automatically populate the API Name.

   b. If desired, enter a description.

   c. For Display Type, select **List Button**.

   d. For Behavior, select **Display in existing window with sidebar**.

   e. For Content Source, select **URL**.

   f. In the field formula box, enter the URL for the ComplaintIntake (Version 1) OmniScript followed by an ampersand and the contextId for the target object, Public Complaint. To get your URL, in the OmniStudio app, go to the ComplaintIntake OmniScript. In the highlights panel, click ▾ and select **How To Launch**. Look for the Lightning URL. The formula looks something like this: *[Lightning URL]&c__ContextId={!PublicComplaint.Id}* .

4. Save your changes.

Add the Add Participant Button to the Complaint Participant Related List

Easily add participants to public complaints by creating an action on the Complaint Participant related list.

1. From Setup, in Object Manager, select **Complaint Participant**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

   a. For Label, enter *Add Participant*, and then press Tab to automatically populate the API Name.

   b. If desired, enter a description.

   c. For Display Type, select **List Button**.

   d. For Behavior, select **Display in existing window with sidebar**.

   e. For Content Source, select **URL**.

   f. In the field formula box, enter the URL for the Add Complaint Participants OmniScript followed by an ampersand and the contextId for the target object, Complaint Participant. To get your URL, in the OmniStudio app, go to the Add Complaint Participants OmniScript. In the highlights panel, click ▾ and select **How To Launch**. Look for the Lightning URL. The formula looks something like this: *[Lightning URL]&c__ContextId={!ComplaintParticipant.Id}*

4. Save your changes.

5. To add the button to the Complaint Participant related list on the Public Complaint layout, in Object Manager, select **Public Complaint**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create custom buttons or links:
• Customize Application

To access OmniScripts:
• OmniStudio Admin

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create custom buttons or links and add them to page layouts:
• Customize Application

To access OmniScripts:
• OmniStudio Admin

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6. Click **Page Layouts**, and then click **Public Complaint Layout**.

7. Select **Related Lists**, and then for Complaint Participant, click ⚒ .

8. Click **Buttons**, and then add a button to the Selected Buttons list and name it `Add Participant`.

9. Save your changes.

Customize the Add Allegation OmniScript Template

Allow caseworkers to capture information about additional allegations by adding a related list action to the Add Allegation OmniScript guided flow template.

1. From the App Launcher, find and select **OmniScripts**.

2. Click **SPCM/Add Allegation**, and then click **Add Allegation (Version 1)**.

3. Expand the **Allegations** step, and then select **Type of Allegation**.

4. For each allegation type, in the Properties panel, under Options, specify a type and subtype, such as `Safety`.

5. For each allegation category, select the allegation element, and then change the Expression formula to look for the corresponding allegation category. For example, add the CONTAINS(%Type%,'Safety') condition. Rename the formula appropriately, for example, name it `isSafety`.

6. In the Build panel, select the allegation OmniScripts that you created earlier, and add them to canvas after the NewComplaint step.

7. Add a conditional statement to link the allegation OmniScript to an allegation type check. For example, create the statement (isSafety = true AND isWorkflowEnded = false).
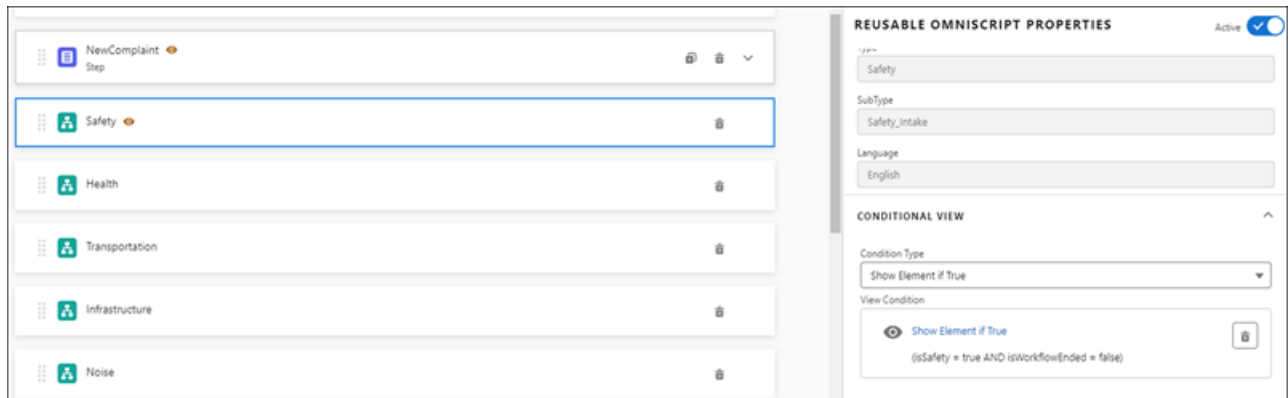
8. Update the SaveAllegation1 step to capture the response of the allegation OmniScript.

   a. Select the save response step, and in Send/Response Transformations properties, in the Send JSON Path field, enter the allegation OmniScript step name, such as `checkSafety`.

   b. Rename SaveAllegation1 to reflect the allegation type. For example, name it `SaveSafetyResponse`.
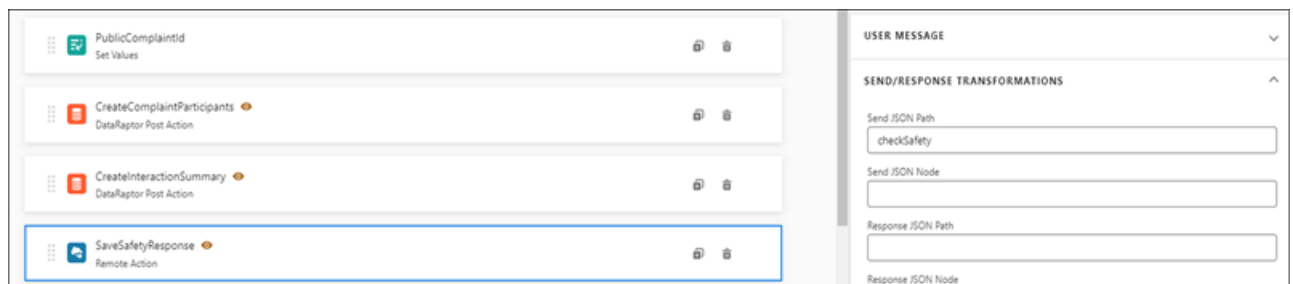
9. After setting up all of the allegations that you want to capture during intake, review and activate the OmniScript.

Add the Add Allegation Button to the Assessments Related List

Easily add allegations to public complaints by setting up an action on the Assessments related list.

1. From Setup, in Object Manager, select **Assessments**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

   a. For Label, enter *Add Allegation*, and then press Tab to automatically populate the API Name.

   b. If desired, enter a description.

   c. For Display Type, select **List Button**.

   d. For Behavior, select **Display in existing window with sidebar**.

   e. For Content Source, select **URL**.

   f. In the field formula box, enter the URL for the Add Allegation OmniScript followed by an ampersand and the contextId for the target object, Assessments. To get your URL, in the OmniStudio app, go to the Add Allegation OmniScript. In the highlights panel, click ⌄ and select **How To Launch**. Look for the Lightning URL. The formula looks something like this: *[Lightning URL]&c__ContextId={!Assessments.Id}*

4. Save your changes.

5. To add the button to the Complaint Participant related list on the Public Complaint layout, in Object Manager, select **Public Complaint**.

6. Click **Page Layouts**, and then click **Public Complaint Layout**.

7. Select **Related Lists**, and then for Assessments, click 🔧 .

8. Click **Buttons**, and then add a button to the Selected Buttons list and name it *Add Allegation*.

9. Save your changes.

Add a Case Button to Public Complaint Record Detail Pages

Add a button to the highlights panel of public complaint record pages so that caseworkers can easily create a case from a constituent's reported concern.

Cases track the response to a reported incident or concern, including an investigation and a care plan. Case managers assign caseworkers to investigate and create care plans based on which cases are high priority.

To allow case managers to quickly create cases based on complaints, add a custom button to public complaint record pages that uses an OmniScript to relate the complaint to a case. You don't have to create the OmniScript. The button is included in the Create Case from Complaint process package. Add the button to public complaint record pages.

1. From Setup, in Object Manager, select **Public Complaint**.

2. Click **Button, Links, and Actions** and then click **New Button or Link**.

3. Specify these details.

   a. For Label, enter the button name and press Tab to autopopulate the API Name. The name can be anything that makes sense for your agency or organization. For example, enter *Add Case*.

    b. Optionally, enter a Description.

    c. For Display Type, select the **Detail Page Button**.

    d. For Behavior, select **Display in new window**.

    e. For Content Source, select **URL**.

    f. In the field formula box, enter the URL for your OmniStudio process package followed by an ampersand and the contextId for the target object, Public Complaint. To get your process package's URL, in the OmniStudio app, go to the Create New Case OmniScript version that you're using. In the highlights panel, click ▾ and select **How To Launch**. Look for the Lightning URL. The formula looks something like this: *[Lightning URL]&c__ContextId={!PublicComplaint.Id}*

4. Save your changes.

    Now, add the button to the page layout.

5. Click **Page Layouts** and then click **Public Complaint Layout.**

6. Under Public Complaint Layout, select **Mobile & Lightning Actions**. Then, drag your newly created button to the Salesforce Mobile and Lightning Experience Actions section of the page. Make it the first button in the list.

7. Save your changes.

Configure Case and Complaint Participants

Define roles and statuses for case and complaint participants in Public Sector Solutions.

When someone creates a case based on a public complaint, they add case participants. Each participant has a role and a status. Public Sector Solutions doesn't include any values for these picklists, so create them for your org.

1. From Setup, in Object Manager, select **Case Participant**.

2. Click **Fields & Relationships**, and then click **Role**.

3. Under Role Picklist Values, click **New**.

4. Enter values. For example, enter *Victim*, *Observer*, *Lawyer*, *Perpetrator*, *Inspection Officer*, *Beneficiary*, *Family Member*, and *Offender*, without commas, each on a separate line.

5. Save your work

6. Select **Status**.

7. Under Status Picklist Values, click **New**.

8. Enter values. For example, enter *Active* and *Inactive*, each on a separate line.

9. Save your work.

10. Repeat to add the same Role and Status values on the Complaint Participant object.

Document a Constituent Concern by Using a Public Complaint Guided Intake

Use a guided flow to collect details from a constituent who reports an incident of concern about an individual's well-being, including child welfare concerns.

Constituents who report concerns have varying levels of insight into the incident, and often can't spend a lot of time answering detailed intake questions. The complaint guided intake form in Public Sector Solutions is designed to let you quickly capture information from reporters, and add details either during the initial intake, or later as time allows and you learn more about what occurred.

Here's how to create a public complaint record using a guided flow.

1. From the App Launcher, find and select **Public Complaints**.

2. Click **New Guided Intake**.

3. If the reporter has requested to remain confidential, under Reporter Confidential, select **Yes**.

4. Specify the complaint details.

    a. For Title, enter a brief description of the issue.

    b. For Priority, select Low, Medium, High, or Critical.

    c. For Status, select **Submitted**.

5. To add open-ended information about the incident, such as the nature and severity of the allegations, enter text in the running notes.

6. Optionally, for Reporter, enter the reporting constituent's name, organization, and contact details.

7. Specify the incident details.

    a. For Incident Date, select the date the incident occurred.

    b. For Location, enter where the incident occurred.

    c. For Participants Involved, list the names of any participants the reporter provides.

    d. For Observations, enter any notes or comments provided by the reporter.

8. To add participants and details about the allegations, select **Add Allegations and Participants Details**.

9. For Participants, search for contacts or person accounts by first name, last name, or city. Select participants, and then click **Add Selected**.

10. Specify a role and status for each participant.

11. For Allegation, select a type and, if appropriate, a subtype that characterize the concern, such as Health, Infrastructure, Noise, Safety, or Transportation.

12. To add an allegation, click **Add**, and then enter details for it.

13. Click **Next**.
    The guided intake form shows questions based on the type of allegation you selected.

14. Answer questions to capture information about the reported concern, and when you're finished, click **Done**.
    If you can't get all of the details you need, you can add information to the complaint after it's created.

15. To add even more allegations, on the public complaint record page, on the Assessments related list, click **Add Allegations**. Then, enter details for it.

16. To add participants, on the Complaint Participants related list, click **Add Participants**.

17. Search for contacts or person accounts by first name, last name, or city, and then click **Add Selected**.

18. Specify a role and status for each participant, and then click **Add**.

Document a Constituent Concern in a Public Complaint Record

Create records to document incidents, events, or concerns reported by constituents about someone's well-being.

Here's how to create a complaint record to use to create a case that's assigned a care plan.

1. From the App Launcher (⠿), find and select **Public Complaints**.

2. Click **New**.

3. Specify the complaint details.

    a. Select the account for the business being reported and enter its name.

    a. Select a type and subtype that characterize the concern, such as Safety, Health, Transportation, Noise, or Infrastructure.

    b. Specify the incident date.

    c. For Subject, enter a high-level summary of the incident.

    d. Select a priority.

    e. For Description, enter as many specific details as possible.

    f. Optionally, enter the name and contact information for the person who's reporting the concern.

4. Save your changes.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS
To create a public complaint:
• Public Sector Access OR Complaint Management Access

Create a Case Related to a Public Complaint

Create a case to investigate and follow up on a concern recorded as a public complaint in Public Sector Solutions.

When you receive a public complaint about a social issue or concern that needs investigation, create a case to use to conduct a dynamic assessment. When the investigation concludes, create a care plan for the case to address the situation.

1. From the App Launcher, (⠿), find and select **Public Complaints**.

2. Select a complaint, and in the highlights panel, click **Add Case**.

    📝 Note: If you don't see the Add Case button, check with your Public Sector Solutions administrator. They may have named it something else.

3. Specify the case details.

    a. For Subject, enter a high-level summary of the case, such as `Erratic Driving`.

    b. Select a priority.

    c. For Origin, select how the reporting constituent initiated contact with your agency: **Phone**, **Email**, or **Web**.

    d. For Status, select **New**.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS
To create cases:
• Public Sector Access

    e. For Description, enter additional details about the case.

4. Click **Next**.

5. Add participants to the case. Participants identified in the public complaint are listed. Add participants by searching existing records, or by creating new contacts or accounts.

6. Save your changes.

Design and Conduct Dynamic Assessments on Cases Related to Constituent Concerns

Investigate the concerns raised in a public complaint by conducting a dynamic assessment on the related case in Public Sector Solutions.

Dynamic assessments provide a framework for complex inspections, investigations, and evaluations, and are ideal for investigating issues raised by constituents about an individual's social or physical well-being. Using detailed assessment questions and tasks that include conditional logic and dependencies, you can design dynamic assessments to investigate all types of issues reported to your agency as public complaints, including reported safety or health concerns. Then, based on the caseworker's findings in the dynamic assessment, create a care plan to help affected individuals get the services or other support they need.

SEE ALSO:

    Dynamic Assessments in Public Sector Solutions

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To use assessments objects and features:
- Dynamic Assessments Access

To create action plan templates and action plans:
- ActionPlans

To access Public Sector Solutions objects and features:
- Public Sector Access

To access inspection-related objects and features:
- Public Sector Field Access

Case Referrals in Public Sector Solutions

Deliver services and support to constituents by referring them to service providers within or outside of your organization.

For example, to help an unemployed constituent (client) find a job, a government agency that provides job assistance (referrer) interviews the constituent and recommends a training program to the client. The agency then refers the client to a skills development program offered by a social welfare agency or an external training and placement organization (provider) to help the constituent find employment.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Case Referrals Prerequisites

Before you set up the case referrals in Public Sector Solutions, complete the prerequisites.

Enable Case Referrals in Public Sector Solutions

Turn on Case Referrals so that you can create and manage referrals for constituents.

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Case Referrals Settings**.

2. Turn on Create and manage referrals.

Create Values for the Referral Category Field

Define categories for case referrals in Public Sector Solutions.

1. From Setup, in Object Manager, select **Referral**.

2. Click **Fields & Relationships** and then click **Category**.

3. In Category Picklist Values, click **New**.

4. On separate lines, enter values for the Category picklist. For example, enter `Regular` and `Special`.

5. Save your changes.

Enable Standard OmniStudio Runtime

Enable standard OmniStudio runtime so that you can create a referral intake flow using the OmniStudio components that Public Sector Solutions provides.

To enable standard OmniStudio runtime, turn off the OmniStudio managed package runtime.

1. From Setup, in the Quick Find box, enter `OmniStudio Settings`, and then select **OmniStudio Settings**.

2. Disable Managed Package Runtime.

Configure Permissions for Referrals in Public Sector Solutions

Assign the necessary permissions for setting up and creating referrals.

1. Assign these permissions to admins who set up referrals:

   - Case Referral

- Industries Assessment
- OmniStudio Admin

2. Assign the Case Referral permission to anyone who creates referrals.

Enable Omni-Channel for Case Referrals

Enable Omni-Channel to route incoming referrals to the most qualified, available intake agents to help constituents who seek services.

Omni-Channel integrates seamlessly into the console in both Salesforce Classic and Lightning Experience. For information on how to set up Omni-Channel, see Set Up Omni-Channel.

SEE ALSO:

View and Assign Permission Sets in Public Sector Solutions

Set Up the Referral Intake Guided Flow

Capture essential details about a referral efficiently using assessments and guided flows.

Support your constituents who are in need of special services by referring them to appropriate agencies and organizations. Enable intake officers to capture information about a referral and upload supporting documents. Screen referrals and create a case from referrals using assessments.

Configure these three flows to enable the guided referral intake process for intake officers.

Referral Intake Flow
Collects information about a referral, captures details of the referrer and client, and runs preliminary assessments with a predefined checklist of questions to collect the client's background information.

Edit Referral Flow
Adds details to a referral. Submitted assessments can't be edited.

Create Case from Referral
Creates a case from a referral after the referral is screened.

<table>
<tr><td>EDITIONS</td></tr>
<tr><td>Available in: Lightning Experience</td></tr>
<tr><td>Available in: Enterprise, Performance, Unlimited, and Developer Editions with Public Sector Solutions</td></tr>
</table>

Install the Referral Intake Flow DataPack

Starting with Summer '23, Public Sector Solutions includes the OmniScripts, Omnistudio Data Mappers, Integration Procedures, and FlexCard that the referral intake guided flow uses. Downloading and installing the OmniStudio DataPack from the Salesforce Industries Process Library is unnecessary.

Referral Intake Guided Flow Components

Review the OmniStudio components that Public Sector Solutions uses in its referral intake guided flows.

Create Questions to Capture Assessment Details

Create questions to capture information about the referral to use in the referral intake guided flow.

Create an OmniScript for Each Assessment Category

Create a streamlined intake flow to capture information such as the age, income, and educational qualification of the client.

Customize the Referral Intake OmniScript Template

Add your assessment categories to the Referral Intake OmniScript guided flow template.

Activate the Case Referral Flow Components

Activate the OmniScripts and Flexcards that support case referral workflows.

Make the Referral Flows Available to Users

Give agency workers the ability to quickly create and edit referrals.

SEE ALSO:

Trailhead: Get to Know OmniStudio

Trailhead: Build Guided Experiences with OmniStudio

Trailhead: Advanced Features of OmniStudio Integration Procedures

Trailhead: OmniOut: OmniStudio Off-Platform

Trailhead: OmniStudio Developer Tools

Install the Referral Intake Flow DataPack

Starting with Summer '23, Public Sector Solutions includes the OmniScripts, Omnistudio Data Mappers, Integration Procedures, and FlexCard that the referral intake guided flow uses. Downloading and installing the OmniStudio DataPack from the Salesforce Industries Process Library is unnecessary.

For a list of the referral intake components that Public Sector Solutions includes, see Referral Intake Guided Flow Components. Set up these three flows using the corresponding OmniScripts and the related OmniStudio components:

- Referral Intake Flow: Submit Referral OmniScript

- Edit Referral Flow: Edit Referral OmniScript

- Create Case from Referral: Create a Referral Case OmniScript

To start setting up the flow, see Enable Standard OmniStudio Runtime.

Referral Intake Guided Flow Components

Review the OmniStudio components that Public Sector Solutions uses in its referral intake guided flows.

Component	Type
SPCM/CreateReferralCase	OmniScript
SPCM/EditReferral	OmniScript
SPCM/SubmitReferral	OmniScript
SPCM/AttachFilesToReferral	Integration Procedure
SPCM/SearchClientByName	Integration Procedure
SPCM/SearchReferrerByName	Integration Procedure
PSSDRAssociateCaseWithReferral	Omnistudio Data Mapper

Component	Type
PSSDRAttachFile	Omnistudio Data Mapper
PSSDRCreateCaseParticipantsForReferral	Omnistudio Data Mapper
PSSDRExtractSavedApplicationURL	Omnistudio Data Mapper
PSSDRFetchAssessment	Omnistudio Data Mapper
PSSDRFetchInteractionSummaryRecord	Omnistudio Data Mapper
PSSDRFetchReferralValues	Omnistudio Data Mapper
PSSDRGetAccountRecordsForTypeAhead	Omnistudio Data Mapper
PSSDRGetCaseId	Omnistudio Data Mapper
PSSDRGetReferralDetails	Omnistudio Data Mapper
PSSDRSaveOrUpdateReferral	Omnistudio Data Mapper
PSSDRSaveReferralCase	Omnistudio Data Mapper
PSSDRSearchAccountByName	Omnistudio Data Mapper
PSSDRSearchContactByName	Omnistudio Data Mapper
PSSDRTransformClientRecord	Omnistudio Data Mapper
PSSDRTransformReferrerRecord	Omnistudio Data Mapper
PSSDRUpdateAndInsertInteractionSummary	Omnistudio Data Mapper
PSSReferralCreateAccountAndContact	FlexCard

Create Questions to Capture Assessment Details

Create questions to capture information about the referral to use in the referral intake guided flow.

Create assessment question categories such as Education, Health and Safety, and Work Experience, and then create assessment questions to collect information about each assessment category.

For instructions, see Create Assessment Question Categories and Create Assessment Questions.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create assessment questions and assessment question categories:
- Industry Assessment

Create an OmniScript for Each Assessment Category

Create a streamlined intake flow to capture information such as the age, income, and educational qualification of the client.

Create an OmniScript for each assessment category that you created.

1. From the App Launcher, find and select **Assessment Questions**.

2. Click **Select Questions**.

3. Search for the questions that you want to include in the OmniScript.

   If necessary, use the Question Set or Category picklists to filter questions based on assessment question sets or assessment categories.

4. Drag the questions onto the New OmniScript canvas.

5. Name each step.

6. Specify the OmniScript details:

   a. Enter a name such as `Educational Qualification`.

   b. Select the language for the OmniScript.

   c. Select a Type and Sub Type.

      The type and subtype are referenced in the Referral Intake OmniScript.

7. To allow the complaint intake guided flow to use the OmniScript, select **Reusable**.

8. Click **Build OmniScript**.

9. Open the OmniScript, for each step in the Properties panel, enter a name such as `Educational Qualification`.

   🛑 Important: This name is referenced in the Referral Intake OmniScript.

10. Delete the **Remote Action** element.

11. Activate the OmniScript version.

Customize the Referral Intake OmniScript Template

Add your assessment categories to the Referral Intake OmniScript guided flow template.

1. From the App Launcher, find and select **OmniScripts**.

2. Click **SPCM/SubmitReferral**, and then click **Submit a Referral (Version 1)**.

3. Scroll down to the assessment, and then select **Sample Assessment 1**.

4. For each assessment, in the Properties panel, enter the name, type, and subtype that you've used in the assessment category OmniScript. For example, for name, enter `Educational Qualification`.

5. Scroll down to the remote action, and then select **SaveSampleAssessment1Action**.

6. For each remote action, in the Properties panel, under Send/Response Transformations section, enter the assessment category OmniScript name, such as `Educational Qualification` in the Send Json Path field.

7. Expand the ReferralIntakeDetails step, scroll down to Assessment, and then click Sample Assessment Type.

8. For each assessment, in the Properties panel, under Options, enter the assessment category OmniScript name, such as *Educational Qualification* in the Value field.

9. Optionally, modify the phone masks in the ReferralIntakeDetails step to match the phone number format used in your country.

10. After setting up all the assessments, review and activate the OmniScript.

> 📝 Note: In the ReferralIntakeDetails step, when you select **Add Other Documents and Assessments** and select an assessment type, three additional steps are enabled: Upload Documents, Assessment, and Review Assessments. When you add a document in the Upload Documents step, you can't return to the previous step and deselect **Add Other Documents and Assessments**. You must remove the document you added and then deselect the checkbox.

Activate the Case Referral Flow Components

Activate the OmniScripts and Flexcards that support case referral workflows.

Activate the Edit Referral OmniScript

Activate the OmniScript that enables you to edit an existing referral using a guided intake flow.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **SPCM/EditReferral**, and then select **Edit a Referral (Version 1)**.

3. Click **Activate Version**.

Activate the Referral Intake FlexCard

Activate a FlexCard to make it easy for Public Sector Solutions caseworkers to create accounts and contacts and add them as participants when caseworkers are creating a case from a referral.

1. From the App Launcher, find and select **OmniStudio FlexCards**.

2. Expand **PSSReferralCreateAccountAndContact**, and then select the box next to **PSSReferralCreateAccountAndContact (version 1)**.

3. Click **Activate**.

Activate the Create Referral Case OmniScript

Activate the OmniScript that enables you to create a case from a referral using a guided intake flow.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **SPCM/CreateReferralCase**, and then select **Create a Referral Case (Version 1)**.

3. Click **Activate Version**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To activate OmniScripts and FlexCards:
- OmniStudio Admin

Make the Referral Flows Available to Users

Give agency workers the ability to quickly create and edit referrals.

Add the New Guided Intake Button to the Case Referral List View

Enable intake agents to start guided intake flows from case referral list views.

Add the Edit Referral Button to the Case Referral Record Page

Enable intake agents and caseworkers to launch the edit referral guided intake flow from the case referral record page.

Add the Create Case Button to the Referral Record Page

Enable intake agents to create a case from a referral by using a guided intake flow on a referral record page.

Add the New Guided Intake Button to the Case Referral List View

Enable intake agents to start guided intake flows from case referral list views.

1. From Setup, in Object Manager, select **Referral**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

    a. For Label, enter *New Guided Intake* and then press Tab to automatically populate the API Name.

    b. If desired, enter a description.

    c. For Display Type, select **List Button**.

    d. For Behavior, select **Display in existing window with sidebar**.

    e. For Content Source, select **URL**.

    f. In the field formula box, enter the URL for the Submit a Referral (Version 1) OmniScript. To get your URL, in OmniStudio, go to the Submit a Referral OmniScript and, in the highlights panel, click ▾ and select **How To Launch**. Look for the Lightning URL.

4. Save your changes.

5. To add the button to the Referral object list view page, select **Search Layouts**.

6. For Default Layout, click ▾ and select **Edit**.

7. Under Custom Buttons, add **New Guided Intake** to the Selected Buttons list.

8. Save your changes.

Add the Edit Referral Button to the Case Referral Record Page

Enable intake agents and caseworkers to launch the edit referral guided intake flow from the case referral record page.

1. From Setup, in Object Manager, select **Referral**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

    a. For Label, enter *Edit Referral* and then press Tab to automatically populate the API Name.

    b. If desired, enter a description.

    c. For Display Type, select **Detail Page Button**.

    d. For Behavior, select **Display in existing window with sidebar**.

    e. For Content Source, select **URL**.

    f. In the field formula box, enter the URL for the Edit a Referral (Version 1) OmniScript followed by an ampersand and the contextId for the target object, Referral. To get your URL, in OmniStudio, go to the Edit a Referral OmniScript and, in the highlights panel, click ⌄ and select **How To Launch**. Look for the Lightning URL. The formula looks something like this: *[Lightning-URL]&c__ContextId={!Referral.Id}* .

4. Save your changes.

5. To add the button to the Referral object page layout, select **Page Layouts**.

6. For Referral Layout, click ⌄ and select **Edit**.

7. Under Buttons, drag **Edit Referral** to the Salesforce Mobile and Lightning Experience Actions section.

8. Save your changes.

Add the Create Case Button to the Referral Record Page

Enable intake agents to create a case from a referral by using a guided intake flow on a referral record page.

1. From Setup, in Object Manager, select **Referral**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

    a. For Label, enter *Create Case* and then press Tab to automatically populate the API Name.

    b. If desired, enter a description.

    c. For Display Type, select **Detail Page Button**.

    d. For Behavior, select **Display in existing window with sidebar**.

    e. For Content Source, select **URL**.

    f. In the field formula box, enter the URL for the Create a Referral Case (Version 1) OmniScript followed by an ampersand and the contextId for the target object, Referral. To get your URL, in OmniStudio, go to the Create a Referral Case OmniScript and, in the highlights panel, click ⌄ and select **How To Launch**. Look for the Lightning URL. In the field formula box, enter the URL using this format: *[Lightning-URL]&c__ContextId={!Referral.Id}* .

4. Save your changes.

5. To add the button to the Referral object page layout, select **Page Layouts**.

6. For Referral, click ⌄ and select **Edit**.

7. Under Buttons, drag **Create Case** to the Salesforce Mobile and Lightning Experience Actions section.

8. Save your changes.

Create a Case Referral by Using the Guided Flow

Use a guided flow to process inbound constituent referrals from a referring agency.

The referral intake guided flow in Public Sector Solutions streamlines referral intake to efficiently connect constituents with service providers who can provide assistance. Quickly capture constituent information, attach supporting documents, and complete assessment questions to provide all the necessary information to the organization.

1. From the App Launcher, find and select **Referrals**.

2. Select **New Guided Intake**.

3. Specify the referral intake details:

    a. For Title, enter a brief description of the referral.

    b. For Source, select the origin of the referral request.

    c. Select a Category and Priority for the referral.

    d. Optionally, enter a Description that summarizes the reason for the referral.

    e. Select a Status and Result Category for the referral.

    f. Select **Self** or **Someone Else** to indicate the person who is being referred.

4. Specify the referrer details by searching for existing referrers or manually entering referrer information.

5. Specify the client details by searching for existing clients or manually entering client information.

6. Optionally, enter additional notes about the referral.

7. To add a preconfigured assessment to the referral form, select **Add Other Documents and Assessments** and select an assessment type from the dropdown menu.

8. Select **Next**.

9. Optionally, attach a photo ID, proof of address, or additional documents to the referral.

10. To request documents from the constituent being referred, enter their email address, and enter a subject and message to the recipient regarding the document request. Then, select **Send a Request**.

11. Select **Next**.

12. If necessary, complete any assessment question sections that you added to the form.

13. Click **Next** to open the Referral Created Section.

14. Select **Done**.

Manually Create a Case Referral in Public Sector Solutions

Capture details of referrals to support constituents.

For example, to help an unemployed constituent (client) find a job, a government agency that provides job assistance (referrer) interviews the constituent and recommends a training program to the client. The agency then refers the client to a skills development program offered by a social welfare agency or an external training and placement organization (provider) to help the constituent find employment.

1. From the App Launcher, find and select **Referrals**.

2. Click **New**.

3. For Referral Type, select **Inbound** if an external organization or individual has referred the client to your organization. Select **Outbound** if your organization is referring the client to an external service provider.

4. Specify optional but recommended fields, including names and details for the client, referrer, and provider.

5. Save your changes.

Benefit Management in Public Sector Solutions

Help individuals, families, and organizations achieve self-sufficiency through monetary assistance.

Offer eligible constituents monetary benefits such as social insurance, tax benefits, subsidies, food and housing assistance, or direct cash assistance. Offer assistance through a direct or indirect transfer of resources or credits for a specific period. For example, assist eligible low-income households with their heating and cooling energy costs by offering the Low Income Home Energy Assistance Program (LIHEAP).

Specify who is eligible to apply for the benefits based on their age, income, expenses, household size, and other criteria. Review and screen applications and approve the ones that are eligible. Assign benefits to eligible applicants and specify details such as the amount and frequency of the benefit. Configure benefits to be disbursed automatically for upcoming payment schedules or disburse them manually.

Enable constituents to search for benefits that they're eligible for and apply for them. Also enable them to track the status of their applications and the benefits assigned to them, and view a schedule of payments that they can expect to receive. Also share the reasons behind these decisions with your constituents.

> **Note:** Customer is solely responsible for any use of sample, example, or template benefit eligibility criteria, formulae, or similar schema provided with Benefit Management. Customer must ensure that any benefit eligibility decision-making by Customer using such sample, example, or template benefit eligibility determination tools are used: (i) only by authorized personnel of Customer; and (ii) in compliance with applicable laws and regulations to which Customer is subject.

Benefit Management Prerequisites

Before you set up benefit management in Public Sector Solutions, complete the prerequisites.

Set Up the Eligibility Assessment Flow for Your Benefit Assistance Site

To specify eligibility criteria and set up the assessment, customize the OmniScript, create a decision matrix, build an expression set, and activate the OmniScript.

Automate Eligibility Determinations

Use Business Rules Engine to determine benefit eligibility and the benefit amounts for qualified applicants. First, create a decision matrix that defines the income threshold based on the income and household size. Then build an expression set that uses the matrix to find benefit eligibility and calculate eligible benefit amounts. Use Decision Explainer to share the reasoning behind application decisions, eligibility determinations, and benefit amount calculations with constituents.

Deploy the Benefit Management Discovery Framework Template

Deploy version v5 of the Discovery Framework sample template for benefit management in Public Sector Solutions.

Set Up Benefit Application Intake

Use Discovery Framework assessment questions and OmniScripts to capture information from constituents who apply for a benefit. Store assessment questions responses in Salesforce objects using OmniStudio Integration Procedures and Omnistudio Data Mappers. Capture effective start and end dates when you store income and expense data. Use Business Rules Engine to automate benefit eligibility determination.

Set Up the Change of Circumstances Application Flow

Set up a guided flow on your Experience Cloud site that constituents can use to report changes of circumstance that affect benefit or service eligibility. Review the changes in an individual application record, and adjust the services or benefits assigned to constituents as necessary.

Set Up the Benefit Recertification Flow

Enable constituents to recertify for benefits on your Experience Cloud site. Show them benefits that are pending recertification and give them a guided flow to review the information that they previously provided, confirm or update details, upload supporting documents, and submit their recertification application.

Set Up the Benefit Application Review Flow

Configure a guided flow for caseworkers to use to check whether benefit, change of circumstances, and benefit recertification applications are complete and accurate, to determine eligibility, and to assign and adjust benefits and services.

Alert Applicants When Their Benefit Application Status Changes

Keep applicants informed of the progress of their benefit applications by using a flow to automatically send a desktop notification and an email to applicants when the status of their benefit application changes.

Build a Benefit Assistance Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where constituents can apply and recertify for benefits, report a change of circumstances, and file complaints.

Process Benefit Applications by Using a Guided Flow

Check whether an application in review is complete and accurate. Correct details based on evidence and, if necessary, return the application for additional information. When the application is complete, if the applicants are eligible, assign them a benefit amount.

Process Change of Circumstance Applications by Using a Guided Flow

Check whether a change of circumstances application is complete and accurate. Correct details based on supporting documentation and, if necessary, return the application for additional information. When the application is complete and you have confirmed the details, accept or deny the application.

Process Benefit Assignment Adjustment Applications by Using a Guided Flow

Check the changes reported. View benefit assignment details and adjust the benefit amount to match the change in circumstances.

Process Benefit Recertification Applications by Using a Guided Flow

Check whether a recertification application is complete and accurate. Correct details based on supporting documentation and, if necessary, return the application for additional information. When the application is complete and you've confirmed the details, accept or deny the application. Renew or adjust the amount of benefits that constituents receive to match their benefit eligibility.

Assign and Disburse Benefits to Eligible Applicants

Assign benefits to eligible applicants and disburse the benefits by using flows in Public Sector Solutions.

Benefit Management Prerequisites

Before you set up benefit management in Public Sector Solutions, complete the prerequisites.

Enable Standard OmniStudio Runtime

To enable standard OmniStudio runtime, turn off the OmniStudio managed package runtime.

1. From Setup, in the Quick Find box, enter `OmniStudio Settings`, and then select **OmniStudio Settings**.

2. Disable Managed Package Runtime.

Enable Program and Benefit Management

1. From Setup, in the Quick Find box, enter `Benefit`, and then select **Program and Benefit Management Settings**.

2. Turn on Create and manage your programs, benefits, and goals.

3. Select **Benefit Disbursement Settings**, and then turn on Create and manage benefit disbursements.

Turn on Discovery Framework

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under Assessments, select **General Settings**.

2. Turn on Discovery Framework.

Enable Case Referrals

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Case Referrals Settings**.

2. Turn on Create and manage referrals.

Turn on Document Checklist Items

1. See Set Up Document Checklist Items in Public Sector Solutions.

Enable Interaction Summaries

1. See Set Up Interaction Summaries.

Enable Group Membership

1. See Set Up Group Membership.

Set Field-Level Security

Give users access to fields that aren't visible by default so that the fields are available for application intake. See Modify Field Access Settings and Set Field-Level Security for a Field on All Profiles.

1. On the Contact Profile object, make Ethnicity, Highest Education Level, Location, Primary Citizenship Type, and Race visible to all profiles.

2. On the Party Expense object, make End Date time visible to all profiles.

3. On the Person Disability object, make Start Date, Status, Type, Verification Date, and Verified By visible to all profiles.

Assign Permissions for Benefit Management

1. Assign these permission to admins who configure benefit management.

- Author Apex
- Dynamic Assessment Access
- OmniStudio Admin
- Rule Engine Designer

2. Assign these permission sets to application reviewers and other users who work with benefit applications.

- Benefit Disbursement Access
- Case Referral
- Decision Explainer Service Access
- Industries Assessment
- Document Checklist
- Dynamic Assessment Access
- Group Membership
- Interaction Summary
- OmniStudio User
- Program and Benefit Management Access
- Rule Engine Runtime

See View and Assign Permission Sets in Public Sector Solutions on page 19.

Create an Application Record Type and Configure Usage-Based Pricing

1. From Setup, in Object Manager, select **Individual Application**.

2. Select **Record Types**, and then click **New**.

3. For Existing Record Type, select **Master**.

4. Enter a record type label, such as `Benefit Assistance`, that's unique within the object, and then press Tab to autofill the record type name.

5. Optionally, enter a description.

6. Activate the record type.

   For information on how to make the record type available to users, see Create Record Types for License and Permit Applications.

7. Click **Next**, and then save your changes.

8. From Setup, in the Quick Find box, enter `Usage Based Pricing`, and then select **Usage Based Pricing**.

9. Click **New Application RecordType Config**.

10. Enter a label.

11. For Application Usage Type, select **Benefit Assistance**.

12. For Object Name, select **Individual Application**.

13. For Record Type Name, enter the name that you entered earlier.

14. Save your changes.

Define Benefits and Benefit Types

1. See Define Benefits and Benefit Types for Programs.

Set Up the Eligibility Assessment Flow for Your Benefit Assistance Site

To specify eligibility criteria and set up the assessment, customize the OmniScript, create a decision matrix, build an expression set, and activate the OmniScript.

Customize the Eligibility Assessment OmniScript Template

Customize the OmniScript template that constituents use to assess their eligibility for benefits. Constituents complete this form by selecting Benefit Finder on your benefit assistance Experience Cloud site.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **BenefitAssistance/AssessEligibility** and then select **Find Applicable Benefits (Version 1)**.

3. Click **New Version**.

4. Click **Edit**.

5. Enter a name and language for the new version of the OmniScript.

6. For Type and SubType, keep the default values, `BenefitAssistance` and `AssessEligibility`, respectively.

7. Save your changes.

8. For each step and expression set in the OmniScript that you want to configure, expand the step, select the element, and change properties such as name, label, and instructions as needed.

Create a Decision Matrix to Define Benefit Eligibility Criteria

Set the income threshold that's used to determine whether an applicant is eligible for benefits.

1. From the App Launcher, find and select **Lookup Tables**.

2. Click **New**, and then select **Decision Matrix**.

3. Click **Next**.

4. For Name, enter `PrescreeningForBenefits_PovertyGuideline`.

   Use this name for the decision matrix, because it's referenced in the eligibility assessment OmniScript.

5. For Type, select **Standard**.

6. Save the matrix.

7. On the Related tab of the decision matrix record page, select version 1 of the matrix.

8. To define your input and output data, add columns to the matrix.

   a. Click **Add Column**. For Column Header, enter `NumberOfHouseholdMembers`, for Header Type select **Input**, and for Data Type select **Number**.

   b. Click **Add Column**. For Column Header, enter `AnnualIncomeLimit`, for Header Type select **Output**, and for Data Type select **Currency**.

   c. Click **Done**.

   ⊘ Important: Use these column headers, which are referenced in the eligibility assessment expression set. You can change the values if necessary.

9. Add these rows for input and output data values.

Input Data	Output Data
NumberOfHouseholdMembers (Number)	AnnualIncomeLimit (Currency)
1	19320
2	26130
3	32940
4	39750
5	46560
6	53370
7	60180
8	66990

10. Activate the decision matrix.

Build the Eligibility Assessment Expression Set

Create the expression set from a template.

1. From the App Launcher, find and select **Expression Set Templates**.

2. Select **PSSExpCloud_PrescreeningForBenefits**, and then click **Save As**.

3. In the expression set builder, set the properties for the expression set version.

  a. Click ⚙ , and then enter a start date time and an end date time for the expression set version.

  b. Enter a rank number.

  > 📝 Note: When more than one enabled version matches an expression set call and the date-time periods overlap, the version with the highest rank is chosen. For example, if two enabled versions have the rank values 1 and 2, the version with rank 2 is chosen.

4. Save and activate the expression set.

Activate the Eligibility Assessment OmniScript

Finally, activate the eligibility assessment OmniScript.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **BenefitAssistance/AssessEligibility** and then select **Find Applicable Benefits (Version 1)**.

3. Click **Activate Version**.

Automate Eligibility Determinations

Use Business Rules Engine to determine benefit eligibility and the benefit amounts for qualified applicants. First, create a decision matrix that defines the income threshold based on the income and household size. Then build an expression set that uses the matrix to find benefit eligibility and calculate eligible benefit amounts. Use Decision Explainer to share the reasoning behind application decisions, eligibility determinations, and benefit amount calculations with constituents.

Create a Decision Matrix to Calculate the Benefit Amount

Create a decision matrix that defines the income threshold based on the income and household size to calculate the benefit amount that applicants are eligible to receive.

1. From the App Launcher, find and select **Lookup Tables**.

2. Click **New**, and then select **Decision Matrix**.

3. Click **Next**.

4. Specify these details.

   a. For Name, enter `CalculateBenefitAmount_NetIncomePointsTable`.

   Use this name for the decision matrix, because it's referenced in the benefit application OmniScript.

   b. For Type, select **Standard**.

5. Save your work.

6. On the record page of the decision matrix, on the Related tab, click version 1 of the matrix.

7. To define your input and output data, add columns to the matrix.

   a. Click **Add Column**. For Column Header, enter `HouseholdSize`, for Header Type select **Input**, and for Data Type select **Number**.

   b. Click **Add Column**. For Column Header, enter `ThreePointsLimit`, for Header Type select **Output**, and for Data Type select **Currency**.

   c. Click **Add Column**. For Column Header, enter `TwoPointsLimit`, for Header Type select **Output**, and for Data Type select **Currency**.

   d. Click **Done**.

   🛑 **Important:** Use these column headers, which are referenced in the benefit amount expression set. You can change the values if necessary.

8. Add these rows for input and output data values.

Input Data	Output Data	
HouseholdSize (Number)	ThreePointsLimit (Currency)	TwoPointsLimit (Currency)
1	$1074	$1610
2	$1452	$2178
3	$1830	$2745
4	$2209	$3313

Input Data	Output Data	
5	$2587	$3880
6	$2965	$4448
7	$3344	$5016
8	$3722	$5583

9. Activate the decision matrix.

Build the Benefit Amount Expression Set

Create the benefit amount expression set from an expression set template.

1. From the App Launcher, find and select **Expression Set Templates**.

2. Select **PSSExpCloud_CalculateBenefitAmount** and then click **Save As**.

3. In the expression set builder, set the properties for the expression set version.

   a. Click ⚙ , and then enter a start date time and an end date time for the expression set version.

   b. Enter a rank number.

   > 📝 Note: When more than one enabled version matches an expression set call and the date-time periods overlap, the version with the highest rank is chosen. For example, if two enabled versions have the rank values 1 and 2, the version with rank 2 is chosen.

4. Save and activate the expression set.

Set Up Decision Explainer for Eligible Benefit Amount

Configure Decision Explainer to share the reasoning behind benefit application decisions, such as eligibility determination and benefit calculation, with constituents.

1. Create explainability message templates for the PSSExpCloud_CalculateBenefitAmount expression set. For more information, see Create Explainability Message Templates.

2. To show explanations to constituents, modify the expression set version configuration. For more information, see Show Rule Explanations to External Users.

3. Create an application subtype definition. For more information, see Create Application Subtype Definitions.

4. Create a business process type definition. For more information, see Create Business Process Type Definitions.
   Next, define the metadata for the Decision Explainer business rule by creating an explainability action definition

5. From Setup, in the Quick Find box, enter `Decision Explainer`, and then select **Explainability Action Definition**.

6. Click **New Explainability Action Definition**.

7. For Label, enter `BenefitApplicationLogs`, and then press Tab to autofill the developer name.

   > ⛔ Important: Use `BenefitApplicationLogs` for both the label and the developer name.

8. For Business Process Type, click 🔍, and then select the business process type definition for this explainability action definition.

9. For Application Type, select **Public Sector**.

10. For Action Log Schema Type, select **Expression Set**.

11. If necessary, enter a description.

12. For Application Subtype, click 🔍, and then select the application subtype definition for the explainability action definition.

13. Save your changes.
    Next, define and store a version of the explainability action that your Decision Explainer business rule uses.

14. From Setup, in the Quick Find box, enter `Decision Explainer`, and then select **Explainability Action Version**.

15. Click **New Explainability Action Version**.

16. For Label, enter a name.

17. Activate the explainability action version.

    📝 Note: You can't edit or delete active explainability action version records.

18. For Explainability Action Definition, click 🔍, and then select **BenefitApplicationLogs**.

19. If necessary, enter a description.

20. Save your changes.

Build the Member Eligibility Expression Set

Use an expression set template to create the expression set that determines the benefit eligibility of a household member. To be eligible for benefits, the household member must be a US citizen.

1. From the App Launcher, find and select **Expression Set Templates**.

2. Select **PSSExpCloud_MemberBenefitEligibility**, and then click **Save As**.

3. In the expression set builder, set the properties for the expression set version.

    a. Click ⚙ , and then enter a start date time and an end date time for the expression set version.

    b. Enter a rank number.

    📝 Note: When more than one enabled version matches an expression set call and the date-time periods overlap, the version with the highest rank is chosen. For example, if two enabled versions have the rank values 1 and 2, the version with rank 2 is chosen.

4. Save and activate the expression set.

Deploy the Benefit Management Discovery Framework Template

Deploy version v5 of the Discovery Framework sample template for benefit management in Public
Sector Solutions.

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under
   Discovery Framework, select **General Settings**.

2. Turn on Enhanced Questions, Import or Export, and Sample Templates.

   Next, deploy the benefit management Discovery Framework template in your org.

3. From Setup, in the Quick Find box, enter `Discovery Framework Sample Templates`,
   and then select **Discovery Framework Sample Templates**.

4. (Optional) To see a list of the assessment questions, OmniScripts, Omnistudio Data Mappers,
   and Integration Procedures that are included in the template, for Public Sector Benefit
   Management, click **View Details**.

5. To deploy the template, for Public Sector Benefit Management, click **Deploy**.

   🛑 **Important:** Make sure that you deploy version v5 of the sample template.

6. (Optional) To check the progress, go to the **Deployment Status** Setup page.

EDITIONS

Available in: Lightning
Experience

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions with
Public Sector Solutions

USER PERMISSIONS

To deploy Discovery
Framework sample
templates:
- Customize Application
  AND Industries
  Assessment

Set Up Benefit Application Intake

Use Discovery Framework assessment questions and OmniScripts to capture information from
constituents who apply for a benefit. Store assessment questions responses in Salesforce objects
using OmniStudio Integration Procedures and Omnistudio Data Mappers. Capture effective start
and end dates when you store income and expense data. Use Business Rules Engine to automate
benefit eligibility determination.

Public Sector Solutions provides a benefit application intake process that helps you streamline how
you receive benefit applications, store application data, and process the applications.

- Create benefit applications: Create applications using Discovery Framework and OmniScripts
  to capture constituent information in a standard format. Use Discovery Framework assessment
  questions to specify the information that you need from an applicant and store the provided
  information in assessment responses. Reuse common assessment questions across benefit applications.

- Store application data with effective dates: Store data from assessment responses to objects by using Integration Procedures and
  Data Mappers. Capture effective start and end dates for information such as income and expenses. When you reuse assessment
  questions in the benefit application, reuse the data-mapping components as well.

- Check eligibility and assign benefits: Let caseworkers launch an OmniScript guided flow from the individual application record page.
  Using the flow, caseworkers can easily check the benefit eligibility of the application they're reviewing and assign benefits to eligible
  applicants.

EDITIONS

Available in: Lightning
Experience

Available in: **Enterprise**,
Performance, **Unlimited**,
and **Developer** Editions with
Public Sector Solutions

Public Sector Solutions provides a Discovery Framework template to help you set up the benefit application intake. The template includes
Discovery Framework assessment questions, OmniScripts, Integration Procedures, and Data Mappers. These components are designed
for a sample Low Income Home Energy Assistance Program (LIHEAP). Customize them for your benefit programs.

💡 **Tip:** You can also use the Apply for a Benefit OmniScript to set up benefit applications. However, we recommend that you use
the Discovery Framework-based application intake flow. This intake flow is more robust and is tightly integrated with other benefit
flows and the benefit assistance Experience Cloud template.

[Customize Benefit Application Assessment Questions](#)

Create and edit assessment questions to capture constituent information for benefit programs in Public Sector Solutions.

[Customize the Benefit Applicant Assessment OmniScript Template](#)

The benefit applicant assessment OmniScript template is designed for a U.S.-based Low Income Home Energy Assistance Program (LIHEAP) application. Customize the template to work for your benefit program applications.

[Activate the Benefit Application Integration Procedures](#)

Activate the Discovery Framework integration procedures to save application data, modify returned applications, and process benefit applications.

[Create a Trigger to Screen Benefit Applications](#)

Create a trigger to call an Integration Procedure when an individual application record is created for a benefit applicant assessment application. The Integration Procedure performs basic screening on the application, such as checking whether the participants named in the application are U.S. citizens. If the application fails the screening, then the Integration Procedure denies the application. If the application passes, then the Integration Procedure queues it for caseworkers to review.

[Activate the Benefit Applicant Assessment OmniScripts](#)

After you've customized the benefit applicant assessment OmniScript for your benefit program, activate it. Also activate the child OmniScripts that group assessment questions related to expenses and household details.

SEE ALSO:

[Define Benefits and Benefit Types for Programs](#)

[Automate Eligibility Determinations](#)

Customize Benefit Application Assessment Questions

Create and edit assessment questions to capture constituent information for benefit programs in Public Sector Solutions.

The Public Sector Solutions benefit management Discovery Framework template includes dozens of assessment questions to help you gather necessary information from constituents who apply for a benefit. To see a list of the questions, in Setup, go to the Discovery Framework Sample Templates page and, for PSS_BM v1, click **View Details**. Add assessment questions or customize existing questions to suit your needs.

Create Assessment Questions

Create assessment questions to capture constituent information for your benefit programs.

1. From the App Launcher, find and select **Assessment Questions**.

2. Click **New**.

3. Specify these details.

    a. Enter a name for the assessment question and then press **Tab** to fill in the Developer Name.

    b. Specify the question data type and category.

    c. Enter the question text.

    d. To make this question the active version, select **Active**.

       For information about the other fields, see [Create Questions](#) in the Discovery Framework documentation.

<div style="float:right">

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To create and edit assessment questions:
- Industries Assessment

</div>

4. Save your changes, or save them and create another question.

Modify Assessment Questions

Edit assessment questions from the benefit management Discovery Framework template to suit your needs.

1. From the App Launcher, find and select **Assessment Questions**.

2. From an Assessment Questions list view, select the question that you want to edit.

3. On the assessment question record page, on the Assessment Question Versions related list, click **New**.

4. Enter a name and the question text for the assessment question version.

5. To make this question the active version, select **Active**.

6. Save your changes.

Customize the Benefit Applicant Assessment OmniScript Template

The benefit applicant assessment OmniScript template is designed for a U.S.-based Low Income Home Energy Assistance Program (LIHEAP) application. Customize the template to work for your benefit program applications.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **BenefitManagement/BenefitApplicantAssessment**, and then select **Benefit Applicant Assessment (Version 1)**.

3. Click **New Version**.

4. Click **Edit**.

   a. Enter a name for this OmniScript version.

   b. If necessary, change the language.

   c. For Type and SubType, keep the default values, BenefitManagement and BenefitApplicantAssessment, respectively.

   d. Save your changes.

5. To include the latest assessment question versions in the OmniScript, click **Edit Form** and then click **OK**.

6. To add assessment questions to the OmniScript, click **Edit Form** and then click **Add Step**.

   a. To name the step, at the bottom of the Edit Form window, click **Untitled Step**, then click ✎ .

   b. To add a question to the step, start typing its name in the Search Assessment Questions field. To narrow the search, enter the name of an assessment Question Set and select a Category.

   c. Drag the assessment question onto the new step.

   d. Add more questions and reorder questions and steps as required.

   e. Click **OK**.

7. To change a referenced OmniScript, Omnistudio Data Mapper, Integration Procedure, or Expression Set, select it in the OmniScript canvas and edit its settings in the Properties panel.

SEE ALSO:

OmniScript Designer Overview

Activate the Benefit Application Integration Procedures

Activate the Discovery Framework integration procedures to save application data, modify returned applications, and process benefit applications.

Activate the Integration Procedure to Save Application Data

The CreateIndividualApplicationAndRelatedRecords integration procedure creates an individual application and a related case, and updates the preliminary application reference associated with the individual application.

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.

2. Expand **BenefitManagement/CreateIndividualAppliationAndRelatedRecords**, and then select **CreateIndividualApplicationAndRelatedRecords (Version 1)**.

3. In the Structure panel, click **Procedure Configuration**.

4. Click **Activate Version**.

Activate the Integration Procedure to Modify Returned Applications

The ModifyReturnedIndividualApplication integration procedure modifies an individual application that's returned to a constituent so that they can provide additional details and supporting documents. It deletes existing document checklist items and creates new document checklist items. It also creates a new assessment and uses a remote action to save application data to the Assessment and Assessment Question Response objects.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.

2. Make note of the namespace prefix for the OmniStudio package.

3. From the App Launcher, find and select **OmniStudio Integration Procedures**.

4. Expand **BenefitManagement/ModifyReturnedIndividualApplication**, and then select **ModifyReturnedIndividualApplication (Version 1)**.

5. At the bottom of the Structure panel, select **Save-Responses**.

6. In the Properties panel, confirm that the Remote Class is `<OmniStudio-namspace-prefix>.StoreResponses`. If necessary, edit it to include the namespace prefix for your installed OmniStudio package.

7. In the Structure panel, select **Procedure Configuration**.

8. Save your changes and activate the Integration Procedure.

Activate the Integration Procedure to Process Benefit Applications

The ProcessIndividualApplicationForBenefits integration procedure checks whether at least one household member in a benefit application is a U.S. citizen and calculates the total annual income of the household. Then it calls the PSSExpCloud_PrescreeningForBenefits expression set to check whether the annual household income meets the threshold for benefit eligibility. If the application participants are eligible, the integration procedure sets the application status to In Review. Otherwise, it sets the application status to Denied.

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.

2. Expand **BenefitManagement/ProcessIndividualApplication**, and then select **ProcessIndividualApplicationForBenefits (Version 1)**.

3. If desired, customize the Integration Procedure to add or change the checks.

4. In the Structure panel, click **Procedure Configuration**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To activate integration procedures:
- OmniStudio Admin

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5. Click **Activate Version**.

Create a Trigger to Screen Benefit Applications

Create a trigger to call an Integration Procedure when an individual application record is created for a benefit applicant assessment application. The Integration Procedure performs basic screening on the application, such as checking whether the participants named in the application are U.S. citizens. If the application fails the screening, then the Integration Procedure denies the application. If the application passes, then the Integration Procedure queues it for caseworkers to review.

1. From Setup, in Object Manager, select **Individual Application**.

2. Click **Triggers** and then click **New**.

3. On the Version Settings tab, click **Select to Add Installed Package** and then select **OmniStudio**.

4. On the Apex Trigger tab, select **is active**.

5. In the text box, paste the following code. Replace *OmniStudio-Namespace-Prefix* with the namespace prefix of the OmniStudio package installed in your org.

Find the namespace prefix of the OmniStudio package on the Installed Packages page in Setup.

```
trigger ProcessIAForBenefitAssistance on IndividualApplication (after update) {
    String procedureName = 'BenefitManagement_ProcessIndividualApplication';
    Map <String, Object> ipInput = new Map <String, Object> ();
    Map <String, Object> ipOutput = new Map <String, Object> ();
    Map <String, Object> ipOptions = new Map <String, Object> ();

    for (IndividualApplication ia: trigger.new) {

        /* Populating input map for an Integration Procedure. Follow whatever structure
 your VIP expects */
        if(ia.Status == 'Submitted' && ia.Category == 'Benefit') {
            String recordId = ia.Id;
            ipInput.put('RecordId', recordId);

            /* Call the IP via runIntegrationService, and save the output to ipOutput
*/
            ipOutput = (Map <String, Object>)
OmniStudio-Namespace-Prefix.IntegrationProcedureService.runIntegrationService(procedureName,
 ipInput, ipOptions);

            System.debug('IP Output: ' + ipOutput);
        }
    }
}
```

6. Save your changes.

Activate the Benefit Applicant Assessment OmniScripts

After you've customized the benefit applicant assessment OmniScript for your benefit program, activate it. Also activate the child OmniScripts that group assessment questions related to expenses and household details.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **BenefitManagement/Household Details**, and then select the Household Details version that you want to activate.

3. Click **Activate Version**.

4. Activate the appropriate versions of these additional OmniScripts.

   - **BenefitManagement/HeadOfHousehold**
   - **BenefitManagement/ExpenseDetails**
   - **BenefitManagement/BenefitApplicantAssessment**

Set Up the Change of Circumstances Application Flow

Set up a guided flow on your Experience Cloud site that constituents can use to report changes of circumstance that affect benefit or service eligibility. Review the changes in an individual application record, and adjust the services or benefits assigned to constituents as necessary.

After you assign benefits to constituents, a change in their personal, household, or financial circumstances may affect the benefits they're eligible to receive. For example, a loss of income may entitle a constituent to increased benefits.

To simplify how constituents report a change of circumstances and ensure that you capture the details of the change, set up the change of circumstances guided application flow on your Experience Cloud site. Constituents use the flow to:

- Find and select the changes that they need to report.
- View the details that they previously provided.
- Update personal, household, and financial details.
- Upload supporting documents.
- Confirm and submit their changes.

The flow creates an individual application that captures the details of the change of circumstances. A caseworker reviews the application, determines whether the changes affect benefit or service eligibility, and adjusts benefits or services assigned

The change of circumstances application flow uses OmniStudio and Discovery Framework components. Before you set up the flow, make sure that you've set up benefit application intake using Discovery Framework. Then, customize the components in the change of circumstances flow for your benefit programs, and activate them.

Although the change of circumstances flow is designed for benefit management, you can also customize it for other types of applications. For example, a business owner can report a change of address when their establishment moves to a new location, and a public reviewer can review the application to determine whether the owner needs new licenses and permits. .

Change of Circumstances Flow Prerequisites

Before you set up the change of circumstances application guided flow in Public Sector Solutions, complete the prerequisites.

When recertifying for a benefit or reporting a change of circumstances, if constituents remove members from their household, the incomes of the removed members must be omitted from the household income. The TransformIncomeRecords Apex class finds and flags the incomes of removed members in the household income details that the applicant previously declared. The UpdateHouseholdIncomeList Integration Procedure calls the Apex class and uses the flags to create a list of incomes of existing members and a list of incomes of removed members. The guided flow shows the two lists to the applicant so that they can review the information.

Activate the Integration Procedure that the change of circumstances OmniScript uses when an incomplete application is returned to a constituent. Then, activate the Integration Procedures that the change of circumstances flow uses to add, fetch, or update information.

Activate the OmniScripts that constituents use to report a change of circumstances.

Change of Circumstances Flow Prerequisites

Before you set up the change of circumstances application guided flow in Public Sector Solutions, complete the prerequisites.

1. Complete the Benefit Management Prerequisites on page 200.

2. Deploy the Benefit Management Discovery Framework Template on page 208.

   (!) **Important:** Make sure that you deploy version v5 of the sample template.

3. Create a Trigger to Screen Benefit Applications on page 212.

4. Activate the Integration Procedure to Process Benefit Applications on page 211.

Create an Apex Class to Identify Incomes of Removed Household Members

When recertifying for a benefit or reporting a change of circumstances, if constituents remove members from their household, the incomes of the removed members must be omitted from the household income. The TransformIncomeRecords Apex class finds and flags the incomes of removed members in the household income details that the applicant previously declared. The UpdateHouseholdIncomeList Integration Procedure calls the Apex class and uses the flags to create a list of incomes of existing members and a list of incomes of removed members. The guided flow shows the two lists to the applicant so that they can review the information.

1. From Setup, in the Quick Find box, enter *Apex*, and then select *Apex Classes*.

2. Click **New**.

3. Paste this class definition into the text box.

```
global with sharing class TransformIncomeRecords implements Callable {

    /*
```

```
     * @description      : In a JSON object that has the incomes of all household members,
 finds and flags incomes of removed members. The flag helps display a list of incomes
of existing members and a list of incomes of removed members to the applicant.
     * @return output    : Object containing updated member income details
     */
     global Object call(String action, Map<String, Object> args) {
         Map<String, Object> input = (Map<String, Object>)args.get('input');
         Map<String, Object> output = (Map<String, Object>)args.get('output');

         Object incomeDetailsObj = input.get('PSS_BM_v5_HouseholdIncomeDetails');
         // Null check for Household Income
         if(incomeDetailsObj == null || incomeDetailsObj instanceof String) {
             return output.put('PSS_BM_v5_HouseholdIncomeDetails', incomeDetailsObj);
         }

         List<Object> incomedetails = new List<Object>();

         if(String.valueOf(incomeDetailsObj).substring(0, 1).equals('{')) {
             incomedetails.add(incomeDetailsObj);
         } else {
           incomeDetails = (List<Object>)(input.get('PSS_BM_v5_HouseholdIncomeDetails'));

         }

         Object memberListObj = input.get('MemberList');
         // Null check for Household Member List
         if(memberListObj == null || memberListObj instanceof String) {
             return output.put('PSS_BM_v5_HouseholdIncomeDetails', incomedetails);
         }

         List<Object> memberList = new List<Object>();

         if(String.valueOf(memberListObj).substring(0, 1).equals('{')) {
             memberList.add(memberListObj);
         } else {
             memberList = (List<Object>)(input.get('MemberList'));
         }

         List<Object> result = new List<Object>();

         // To store name list of removed household members
         Set<String> removedMembers = new Set<String>();

         // Removed household members have AQ 'PSS_BM_v5_MemberSectionAction' set to
Remove member,
         // add those member names to removed member list
         for(Object member : memberList) {
             Map<String,Object> memberDetails = (Map<String, Object>) member;
             if(memberDetails.containsKey('PSS_BM_v5_MemberSectionAction') &&
memberDetails.get('PSS_BM_v5_MemberSectionAction').equals('Remove member')) {
                 removedMembers.add((String)
memberDetails.get('PSS_BM_v5_HouseholdMemberName'));
             }
         }
```

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```
        // Insert removed income flag to income details of removed members
        for(Object income : incomedetails) {
            insertIncomeRemovedFlag(result, income, removedMembers);
        }

        return output.put('PSS_BM_v5_HouseholdIncomeDetails', result);
    }

    /*
    * @description        : Inserts the MemberRemoved flag in income details object
for removed household members
    * @param result       : Updated Income Details List
    * @param income        : Income detail object
    * @param removedMembers : List of names of removed members
    * @return void
    */
    global void insertIncomeRemovedFlag(List<Object> result, Object income, Set<String>
 removedMembers) {
        Map<String,Object> incomeDetails = (Map<String, Object>)income;
        String name = (String)
incomeDetails.get('PSS_BM_v5_ExistingIncomeHouseholdMemberName');
        if(removedMembers.contains(name)) {
            // Insert MemberRemoved flag
            incomeDetails.put('MemberRemoved', 'Yes');
        }
        result.add(incomeDetails);
    }

}
```

4. Save your changes.

Activate the Change of Circumstances Integration Procedures

Activate the Integration Procedure that the change of circumstances OmniScript uses when an incomplete application is returned to a constituent. Then, activate the Integration Procedures that the change of circumstances flow uses to add, fetch, or update information.

Activate the Integration Procedure to Modify Returned Change of Circumstances Applications

The ChangeOfCircumstances/ModifyReturnedIndividualApplication Integration Procedure modifies a change of circumstances application that's returned to a constituent so that they can provide additional details and supporting documents. It deletes existing document checklist items and creates new document checklist items. It also creates a new assessment and uses a remote action to save application data to the Assessment and Assessment Question Response objects. Confirm that the remote action is properly configured, and then activate the integration procedure.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.

2. Make note of the namespace prefix for the OmniStudio package.

3. From the App Launcher, find and select **OmniStudio Integration Procedures**.

4. Expand **ChangeOfCircumstances/ModifyReturnedIndividualApplication**, and then select **ModifyReturnedIndividualApplication (Version 1)**.

5. In the Structure panel, select **Save-Responses**.

6. In the Properties panel, confirm that Remote Class is `<OmniStudio-namespace-prefix>.StoreResponses`. If necessary, edit it to include the namespace prefix for your installed OmniStudio package.

7. In the Structure panel, select **Procedure Configuration**.

8. Save your changes, and then activate the version.

Activate the Integration Procedures for the Change of Circumstances Flow

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.

2. Expand **ChangeOfCircumstances/GetHouseHoldMemberDetailsByHeadOfHouseholdId**, and then select **GetHouseHoldMemberDetailsByHeadOfHouseholdId (Version 1)** .

3. In the Structure panel, select **Procedure Configuration**.

4. Click **Activate Version**.

5. Repeat the steps to activate these integration procedures. If you customized them, make sure that you activate the correct version.

- ChangeOfCircumstances/GetHouseholdIncomeList - GetHouseholdIncomeList (Version 1)
- ChangeOfCircumstances/UpdateHouseholdIncomeList - UpdateHouseholdIncomeList (Version 1)
- ChangeOfCircumstances/CreateIndividualApplicationAndRelatedRecords - CreateIndividualApplicationAndRelatedRecords (Version 1)

Activate the Change of Circumstances Flow OmniScripts

Activate the OmniScripts that constituents use to report a change of circumstances.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **ChangeOfCircumstances/ReportChangeType**, and then select **ChangeOfCircumstancesReportChangeType (Version 1)**.

3. Click **Activate Version**.

4. Repeat the steps to activate these OmniScripts. If you customized them, make sure that you activate the correct version.

- ChangeOfCircumstances/UpdateHouseHoldMemberDetails - Update HouseHold Member Details (Version 1)
- ChangeOfCircumstances/UpdateMemberIncome - UpdateMemberIncome (Version 1)
- ChangeOfCircumstances/SignatureCapture - SignatureCapture (Version 1)
- ChangeOfCircumstances/ApplicationSubmissionConfirmation - ApplicationSubmissionConfirmation (Version 1)
- ChangeOfCircumstances/ReportChangeOfCircumstances - ChangeOfCircumstancesReportChangeOfCircumstances (Version 1)

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To activate OmniScripts:
- OmniStudio Admin

Set Up the Benefit Recertification Flow

Enable constituents to recertify for benefits on your Experience Cloud site. Show them benefits that are pending recertification and give them a guided flow to review the information that they previously provided, confirm or update details, upload supporting documents, and submit their recertification application.

After constituents start to receive benefits, changed circumstances or revised eligibility criteria can affect their benefit eligibility. To redetermine their eligibility at regular intervals and update their benefit amounts, have constituents recertify for benefits on your benefit assistance site. Public Sector Solutions provides a streamlined recertification process that includes these steps.

1. Define how frequently constituents must recertify for a benefit.

2. Run batch jobs regularly to identify the benefit assignments that are due for recertification.

   Public Sector Solutions includes template Data Processing Engine definitions for the batch jobs. Customize and run the definitions as required.

3. On your Experience Cloud site, show constituents benefit assignments that are due for recertification.

   The Benefit Assistance Experience Cloud site template includes a Pending Recertification list view that shows benefit assignments that are due for recertification. The list view appears on the Benefits page.

4. Set up a guided flow for constituents to use to apply for recertification.

   The Benefit Assistance Experience Cloud site template provides a Recertify action for each benefit assignment in the Pending Recertification list view. To start the guided flow, constituents use the Recertify action.

Constituents use the benefit recertification guided flow to:

- Confirm or update household details.
- Confirm or update household income information.
- Upload supporting documents.
- Preview and submit the application.

The flow creates an individual application that captures the details of their circumstances. Review the submitted application, determine their benefit or service eligibility, and adjust the benefits or services assigned.

The benefit recertification flow uses OmniStudio and Discovery Framework components. Before you set up the flow, ensure that you've set up the benefit application intake flow. Then, customize the components of the benefit recertification flow for your benefit programs and activate them.

Benefit Recertification Flow Components

Review the OmniStudio components that Public Sector Solutions uses in the benefit recertification flow.

Benefit Recertification Flow Prerequisites

Before you set up the benefit recertification guided flow in Public Sector Solutions, complete the prerequisites.

Define Recertification Timelines for a Benefit

Specify the frequency at which constituents must recertify for a benefit, and indicate when a constituent can recertify for the benefit as the due date approaches.

Update Benefit Assignments for Recertification

Update the recertification due date and the recertification status of benefit assignments based on the recertification timelines that you defined for the benefits. Clone and activate the Data Processing Engine definitions that Public Sector Solutions provides to update benefit assignments, and then create flows to run the definitions regularly.

Update the Recertification Status When an Application Is in Review

When a recertification application is in review, update the recertification status of the related benefit assignment to In Progress. Define a custom platform event that indicates that a recertification application is in review, and configure an event handler that updates the recertification status of the related benefit assignment when the platform event is published. Subscribe to the platform event by using an Apex trigger.

Update the Apex Trigger to Screen Recertification Applications

Update the Apex trigger that runs when an individual application record of the category Benefit is created. Configure the trigger to publish a BMRecertEvent when a recertification application passes the screening and is in review. The event handler for BMRecertEvent updates the recertification status of the benefit assignment related to the application.

Activate the Benefit Recertification Integration Procedures

Activate the Integration Procedure that the recertification application OmniScript uses when an incomplete application is returned to a constituent. Then, activate the Integration Procedures that the recertification flow uses to add, fetch, or update information.

Activate the Benefit Recertification Flow OmniScripts

Activate the OmniScripts that constituents use to recertify for a benefit.

Configure the Benefit Recertification Flow Available to Constituents

The Benefit Recertification Flow custom setting determines the OmniScript guided flow that's available to constituents on your benefit assistance site when they use the Recertify action in the Pending Recertification list view. Update the custom setting and specify the type, subtype, and name of the OmniScript.

Benefit Recertification Flow Components

Review the OmniStudio components that Public Sector Solutions uses in the benefit recertification flow.

Component	Type	Description	Invoked Components
Recertification/Application - ApplyForRecertification	OmniScript	Enables constituents to review and update their information, and apply to recertify for a benefit that they receive.	**OmniStudio Integration Procedures** • ChangeToHouseHold - Update HouseHold Member Details • RecertifyHouseholdIncome - Recertify Household Income • ChangeToSignatureCapture - SignatureCapture • ChangeToApplicationConfirmation - ApplicationSubmissionConfirmation

Component	Type	Description	Invoked Components
			• ChangeCircumstancesModifyReturnedIndividualApplication - ModifyReturnedIndividualApplication • RealtionCreateIndividualApplicationAndRelatedRecords - CreateIndividualApplicationAndRelatedRecords **Omnistudio Data Mappers** • PSSFetchReturnedToApplicantStatus • PSSFetchIndividualApplicationStatus • PSSCheckUserType • PSSExpCloudGetPersonAccountDOFApplicant • PSSRepoChangeCreatePAFromAssesment **OmniStudio FlexCards** FlexCards that show the household member details in the Application Review step: • PSSCoCShowUpdatedHouseholdDetails • PSSCoCShowUpdatedHouseholdDetailsEmptyState • PSSCoCShowRemovedHouseholdDetails • PSSCoCShowCurrentHouseholdDetails • PSSCoCShowCurrentHouseholdDetailsEmptyState FlexCards that show the household income information in the Application Review step: • PSSCoCShowUpdatedHouseholdIncomeDetails • PSSCoCShowUpdatedHouseholdIncomeDetailsEmptyState • PSSCoCShowRemovedHouseholdIncomeDetails • PSSCoCShowCurrentHouseholdIncomeDetails • PSSCoCShowCurrentHouseholdIncomeDetailsEmptyState **Fillable PDF Template** LiheapApplicationWithPeriodIncomeDetails.pdf
ChangeCircumstancesUpdateHouseHoldMemberDetails - Update HouseHold Member Details	OmniScript	Enables constituents to review and update the details of their household members.	**OmniStudio Integration Procedure** ChangeCircumstancesGetHouseHoldMemberDetailsByHeadOfHousehold - GetHouseHoldMemberDetailsByHeadOfHousehold

Component	Type	Description	Invoked Components
			Omnistudio Data Mappers • PSSBMTransformToAddMemberAction • PSSEXPExtractPARs • PSSExpTransformMemberDetailsArray • PSSGetMembersFromPersonACR
Recertification/HouseholdIncome - Recertify Household Income	OmniScript	Enables constituents to review and update their household income information.	**OmniStudio Integration Procedure** ChangeOfCircumstancesUpdateHouseholdIncomeList - UpdateHouseholdIncomeList **Omnistudio Data Mappers** • PSSCoCFetchIncomeDetailsByUser • PSSCoCSeparateRemovedMemberIncome • PSSExpPopulateDocIDFromObject **Apex Class** TransformIncomeRecords
ChangeOfCircumstances/SignatureCapture - SignatureCapture	OmniScript	Lets constituents acknowledge the information that they're about to submit in their recertification application.	
ChangeOfCircumstances/ApplicationSubmissionConfirmation - ApplicationSubmissionConfirmation	OmniScript	Confirms to constituents that they've submitted the recertification application and shows them the application ID.	

Benefit Recertification Flow Prerequisites

Before you set up the benefit recertification guided flow in Public Sector Solutions, complete the prerequisites.

1. Complete the Benefit Management Prerequisites on page 200.
2. Deploy the Benefit Management Discovery Framework Template on page 208.

   🛑 **Important:** Make sure that you deploy version v5 of the sample template.

3. Set up the Benefit Application Intake flow.
4. Create an Apex Class to Identify Incomes of Removed Household Members.
5. Add the Start Recertification From field to the Benefit page layout. See Customize Page Layouts with the Enhanced Page Layout Editor.

Enable Data Pipelines

1. From Setup, in the Quick Find box, enter `Data Pipelines`, and then select **Get Started**.
2. Turn on **Data Pipelines**.

Define Recertification Timelines for a Benefit

Specify the frequency at which constituents must recertify for a benefit, and indicate when a constituent can recertify for the benefit as the due date approaches.

1. From the App Launcher, find and select **Benefits**, and then select a benefit.
2. For Recertification Frequency, enter the number of days after which constituents must regularly recertify for the benefit.
3. For Start Recertification From, enter the number of days before the recertification due date that constituents can recertify for the benefit.
4. Save your changes.

Update Benefit Assignments for Recertification

Update the recertification due date and the recertification status of benefit assignments based on the recertification timelines that you defined for the benefits. Clone and activate the Data Processing Engine definitions that Public Sector Solutions provides to update benefit assignments, and then create flows to run the definitions regularly.

Public Sector Solutions provides Data Processing Engine definition templates that you can clone and run to update the recertification status and recertification due date of benefit assignments.

Add Recertification Due Date to Benefit Assignments

Finds benefit assignments without a recertification due date. Calculates the recertification due date for each benefit assignment based on the benefit's recertification frequency, and updates the recertification due date in the benefit assignment record.

Identify Benefit Assignments Pending Recertification

Finds benefit assignments for which constituents haven't recertified. If constituents can recertify for a benefit assignment, sets the recertification status of the benefit assignment to Pending.

Identify Lapsed Benefit Assignments

Finds benefit assignments whose recertification status is Pending and whose recertification due date has passed. Updates the benefit assignments' recertification status to Lapsed.

Clone and Activate the Benefit Recertification Data Processing Engine Definitions

1. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.

2. Click **Add Recertification Due Date to Benefit Assignments**.

3. Click ⌄ , and then select **Save As**.

4. Enter a name for the new definition, and then click **Save**.

5. Activate the definition.

6. Repeat these steps for these Data Processing Engine definitions.

   • Identify Benefit Assignments Pending Recertification

   • Identify Lapsed Benefit Assignments

Create a Flow to Regularly Run a Benefit Recertification Data Processing Engine Definition

Create a schedule-triggered flow that runs your cloned Data Processing Engine definition.

To run the Data Processing Engine definitions at the same time, create a common schedule-triggered flow with three Data Processing Engine actions. To run the Data Processing Engine definitions at different times, create a schedule-triggered flow for each Data Processing Engine definition.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **New Flow**.

3. In the New Flow window, select **Start From Scratch**, and then click **Next**.

4. Select **Schedule-Triggered Flow**, and then click **Create**.

5. In the Set a Schedule window, enter a start date, start time, and frequency, and then close the window.

6. Add the **Action** element to the canvas.

7. In the Action window, for Category, select **Data Processing Engine**, and then search for and select your Data Processing Engine definition.

8. Enter a Label and an API Name for the action, and then close the window.

9. Save and activate your flow.

   The definition runs on the schedule you set. Track its progress and status by using Monitor Workflow Services.

Update the Recertification Status When an Application Is in Review

When a recertification application is in review, update the recertification status of the related benefit assignment to In Progress. Define a custom platform event that indicates that a recertification application is in review, and configure an event handler that updates the recertification status of the related benefit assignment when the platform event is published. Subscribe to the platform event by using an Apex trigger.

Define a Custom Platform Event

1. From Setup, in the Quick Find box, enter `Platform`, and then select **Platform Events**.

2. Click **New Platform Event**.

3. Enter these details.

   - Label: `BMRecertEvent`
   - Plural Label: `BMRecertEvents`
   - Object Name: `BMRecertEvent`

4. Save your changes.

5. In the Custom Fields & Relationships list, click **New**.

6. For Data Type, select **Text**, and then click **Next**.

7. Enter these details.

   - Field Label: `RecordId`
   - Length: `50`

   Field Name is autopopulated.

8. Save your changes.

Create an Apex Class for the Event Handler

1. From Setup, in the Quick Find box, enter `Apex`, and then select **Apex Classes**.

2. Click **New**.

3. Paste this class definition into the text box.

```
public class SubscribeBMRecertEvent {
    // Implement the event handler method
    @InvocableMethod(label='Handle BMRecertEvent Platform Event')
    public static void handleEvent(List<BMRecertEvent__e> events) {
```

```
    for (BMRecertEvent__e event : events) {
        List<IndividualApplication> recordsToUpdate = [SELECT Id, Status, ApplicationType,
 Category, BenefitAssignmentId FROM IndividualApplication WHERE Id = :event.RecordId__c];

        for (IndividualApplication ia: recordsToUpdate) {
            BenefitAssignment baRecord = [SELECT Id, RecertificationStatus FROM
BenefitAssignment WHERE Id = :ia.BenefitAssignmentId];
            baRecord.RecertificationStatus = 'InProgress';
            update baRecord;
        }
        }
    }
}
```

4. Save your changes.

Subscribe to the Platform Event by Using an Apex Trigger

1. From Setup, in the Quick Find box, enter `Platform`, and then select **Platform Events**.

2. Click **BMRecertEvent**.

3. In the Triggers list, click **New**.

4. Paste this class definition into the text box.

```
trigger BMRecertEventTrigger on BMRecertEvent__e (after insert) {
    SubscribeBMRecertEvent.handleEvent(Trigger.new);
}
```

5. Save your changes.

Update the Apex Trigger to Screen Recertification Applications

Update the Apex trigger that runs when an individual application record of the category Benefit is created. Configure the trigger to publish a BMRecertEvent when a recertification application passes the screening and is in review. The event handler for BMRecertEvent updates the recertification status of the benefit assignment related to the application.

1. From Setup, in Object Manager, select **Individual Application**.

2. Click **Triggers**.

3. For ProcessIAForBenefitAssistance, click ⌄ , and then select **Edit**.

4. Paste this code in the text box. Replace OmniStudio-Namespace-Prefix with the namespace prefix of the OmniStudio package installed in your org.

   Find the namespace prefix of the OmniStudio package on the Installed Packages page in Setup.

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EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To update Apex triggers:
• Author Apex

</div>

```
trigger ProcessIAForBenefitAssistance on IndividualApplication (after update) {
    String procedureNameForNewIA = 'BenefitManagement_ProcessIndividualApplication';
    Map <String, Object> ipInput = new Map <String, Object> ();
```

```
    Map <String, Object> ipOutput = new Map <String, Object> ();
    Map <String, Object> ipOptions = new Map <String, Object> ();

    // List to hold the Platform Events to be published
    List<BMRecertEvent__e> eventsToPublish = new List<BMRecertEvent__e>();

    // Iterate through the inserted or updated records
    for (IndividualApplication ia : Trigger.new) {
        if(ia.Status == 'Submitted' && ia.Category == 'Benefit') {
            String recordId = ia.Id;
            ipInput.put('RecordId', recordId);

            /* Call the IP via runIntegrationService, and save the output to ipOutput
*/
            ipOutput = (Map <String, Object>)
OmniStudio-Namespace-Prefix.IntegrationProcedureService.runIntegrationService(procedureNameForNewIA,
 ipInput, ipOptions);
            System.debug('IP Output: ' + ipOutput);
          IndividualApplication iaRecord = [SELECT Id, Status, ApplicationType, Category
 FROM IndividualApplication WHERE Id = :ia.Id];
            if(iaRecord.Status != 'Denied' && iaRecord.ApplicationType ==
'Recertification'){
                BMRecertEvent__e event = new BMRecertEvent__e();

                // Set fields on the Platform Event based on the inserted or updated
record
                event.RecordId__c = iaRecord.Id;

                // Add the Platform Event to the list of events to be published
                eventsToPublish.add(event);
            }
        }
    }

    // Publish the list of Platform Events
    if (!eventsToPublish.isEmpty()) {
        EventBus.publish(eventsToPublish);
    }
}
```

5. Save your changes.

Activate the Benefit Recertification Integration Procedures

Activate the Integration Procedure that the recertification application OmniScript uses when an incomplete application is returned to a constituent. Then, activate the Integration Procedures that the recertification flow uses to add, fetch, or update information.

Activate the Integration Procedure to Modify Returned Benefit Recertification Applications

The ChangeOfCircumstances/ModifyReturnedIndividualApplication Integration Procedure modifies a recertification application that's returned to a constituent so that they can provide additional details and supporting documents. It deletes existing document checklist items and creates new document checklist items. It also creates a new assessment and uses a remote action to save application data to the Assessment and Assessment Question Response objects. Confirm that the remote action is properly configured, and then activate the integration procedure.

> 📝 **Note:** The ChangeOfCircumstances/ModifyReturnedIndividualApplication Integration Procedure is used in both the benefit recertification and the change of circumstances flows. If you set up the change of circumstances flow and activated the correct version of the Integration Procedure, you don't need to activate it again.

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
2. Make note of the namespace prefix for the OmniStudio package.
3. From the App Launcher, find and select **OmniStudio Integration Procedures**.
4. Expand **ChangeOfCircumstances/ModifyReturnedIndividualApplication**, and then select **ModifyReturnedIndividualApplication (Version 1)**.
5. In the Structure panel, select **Save-Responses**.
6. In the Properties panel, confirm that Remote Class is `<OmniStudio-namespace-prefix>.StoreResponses`. If necessary, edit it to include the namespace prefix for your installed OmniStudio package.
7. In the Structure panel, select **Procedure Configuration**.
8. Save your changes, and then activate the version.

Activate the Integration Procedures for the Benefit Recertification Flow

Before you begin, create an Apex class to identify incomes of removed household members.

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.
2. Expand **Recertification/CreateIndividualApplicationAndRelatedRecords**, and then select **CreateIndividualApplicationAndRelatedRecords (Version 1)**.

   If you customized the Integration Procedure, make sure that you activate the correct version.

3. In the Structure panel, select **Procedure Configuration**.
4. Click **Activate Version**.
5. Repeat the steps to activate these Integration Procedures. If you customized them, make sure that you activate the correct version.

   These Integration Procedures are used in both the benefit recertification and the change of circumstances flows. If you set up the change of circumstances flow and activated the correct versions of these Integration Procedures, you don't need to activate them again.

- ChangeOfCircumstances/GetHouseHoldMemberDetailsByHeadOfHouseholdId - GetHouseHoldMemberDetailsByHeadOfHouseholdId (Version 1)
- ChangeOfCircumstances/GetHouseholdIncomeList - GetHouseholdIncomeList (Version 1)
- ChangeOfCircumstances/UpdateHouseholdIncomeList - UpdateHouseholdIncomeList (Version 1)

Activate the Benefit Recertification Flow OmniScripts

Activate the OmniScripts that constituents use to recertify for a benefit.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **Recertification/HouseholdIncome**, and then select **Recertify Household Income (Version 1)**.

   If you customized the Integration Procedure, make sure that you activate the correct version.

3. Click **Activate Version**.

4. Repeat the steps to activate these OmniScripts. If you customized them, make sure that you activate the correct version.

   - Recertification/Application - ApplyForRecertification (Version 1)

   These OmniScripts are used in both the benefit recertification and the change of circumstances flows. If you set up the change of circumstances flow and activated the correct versions of these OmniScripts, you don't need to activate them again.

   - ChangeOfCircumstances/UpdateHouseHoldMemberDetails - Update HouseHold Member Details (Version 1)
   - ChangeOfCircumstances/SignatureCapture - SignatureCapture (Version 1)
   - ChangeOfCircumstances/ApplicationSubmissionConfirmation - ApplicationSubmissionConfirmation (Version 1)

Configure the Benefit Recertification Flow Available to Constituents

The Benefit Recertification Flow custom setting determines the OmniScript guided flow that's available to constituents on your benefit assistance site when they use the Recertify action in the Pending Recertification list view. Update the custom setting and specify the type, subtype, and name of the OmniScript.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

2. For Benefit Recertification Flow, click **Manage**.

3. To specify the custom setting data for the first time, click **New**. To edit existing data, click **Edit**.

4. Specify these details about the OmniScript.

   - For Type, enter `Recertification`.
   - For Subtype, enter `Application`.
   - For Language, enter `English`.

5. Save your changes.

Enable access to the Benefit Recertification Flow custom setting in the profile that you're using for your Experience Cloud site users.

SEE ALSO:

[Benefit Assistance Site Prerequisites](#)

Set Up the Benefit Application Review Flow

Configure a guided flow for caseworkers to use to check whether benefit, change of circumstances, and benefit recertification applications are complete and accurate, to determine eligibility, and to assign and adjust benefits and services.

The application review guided flow makes it easy to process benefit, change of circumstances, and benefit recertification applications.

For a benefit application, use the guided flow to:

- See a summary of the number of members in the applicant's household, their total monthly income and expenses, and the estimated benefit amount.

- Review the application, update information based on evidence, or return the application so that constituents can provide further details or documentation.

- Check whether the applicants are eligible for a benefit or service, and see how updates to the application details affect their eligibility. You can also view details of other benefits or services that they already receive.

- After confirming that the application is complete and accurate, assign a benefit amount to eligible applicants. The flow stores application details in the database and creates a benefit assignment record.

For a change of circumstances application, use the guided flow to:

- See a summary of the application, including the types of changes reported, the number of household members, and the change in the total household income.

- Review the application, update information based on evidence, or return the application so that constituents can provide further details or documentation.

- Check whether the changed household membership or income affect the benefits or services that the household is eligible to receive.

- After confirming that the reported changes are accurate and that supporting documents are uploaded, accept the application. The flow updates the constituents' details, and if the changes affect their benefit or service entitlements, it creates an individual application to adjust the benefit or services assigned.

For a benefit assignment adjustment application, use the guided flow to:

- See a summary of the application, including the types of changes reported, the number of household members, and the change in the total household income.

- See the change of circumstances application that led to the creation of the benefit assignment adjustment application.

- Adjust the benefits or services that the constituents receive. The flow creates a benefit assignment adjustment record to capture the change in the benefit amount payout or service delivery.

To set up the guided flow, customize and activate the integration procedures that it uses. Then, add the flow to the individual application record page so that caseworkers can access it and process benefit applications efficiently.

For a benefit recertification application, use the guided flow to:

- See a summary of the application, including the number of household members and the change in the total household income.

- Review the application, update information based on evidence, or return the application so that constituents can provide further details or documentation.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

- After confirming that the application is accurate and complete, and that supporting documents are uploaded, accept the application. If the recertification application includes changes in household membership or income, the flow updates the constituents' details.

- Renew or adjust the benefits or services that the constituents receive. The flow creates a benefit assignment adjustment record to capture the change in the benefit amount payout or service delivery, and the start and end dates for the change.

[Benefit Application Review Flow Components](#)

Review the OmniStudio components that Public Sector Solutions uses in the benefit application review guided flow.

[Benefit Application Review Flow Prerequisites](#)

Before you set up the benefit application review guided flow in Public Sector Solutions, complete the prerequisites.

[Activate the Integration Procedures for the Benefit Application Review Guided Flow](#)

Activate the integration procedures that the benefit application review flow uses to add, fetch, or update information.

[Add the Benefit Application Review Guided Flow to the Individual Application Lightning Record Page](#)

Add the benefit application review guided flow to the individual application page so that caseworkers can use the flow to process applications.

Benefit Application Review Flow Components

Review the OmniStudio components that Public Sector Solutions uses in the benefit application review guided flow.

Component	Type	Description	Invoked Components
Benefit Management Caseworker Guided Flow - Caseworker Guided Flow	OmniScript	Enables caseworkers to review submitted applications, check benefit eligibility, and assign or adjust benefits.	**OmniStudio Integration Procedure** • CaseManagementBenefitAssignment - FetchCurrentBenefitAssignments **Omnistudio Data Mappers** • FetchSubmittedApplicationURL • PSSTechnicalUpdateApplicationStatus • PSSGetParentIA **OmniStudio FlexCards** • PSSReviewApplicationSummaryAndDocs • PSSReviewApplication • PSSConfirmAndReturnApplication • PSSBMAcceptApplication • PSSBenefitAssignmentsInfoReset • PSSBenefitAssignmentAdjustmentDetails • PSSNewBenefitAssignmentAdjustmentDetails

Component	Type	Description	Invoked Components
PSSShowApplicationSummaryAndActions	OmniStudio FlexCard	Shows a summary of a submitted application and the actions available to a caseworker.	**OmniStudio Integration Procedures** • BenefitManagementApplicationSummaryCaseWorkerGuidedFlow - ApplicationSummaryCaseWorkerGuidedFlow • BenefitManagementFetchApplicationSummaryInformation - FetchApplicationSummaryInformation • BenefitManagementDetermineEligibleBenefitAmount - Determine Eligible Benefit Amount • BenefitManagementFetchPartyExpenses - FetchPartyExpenses **Omnistudio Data Mappers** • PSSFetchBenefitAssignmentForIndividualApplication • PSSFetchCurrentBenefitAssignmentAdjustments • PSSFetchPublicApplicationParticipants • PSSFetchPrivilegedParticipants • PSSFetchHouseholdIncome • PSSFetchAssessmentId • PSSAssignGeneratedNamesToResponseNode • PSSFetchApplicationSubmissionDate • PSSFetchPartyExpense • PSSGetParentIA • PSSFetchIndividualApplicationStatus
PSSReviewApplication	OmniStudio FlexCard	Shows the Review Application title bar and gives caseworkers the option to return an application.	**OmniStudio Integration Procedure** BenefitManagementFetchApplicationStatusAndAssignmentInfo - FetchApplicationStatusAndAssignmentInfo
PSSConfirmAndReturnApplication	OmniStudio FlexCard	Lets caseworkers confirm that they want to return an application.	**OmniStudio Integration Procedure** BenefitManagementUpdateAndReturnIndividualApplicationStatus - UpdateAndReturnIndividualApplicationStatus
PSSBMAcceptApplication	OmniStudio FlexCard	Lets caseworkers confirm that they want to accept an application.	**OmniStudio Integration Procedures** • ChangeOfCircumstancesUpsertRecordsForCoC - UpsertRecordsForCoC

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Component	Type	Description	Invoked Components
			• ChangeOfCircumstancesDetermineEligibleBenefitAmount - Determine Eligible Benefit Amount **Omnistudio Data Mappers** • PSSFetchAssessmentId • PSSCoCAssignGenericNamesToResponseNode • PSSFetchApplicationSubmissionDate • PSSFetchParenthoodUalApplicationForCoCType • PSSGetHouseholdAccountIdForIA • PSSUpsertPersonDisability • PSSUpsertAccountAndPublicApplicationParticipant • PSSFetchPersonDisability • PSSGetContactIDFromPersonAccount • PSSUpsertContactProfile • PSSFetchACRForHouseholdMember • PSSRemoveMember • PSSUpsertAccountContactRelation • PSSUpsertPartyIncome • PSSFetchExistingPartyIncome • PSSExpCloudNewDocumentChecklistItem • PSSCoCDeletePartyIncomeRecords • FetchBAFromRecertIA • PSSFetchBenefitFromBA • PSSUpsertRecertBADueDate **Expression Set** PSSExpCloud_MemberBenefitEligibility
PSSBenefitAssignmentsListForRecert	OmniStudio FlexCard	Shows details of previously created benefit assignment and benefit assignment adjustment records and lets a caseworker adjust the amount of benefits assigned to constituents.	**OmniStudio Integration Procedures** • RecertificationFetchCurrentBenefitAssignments - FetchCurrentBenefitAssignments • RecertificationFindEligibleEntitlementAmount - Find Eligible Entitlement Amount Recertification • ChangeOfCircumstancesPSSCreateBenefitAssignmentAdjustment - PSSCreateBenefitAssignmentAdjustment

Component	Type	Description	Invoked Components
			• ChangeCircumstancesDetermineNewEntitledAmount - Determine New Entitled Amount
			• BenefitManagementFetchCurrentBenefits - FetchCurrentBenefits
			• BenefitManagementFetchPartyExpenses - FetchPartyExpenses
			• BenefitManagementDetermineEligibleBenefitAmount - Determine Eligible Benefit Amount
			Omnistudio Data Mappers
			• PSSFetchBenefitAssignmentsForIndividualApplication
			• PSSFetchCurrentBenefitAssignmentAdjustments
			• PSSGetParentIA
			• PSSFetchIndividualApplicationStatus
			• PSSFetchPublicApplicationParticipants
			• PSSFetchPrivilegedParticipants
			• PSSFetchHouseholdIncome
			• PSSFetchParentIndividualApplicationForCoCType
			• PSSFetchAssessmentId
			• PSSAssignGeneratedNamesToResponseNode
			• PSSCoCAssignGeneratedNamesToResponseNode
			• PSSFetchCurrentBenefits
			• PSSFetchOtherBenefitEnrolleeName
			• PSSFetchApplicationSubmissionDate
			• PSSFetchPartyExpense
			• PSSUpdateIndividualApplicationStatus
			Expression Set PSSExpCloud_CalculateBenefitAmount
PSSBenefitAssignmentAdjustmentDetails	OmniStudio FlexCard	Shows the details of a benefit assignment adjustment related to a benefit assignment.	
PSSNewBenefitAssignmentAdjustmentDetails	OmniStudio FlexCard	Lets a caseworker create a benefit assignment adjustment.	**OmniStudio Integration Procedures** • ChangeCircumstancesPSSCreateBenefitAssignmentAdjustment - PSSCreateBenefitAssignmentAdjustment • BenefitManagementDetermineBenefitAssignmentAdjustmentLogs - Determine Benefit

Component	Type	Description	Invoked Components
			Assignment Adjustment Logs
			Omnistudio Data Mappers
			• PSSFetchBenefitProgram
			• PSSCreateBenefitAssignmentAdjustment

Benefit Application Review Flow Prerequisites

Before you set up the benefit application review guided flow in Public Sector Solutions, complete the prerequisites.

1. Complete the Benefit Management Prerequisites on page 200.

2. Deploy the Benefit Management Discovery Framework Template on page 208.

   ⛔ **Important:** Make sure that you deploy version v5 of the sample template.

Activate the Integration Procedures for the Benefit Application Review Guided Flow

Activate the integration procedures that the benefit application review flow uses to add, fetch, or update information.

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.

2. Expand **BenefitManagement/ProcessHouseholdIncome**, and then select **ProcessHouseholdIncome**.

3. In the Structure panel, select **Procedure Configuration**.

4. Click **Activate Version**.

5. Repeat the steps to activate these integration procedures. If you customized them, make sure that you activate the correct version.

   • BenefitManagement/CreateSerializedRecordList - CreateSerializedRecordList

   • BenefitManagement/CreatePartyExpenses - CreatePartyExpenses

   • BenefitManagement/UpsertRecordsForIndividualApplication - UpsertRecordsForIndividualApplication

   • BenefitManagement/FetchPartyExpenses - FetchPartyExpenses

   • BenefitManagement/DetermineEligibleBenefitAmount - Determine Eligible Benefit Amount

   • BenefitManagement/CreateHousehold - CreateHousehold

   • ChangeOfCircumstances/DetermineEligibleBenefitAmount - Determine Eligible Benefit Amount

   • ChangeOfCircumstances/UpsertRecordsForCoC - UpsertRecordsForCoC

   • BenefitManagement/FetchCurrentBenefits - FetchCurrentBenefits

   • ChangeOfCircumstances/FindEligibleBenefitAmount - Find Eligible Entitlement Amount

   • ChangeOfCircumstances/DetermineNewEntitledAmount - Determine New Entitled Amount

- ChangeOfCircumstances/FetchCurrentBenefitAssignments - FetchCurrentBenefitAssignments

- ChangeOfCircumstances/PSSCreateBenefitAssignmentAdjustment - PSSCreateBenefitAssignmentAdjustment

- BenefitManagement/FetchApplicationSummaryInformation - FetchApplicationSummaryInformation

- BenefitManagement/ApplictionSummaryCaseWorkerGuidedFlow - ApplictionSummaryCaseWorkerGuidedFlow

- Recertification/FetchCurrentBenefitAssignments - FetchCurrentBenefitAssignments

- Recertification/FindEligibleEntitlementAmount - Find Eligible Entitlement Amount Recertification

Add the Benefit Application Review Guided Flow to the Individual Application Lightning Record Page

Add the benefit application review guided flow to the individual application page so that caseworkers can use the flow to process applications.

1. From the App Launcher, find and select **Individual Applications**, and then select a record.

2. Click ⚙ , and then select **Edit Page**.

3. From the Standard section of the Components pane, drag **OmniScript** onto the page canvas.

4. In the Properties pane, for Type, select **BenefitManagement**. For Subtype, select **CaseworkerGuidedFlow**.

5. Under Set Component Visibility, click **Add Filter**.

   a. For Filter Type, select **Advanced**.

   b. For Field, click **Select**.

   c. In the Select field window, click ▾ , and then select **Record** > **Record Type** > **Record Type Name**.

   d. Click **Done**.

   e. For Operator, select **Equal**.

   f. For Value, enter `Benefit_Assistance`.

   g. Click **Done**.

6. Save your changes and activate the page.

Alert Applicants When Their Benefit Application Status Changes

Keep applicants informed of the progress of their benefit applications by using a flow to automatically send a desktop notification and an email to applicants when the status of their benefit application changes.

Create a flow that sends a desktop notification and an email to the primary applicant who submitted the benefit application and created the individual application record.

1. Create a custom notification type to alert applicants to a change in their application status.

   a. From Setup, in the Quick Find box, enter `Notification Builder`, and then select **Custom Notifications**.

   b. Click **New**.

   c. Enter a custom notification name, such as `Benefit Application Status Update`, and then press Tab to populate the API name.

   d. For Supported Channels, select **Desktop**.

   e. Save your changes.

2. Create a record-triggered flow.

   a. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

   b. Click **New Flow**.

   c. Select **Start From Scratch** and then click **Next**.

   d. Select **Record-Triggered Flow**, and then click **Create**.

3. Configure the Start element.

   a. For Object, select **Individual Application**.

   b. Under Configure Trigger, for Trigger the Flow When, select **A record is updated**.

   c. Under Set Entry Conditions, for Condition Requirements, select **All Conditions Are Met (AND)**.

   d. For Field, select **RecordTypeID**. For Operator, select **Equals**. For Value, enter the ID of the record type on the Individual Application object. For example, enter the Benefit Assistance record type ID.

   For information on how to find the ID of a record type, see Find the ID of a record type.

   e. Click **Add Condition**.

   f. For Field, select **Status**. For Operator, select **Is Changed**. For Value, select **$GlobalConstant.True**.

4. Create variables to store the applicant's user ID and email ID.

   a. Click ⬚ , and then click **New Resource**.

   b. For Resource Type, select **Variable**.

   c. For API Name, enter `applicant_user_id`.

   d. (Optional) Enter a description.

   e. For Data Type, select **Text**.

   f. Select **Allow multiple values (collection)**, and then click **Done**.

   g. Repeat the steps to create another variable whose API name is `applicant_email_id` and whose data type is **Text**.

5. Create a text template for the notification title and the email subject, and create another text template for the notification and email body.

   a. Click ▫, and then click **New Resource**.

   b. For Resource Type, select **Text Template**.

   c. For API Name, enter `notif_title_email_subject`.

   d. (Optional) Enter a description.

   e. For Body, enter `Application status change`.

   f. Click **Done**.

   g. Repeat the steps to create another text template whose API name is `notif_email_body`. For Body, select **View as Plain Text**, and then enter `Your application {!$Record.Name} is {!$Record.Status}.`

      The notif_email_body text template uses the Record.Name and Record.Status resources to get the application ID and the application status from the individual application record.

   h. Close the toolbox.

6. Store the applicant's user ID and email ID in the variables.

   a. In the canvas, hover over ○ and click ⊕.

   b. Search for and select the **Assignment** element to add to the canvas.

   c. For Label, enter `Get Applicant User ID and Email`, and then press Tab to populate the API name.

   d. (Optional) Enter a description.

   e. For Variable, select **applicant_user_id**. For Operator, select **Add**. For Value, select **Record** > **Created By ID** > **User ID**.

   f. Click **Add Assignment**.

   g. For Variable, select **applicant_email_id**. For Operator, select **Add**. For Value, select **Record** > **Created By ID** > **Email**.

7. Use the ID for your custom notification type record to send the notification.

   a. Add the **Get Records** element to the canvas after the Assignment element.

   b. For Label, enter `Get Custom Notification Type`, and then press Tab to populate the API name.

   c. (Optional) Enter a description.

   d. Under Get Records of This Object, for Object, search for and select **Custom Notification Type**.

   e. Under Filter Custom Notification Type Records, for Condition Requirements, select **All Conditions Are Met (AND)**.

   f. For Field, select **DeveloperName**. For Operator, select **Equals**. For Value, enter `Benefit_Application_Status_Update`.

8. Create an action to send the notification to the applicant.

   a. Add the **Action** element to the canvas after the Get Records element..

   b. For Category, select **Notifications**.

   c. For Action, search for and select **Send Custom Notification**.

   d. For Label, enter `Send Application Status Change Notification`, and then press Tab to populate the API name.

   e. (Optional) Enter a description.

   f. Under Set Input Values for the Selected Action, for Custom Notification Type ID, select **Custom Notification Type from Get_Custom_Notification_Type** > **Custom Notification Type Id**.

g. For Notification Body, select **notif_email_body**.

h. For Notification Title, select **notif_title_email_subject**.

i. For Recipient IDs, select **applicant_user_id**.

j. Turn on Target ID, and then select **Triggering Individual Application** > **Individual Application ID**.

k. Click **Done**.

9. Create an action to send the email to the applicant.

a. Add the **Action** element to the canvas after the notification action.

b. For Category, select **Email**.

c. For Action, select **Send Email**.

d. For Label, enter *Send Application Status Change Email*, and then press Tab to populate the API name.

e. (Optional) Enter a description.

f. Turn on Body, and then select **notif_email_body**.

g. Turn on Recipient Address Collection, and then select **applicant_email_id**.

h. Turn on Subject, and then select **notif_title_email_subject**.

10. Save and activate the flow.

Build a Benefit Assistance Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where constituents can apply and recertify for benefits, report a change of circumstances, and file complaints.

To help you build a benefit assistance portal for your constituents, Public Sector Solutions provides an Experience Cloud site template with preconfigured pages. In addition to a home page and pages for login, self-registration, changing a password, and forgotten passwords, the Benefit Assistance Experience Cloud site template includes these pages:

- Benefits
- Complaints
- Care Plans
- Tasks
- Applications

You can customize the pages at any time in Experience Builder.

Benefit Assistance Site Prerequisites

Before you create a benefit assistance site from the Experience Cloud site template, complete the prerequisites.

Create an Experience Cloud Site from the Benefit Assistance Template

Use a template to create an Experience Cloud site where constituents can apply for benefits and file complaints.

Customize the Pending Recertification List for Constituents

On your Benefits page, customize the Record List component in the Pending Recertification tab. Pin the list view that constituents need and disable list properties and actions that aren't useful to them.

Benefit Assistance Site Prerequisites

Before you create a benefit assistance site from the Experience Cloud site template, complete the
prerequisites.

Before you begin, configure the benefit management guided application flows for constituents.

General Site Setup

Complete the setup tasks that apply to all Experience Cloud sites.

1. Review and understand Experience Cloud licenses. See Experience Cloud User Licenses, Industries
   Object Access by Community License, and Public Sector Solutions Products: User, Feature, and
   Permission Set Licenses.

2. Enable Digital Experiences.

3. Set up templates for your welcome email and other communications to site members. See Create an Email Template in Lightning
   Experience.

4. Configure optional Service Cloud features such as embedded chat and Salesforce Knowledge. See Embedded Chat and Create a
   Knowledge Base with Salesforce Knowledge.

5. For additional site setup tasks, see Experience Cloud Site Setup Checklist.

Customize the Customer Community Profile for Site Users

Clone and customize the Customer Community Plus User profile to grant Experience Cloud site
users access to required objects and data. To make the Recertify action on the Pending Recertification
list view available to users, grant them access to the Benefit Recertification Flow custom setting.

Every Salesforce org includes standard profiles that you can assign to users so that they have access
to the features and objects they need to use the site. Clone and customize the profile that
constituents use when they log in to your Experience Cloud site so that they have access to features
and objects they need to apply for licenses, permits, and benefits.

> 📝 Note: Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface.
> You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile
> User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. Next to the Customer Community Plus User profile, click **Clone**.

3. Enter a name for the profile, such as `Benefit Assistance Site User`, and save your changes.

4. Select **System Permissions** and then click **Edit**.

5. Select these options.

   - **Access Activities**
   - **Discovery Framework Platform User**
   - **Edit Tasks**
   - **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**
   - **Grant community users access to LPI features**
   - **Grant users access to Industries Interaction Calculation features**
   - **Provides access to Public Sector data for Community users**

- **Provides site users with access to Decision Explainers features and APIs**
- **Run Decision Matrices**
- **Run Decision Tables**
- **Run Expression Sets**
- **View Roles and Role Hierarchy**

6. Save your changes.

7. Select **App Permissions**, and then click **Edit**.

8. Select **Run Flows**, and then save your changes.

9. Select **Object Settings**, and then click **Edit**.

10. Set permissions based on your needs, using the table as a guide.

Table 2: Object Settings for Benefit Management

Object	Access Level
Accounts	Read, Create, Edit
Assessments	Read, Create, Edit
Assessment Questions	Read
Assessment Question Responses	Read, Create, Edit
Assessment Question Sets	Read
Assessment Question Versions	Read
Care Plan Templates	Read
Cases	Read, Create, Edit
Decision Matrices	Read
Decision Matrix Columns	Read
Decision Matrix Rows	Read
Decision Matrix Versions	Read
Documents	Read
Document Checklist Items	Read, Create, Edit, Delete
Expression Sets	Read
Expression Set Step Relationships	Read
Expression Set Versions	Read
Individual Applications	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read

Object	Access Level
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
OmniScript Saved Sessions	Read
Omni UI Cards	Read
Party Incomes	Read
Preliminary Application References	Read, Create, Edit
Public Complaint	Read, Create, Edit

11. Save your changes.

12. Select **Custom Settings Definitions**, and then click **Edit**.

13. Add **Benefit Recertification Flow** to the Enabled Custom Setting Definitions list.

14. Save your changes.

Create Experience Cloud Site Users

To allow constituents to access your Experience Cloud site, enable them as customer users and
assign them the Customer Community Plus license and the Benefit Assistance Site User profile.

Ensure that the user who owns a constituent's person account is assigned a role. If necessary, before
you begin, create and assign a role to the user.

1. From the App Launcher, find and select **Accounts**, and then click a constituent's person account.

2. Click ⌄ , and then select **Enable Customer User**.

3. On the user record page, enter an email address and a unique username in the form of an email address. By default, the username
is the same as the email address.

4. (Optional) Change the system-generated nickname for the user. The nickname is the user's display name in an Experience Cloud
site.

5. For User License, select **Customer Community Plus**.

6. For Profile, select **Benefit Assistance Site User**.

7. Deselect **Generate new password and notify user immediately** so that the user doesn't receive a password until you activate
your Experience Cloud site.

8. Save your changes.

USER PERMISSIONS

To create or edit Customer
Community Plus users:
- Manage Customer
  Users

Assign Permissions to Site Users

1. Assign these permission sets to users of your benefit assistance site. See Manage Permission Set Assignments.

- Benefit Assistance Community Access

- Composable Case Management Community Access
- Document Checklist
- OmniStudio User
- Public Sector Access
- Rule Engine Community Runtime

Configure Sharing Settings for Benefit Assistance

Review and edit the org-wide default sharing settings for the objects that Public Sector Solutions uses to determine the level of access that users have to each others' data.

1. From Setup, in the Quick Find box, enter `Security`, and then select **Sharing Settings**.

2. Click **Edit**.

3. Set organization-wide defaults based on your needs, using the table as a guide.

Object	Default Internal Access	Default External Access
Account and Contact	Public Read, Write	Public Read Only
Case	Public Read, Write, Transfer	Public Read Only
Assessment	Public Read Only	Public Read Only
Assessment Question	Public Read Only	Public Read Only
Assessment Question Assignment	Public Read Only	Public Read Only
Assessment Question Response	Public Read Only	Public Read Only
Assessment Question Set	Public Read Only	Public Read Only
Decision Matrix	Public Read Only	Public Read Only
Document Checklist Item	Public Read Only	Public Read Only
Expression Set	Public Read Only	Public Read Only
Individual Application	Public Read, Write	Public Read Only
Omni Assessment Task	Public Read, Write	Public Read Only
Omni DataPack	Private	Private
Omni Data Transformation	Public Read Only	Public Read Only
Omni Electronic Signature Template	Public Read Only	Public Read Only
Omni Process	Public Read Only	Public Read Only
Omni Process Assessment Question Version	Public Read, Write	Public Read Only
Omni Process Transient Data	Public Read Only	Public Read Only
OmniScript Saved Session	Public Read Only	Public Read Only

Object	Default Internal Access	Default External Access
Omni UI Card	Public Read Only	Public Read Only
Preliminary Application Reference	Public Read Only	Public Read Only
Public Complaint	Public Read, Write	Private

4. Save your changes.

SEE ALSO:

Sharing Settings

Create an Experience Cloud Site from the Benefit Assistance Template

USER PERMISSIONS		EDITIONS

To create, customize, and publish an Experience Cloud site:

Create and Set Up Experiences

AND

View Setup and Configuration

To customize an Experience Cloud site:

Be a member of the site AND Create and Set Up Experiences

To publish an Experience Cloud site:

Be a member of the site AND Create and Set Up Experiences

To edit app and system permissions in profiles:

Manage Profiles and Permission Sets

To edit object and field permissions in profiles:

Manage Profiles and Permission Sets AND Customize Application

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Use a template to create an Experience Cloud site where constituents can apply for benefits and file complaints.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Click **New**.

3. Select **Benefit Assistance**, and then click **Get Started**.

4. Enter a site name.

5. Complete the URL.

The string that you enter is appended to the Experience Cloud site domain that you created when you enabled Digital Experiences. For example, if your site domain is `CosvilleGov.my.site.com`, and for URL you enter `benefitassistance`, then your site URL is `CosvilleGov.my.site.com/benefitassistance`.

6. Click **Create**.

7. Add members to the site.

    a. In the Administration workspace, click **Members**.

    b. Under Select Profiles, for Search, select **Customer**.

    c. Move **Benefit Assistance Site User** to the Selected Profiles list.

    d. Save your changes.

Set Up Self-Registration for Your Site

Configure your Experience Cloud site to create person accounts for visitors who self-register.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your site name, click **Workspaces**.

3. Select **Administration** and then select **Login & Registration**.

4. Under Registration Page Configuration, select **Allow customers and partners to self-register**.

5. Select the self-registration page type.

6. To ensure that Salesforce creates a person account for each self-registering visitor, under Assign users to a profile and account, leave the Account field empty.

7. Save your changes.

Assign Permissions to Your Site's Guest User Profile

Allow unauthenticated users to access your site to find benefits that they're eligible for and to file complaints.

> 📝 Note: Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From the All Sites page in Setup, next to your site name, click **Builder**.

2. Click 🔧.

3. On the General tab, select **Guest users can see and interact with the site without logging in**.

4. Under Guest User Profile, click the profile name.

5. Select **System Permissions**, and then click **Edit**.

6. Select these options.

   - **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**
   - **Grant community users access to LPI features**
   - **Grant users access to Industries Interaction Calculation features**

7. Save your changes, and then select **Object Settings**.

8. Set these permissions.

Object	Access Level
Accounts	Read, Create
Decision Matrices	Read
Decision Matrix Columns	Read

Object	Access Level
Decision Matrix Rows	Read
Decision Matrix Versions	Read
Expression Sets	Read
Expression Set Versions	Read
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Processes	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni UI Cards	Read
Public Complaints	Read, Create

9. Save your work.

Customize the Pending Recertification List for Constituents

On your Benefits page, customize the Record List component in the Pending Recertification tab. Pin the list view that constituents need and disable list properties and actions that aren't useful to them.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.
2. Click **Builder** for your benefit assistance Experience Cloud site.
3. From the Pages menu, click **Pending Recertification**, and then select the Record List component in the tab.
4. In the property editor, configure these properties for the Record List component.
   a. For Filter Name, select **Pending Recertification**.
   b. To prevent site users from changing the list view, deselect **Allow list pinning**.
   c. To prevent site users from editing benefit assignment records, deselect **Allow inline edit**.
   d. To hide list view controls, under Header Properties, deselect **Show list actions**.
   e. To hide charts and filters, under Header Properties, deselect **Show charts button** and **Show filter button**.
   f. To show record information in the table format, under Header Properties, for Show display options, select **Table Only**.
5. Preview your changes and publish them when you're ready.

Process Benefit Applications by Using a Guided Flow

To use the benefit application review guided flow:	OmniStudio User
	AND
	Rules Engine Runtime
	AND
	Program and Benefit Management Access
	AND
	Discovery Framework Platform User
	AND
	Document Checklist
	AND
	Decision Explainer Service Access
	AND
	Group Membership
	AND
	Case Referral
To access benefit disbursements:	Benefit Disbursement Access
To create interaction summaries:	Interaction Summary

Check whether an application in review is complete and accurate. Correct details based on evidence and, if necessary, return the application for additional information. When the application is complete, if the applicants are eligible, assign them a benefit amount.

1. From the App Launcher, find and select **Individual Applications**, and then select an application whose Application Status is In Review.

    The benefit application guided flow appears in the Review Application section of the page.

2. Under Application Summary, see the number of participants in the application, their total monthly income, their total expenditure, and estimated eligible benefit amount.

3. (Optional) For more information about the participants, click the number of participants.

4. To check the completeness and accuracy of the application, click **Review Application**.

    a. Review the head of household and household member details. Check whether the members have applied to any benefit programs, and whether anyone is disabled or elderly.

    b. Review the income details and proof of income. Confirm that the income details in the application match the details in the proof of income.

    c. Review the expense details and proof of expenses. Confirm that the expense details in the application match the details in the proof of expenses.

    d. If you find any discrepancies in the application details, contact the application participants. If possible, change the details based on evidence. Capture the details of consultations in an interaction summary.

e. If you make changes, review the application again to ensure that your changes are saved. Then, to update the application, resubmit it.

Resubmitting the application creates an assessment version that includes your changed responses. If the application participants aren't eligible for the benefit based on the changed responses, the guided flow changes the application status to Denied.

f. If you don't make changes, close the tab and return to the individual application record page.

5. If you find missing or incorrect details in the application or require the additional supporting documentation, to return the application to the participants, click **Return Application**.

6. To see whether application participants are eligible to receive a benefit amount, click **Check Eligibility**.

In the left pane, under Variables, you see the data points that the flow uses to determine benefit eligibility. If you changed a response to an application question, the updated data appears.

a. To check how benefit eligibility changes if you change a particular detail, edit the value of a variable.

b. To calculate the benefit amount that the application participants are eligible for, click **Simulate**.

7. To check whether the application participants already receive other benefits, click **Other Applied Benefits**.

8. To finish processing the application:

a. Under Benefit Assignment, click **Assign Benefit**.

b. Confirm that the application is complete and that you want to assign the eligible benefit amount.

The guided flow stores the application data in these objects.

Application Data	Object
Household member's role in the application, relationship to the primary applicant, and benefit eligibility	Public Application Participant
Household member's name, date of birth, and mobile phone number	Person Account
Household member's income	Party Income
Household expenses	Party Expense
Household member's disability status and effective start and end dates of any disability	Person Disability
Household address	Contact Point Address
Household member's citizenship, race, and ethnicity	Contact Profile
Household details	Account, Party Relationship Group, and Account Contact Relationship

If the application participants are eligible for the benefit, the guided flow populates the entitlement amount under Benefit Assignment. Specify values for the other fields.

c. Select the benefit.

d. Select the start and end dates for the benefit amount payout.

e. Enter the total amount approved and select the payout frequency.

f. To assign the benefit, click **Save**.
The guided flow creates the benefit assignment and changes the application status to Approved.

g. To see the application participants who are eligible for the benefit, under Member Eligibility, click **View**.

h. To view the benefit assignment record page, click the benefit assignment name. The name has the format BA-xxxxxxxxx.

i. To view the benefit disbursement schedule, click **Disbursement**.

Process Change of Circumstance Applications by Using a Guided Flow

To use the benefit application review guided flow:

OmniStudio User

AND

Rules Engine Runtime

AND

Program and Benefit Management Access

AND

Dynamic Assessments Access

AND

Document Checklist

AND

Decision Explainer Service Access

AND

Group Membership

AND

Case Referral

To create interaction summaries:

Interaction Summary

Check whether a change of circumstances application is complete and accurate. Correct details based on supporting documentation and, if necessary, return the application for additional information. When the application is complete and you have confirmed the details, accept or deny the application.

1. From the App Launcher, find and select **Individual Applications**, and then select a change of circumstances application whose Application Status is In Review.
The benefit application guided flow appears in the Review Application section of the page.

2. Under Application Summary, see the types of changes reported, the number of members in the applicant's household, and the change in their household income.

3. (Optional) For more information about the participants, click the number of participants.

4. To check the completeness and accuracy of the application, click **Review Application**.

a. Review the household member details. Check whether the members have applied to any benefit programs, and whether anyone is disabled or elderly. If members are added or removed, or their details are updated, confirm that the changes match the details in the supporting documentation.

b. Review the income details and proof of income. Confirm that the income details in the application match the details in the proof of income.

c. If you find discrepancies in the application details, contact the application participants. If possible, change the details based on supporting documentation. Capture the details of conversations in an interaction summary.

d. If you make changes, review the application again to make sure that your changes are saved. Then, to update the application, resubmit it.

Resubmitting the application creates an assessment version that includes your changed responses.

e. If you don't make changes, close the tab and return to the individual application record page.

5. If you find missing or incorrect details in the application or require the additional supporting documentation, to return the application to the participants, click **Return Application**.

6. To update the household's details based on the application data, click **Accept Application**.

a. Confirm that the application is complete and that you want to save the details.

The guided flow updates the application status to Application Accepted and saves the application data in these objects.

Application Data	Object
Household member's role in the application, relationship to the primary applicant, and benefit eligibility	Public Application Participant
Household member's name and date of birth	Person Account
Household member's income	Party Income
Household member's disability status and effective start and end dates of any disability	Person Disability
Household member's citizenship, race, and ethnicity	Contact Profile
Member's role in the household	Account Contact Relationship

For each benefit assigned to the household, the flow checks whether the members are entitled to a benefit amount that differs from what they currently receive. If so, the flow creates an individual application for each benefit assignment that needs an adjustment.

7. To deny the application, for Application Status, select **Denied**.

Process Benefit Assignment Adjustment Applications by Using a Guided Flow

To use the benefit application review guided flow:

OmniStudio User

AND

Rules Engine Runtime

AND

Program and Benefit Management Access

AND

Dynamic Assessments Access

AND

Document Checklist

AND

Decision Explainer Service Access

AND

Group Membership

AND

Case Referral

To create interaction summaries:

Interaction Summary

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

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Check the changes reported. View benefit assignment details and adjust the benefit amount to match the change in circumstances.

1. From the App Launcher, find and select **Individual Applications**, and then select a benefit assignment adjustment application whose Application Status is In Review.
The benefit application guided flow appears in the Review Application section of the page.

2. Under Application Summary, see the types of changes reported, the number of members in the applicant's household, and the change in their household income.

3. (Optional) For more information about the participants, click the number of participants.

4. To view the change of circumstances application that led to the creation of this application, under Related Application, click the application ID.

5. Under Benefit Assignment Details, see the benefit assignment name, its associated benefit, the start and end dates, the entitled and approved amounts, and the payment frequency.

6. To modify the benefit amount due to the constituents' change in circumstances, click **Adjust Benefit**.

   The flow populates the constituents' new entitlement amount for the benefit and the corresponding adjustment amount.

   a. Select the start and end dates for the benefit amount adjustment.

   b. To adjust the benefit amount, click **Save**.
   The guided flow creates the benefit assignment adjustment.

   c. To update the application status, click **Refresh**.

The guided flow shows information from the benefit assignment adjustment and changes the application status to Approved.

  d. To view the benefit assignment adjustment record page, click the benefit assignment adjustment name. Benefit assignment adjustment names begin with BAA-.

Process Benefit Recertification Applications by Using a Guided Flow

To use the benefit application review guided flow:

OmniStudio User

AND

Rules Engine Runtime

AND

Program and Benefit Management Access

AND

Dynamic Assessments Access

AND

Document Checklist

AND

Decision Explainer Service Access

AND

Group Membership

AND

Case Referral

To create interaction summaries: Interaction Summary

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Check whether a recertification application is complete and accurate. Correct details based on supporting documentation and, if necessary, return the application for additional information. When the application is complete and you've confirmed the details, accept or deny the application. Renew or adjust the amount of benefits that constituents receive to match their benefit eligibility.

1. From the App Launcher, find and select **Individual Applications**, and then select a recertification application whose Application Status is In Review.
The benefit application guided flow appears in the Review Application section of the page.

2. Under Application Summary, see the types of changes reported, the number of members in the applicant's household, and the change in their household income.

3. (Optional) For more information about the participants, click the number of participants.

4. To check the completeness and accuracy of the application, click **Review Application**.

  a. Review the household member details. Check whether the members have applied to any benefit programs, and whether anyone is disabled or elderly. If members are added or removed, or their details are updated, confirm that the changes match the details in the supporting documentation.

  b. Review the income details and proof of income. Confirm that the income details in the application match the details in the proof of income.

   c. If you find discrepancies in the application details, contact the application participants. If possible, change the details based on supporting documentation. Capture the details of conversations in an interaction summary.

   d. If you make changes, review the application again to make sure that your changes are saved. Then, to update the application, resubmit it.

     Resubmitting the application creates an assessment version that includes your changed responses.

   e. If you don't make changes, close the tab and return to the individual application record page.

5. If you find missing or incorrect details in the application or require the additional supporting documentation, to return the application to the participants, click **Return Application**.

6. To update the household's details based on the application data, click **Accept Application**.

   a. Confirm that the application is complete and that you want to save the details.

     The guided flow updates the application status to Application Accepted and saves the application data in these objects.

Application Data	Object
Household member's role in the application, relationship to the primary applicant, and benefit eligibility	Public Application Participant
Household member's name and date of birth	Person Account
Household member's income	Party Income
Household member's disability status and effective start and end dates of any disability	Person Disability
Household member's citizenship, race, and ethnicity	Contact Profile
Member's role in the household	Account Contact Relationship

7. After you accept the application, to renew or adjust the amount of benefits that the constituents receive, click **Adjust Benefit**.

The flow populates the constituents' entitlement amount for the benefit based on the details of their circumstances and the eligibility criteria, and the corresponding adjustment amount.

   a. Select the start and end dates for the benefit amount adjustment.

   b. To adjust the benefit amount, click **Save**.
     The guided flow creates the benefit assignment adjustment. A benefit assignment adjustment with a zero adjustment amount renews the benefit assignment for the selected date range.

   c. To update the application status, click **Refresh**.
     The guided flow shows information from the benefit assignment adjustment and changes the application status to Approved. The flow also updates the recertification status of the benefit assignment to Recertified.

   d. To view the benefit assignment adjustment record page, click the benefit assignment adjustment name. Benefit assignment adjustment names begin with BAA-.

8. To deny the application, for Application Status, select **Denied**.

Assign and Disburse Benefits to Eligible Applicants

Assign benefits to eligible applicants and disburse the benefits by using flows in Public Sector Solutions.

Assign Benefits to Eligible Applicants

Manually assign benefits to eligible applicants.

1. From the App Launcher, find and select **Benefit Assignments**.

2. Click **New**.

3. For Benefit, search for and select the applicable benefit, such as **LIHEAP**.

4. For Program Enrollment, search for and select the applicable program, such as **Enrollment for LIHEAP Assistance**.

5. For Parent Record, search for and select the individual application record of the eligible applicant.

6. Select start and end dates and times.

7. Enter the total approved amount, next payout date, entitlement amount, and remaining amount.

   > ✏️ **Note:** If you plan to run the schedule-triggered flow to disburse benefits, these fields are required.

8. Save your changes.

9. To disburse the benefit and to see the schedule of upcoming disbursements, click **View Disbursements**.

Run a Schedule-Triggered Flow to Disburse Benefits

Customize and use a provided flow to generate benefit disbursements for eligible applicants, including large volumes of disbursements, at a specified frequency.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **Create Disbursements and Adjustments**.

3. In the Start node, click **Edit**.

4. Specify a start date, start time, and frequency for the flow, and click **Done**.

5. Click **Activate**.

Run a Flow to Disburse Benefit Assignments

Although we recommend using a schedule-triggered flow to generate benefit disbursements, if necessary you can use a provided flow to disburse benefits on a case-by-case basis.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **Create Disbursement**.

3. Click the **Create Disbursement Record** action and then click **Edit Element**.

4. For Benefit Assignment ID, enter the ID from the benefit assignment record's Lightning URL. For example, if the Lightning URL for the benefit assignment record is

```
https://[domain]/lightning/r/BenefitAssignment/0nDDD0000000EVj2AM/view, then enter the ID
0nDDD0000000EVj2AM.
```

5. Click **Done** and then run the flow.

Social Insurance

Define social insurance policies that help constituents who experience economic hardship. Enable eligible constituents to enroll into the policies and track contributions. Capture claims, claim items, and claim participants. Record the claim approval status and benefit eligibility, and assign benefits to constituents.

Publicly supported social insurance programs provide financial assistance and protection for constituents who experience life events that reduce their income or increase their expenses. For example, pensions provide income to retired individuals. Workers' compensation provides replacement wages, medical treatment, and other benefits to employees who become injured or ill on the job. And Social Security provides retirement income to almost every American worker.

Employees, including self-employed individuals, typically fund social insurance programs through regular contributions such as paycheck deductions. In addition, employers contribute to some social insurance programs on behalf of their employees. Contribution to some social insurance programs, such as workers' compensation, is mandatory.

Public Sector Solutions provides these objects to enable you to manage social insurance programs and administer social insurance benefits to constituents.

*   Set up social insurance benefits programs by using the Program, Benefit Type, and Benefit objects.

*   Use the Insurance Policy object to define social insurance policies. Manage enrollments by relating constituents' person accounts to policies. Track contributions by using the Insurance Policy Transaction object.

*   Capture compensation classes in the Worker Compensation Coverage Class object. Workers' compensation classes represent the category of work that employees perform, such as welder, computer engineer, or sales executive.

*   Use the Payment Request and Payment Request Line objects to capture required contributions that constituents or employers make to social insurance policies. For example, create a payment request for a pending contribution from an employer for a workers' compensation policy.

*   When constituents file claims, store details in the Claim object. Relate constituents to a claim by using the Claim Participant object. Use the Claim Item object to capture details of items related to a claim. After reviewing a claim, record its approval status in the Claim object.

*   For approved claims, create a support plan by using the Care Plan object.

Circumstances can make it difficult for constituents to get the care or services they need. For example, an injured worker needs physiotherapy sessions but cannot commute to the healthcare facility because the injury limits their mobility. To address the care barrier, you can assign the worker physiotherapy sessions at home.

Public Sector Solutions provides these objects to help you identify care barriers.

*   Define the obstacles or circumstances that make it difficult for constituents to get the care and services they need by using the Care Barrier Type object.

*   Use the Code Set and Code Set Bundle objects to store diagnostic codes for medical conditions. Map care barrier types for medical conditions to the corresponding diagnostic codes.

*   Capture details of an obstacle or circumstance that affects a particular constituent by using the Care Barrier object.

*   Relate a care barrier to a constituent's care plan by using the Care Plan Detail object.

Public Sector Solutions provides these objects to help you assign constituents benefits and goals to address their economic hardship and care barriers.

- Assign goals to constituents to track their progress by using the Goal Assignment object. Relate a goal assignment to a care barrier by using the Goal Assignment Detail object.

- Assign eligible benefits to constituents by using the Benefit Assignment object. To adjust the amount of the benefit, use the Benefit Assignment Adjustment object. Track the delivery of assigned benefits by using the Benefit Disbursement object.

Before you set up social insurance in Public Sector Solutions, complete the prerequisites.

Constituents can file claims for social insurance benefits through guided flows on your Experience Cloud site. They can provide the required details, upload supporting documents, and preview and submit their claims. They can also track the status of the claims on the site.

Create an Experience Cloud site where constituents can file and track claims for social insurance benefits.

Social Insurance Prerequisites

Before you set up social insurance in Public Sector Solutions, complete the prerequisites.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Enable Program and Benefit Management

1. From Setup, in the Quick Find box, enter `Benefit`, and then select **Program and Benefit Management Settings**.

2. Turn on Create and manage your programs, benefits, and goals.

3. Select **Benefit Disbursement Settings**, and then turn on Create and manage benefit disbursements.

> **USER PERMISSIONS**
>
> To enable program and benefit management settings:
> - Customize Application

Enable Care Plans

1. From Setup, in the Quick Find box, enter `Care`, and then select **Care Plan Settings**.

2. Turn on Create and manage care plans.

> **USER PERMISSIONS**
>
> To enable care plans:
> - Customize Application

Assign Permissions

1. Assign these permission sets to anyone who sets up and works with social insurance objects.

   - Benefit Disbursement Access

- Care Plans Access
- Program and Benefit Management Access

Social Insurance Claim Flows

Constituents can file claims for social insurance benefits through guided flows on your Experience Cloud site. They can provide the required details, upload supporting documents, and preview and submit their claims. They can also track the status of the claims on the site.

To make it easy for constituents to file claims and to capture all the details that you require to process the claims, provide guided flows for constituents on your Experience Cloud site. Public Sector Solutions includes sample components that you can use to set up two guided flows for workers' compensation claims: the File a Claim flow and the Respond to Claim flow.

Injured workers can use File a Claim flow to apply for workers' compensation benefits when they suffer a work-related injury. They can use the flow to:

- Specify the date and time of the injury, the worksite where the injury occurred, and how the injury occurred
- Describe the nature of the injury and its effect on their productivity and well-being
- Indicate their work capacity and upload a supporting certificate from a healthcare provider
- Provide details of their employment and the loss of income due to the injury

When an injured worker files a claim, the flow creates a claim and a related individual application. The flow stores the details that the worker provided in assessment records and in a PDF file, and relates the records and the file to the individual application.

Employer representatives can use the Respond to Claim flow to verify the information in filed claims, modify details and add comments about the changes, and provide additional information.

When an employer representative responds to a claim, the flow creates an individual application and relates it to the claim. The flow captures the representative's responses in assessment records and in a PDF file, and relates the records and the file to the individual application.

The Benefit Assistance template includes pages and components to run the guided flows. When you build your Experience Cloud site by using the template, injured workers can access the guided flow on the File a Claim page. They can track their claims on the View Claims page.

Employer representatives can also find filed claims on the View Claims page, and they can use the Respond action for the claim and start the guided flow to verify it.

Customize the guided flow components for your workers' compensation program, or clone them to build your own guided flows for other social insurance programs.

Social Insurance Flows Components

Review the OmniStudio components that Public Sector Solutions uses in the social insurance claim flows.

Social Insurance Claim Flows Prerequisites

Before you set up social insurance claim flows in Public Sector Solutions, complete the prerequisites.

Deploy the Social Insurance Discovery Framework Sample Template

Deploy version v1 of the Discovery Framework sample template for social insurance in Public Sector Solutions.

Set Up the File a Claim Flow

Activate the Integration Procedure and the OmniScript guided flow that injured workers can use to file workers' compensation claims.

Activate the Integration Procedures and the OmniScript guided flow that employer representatives use to verify claims and provide required information. Configure the custom setting that makes the flow available on your social insurance Experience Cloud site.

Social Insurance Flows Components

Review the OmniStudio components that Public Sector Solutions uses in the social insurance claim flows.

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EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

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Table 3: File a Claim Flow Components

Component	Type	Description	Invoked Components
SocialInsurance/FileClaim - File A Claim	OmniScript	A claim form for injured workers to use to file for workers' compensation benefits.	**OmniStudio Integration Procedure** • CreateIndividualApplicationAndClaim **Omnistudio Data Mappers** • PSSSocInsGetPrimaryApplicantReference • PSSSocInsGetMatchingAccounts • PSSSocInsGetMatchingEmployerAccounts • PSSSocInsGetMatchingHealthcarePriders • PSSSocInsAssessmentResponsePDF • PSSSocInsConfirmClaimFiling • PSSReviewUploadDocuments **OmniStudio FlexCards** • PSSSocInsConfirmClaimFiling • PSSReviewUploadDocuments
SocialInsuranceCreateIndividualApplicationAndClaim - CreateIndividualApplicationAndClaim	OmniStudio Integration Procedure	Creates an individual application and a claim when an injured worker files a workers' compensation claim.	**Omnistudio Data Mappers** • PSSSocInsCreateClaim • PSSSocInsCreateIndividualApplication • PSSSocInsGetPersonAccountOfApplicant
PSSSocInsCreateClaim	Omnistudio Data Mapper	Creates a claim record when an injured worker files a workers' compensation claim.	
PSSSocInsCreateIndividualApplication	Omnistudio Data Mapper	Creates an individual application when an injured worker files a	

Component	Type	Description	Invoked Components
		workers' compensation claim.	
PSSSocInsCreatePreliminaryApplicationReference	Omnistudio Data Mapper	Creates a preliminary application reference when an injured worker files a workers' compensation claim.	
PSSSocInsGetMatchingAccounts	Omnistudio Data Mapper	Gets up to 100 business accounts with names matching the characters entered by the injured worker during a typeahead search, allowing them to select the employer responsible for the work site from the search results.	
PSSSocInsGetMatchingEmployerAccounts	Omnistudio Data Mapper	Gets up to 100 business accounts with names matching the characters entered by the injured worker during a typeahead search, allowing them to select their employer from the search results.	
PSSSocInsGetMatchingHealthcareProviders	Omnistudio Data Mapper	Gets the healthcare providers whose names have the characters entered by the injured worker for typeahead search.	
PSSSocInsGetPersonAccountIDOfApplicant	Omnistudio Data Mapper	Gets the person account ID of the logged-in Experience Cloud site user.	
PSSSocInsSaveAssessmentResponsesToPDF	Omnistudio Data Mapper	Saves the injured worker's assessment responses to a PDF file. Used in the PDF action.	
PSSSocInsConfirmClaimFiling	OmniStudio FlexCard	Confirms that an injured worker has filed a workers compensation claim and gives a reference ID to track the claim.	
PSSSIReviewUploadDocuments	OmniStudio FlexCard	Shows the supporting documents uploaded by the injured worker in the Review step.	
WorkersCompensationClaimTemplate.pdf	Fillable PDF Template	The injured worker's assessment responses are saved to a PDF file by using this template.	

Table 4: Respond to Claim Flow Components

Component	Type	Description	Invoked Components
SocialInsurance/RespondToClaim -Respond to Claim	OmniScript	Allows an employer to verify the details in a worker compensation claim and provide further information required to process the claim.	**OmniStudio Integration Procedures** • CheckClaimResponseStatus • CreateIndividualApplicationForClaimResponse • GetContentDocumentsForEmployeeFiles • LoadEmployeeResponsesForVerification **Omnistudio Data Mappers** • PSSSocInsAddClaimIdToJSON • PSSSocInsCreatePreliminaryApplicationReference **OmniStudio FlexCards** • PSSSocInsConfirmClaimResponse • PSSSIReviewUploadDocuments
SocialInsurance/CheckClaimResponseStatus - CheckClaimResponseStatus	OmniStudio Integration Procedure	Checks whether the employer has responded to a workers' compensation claim filed by an injured worker. The check is done by getting an individual application of type Acknowledged Claim associated with the claim.	**Omnistudio Data Mappers** • PSSSocInsFetchClaimDetails • PSSSocInsFetchIndApplForEmployeeResponse
SocialInsurance/CreateIndividualApplicationForClaimResponse - CreateIndividualApplicationForClaimResponse	OmniStudio Integration Procedure	Saves an employer's responses to a workers' compensation claim and creates an individual application.	**Omnistudio Data Mappers** • PSSSocInsCreateIndividualApplication • PSSSocInsFetchClaimDetails • PSSSocInsGetPersonAccountDOPApplicant
SocialInsurance/GetContentDocumentsForEmployeeFiles - GetContentDocumentsForEmployeeFiles	OmniStudio Integration Procedure	Gets the assessment completed by the injured worker to file a workers' compensation claim and the content documents for the files that the injured worker has uploaded during the assessment.	**Omnistudio Data Mappers** • PSSSocInsCreateContentDocumentCollection • PSSSocInsFetchEmployeeAssessment • PSSSocInsGetContentDocuments
SocialInsurance/LoadEmployeeResponsesForVerification - LoadEmployeeResponsesForVerification	OmniStudio Integration Procedure	Loads the information provided by the injured worker for verification when an employer responds to a workers' compensation claim.	**Omnistudio Data Mapper** PSSSocInsFetchEmployeeAssessment
PSSSocInsAddClaimIdToJSON	Omnistudio Data Mapper	Adds the claim ID of the workers' compensation claim filed by the	

Component	Type	Description	Invoked Components
		injured worker as the context ID in the Respond to Claim OmniScript JSON.	
PSSSocInsCreateContentDocumentCollection	Omnistudio Data Mapper	Creates an array of content document JSON objects.	
PSSSocInsCreateIndividualApplication	Omnistudio Data Mapper	Creates an individual application when an employer responds to a workers' compensation claim.	
PSSSocInsCreatePreliminaryApplicationReference	Omnistudio Data Mapper	Creates a preliminary application reference when an employer responds to a workers' compensation claim.	
PSSSocInsFetchClaimDetails	Omnistudio Data Mapper	Gets the details of the workers' compensation claim filed by the injured worker.	
PSSSocInsFetchEmployeeAssessment	Omnistudio Data Mapper	Gets the latest assessment that the injured worker completed to file a workers' compensation claim.	
PSSSocInsFetchIndvApplnForEmployerResponse	Omnistudio Data Mapper	Checks whether an individual application of type Acknowledged Claim exists for the workers' compensation claim. If so, gets the corresponding record.	
PSSSocInsGetContentDocuments	Omnistudio Data Mapper	Gets the files that were uploaded for an assessment.	
PSSSocInsGetPersonAccountIDOfApplicant	Omnistudio Data Mapper	Gets the person account ID of the logged-in Experience Cloud site user.	
PSSSocInsSaveEmployerAssessmentResponsesToPDF	Omnistudio Data Mapper	Saves the employer's assessment responses to a PDF file.	
PSSSocInsConfirmClaimResponse	OmniStudio FlexCard	Confirms that an employer has responded to a workers compensation claim.	
PSSSIReviewUploadDocuments	OmniStudio FlexCard	In the Review step, shows the supporting documents uploaded by the injured worker.	

Component	Type	Description	Invoked Components
WorkersCompensationResponseTemplate.pdf	Fillable PDF Template	An employer verifies information in a workers' compensation claim and completes an assessment to provide comments and details. The employer's assessment responses are saved to a PDF file by using this template.	

Social Insurance Claim Flows Prerequisites

Before you set up social insurance claim flows in Public Sector Solutions, complete the prerequisites.

Enable Standard OmniStudio Runtime

To enable standard OmniStudio runtime, turn off the OmniStudio managed package runtime.

1. From Setup, in the Quick Find box, enter `OmniStudio Settings`, and then select **OmniStudio Settings**.

2. Disable Managed Package Runtime.

Enable Program and Benefit Management

1. From Setup, in the Quick Find box, enter `Benefit`, and then select **Program and Benefit Management Settings**.

2. Turn on Create and manage your programs, benefits, and goals.

3. Select **Benefit Disbursement Settings**, and then turn on Create and manage benefit disbursements.

Enable Provider Management

1. From Setup, in the Quick Find box, enter `Provider Management`, and then select **Provider Management Settings**.

2. Turn on Provider Management: Let users manage a network of providers, their facilities, and their specialties.

3. Turn on View Healthcare Details: Let users see healthcare-specific details for providers.

Enable Person Accounts

🛑 **Important:** You can't turn off Person Accounts after they're enabled. Before enabling Person Accounts, use a sandbox to preview how they affect your Salesforce org.

1. From Setup, in the Quick Find box, enter `Person Accounts`, and then select **Person Accounts**.

2. Acknowledge the implications of using person accounts.

3. Verify that the Account object has at least one record type.

4. Verify that user profiles that have Read permission on Accounts also have Read permission on Contacts.

5. Set the org-wide default sharing for Contacts to **Controlled by Parent** or set the sharing settings for Accounts and Contacts to **Private**.

6. Turn on Person Accounts.
   Salesforce creates the person account record type. If needed, create additional record types for Person Accounts.

7. Assign the person account record type to user profiles.

Turn on Discovery Framework

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under Assessments, select **General Settings**.

2. Turn on Discovery Framework.

Assign Permissions

1. Assign these permission sets to anyone who sets up social insurance claim flows:

   • Benefit Disbursement Access

   • Dynamic Assessment Access

   • OmniStudio Admin

   • Program and Benefit Management Access

   • Provider Management Access

   • Public Sector Access

Set Field-Level Security

Give users access to fields that aren't visible by default for the social insurance claim flows. See Modify Field Access Settings.

1. On the Account object, make Gender Identity visible to the required profiles.

Configure Application Types for Workers' Compensation Claims

For the Application Type field on the Individual Application object, create the picklist values Filed Claim and Acknowledged Claim. When an employee files a workers' compensation claim through the guided flow, the flow creates an individual application whose type is Filed Claim. When the employer responds to the claim through the guided flow, the flow creates an individual application whose type is Acknowledged Claim.

1. From the object management settings for individual applications, go to **Fields & Relationships**.

2. Select **Application Type**.

3. For Application Type Picklist Values, click **New**.

4. In the text box, on separate lines, enter `Filed Claim` and `Acknowledged Claim`.

5. Save your changes.

Create an Application Record Type and Configure Usage-Based Pricing

1. From Setup, in Object Manager, select **Individual Application**.

2. Select **Record Types**, and then click **New**.

3. For Existing Record Type, select **Master**.

4. Enter a record type label, such as `Social Insurance`, that's unique within the object, and then press Tab to autofill the record type name.

5. If necessary, enter a description, and then activate the record type.

   For information on how to make the record type available to users, see Create Record Types for License and Permit Applications.

6. Save your changes.

7. From Setup, in the Quick Find box, enter `Usage Based Pricing`, and then select **Usage Based Pricing**.

8. Click **New Application RecordType Config**.

9. For Label, enter a name for the record.

10. For Application Usage Type, select **Benefit Assistance**.

11. For Object Name, select **Individual Application**.

12. For Record Type Name, enter the name that you entered earlier.

13. Save your changes.

Create Records for Typeahead Search

The File a Claim flow requires constituents to search for and select their employer, healthcare provider, and the type of injury. For the search functionality to work as intended, ensure that you create these records.

- Business accounts for employers who participate in your workers' compensation program

- Healthcare provider records for medical practitioners and hospitals who are authorized to issue certificates of capacity to constituents

- Code sets for the different types of injuries that your workers' compensation program covers

Deploy the Social Insurance Discovery Framework Sample Template

Deploy version v1 of the Discovery Framework sample template for social insurance in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under Discovery Framework, select **General Settings**.

2. Turn on Enhanced Questions, Import or Export, and Sample Templates.

    Next, deploy the social insurance Discovery Framework sample template.

3. From Setup, in the Quick Find box, enter `Sample`, and then select **Discovery Framework Sample Templates**.

    On the Discovery Framework Sample Templates page, under Deploy Sample Templates, you see the Public Sector Social Insurance template.

4. (Optional) To see a list of the assessment questions, OmniScripts, Omnistudio Data Mappers, and Integration Procedures that are included in the template, click **View Details**.

5. To deploy the template, click **Deploy**.

6. (Optional) To check the progress, go to the **Deployment Status** Setup page.

Set Up the File a Claim Flow

Activate the Integration Procedure and the OmniScript guided flow that injured workers can use to file workers' compensation claims.

Activate the Integration Procedure

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.

2. Make note of the namespace prefix for the OmniStudio package.

3. From the App Launcher, find and select **OmniStudio Integration Procedures**.

4. Expand **SocialInsurance/CreateIndividualApplicationAndClaim**, and then select **CreateIndividualApplicationAndClaim (Version 1)**.

5. At the bottom of the Structure panel, select **Save-Responses**.

6. In the Properties panel, confirm that the Remote Class is `<OmniStudio-namspace-prefix>.StoreResponses`. If necessary, edit it to include the namespace prefix for your installed OmniStudio package.

7. In the Structure panel, select **Procedure Configuration**.

8. Click **Activate Version**.

Activate the OmniScript

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **SocialInsurance/FileClaim**, and then select **File A Claim (Version 1)**.

3. Click **Activate Version**.

Set Up the Respond to Claim Flow

Activate the Integration Procedures and the OmniScript guided flow that employer representatives use to verify claims and provide required information. Configure the custom setting that makes the flow available on your social insurance Experience Cloud site.

Activate the Integration Procedures to Get Employee-Provided Information

1. From the App Launcher, find and select **OmniStudio Integration Procedures**.

2. Expand **SocialInsurance/CheckClaimResponseStatus**, and then select **CheckClaimResponseStatus (Version 1)**.

3. In the Structure panel, select **Procedure Configuration**.

4. Click **Activate Version**.

5. Repeat the steps to activate these Integration Procedures.

   - SocialInsurance/LoadEmployeeResponsesForVerification - LoadEmployeeResponsesForVerification (Version 1)

   - SocialInsurance/GetContentDocumentsForEmployeeFiles - GetContentDocumentsForEmployeeFiles (Version 1)

Activate the Integration Procedure to Capture Employer Responses

1. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.

2. Make note of the namespace prefix for the OmniStudio package.

3. From the App Launcher, find and select **OmniStudio Integration Procedures**.

4. Expand **SocialInsurance/CreateIndividualApplicationForClaimResponse**, and then select **CreateIndividualApplicationForClaimResponse (Version 1)**.

5. At the bottom of the Structure panel, select **Save-Responses**.

6. In the Properties panel, confirm that the Remote Class is `<OmniStudio-namspace-prefix>.StoreResponses`. If necessary, edit it to include the namespace prefix for your installed OmniStudio package.

7. In the Structure panel, select **Procedure Configuration**.

8. Click **Activate Version**.

Activate the Respond to Claim OmniScript

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **SocialInsurance/RespondToClaim**, and then select **Respond to Claim (Version 1)**.

3. Click **Activate Version**.

Make the Respond to Claim Flow Available to Employer Representatives

The Social Insurance Claim Flow custom setting determines the OmniScript guided flow that's available to employer representatives when they respond to a claim on your Experience Cloud site. Update the custom setting to specify the type, subtype, and name of the OmniScript.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

2. For Social Insurance Claim Flow, click **Manage**.

3. To specify the custom setting data for the first time, click **New**. To edit existing data, click **Edit**.

4. Specify these details about the OmniScript.

   a. For Language, enter `English`.

   b. For Subtype, enter `RespondToClaim`.

   c. For Type, enter `SocialInsurance`.

5. Save your changes.

Make sure to enable access to the Social Insurance Claim Flow custom setting in the profile that you set up for your Experience Cloud site users.

Build a Social Insurance Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where constituents can file and track claims for social insurance benefits.

To help you build a social insurance portal for your constituents, Public Sector Solutions provides an Experience Cloud site template with these preconfigured pages and components.

- Injured workers can access the File a Claim flow on the **Claims** > **File a Claim** page.

- Workers can find filed claims and track their status in a list view on the **Claims** > **View Claims**.

- Employer representatives can also find filed claims in the list view on the **Claims** > **View Claims** page. To verify a claim, they use the Respond action for the claim to start the Respond to Claim flow.

Social Insurance Site Prerequisites

After you set up the social insurance claim flows, prepare your social insurance Experience Cloud portal by completing these prerequisites.

Configure Sharing Settings for Social Insurance

To determine the level of access that users have to each others' data, review and edit the org-wide default sharing settings for the social insurance objects in Public Sector Solutions.

Create an Experience Cloud Site for Social Insurance Benefits

Use a template to create an Experience Cloud site where constituents can file and track claims for social insurance benefits.

Social Insurance Site Prerequisites

After you set up the social insurance claim flows, prepare your social insurance Experience Cloud portal by completing these prerequisites.

General Site Setup

Start by completing basic configuration that applies to all Experience Cloud sites.

1. Review and understand Experience Cloud licenses. See Experience Cloud User Licenses, Industries Object Access by Community License, and Public Sector Solutions Products: User, Feature, and Permission Set Licenses.

2. [Enable Digital Experiences](#).

3. Set up templates for your welcome email and other communications to site members. See [Create an Email Template in Lightning Experience](#).

4. Configure optional Service Cloud features such as embedded chat and Salesforce Knowledge. See [Embedded Chat](#) and [Create a Knowledge Base with Salesforce Knowledge](#).

5. For additional site setup tasks, see [Experience Cloud Site Setup Checklist](#).

Customize the Customer Community Profile for Social Insurance Site Users

Clone and customize the Customer Community Plus User profile to grant site users access to required objects and data. To make the Respond action in the Claims list view available to users, grant them access to the Social Insurance Claim Flow custom setting.

Every Salesforce org includes standard profiles that you can assign to users so that they have access to the features and objects they need to use the site. Clone and customize the profile that constituents use when they log in to your Experience Cloud site so that they have access to features and objects they need to file social insurance claims.

> **Note:** Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn **Enhanced Profile User Interface** on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. Next to the Customer Community Plus User profile, click **Clone**.

3. Enter a name for the profile, such as `Social Insurance Site User`, and save your changes.

4. Select **System Permissions** and then click **Edit**.

5. Select these options.

   - **Access Activities**
   - **Discovery Framework Platform User**
   - **Edit Tasks**
   - **Enables consumers and partners to execute OmniScripts, DRs, Cards through a Community or off platform**
   - **Grant community users access to LPI features**
   - **Provides access to Public Sector data for Community users**
   - **View Roles and Role Hierarchy**

6. Save your changes.

7. Select **Object Settings**, and then click **Edit**.

8. Set permissions based on your needs, using the table as a guide.

Object	Access Level
Accounts	Read
Assessment Questions	Read
Assessment Question Responses	Read, Create, Edit
Assessment Question Sets	Read

Object	Access Level
Assessment Question Versions	Read
Assessments	Read, Create, Edit
Claims	Read, Create, Edit
Code Sets	Read
Healthcare Providers	Read
Individual Applications	Read, Create, Edit
Omni Data Transformations	Read
Omni Data Transformation Items	Read
Omni Electronic Signature Templates	Read
Omni Process Compilations	Read
Omni Process Elements	Read
Omni Process Transient Data	Read
Omni Processes	Read
OmniScript Saved Sessions	Read
Omni UI Cards	Read
Party Incomes	Read
Preliminary Application References	Read, Create, Edit

9. Save your changes.

10. Select **Custom Settings Definitions**, and then click **Edit**.

11. Add **Social Insurance Claim Flow** to the Enabled Custom Setting Definitions list.

12. Save your changes.

Create Experience Cloud Site Users

To allow constituents to access your site, enable them as customer users and assign them the Customer Community Plus license and the Constituent Portal User profile.

Ensure that the user who owns a constituent's person account is assigned a role. If necessary, before you begin, create and assign a role to the user.

1. From the App Launcher, find and select **Accounts**, and then click a constituent's person account.

2. Click ⌄ , and then select **Enable Customer User**.

3. On the user record page, enter an email address and a unique username in the form of a email address. By default, the username is the same as the email address.

USER PERMISSIONS

To create or edit Customer Community Plus users:
- Manage Customer Users

4. (Optional) Change the system-generated nickname for the user. The nickname is the user's display name in an Experience Cloud site.

5. For User License, select **Customer Community Plus**.

6. For Profile, select *Social Insurance Site User.*

7. Deselect **Generate new password and notify user immediately** so that the user doesn't receive a password until you activate your Experience Cloud site.

8. Save your changes.

Assign Permissions to Employee Users

1. Assign these permission sets to employee users so that they can file workers' compensation claims on the Experience Cloud site. See Manage Permission Set Assignments.

   - Benefit Assistance Community Access
   - OmniStudio User
   - Public Sector Access

Assign Permissions to Employer Representative Users

Give employer representative users the permissions they need to review workers' compensation claims and provide the information required to process them.

1. Clone the Benefit Assistance Community Access permission set.

   a. From Setup, in the Quick Find box, enter *Permission*, and then select **Permission Sets**.

   b. For Benefit Assistance Community Access, click **Clone**.

   c. Enter a name for the cloned permission set. For example, enter *Social Insurance Site Access for Employers.* Then, press Tab to autopopulate the API name.

   d. (Optional) Modify the description.

   e. Save your changes.

2. Enable the Respond to Social Insurance Claims system permission in the cloned permission set.

   a. Click **Social Insurance Site Access for Employers**.

   b. Select **System Permissions**, and then click **Edit**.

   c. Turn on Respond to Social Insurance Claims.

   d. Save your changes.

3. Assign these permission sets to employer representative users.

   - Social Insurance Site Access for Employers
   - OmniStudio User
   - Public Sector Access

Configure Sharing Settings for Social Insurance

To determine the level of access that users have to each others' data, review and edit the org-wide default sharing settings for the social insurance objects in Public Sector Solutions.

1. From Setup, in the Quick Find box, enter `Security`, and then select **Sharing Settings**.

2. Click **Edit**.

3. Set organization-wide defaults based on your needs, using the table as a guide.

Object	Default Internal Access	Default External Access
Account and Contact	Public Read Only	Public Read Only
Contact	Controlled by Parent	Controlled by Parent
Assessment	Public Read Only	Public Read Only
Assessment Envelope	Public Read Only	Public Read Only
Assessment Indicator Definition	Public Read, Write	Public Read Only
Assessment Indicator Value	Public Read, Write	Public Read Only
Assessment Question	Public Read Only	Public Read Only
Assessment Question Assignment	Public Read Only	Public Read Only
Assessment Question Response	Public Read Only	Public Read Only
Assessment Question Set	Public Read Only	Public Read Only
Assessment Task	Public Read, Write	Public Read Only
Assessment Task Definition	Public Read, Write	Public Read Only
Claim	Public Read Only	Public Read Only
Code Set	Public Read Only	Public Read Only
Code Set Bundle	Public Read Only	Private
Healthcare Provider	Public Read Only	Public Read Only
Preliminary Application Reference	Public Read Only	Public Read Only
Individual Application	Public Read, Write	Public Read Only
Omni Assessment Task	Public Read, Write	Public Read Only
Omni DataPack	Private	Private
Omni Data Transformation	Public Read Only	Public Read Only
Omni Electronic Signature Template	Public Read Only	Public Read Only

Object	Default Internal Access	Default External Access
Omni Process	Public Read Only	Public Read Only
Omni Process Assessment Question Version	Public Read, Write	Public Read Only
Omni Process Transient Data	Public Read Only	Public Read Only
OmniScript Saved Session	Public Read Only	Public Read Only
Omni UI Card	Public Read Only	Public Read Only

4. Save your changes.

Create an Experience Cloud Site for Social Insurance Benefits

Use a template to create an Experience Cloud site where constituents can file and track claims for social insurance benefits.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Click **New**.

3. Select **Benefits Assistance**, and then click **Get Started**.

4. Enter a site name.

5. Complete the URL.

   The string that you enter is appended to the Experience Cloud site domain that you created when you enabled Digital Experiences. For example, if your site domain is `CosvilleGov.my.site.com`, and for URL you enter `SocialInsurance`, then your site URL is `CosvilleGov.my.site.com/SocialInsurance`.

6. Click **Create**.

7. Add members to the site.

   a. In the Administration workspace, click **Members**.

   b. Under Select Profiles, for Search, select **Customer**.

   c. Move **Social Insurance Site User** to the Selected Profiles list.

   d. Save your changes.

Provider Management in Public Sector Solutions

Capture details about service providers, their facilities, and their specialties in the Provider Management data model. Map the benefits and services that you administer to constituents to the specialties that providers offer. Search for providers and facilities that offer the benefits and services that constituents need, and make referrals. Build an Experience Cloud site that providers can use to process referrals, manage service delivery, and collaborate effectively and transparently with your agencies.

Providers are organizations that offer specialized services to individuals. Government agencies can collaborate with the providers to serve their constituents.

For example, the Human Services Department stores details of providers after it verifies their professional credentials, inspects facilities, and certifies that the providers meet required standards. Then caseworkers can refer constituents to providers in the network to receive services. For example, when a constituent's life partner passes away, the caseworker can refer them to a qualified grief counselor.

Public Sector Solutions offers a suite of objects and functionality that provide a framework for provider management and service delivery.
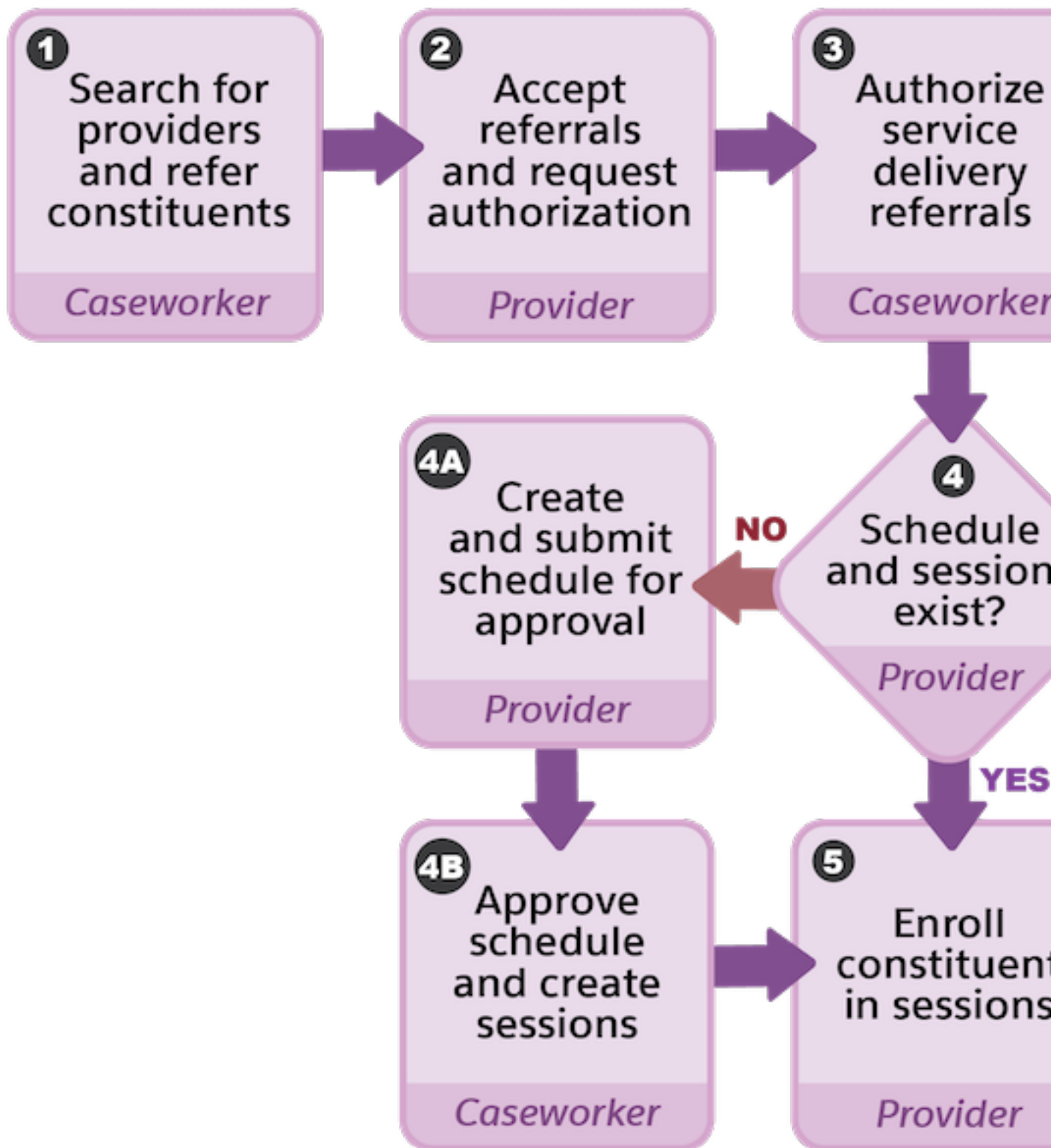
Provider Service Delivery Workflow

Understand how caseworkers and providers collaborate to deliver services to constituents in Public Sector Solutions.

Provider Management Prerequisites

Before you set up provider management in Public Sector Solutions, complete the prerequisites.

Provider Recruitment

Build and manage a network of providers by capturing details of providers, their facilities, and their specialties in the Provider Management data model.

Provider Search

Set up provider search and help caseworkers find suitable providers who can deliver services to constituents and take actions on the providers. The search experience that caseworkers need varies by the provider type, the information they need to act, and the relevant actions that they can take. Use the Criteria-Based Search and Filter features to design varied provider search experiences by configuring the required search criteria, result fields, and actions for each experience. Customize the predefined provider search configuration or create your own configuration based on it.

Provider Referral Guided Flow

The provider referral guided flow streamlines how caseworkers share relevant information with providers, such as the required services, the necessary documentation, and other details to help providers deliver services effectively.

Build a Provider Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where your certified providers can process referral requests, enroll clients in sessions, track service delivery, manage their information, and collaborate effectively and transparently with your agencies.

Configure Referral Authorization

Download and deploy the Authorize Referral for Provider Salesforce flow that enables caseworkers to authorize the service delivery by a provider. The flow updates a referral's authorization status, and shares the benefit assignment record related to the referral and the account of the benefit assignment enrollee with the provider user. The provider user can then easily track service delivery as benefit disbursements against the benefit assignment. This flow isn't available in the org and you must download it from GitHub. Make sure that caseworkers have the appropriate permissions to run the flow, and configure a custom action to initiate the flow.

Authorize Referrals for Providers in Public Sector Solutions

Review referral authorization requests and authorize a provider to serve a constituent.

Provider Service Delivery Workflow

Understand how caseworkers and providers collaborate to deliver services to constituents in Public Sector Solutions.

① Search for providers and refer constituents

Caseworker

② Accept referrals and request authorization

Provider

③ Authorize service delivery referrals

Caseworker

4A Create and submit schedule for approval

Provider

NO

④ Schedule and session exist?

Provider

4B Approve schedule and create sessions

Caseworker

YES

⑤ Enroll constituent in sessions

Provider

1. Search for Providers and Refer Constituents

After the caseworker creates care plans, goal assignments, and benefits for the constituents, and determines the services that a constituent needs, they use provider search to find suitable providers who offer those services. Then, they use the provider referral guided flow to refer the constituent to the providers. The flow creates a referral record per provider that's related to the case, constituent account, and the provider.

See Provider Search and Provider Referral Guided Flow.

2. Accept Referrals and Request Authorization

Providers review incoming referrals on the Home page of the provider site. They determine which referrals they can service, and then ask the caseworker to authorize them. See Build a Provider Site.

3. Authorize Service Delivery Referrals

Caseworkers review the referral authorization requests and select one of them to serve the constituent. On the referral record, they click **Authorize Referral**.

See Authorize Referrals for Providers in Public Sector Solutions on page 310.

Providers review the authorized referrals on the Clients page of the provider site.

4. Schedule and Sessions Exist?

When they receive an authorized referral, the provider determines the benefit sessions that the constituent requires and check whether the sessions are scheduled.

4a. Create and Submit a Schedule for Approval

If sessions are unavailable, the provider creates a schedule from the Schedules page in the provider site. The provider submits the schedule to the caseworker for approval.

4b. Approve Schedule and Create Sessions

The caseworker reviews the benefit schedule from the provider. If it's acceptable, on the benefit schedule to be approved, they click **Approve & Create Sessions**.

See Approve Schedules from Providers in Public Sector Solutions on page 310.

The approval flow creates the benefit schedule and benefit sessions.

Providers review the approved benefit schedules on the Schedules page of the provider site.

5. Enroll Constituent in Sessions

To enroll the constituent in sessions, the provider goes to the Clients page of the provider site and selects a benefit assignment. Then, from the Benefit Disbursement tab, they enroll the constituent in one or more benefit sessions. The flow creates a benefit disbursement record for every session enrollment.

6. Track Constituent Attendance

Providers use the Attendance page of the site to track the constituent's attendance at every session. The related benefit disbursement records are updated with the attendance status and disbursed quantity of the benefit.

Caseworkers review the constituent's attendance and disbursement quantities on the benefit assignment record. See Add Benefit Disbursements to a Page

SEE ALSO:

Provider Search

Provider Recruitment

Build a Provider Site

Provider Management Prerequisites

Before you set up provider management in Public Sector Solutions, complete the prerequisites.

Enable Provider Management

1. From Setup, in the Quick Find box, enter `Provider Management`, and then select **Provider Management Settings**.

2. Turn on Provider Management: Let users manage a network of providers, their facilities, and their specialties.

3. Turn on View Healthcare Details: Let users see healthcare-specific details for providers.

4. For your provider Experience Cloud site:

   a. In the Quick Find box, enter `Benefit Management`, and then select **Program and Benefit Management Settings**.

   b. Turn on Program and Benefit Management: Allow users to access all benefit assignment and goal assignment records when the user has access to the benefit assignment and goal assignment's parent records.

   c. In the Quick Find box, enter `Provider Management`, and then select **Provider Management Settings**.

   d. Turn on Benefit Assignment Access: Restrict providers from accessing child benefit assignment records on an Experience Cloud site based on the parent record access.

Enable Program and Benefit Management

1. From Setup, in the Quick Find box, enter `Benefit`, and then select **Program and Benefit Management Settings**.

2. Turn on Create and manage your programs, benefits, and goals.

3. Select **Benefit Disbursement Settings**, and then turn on Create and manage benefit disbursements.

Enable Case Referrals

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Case Referrals Settings**.

2. Turn on Create and manage referrals.

Assign Permissions

Assign these permission sets to anyone who sets up provider management or handles provider information, such as Salesforce admin, caseworkers, internal org users.

- Advanced Program Management
- Benefit Disbursement Access
- Care Plans Access
- Case Referral
- OmniStudio User
- Program and Benefit Management Access
- Provider Management Access
- Public Sector Access

Provider Recruitment

Build and manage a network of providers by capturing details of providers, their facilities, and their specialties in the Provider Management data model.

Use the Healthcare Provider, Healthcare Provider Specialty, Healthcare Facility, and related objects to capture provider details. Use the Benefit Specialty object to map your agencies' benefits with the specialties of providers in your network. This mapping enables caseworkers to use Provider Search to find suitable providers and facilities that can deliver benefits to constituents.

Use the Code Set object to capture the distinct service that a provider offers and each variation of a benefit that a caseworker can assign to constituents. For example, your Human Services Department offers a nursing care benefit to individuals with disability-related health needs. Create code set records to reflect nursing specialties, weekday and weekend care, and other variations of the benefit. Use the Code Set Bundle object to group code sets, and the Benefit Item Code object to map a benefit to a code set or a code set bundle.

SEE ALSO:

[Provider Management Data Model](#)

Provider Search

Set up provider search and help caseworkers find suitable providers who can deliver services to constituents and take actions on the providers. The search experience that caseworkers need varies by the provider type, the information they need to act, and the relevant actions that they can take. Use the Criteria-Based Search and Filter features to design varied provider search experiences by configuring the required search criteria, result fields, and actions for each experience. Customize the predefined provider search configuration or create your own configuration based on it.

Set Up Provider Search

Run a Data Processing Engine definition to compile provider data in one searchable object, and configure your searchable object setup. Select the fields that constitute your search criteria and that appear in the search results. Define how caseworkers can group and sort results, and specify distance filters to constrain search results to a certain proximity. Configure flows, OmniScripts, or Lightning web components as actions that caseworkers can apply to providers in search results.

Search for Providers

Search for a provider from the Benefit Assignments related list or from a Lightning page. Specify search criteria, group and sort search results, and then select the best match for your constituent.

Set Up Provider Search

Run a Data Processing Engine definition to compile provider data in one searchable object, and configure your searchable object setup. Select the fields that constitute your search criteria and that appear in the search results. Define how caseworkers can group and sort results, and specify distance filters to constrain search results to a certain proximity. Configure flows, OmniScripts, or Lightning web components as actions that caseworkers can apply to providers in search results.

How Provider Search Works

Understand how provider search works so that you can set it up efficiently.

Considerations for Provider Search

Understand how to effectively set up provider search.

Provider Search Prerequisites

Before you set up provider search, complete the prerequisites.

Customize the Provider Search Experience

To customize the provider search experience for caseworkers, edit the provider search configuration included in Public Sector Solutions or define your own configuration based on it.

Add Data to the Searchable Object

Set up a Data Processing Engine definition to collate the data in the searchable object Benefit Provider Searchable Field.

Enable Provider Search Access

Make provider search available to caseworkers from the Benefit Assignment Related List, or add provider search to a Lightning page.

How Provider Search Works

Understand how provider search works so that you can set it up efficiently.

The Data Processing Engine definition, searchable object configuration, search criteria configuration, and the search result action configuration determine the provider search experience for caseworkers.

Data Processing Engine Definition and the Searchable Object

Information about service providers is stored in multiple provider management objects. To find and show results that depend on data and fields across these objects, provider search uses a Data Processing Engine definition to collate the data in one searchable object, Benefit Provider Searchable Field. Run the Data Processing Engine definition periodically to synchronize Benefit Provider Searchable Field with the data stored in the Provider Management objects.

If desired, to include additional standard or custom fields from provider management objects in your provider search experience, create corresponding fields on the Benefit Provider Searchable Field object. Then, customize the Data Processing Engine definition to add data to these fields from the source object.

Searchable Object Configuration

Create a searchable object configuration to specify the object that is the basis of provider search and the Data Processing Engine definition that collates and adds data to that searchable object. Map search criteria fields to picklist fields on source objects so that caseworkers can select picklist values for search criteria. Configure search result fields as lookups so that users can open a record from the search results.

Public Sector Solutions provides two searchable object configurations:

- Benefit Provider Searchable Object: used in the search criteria configuration Benefit Provider Search
- Provider Search Searchable Object Configuration: used in the search criteria configuration Provider Search with Create Referral Action

Customize a configuration to suit your use case or use it as a reference to create your own configuration.

Search Criteria Configuration

Create a search criteria configuration to specify the fields that caseworkers can use for search and filter criteria, and the fields that show in search results. Also define the sorting and grouping fields that organize search results and specify distance filters to limit search results to a region.

Public Sector Solutions provides two search criteria configurations:

- Benefit Provider Search
- Provider Search with Create Referral Action

The Provider Search with Create Referral Action includes a search result action that Benefit Provider Search doesn't. Otherwise, the configurations are similar. Customize a configuration to suit your use case or use it as a reference to create your own configuration.

To let users access provider search from the Benefit Assignments related list by using the Search Providers quick action, configure a default search criteria configuration. To let users access provider search from a Lightning page, add the Criteria-Based Search and Filter component to the page and select the search criteria configurations to add to the page.

Search Result Action Configuration

Create a search result action to specify a flow, OmniScript, or Lightning web component that caseworkers can apply to provider search results, and then add the search result action to the search criteria configuration to make it available to caseworkers.

Public Sector Solutions provides a search result action configuration called Create Referral that is mapped to the Provider Referral OmniScript. Caseworkers can use the action to create a referral for a constituent to see a provider from the search results.

The Provider Search with Create Referral Action includes the Create Referral search result action.

SEE ALSO:

Data Processing Engine

Considerations for Provider Search

Understand how to effectively set up provider search.

- If you clone the Criteria-Based Search and Filter permission set, make sure to enable the Use Criteria-Based Search and Filter system permission in the copy.
- To enable the Data Processing Engine definition to run successfully, make sure that your source objects don't have duplicate conditions. The Data Processing Engine definition for provider search returns failed writeback records when:
  - Two or more benefit specialty records are associated with the same pair of benefit and care specialty records
  - Two or more healthcare practitioner facility records are associated with the same pair of healthcare provider and healthcare facility records
  - Two or more healthcare provider specialty records are associated with the same pair of healthcare provider and care specialty records
  - Two or more healthcare provider NPI records are associated with the same healthcare provider record
- If you delete records from the Benefit, Benefit Specialty, Healthcare Facility, Healthcare Practitioner Facility, Healthcare Provider, Care Provider Facility Specialty, or Care Specialty source object, then the Data Processing Engine definition deletes the corresponding Benefit Provider Searchable Field record the next time it runs. If you delete records from other source objects, then the Data Processing Engine definition updates the corresponding Benefit Provider Searchable Field record the next time it runs. In the updated record, the field from the deleted source record is set to empty.
- Provider search supports these field data types.

Configuration	Supported Data Types
Search Criteria	 – Boolean – Lookup Relationship – Numeric – Picklist – Text
Search Results	 – Boolean – Date/Time – Picklist – Text
Search Results Grouping and Aggregation	Text type fields

Provider search doesn't support composite, formula, or encrypted fields.

- Criteria field mappings and result Field mappings are applied to all configurations that use the same searchable object configuration. So if you create field mappings for the Benefit Provider Searchable Field searchable object configuration, the mappings are applied to all configurations created for Benefit Provider Searchable Field. If you delete the mappings for one configuration record, the mappings are deleted for all other searchable object configurations that use the same object.

- Provider search uses the SOSL `FIND` clause. When you select search criteria fields, make sure you select text-indexed fields that yield only up to 4,000 records when used in a combination.

Provider Search Prerequisites

Before you set up provider search, complete the prerequisites.

Assign Permissions for Provider Search

1. Assign these permission sets to admins who configure provider search.

   - Criteria-Based Search and Filter
   - Program and Benefit Management Access
   - Provider Management Access
   - Public Sector Access
   - Data Pipelines Base User

2. Assign these permission sets to caseworkers who use provider search.

   - Criteria-Based Search and Filter
   - Program and Benefit Management Access
   - Provider Management Access
   - Public Sector Access

SEE ALSO:

[View and Assign Permission Sets in Public Sector Solutions](#)

Enable Provider Management

1. From Setup, in the Quick Find box, enter `Provider Management`, and then select **Provider Management Settings**.

2. Turn on Provider Management: Let users manage a network of providers, their facilities, and their specialties.

3. Turn on View Healthcare Details: Let users see healthcare-specific details for providers.

Enable Program and Benefit Management

1. From Setup, in the Quick Find box, enter `Benefit`, and then select **Program and Benefit Management Settings**.

2. Turn on Create and manage your programs, benefits, and goals.

3. Select **Benefit Disbursement Settings**, and then turn on Create and manage benefit disbursements.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To enable criteria-based search and filter and data pipelines:
- Customize Application AND Data Pipelines Base User

To activate data integration rules:
- Customize Application

USER PERMISSIONS

To enable provider management settings:
- Customize Application

USER PERMISSIONS

To enable program and benefit management settings:
- Customize Application

Enable Criteria-Based Search and Filter and Data Pipelines

1. From Setup, in the Quick Find box, enter `Criteria`, and then select **Criteria-Based Search and Filter**.

2. Turn on **Criteria-Based Search and Filter**.

3. From Setup, in the Quick Find box, enter `Data Pipelines`, and then select **Get Started**.

4. Turn on **Data Pipelines**.

Enable Geocodes for Account Shipping Address

To allow users to specify distance parameters when they search for providers, populate the Facility Address Latitude and Facility Address Longitude fields on the Benefit Provider Searchable Field object. The Data Processing Engine definition maps Facility Address Latitude and Facility Address Longitude to the Shipping Latitude and Shipping Longitude fields on Account. Turn on the data integration rule that adds geocodes to the Shipping Address field on accounts. Data Processing Engine copies the coordinates for a facility's shipping address to Facility Address Latitude and Facility Address Longitude.

1. From Setup, in the Quick Find box, enter `Data Integration`, and then select **Data Integration Rules**.

2. Click **Geocodes for Account Shipping Address**.

3. Click **Activate**.

   The data integration rule updates account records with geocodes.

   When you run the Data Processing Engine definition to compile provider data in the Benefit Provider Searchable Field object, the Shipping Latitude, Shipping Longitude, Facility Address Latitude, and Facility Address Longitude fields can cause numeric overflow in sfdcDigest. To ensure that Data Processing Engine runs successfully, use Data Manager to change the scale value for these fields.

4. From the App Launcher, find and select **Data Manager**.

5. Click **Connections**.

6. Select **SFDC_Local** or a custom connection.

7. In the Object column, click **Account**.

8. In the Columns tab, in the Shipping Latitude column, and click ✎ .

9. In the Shipping Latitude pane, for Scale, enter `14`. Then, close the pane.

10. Change the Shipping Longitude scale to 14, as well.

11. Save your work.

12. Repeat the steps to set the scale to 14 for Facility Address Latitude and Facility Address Longitude on the Benefit Provider Searchable Field object.

Customize the Provider Search Experience

To customize the provider search experience for caseworkers, edit the provider search configuration included in Public Sector Solutions or define your own configuration based on it.

Map Search Criteria Fields to Picklists on Source Objects

Map text fields on the Benefit Provider Searchable Field object to picklist fields on Provider Management objects so that users can select a picklist value for their search criteria.

To map custom picklists, first create the corresponding text-type fields on the Benefit Provider Searchable Field object.

Benefit Provider Searchable Object and Provider Search Searchable Object Configuration have predefined mappings for these fields: Benefit Type Name, License Status, Operating Days List, Provider Education Level, Provider Type and Specialty Name. For other fields, here's how to create the mappings:

1. From Setup, in the Quick Find box, enter `Criteria`, and then select **Criteria-Based Search and Filter**.

2. On the Searchable Object Configuration tab, click the name of the searchable object configuration for which you want to create the mappings.

   - **Benefit Provider Searchable Object**
   - **Provider Search Searchable Object Configuration**
   - Your custom configuration

3. In the Criteria File Mappings section, click ✏, and then select one or more source objects.

4. For each row with a field that doesn't require a picklist, in the Source Object column, select **Do not map**.

5. For each row with a field that does require a picklist, select a source object and field to use for the mapping.

6. Repeat for every search criteria field that you want to map to a picklist.

7. Save your changes.

Create Hyperlinks for Search Result Fields

Map text fields on the Benefit Provider Searchable Field object to lookup ID fields on Provider Management objects so that record names in search results link to records in your org.

1. From Setup, in the Quick Find box, enter `Criteria`, and then select **Criteria-Based Search and Filter**.

2. On the Searchable Object Configuration tab, click the name of the searchable object configuration for which you want to map text fields to lookup ID fields to create links.

   - **Benefit Provider Searchable Object**
   - **Provider Search Searchable Object Configuration**
   - Your custom configuration

3. In the Result Field Mappings section, click ✏.

4. For each row with a search result field that isn't a lookup, in the Source Object column, select **Do not map**.

5. For each row with a lookup field that's used in search results, select **Benefit Provider Searchable Field** as the source object, and then select the lookup ID field to use for the mapping.

6. Repeat for every required search result field that you want to convert into a hyperlink.

7. Save your changes.

Configure Actions for Search Results

Create actions for provider search results that call a flow, OmniScript, or Lightning web component.

Create a flow or a Lightning web component to use as a search result action.

If you create a flow, make sure that it has a variable called `selectedSearchResultRecordIds` to collect the IDs passed by search. The variable must have these characteristics:

- Its data type must be text.
- It must be a collection variable: select **Allow multiple values** in the variable properties.
- It must be available outside the flow for input: select **Available for input** in the variable properties.

To pass the record IDs of selected search result to an OmniScript, provider search uses the URL parameter c__selectedSearchResultRecordIds.

Here's how to add your workflow automation to a Provider Search result.

1. From Setup, in the Quick Find box, enter `Criteria`, and then select **Criteria-Based Search and Filter**.

2. On the Action Configuration tab, click **New**.

3. Enter a name for the action. The name shows on a button on the search results page.

4. Select the type of action that you're configuring: **FlowDefinition**, **OmniScript**, or **LightningWebComponent**.

5. Select the reference instance that corresponds to your action type.

6. Save your changes.

Add the action to the search criteria configuration to make it available to caseworkers.

Configure the Provider Search Criteria

Specify the fields to use as provider search criteria, the fields that show in search results, the fields that can be used to group and sort search results, and the actions that show on search results.

📝 Note: You can only edit inactive criteria-based search configurations.

1. From Setup, in the Quick Find box, enter `Criteria`, and then select **Criteria-Based Search and Filter**.

2. Create a search criteria configuration or customize a predefined configuration.

- To create a search criteria configuration, on the Search Configuration tab, click **New**.
- To customize the Benefit Provider Search or Provider Search with Create Referral Action configuration, on the Search Configuration tab, click the configuration name, and then click **Edit**.

3. In the basic details:

a. For a new search criteria configuration, enter a name. The API name is autopopulated.

You can rename a predefined configuration but you can't change its API name.

b. For a new search criteria configuration, for Searchable Object, search for and select Benefit Provider Searchable Field.

   c. If you created a custom searchable object configuration, for the Searchable Object Configuration, search for and select the custom configuration.

   d. Click **Next**.

4. For search and filter criteria, include up to 20 fields in the Selected Fields list, arrange them in the order that you want them to show, and then click **Next**.

5. For Search Result Display Format, select **Card** or **List**.

6. For search results columns, include up to 20 fields in the Selected Fields list, arrange them in the order that you want them to show, and then click **Next**.

7. If you don't want to apply distance parameters to search, click **Skip this step**. Otherwise, define the distance criteria.

   a. For Unit of Measure, select **Kilometers** or **Miles**.

   b. For Value, enter a search radius. Provider facilities within this radius show in the search results.

   c. Click **Add**.

     Add up to six values.

   d. For Relative Location, select a location field on the Benefit Provider Searchable Field object that you want to use to calculate the distance to a provider facility.

   e. Click **Next**.

8. For search results group and aggregation criteria, include up to 20 fields in the Selected Fields list, arrange them in the order that you want them to show, and then click **Next**.

9. For the search results sorting criteria, include up to 20 fields in the Selected Fields list, arrange them in the order that you want them to show, and then click **Next**.

   We recommend that you select fields whose values can be sorted alphabetically or by date.

10. For search result actions, include up to 10 actions in the Selected Fields list, arrange them in the order that you want them to show, and then click **Done**.

11. Activate the configuration.

Add Data to the Searchable Object

Set up a Data Processing Engine definition to collate the data in the searchable object Benefit Provider Searchable Field.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Clone and Activate the Data Processing Engine Definition for Provider Search

Public Sector Solutions includes a template Data Processing Engine definition for Provider Search. To collate data from multiple objects in your org for Provider Search, save a copy of the template Data Processing Engine definition and activate it.

1. From Setup, in the Quick Find box, enter `Data Processing Engine`, and then select **Data Processing Engine**.

2. Click **Upsert Benefit Provider Searchable Field Records**.

3. Click ⌄ , and then click **Save As**.

4. Enter a name for the new definition, and then click **Save**.

   If the Data Processing Engine definition uses objects or fields that you can't access, you can't save it. Give yourself the required permissions to access the objects and modify field-level security to access the fields. Also, make the same permission and field-level security changes for the Analytics Cloud Integration User profile to prevent errors when you activate the definition.

5. To activate the definition, click **Activate**.

Associate the Data Processing Engine Definition with Your Searchable Object Configuration

Configure your searchable object configuration to use your Data Processing Engine definition to collate and add provider information to the Benefit Provider Searchable Field object.

1. From Setup, in the Quick Find box, enter `Criteria`, then select **Criteria-Based Search and Filter**.

2. To create a searchable object configuration, on the Searchable Object Configuration tab, click **New**.

   a. Enter a name for the configuration.

      The API Name field is automatically populated.

   b. For Searchable Object, search for and select Benefit Provider Searchable Field.

   c. Enter a description.

   d. For Data Synchronization Job, select the Data Processing Engine definition that you cloned from Upsert Benefit Provider Searchable Field Records.

   e. Save your changes.

3. To edit a searchable object configuration, on the Searchable Configuration tab, click the configuration name.

   - **Benefit Provider Searchable Object**
   - **Provider Search Searchable Object Configuration**

   a. Click **Edit**.

b. For Data Synchronization Job, select the Data Processing Engine definition that you cloned from Upsert Benefit Provider Searchable Field Records.

c. Save your changes.

Create a Flow to Regularly Run the Provider Search Data Processing Engine Definition

Create a scheduled flow to regularly run your provider search Data Processing Engine definition and keep the data in the Benefit Provider Searchable Field object current so that caseworkers get accurate search results.

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.

2. Click **New Flow**.

3. Select **Start From Scratch** and then click **Next**.

4. In the New Flow window, select **Schedule-Triggered Flow**, and then click **Create**.

5. In the Set a Schedule window, enter a start date, start time, and frequency.

6. Add the Action element to the canvas.

   a. In the canvas, hover over ○ and click ⊕.

   b. Select **Action**.

7. For Category, select **Data Processing Engine**, and then search for and select your Data Processing Engine definition.

8. Enter a Label and an API Name for the action.

9. Save and activate your flow.

   The definition runs on the schedule you set. Track its progress and status by using Monitor Workflow Services.

Enable Provider Search Access

Make provider search available to caseworkers from the Benefit Assignment Related List, or add provider search to a Lightning page.

Configure the Search Experience Available from the Benefit Assignment Related List

The default provider search configuration custom setting determines the search experience that's available when a user clicks Search Providers on the Benefit Assignment related list. Update the custom setting to use a search criteria configuration that defines the search experience for users.

1. From Setup, in the Quick Find box, enter `Custom Settings`, and then select **Custom Settings**.

2. For Default Provider Search Configuration , click **Manage**.

3. To specify the custom setting data for the first time, click **New**. To edit existing data, click **Edit**.

4. For Search Configuration, enter the API name of the search criteria configuration that you want to use as the default configuration.

   To use Benefit Provider Search as the default search criteria configuration, enter `Benefit_Provider_Search`. For Provider Search with Create Referral Action, enter `Provider_Search_with_Create_Referral_Action`.

5. Save your changes.

Enable the Search Providers Action for Caseworkers

To make the Search Providers action on the Benefit Assignment related list available to caseworkers, grant them access to the default provider search configuration custom setting through their user profile.

> 📝 **Note:** When configuring profiles, some admins prefer to work in the enhanced profile user interface while others prefer the original profile user interface. You can switch between the two in Setup, on the User Management Settings page. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. Click the name of the profile that you want to edit.

3. Click **Custom Settings Definitions**, and then click **Edit**.

4. Add **Default Provider Search Configuration** to the Enabled Custom Setting Definitions list.

5. Save your changes.

Add Provider Search to a Lightning Page

Give caseworkers access to provider search by adding the Criteria-Based Search and Filter component to a Lightning page and specifying that it shows the provider search configuration. Here's how to add it to the home page of the Public Sector: Benefit Management app.

1. On the home page of the Public Sector: Benefit Management app, click ⚙, and then select **Edit Page**.

2. From the list of standard components, drag **Criteria-Based Search and Filter** onto the page canvas.

3. In the Properties pane, for Search Configurations, click **Select...**.

4. Add the desired provider search configuration to the Selected list. For example, add **Benefit Provider Search**.

5. Click **OK**, and then save your changes and activate the page.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To edit custom settings:
- Customize Application

To edit profiles:
- Manage Profiles and Permission Sets

To add Criteria-Based Search and Filter to a page in Lightning App Builder:
- Customize Application AND Criteria-Based Search and Filter

Search for Providers

Search for a provider from the Benefit Assignments related list or from a Lightning page. Specify search criteria, group and sort search results, and then select the best match for your constituent.

Depending on how your Salesforce admin has set up the search experience, access provider search from the Benefit Assignments related list or from a Lightning page, such as your org's home page .

Use provider search to find providers in your network who can deliver services to constituents. Search for providers based on criteria such as:

- The name and type of benefit
- The name and type of provider
- Specialties offered by providers
- The name of a provider facility
- A provider facility's hours of operation
- Distance range

Group results by a field such as the provider type and sort results by the provider's name or other criteria. Select suitable providers and apply an action to them. For example, start a flow to create a referral for a constituent to visit a provider facility.

Considerations for Using Provider Search

- The search results panel shows up to 2,000 records. So if a search generates 2,500 results, provider search only shows 2,000 records in the results panel. If you apply aggregation criteria, provider search filters the 2,000 records in the results panel to match the criteria. It doesn't filter all 2,500 results.
- You can view up to 10 groups in the search results.
- The Relative Location field shows a city name, but you can also search by street name, state or province, or any other address attribute that Google Maps^{TM} can use to extract information.

Provider Referral Guided Flow

The provider referral guided flow streamlines how caseworkers share relevant information with providers, such as the required services, the necessary documentation, and other details to help providers deliver services effectively.

A government agency learns about constituents who need assistance when they apply for benefits or when someone reports a concern about them or refers them to the agency. Caseworkers understand the issues that constituents are facing and identify benefits and services to improve their wellbeing. Many times caseworkers refer constituents to other agencies or providers to help them get the assistance they need:

- Caseworkers review benefit applications and assign benefits to eligible constituents. If the agency uses certified providers to deliver the benefit, caseworkers search for providers offering the benefit and refer constituents to a suitable provider.
- Caseworkers assess a case and find the benefits or services that a constituent needs. If none of the certified providers deliver the required benefits or services, caseworkers refer the constituent to another agency or provider that offers them.

- Caseworkers review an inbound referral to check whether you can serve the referred constituent. If the assistance that the constituent needs isn't included in the agency's programs, caseworkers refer the constituent to another agency or provider.

When caseworkers refer constituents to providers, the provider referral guided flow streamlines how caseworkers share relevant information with the providers. The flow helps caseworkers complete these tasks:

- Include constituent and the provider information from records in the referral.
- Enter the referral details and describe the required services.
- Attach documents from a case, inbound referral, or benefit assignment to the referral.
- Share additional information from constituent records in service-specific PDF templates so that the provider or agency can customize their services.
- Review the information and create a referral.

The flow creates a referral, attaches documents and filled PDF templates, and shares the referral with the selected providers or agencies. Providers and agencies use the information in the referral to determine whether they can sign up and serve the constituents.

The Provider Referral flow is available as an OmniScript guided flow. Customize the OmniScript and the child OmniStudio components for your programs and processes. Create fillable PDF templates to share information with providers for the services that you deliver to constituents.

Set Up the Provider Referral Guided Flow

Create your own fillable PDF templates to share information with providers. Enable caseworkers to open the guided flow from a case or referral record page or the provider search results page.

Refer Beneficiary Constituents to Providers

Search for suitable providers for a constituent who is assigned benefits. You can select up to three provider and provider facility combinations and start the provider referral flow.

Refer Constituents from a Case or Inbound Referral to Providers

Connect constituents from a case or inbound referral to network or external providers that deliver the appropriate services.

Set Up the Provider Referral Guided Flow

Create your own fillable PDF templates to share information with providers. Enable caseworkers to open the guided flow from a case or referral record page or the provider search results page.

Provider Referral Guided Flow Prerequisites

Before you set up the provider referral guided flow in Public Sector Solutions, complete the prerequisites.

Provider Referral Guided Flow Components

The provider referral guided flow requires these OmniStudio components.

Prepare Information-Sharing PDFs for the Provider Referral Flow

Create fillable PDF templates that the provider referral flow populates with constituent data that's useful to service providers who receive the referral.

Add a Create Referral Button to a Case or Referral Page

Let caseworkers create an outbound referral from a case or an inbound referral by opening the provider referral guided flow on a record page.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Configure the search criteria configuration that includes the Create Referral search result action as the default provider search configuration. Or add the Create Referral search result action to your search criteria configuration.

Provider Referral Guided Flow Prerequisites

Before you set up the provider referral guided flow in Public Sector Solutions, complete the prerequisites.

> **EDITIONS**
>
> Available in: Lightning Experience
>
> Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Enable Person Accounts

⊘ **Important:** You can't turn off Person Accounts after they're enabled. Before enabling Person Accounts, use a sandbox to preview how they affect your Salesforce org.

1. From Setup, in the Quick Find box, enter `Person Accounts`, and then select **Person Accounts**.

2. Acknowledge the implications of using person accounts.

3. Verify that the Account object has at least one record type.

4. Verify that user profiles that have Read permission on Accounts also have Read permission on Contacts.

5. Set the org-wide default sharing for Contacts to **Controlled by Parent** or set the sharing settings for Accounts and Contacts to **Private**.

6. Turn on Person Accounts.
   Salesforce creates the person account record type. If needed, create additional record types for Person Accounts.

7. Assign the person account record type to user profiles.

> **USER PERMISSIONS**
>
> To enable person accounts:
> - Customize Application AND View All Profiles

Enable Standard OmniStudio Runtime

To enable standard OmniStudio runtime, turn off the OmniStudio managed package runtime.

1. From Setup, in the Quick Find box, enter `OmniStudio Settings`, and then select **OmniStudio Settings**.

2. Disable Managed Package Runtime.

> **USER PERMISSIONS**
>
> To enable OmniStudio settings:
> - Customize Application

Enable Provider Management

1. From Setup, in the Quick Find box, enter `Provider Management`, and then select **Provider Management Settings**.

2. Turn on Provider Management: Let users manage a network of providers, their facilities, and their specialties.

3. Turn on View Healthcare Details: Let users see healthcare-specific details for providers.

> **USER PERMISSIONS**
>
> To enable provider management settings:
> - Customize Application

Enable Case Referrals

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Case Referrals Settings**.

2. Turn on Create and manage referrals.

Assign Permissions for Provider Referral Flow

1. Assign these permission sets to admins who configure the provider referral flow.

   - Case Referral
   - Criteria-Based Search and Filter
   - OmniStudio Admin
   - Program and Benefit Management Access
   - Provider Management Access
   - Public Sector Access
   - Data Pipelines Base User

2. Assign these permission sets to caseworkers who use the provider referral flow.

   - Case Referral
   - Criteria-Based Search and Filter
   - OmniStudio User
   - Program and Benefit Management Access
   - Provider Management Access
   - Public Sector Access

Provider Referral Guided Flow Components

The provider referral guided flow requires these OmniStudio components.

Component	Type	Description
Create Outbound Referral	OmniScript	Lets caseworkers create an outbound referral to refer a client to a service provider.
GetClientDetails	Integration Procedure	Gets client details based on the context in which a caseworker is creating the outbound referral.
GetClientDetailsForSelectedTemplates	Integration Procedure	Fetches a client's details from records based on the templates that the caseworker selects to share information with providers.

Component	Type	Description
GetClientRecords	Integration Procedure	Gets the cases, inbound referrals, or benefit assignments associated with a client.
GetProviderDetails	Integration Procedure	Gets the provider details for the selected provider search results to create referrals.
GetRelatedDocumentsForRecord	Integration Procedure	Fetches the documents associated with a case or a referral. For a benefit assignment, fetches the documents associated with its parent record.
PSSOutboundReferralGetBenefitAssignments	Omnistudio Data Mapper	Fetches a constituent's benefit assignments.
PSSOutboundReferralGetCarePlanCase	Omnistudio Data Mapper	Gets the case associated with a care plan.
PSSOutboundReferralGetCases	Omnistudio Data Mapper	Fetches a constituent's cases.
PSSOutboundReferralGetCaseDetailsByID	Omnistudio Data Mapper	Gets the details of a case based on its ID.
PSSOutboundReferralGetClientAccountFromCase	Omnistudio Data Mapper	Gets the client's account from a case based on the case ID.
PSSOutboundReferralGetClientAccountFromReferral	Omnistudio Data Mapper	Gets the client's account from a referral based on the referral ID.
PSSOutboundReferralGetClientCaseAndAssessmentData	Omnistudio Data Mapper	Fetches the case, case participant, and assessment data associated with a client.
PSSOutboundReferralGetClientBenefitAssignments	Omnistudio Data Mapper	Fetches a client's benefit assignments.
PSSOutboundReferralGetClientDetails	Omnistudio Data Mapper	Fetches the details from a client's account.
PSSOutboundReferralGetClientGoalAssignments	Omnistudio Data Mapper	Fetches a client's goal assignments.
PSSOutboundReferralGetClientHouseholdDetails	Omnistudio Data Mapper	Fetches the details of a client's household.
PSSOutboundReferralGetClientEmploymentHistory	Omnistudio Data Mapper	Fetches the employment history from the client's person employment record.
PSSOutboundReferralGetFacilitiesByName	Omnistudio Data Mapper	Fetches the provider facilities whose name matches the search string.
PSSOutboundReferralFillPdfTemplates	Omnistudio Data Mapper	Adds details from the database records to the templates that the caseworker selects and generates the PDFs that are attached to the created referrals.
PSSOutboundReferralGetMatchingAccounts	Omnistudio Data Mapper	Gets up to 10 accounts with names that have the characters entered by the caseworker for typeahead search.
PSSOutboundReferralGetMatchingBenefitAssignments	Omnistudio Data Mapper	Gets up to 10 benefit assignments that have a Name field that includes the characters entered by the caseworker for typeahead search.

Component	Type	Description
PSSOutboundReferralGetMatchingCases	Omnistudio Data Mapper	Gets up to 10 cases that have a Case Number field that includes the characters entered by the caseworker for typeahead search.
PSSOutboundReferralGetMatchingReferrals	Omnistudio Data Mapper	Gets up to 10 referrals that have a Name field that includes the characters entered by the caseworker for typeahead search.
PSSOutboundReferralGetPractitionerFacilities	Omnistudio Data Mapper	Gets the healthcare practitioner facilities associated with the selected provider search results.
PSSOutboundReferralGetProviderDetails	Omnistudio Data Mapper	Gets the provider details for the selected provider search result.
PSSOutboundReferralGetProvidersByName	Omnistudio Data Mapper	Fetches providers whose name matches the search string.
PSSOutboundReferralGetReferrals	Omnistudio Data Mapper	Fetches a constituent's referrals.
PSSOutboundReferralGetReferralDetails	Omnistudio Data Mapper	Gets the details of the referrals that were created based on the caseworker's input.
PSSOutboundReferralGetReferralDetailsByID	Omnistudio Data Mapper	Gets the details from a referral based on its ID.
PSSOutboundReferralGetRelatedDocuments	Omnistudio Data Mapper	Fetches the documents associated with a record.
PSSOutboundReferralGetUserDetails	Omnistudio Data Mapper	Gets the details of the user creating the referral.
PSSOutboundReferralTranformJSON	Omnistudio Data Mapper	Renames keys in the JSON containing the outbound referral details and flattens the JSON.
PSSOutboundReferralTransformProviderDetails	Omnistudio Data Mapper	Transforms provider details from the healthcare practitioner facilities to create referrals.
PSSOutboundReferralShowBenefitAssignments	FlexCard	Shows the client benefit assignments.
PSSOutboundReferralShowCaseParticipants	FlexCard	Shows the participants in the client case.
PSSOutboundReferralShowChildWelfareInformation	FlexCard	Shows the client information that's shared with providers when the caseworker selects the child welfare template.
PSSOutboundReferralShowClientDetails	FlexCard	Shows the client details.
PSSOutboundReferralShowEmploymentHistory	FlexCard	Shows the client employment history.
PSSOutboundReferralShowGoalAssignments	FlexCard	Shows the client goal assignments.

Component	Type	Description
PSSOutboundReferralShowHouseholdMembers	FlexCard	Shows the members in the client household.
PSSOutboundReferralShowJobCounselingInformation	FlexCard	Shows the client information that's shared with providers when the caseworker selects the job counseling template.
PSSOutboundReferralShowProviderDetails	FlexCard	Shows the details of the providers that the caseworker selected.
PSSOutboundReferralShowReferralDetails	FlexCard	Shows the details of the referrals created for the caseworker's reference.
PSSOutboundReferralShowWorkshopInformation	FlexCard	Shows the client information that's shared with providers when the caseworker selects the workshop template.

Prepare Information-Sharing PDFs for the Provider Referral Flow

Create fillable PDF templates that the provider referral flow populates with constituent data that's useful to service providers who receive the referral.

Enable caseworkers to give service providers a PDF with information about referred constituents so that the providers can deliver their service more effectively.

The provider referral guided flow includes three PDF form templates that share constituent data from relevant objects with service providers. When caseworkers create referrals by using the provider referral guided flow, they select a template, and the flow creates a PDF filled with data from the referred constituent's records. The flow attaches the PDF to the referral for the provider's reference.

ShareChildWelfareInformation.pdf
Adds information about the referred constituent from the Account, Assessment Question, Assessment Question Response, Benefit Assignment, Case, Contact, Goal Assignment, and Party Relationship Group objects.

ShareJobCounselingInformation.pdf
Adds information about the referred constituent from the Account, Benefit Assignment, Contact, Goal Assignment, and Person Employment objects.

ShareWorkshopInformation.pdf
Adds information about the referred constituent from the Contact object.

Customize the PDF templates that we provide, or create your own and upload them to Public Sector Solutions. Then, update the provider referral flow to fill the PDF template with information from constituent records.

> 📝 **Note:** Creating and customizing PDF templates requires Adobe Acrobat Pro, which is sold separately. Make sure that your PDF templates meet the requirements in Fill a PDF From OmniScript Using Omnistudio Data Mapper.

The PDF templates are available as documents in Salesforce Classic.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To access and modify provider referral flow OmniStudio components:
- OmniStudio Admin AND Provider Management Access

Customize a Provider Referral Information-Sharing PDF Template

Download one of the templates we provide and customize it by using Adobe Acrobat Pro.

1. In the Lightning Experience header, click your profile picture, and then select **Switch to Salesforce Classic**.

2. On the Documents tab, from the Folders menu, select **PSSOutboundReferralTemplates**.

3. Select the template that you want to customize, click **View file**, and then download it.

4. In Adobe Acrobat Pro, modify the template.
   For example, include a custom field from an object or include information about the referred constituent from a different object.

5. To replace the original PDF template with your new version, in the PSSOutboundReferralTemplates folder, select the template, click **Replace Document**, and then upload your customized PDF template.

The Create Outbound Referral OmniScript uses the integration procedure OutboundReferral/GetClientDetailsForSelectedTemplates to fetch the data from client records that the Provider Referral flow adds to the PDF templates. To fetch the data that you want to add to a modified PDF template, customize this integration procedure.

The OmniScript uses the Data Mapper PSSOutboundReferralFillPDFTemplates to map data from the OmniScript JSON to PDF fields. To map data to any new fields that you added to a PDF template, customize this Data Mapper.

Create and Upload a Provider Referral Information-Sharing PDF Template

Create a fillable PDF template by using Adobe Acrobat Pro and upload it to Public Sector Solutions.

1. In Adobe Acrobat Pro, create a fillable PDF that includes tables for each object whose data you want to share with providers. We recommend that you look at our included template for ideas.

2. When your PDF template is ready, in Public Sector Solutions, switch to Salesforce Classic.

3. On the Documents tab, from the Folders menu, select **PSSOutboundReferralTemplates**.

4. Click **New Document.**

5. Enter a document name, and then press Tab to automatically populate the unique API name for the document.

6. Upload your PDF template.

The Create Outbound Referral OmniScript uses the integration procedure OutboundReferral/GetClientDetailsForSelectedTemplates to fetch the data from client records that the Provider Referral flow adds to the PDF templates. To fetch the data that you want to add to your PDF template, customize this integration procedure

The OmniScript uses the Data Mapper PSSOutboundReferralFillPDFTemplates to map data from the OmniScript JSON to PDF fields. To map data to the fields in your PDF template, customize this Data Mapper.

To add data to your PDF template, add PDF Actions to the OmniScript.

SEE ALSO:

Create an Omnistudio Data Mapper Interface to Map OmniScript Data to a PDF

Map OmniScript Fields to a PDF

Add a PDF Action to an OmniScript

Add a Create Referral Button to a Case or Referral Page

Let caseworkers create an outbound referral from a case or an inbound referral by opening the provider referral guided flow on a record page.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **Referral/OutboundReferral** and click **Create Outbound Referral (Version 1)**.

3. Click ▾ and select **How To Launch**.

4. Find and copy the Lightning URL.

    You apply the URL when you configure the button.

5. From Setup, in Object Manager, select **Case** or **Referral**.

6. Click **Button, Links, and Actions**, and then click **New Button or Link**.

7. Configure the button.

    a. Enter a label for the button, for example, `Create Referral`. Then press Tab to populate the API name.

    b. For Display Type, select **Detail Page Button**.

    c. For Behavior, select **Display in existing window with sidebar**.

    d. For Content Source, select **URL**.

    e. In the Custom Button or Link Editor text box, for Case, enter the URL that you copied in this format: `[Lightning-URL]&c__ContextId={!Case.Id}`. For Referral, enter the URL that you copied in this format:
    `[Lightning-URL]&c__ContextId={!Referral.Id}`

    To change the title of the tab that the flow opens in, change the value of `omniscript__tabLabel` in the URL. For example, to set the tab title to Create Referral: `omniscript__tabLabel=Create%20Referral`

    To change the tab icon, for Case, add the `omniscript__tabIcon` parameter to the URL with value that you want:
    `[Lightning-URL]&omniscript__tabIcon=standard:product_transfer_state&c__ContextId={!Case.Id}`.
    For Referral, add the parameter in this format:
    `[Lightning-URL]&omniscript__tabIcon=standard:product_transfer_state&c__ContextId={!Referral.Id}`

8. Save your changes.

    You can now add the button to the page layout.

9. On the Object Manager page for Case, select **Case Page Layouts**. Or on the Object Manager page for Referral, select **Page Layouts**

10. For the page that you want to add the button to, click ▾ and select **Edit**.

11. Click **Buttons**.

12. For a Case page, drag the **Create Referral** button to the Custom Buttons list under Case Detail. For a Referral page, drag the **Create Referral** button to the Custom Buttons list under Referral Detail.

13. Save your changes.

Configure the Create Referral Search Result Action for Provider Search

Configure the search criteria configuration that includes the Create Referral search result action as the default provider search configuration. Or add the Create Referral search result action to your search criteria configuration.

- If you haven't set up provider search, set up provider search by using the predefined Provider Search with Create Referral Action search criteria configuration. The search criteria configuration includes the Create Referral action that users can start from the search results page.

  See Set Up Provider Search.

- If you've set up provider search by using a search criteria configuration other than Provider Search with Create Referral Action, edit your search criteria configuration and add Create Referral as a search result action. The Create Referral action configuration is predefined in your Public Sector Solutions org.

  See Configure the Provider Search Criteria.

- If you've customized the Provide Referral flow and renamed the OmniScript, create a search result action configuration for your OmniScript. Then, add the search result action to your search criteria configuration.

  See Configure Actions for Search Results and Configure the Provider Search Criteria.

Refer Beneficiary Constituents to Providers

Search for suitable providers for a constituent who is assigned benefits. You can select up to three provider and provider facility combinations and start the provider referral flow.

1. From the App Launcher, find and select **Benefits**, and then select a benefit.

2. From the Benefit Assignment related list, click **Search Providers**.

3. Search for providers based on the relevant criteria, and select up to three provider and provider facility combinations to refer.

4. To start the provider referral flow, click **Create Referral**.

5. Under Client Details, search for and select the constituent's account.

   When you enter one or more characters, the flow suggests up to 10 accounts whose names include those characters. If you don't see the account that you're looking for, enter more characters to improve the suggestions.

6. Under Provider Details, verify the provider and provider facilities that you selected.

7. Under Source Record, select the client record that's the source of this referral.

   a. For Source Object, indicate if this is a case, referral or benefit assignment.

   b. Search for and select the source record. For a case, search by case number. For a referral or benefit assignment, search by name.

   When you enter one or more characters, the flow suggests up to 10 records that include those characters. If you don't see the record that you're looking for, enter more characters to improve the suggestions.

8. Click **Next**.

9. Under Referral Details, enter a title for the referral and the required details.

10. (Optional) Upload files to give additional information to the provider.

11. (Optional) The flow lists documents attached to the source record. Select the documents that you want to attach to give the provider more context.

12. Click **Next**.

13. (Optional) Select one or more PDF templates to share information with providers. The flow fills the templates with information from client records and attaches the filled PDF to the referral.

14. Click **Next**.

15. Before creating the referral, review the information, and then click **Next**.

The flow creates the referral and shares the referral record with the providers that you selected.

Refer Constituents from a Case or Inbound Referral to Providers

Connect constituents from a case or inbound referral to network or external providers that deliver the appropriate services.

1. To refer a constituent from a case, from the App Launcher, find and select **Cases**, and then select the case. To refer a constituent from an inbound referral, find and select **Referral**, and then select the referral.

2. To open the provider referral flow, on the record page, from the actions menu, select **Create Referral**.

   If you don't see the Create Referral action, contact your Salesforce admin.

   Under Client Details, the flow adds the constituent details from the case or the inbound referral. Under Source Record, the flow shows the case number of the case from which you opened the flow. If you opened the flow from an inbound referral, name of the referral is shown.

3. Under Provider Details, select up to three providers and provider facilities that you want to refer the constituent to.

   For a network provider, search for the provider and provider facility. For an external provider, enter the provider email ID and phone number.

4. Click **Next**.

5. Under Referral Details, enter a title for the referral and the required details.

6. (Optional) Upload files to give additional information to the provider.

7. (Optional) The flow lists documents attached to the source record. Select the documents that you want to attach to give the provider more context.

8. Click **Next**.

9. (Optional) Select one or more PDF templates to share information with providers. The flow fills the templates with information from client records and attaches the filled PDF to the referral.

10. Click **Next**.

11. Before creating the referral, review the information, and then click **Next**.

The flow creates the referral and shares the referral record with the providers that you selected.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To access cases:
- Public Sector Access permission set

To access referrals:
- Case Referral Access permission set

To create provider referrals:
- OmniStudio User AND Provider Management Access permission sets

Build a Provider Experience Cloud Site in Public Sector Solutions

Create an Experience Cloud site where your certified providers can process referral requests, enroll clients in sessions, track service delivery, manage their information, and collaborate effectively and transparently with your agencies.

Caseworkers often lack direct insight into constituents' progress with their scheduled benefits and their interactions with providers. Instead, they depend on the providers to keep them informed. Providers, meanwhile, find it challenging to regularly share reports of the services they deliver to clients.

To address these challenges, create a portal where providers can manage and track their services and give agencies and constituents visibility into their data and processes. This collaborative platform promotes efficient and transparent partnerships.

Here are a few ways that providers can use the portal.

- Review and act on referral requests.
- See individuals whose benefits are approved, see their assigned benefits, and enroll them in programs and benefits.
- Create benefit schedules and sessions.
- Review scheduled sessions and mark attendance.
- Review their specialties, facilities, and credentials submitted to the agency, and keep the information up to date.

Public Sector Solutions includes an Experience Cloud site template with preconfigured pages for a provider portal. In addition to a home page and pages for login, self-registration, changing a password, and forgotten passwords, the Service Provider Portal Experience Cloud site template includes these pages:

- Clients
- Schedules
- Attendance

You can customize the pages at any time in Experience Builder.

Provider Site Prerequisites

Before you create a provider portal from the Experience Cloud site template in Public Sector Solutions, complete the prerequisites.

Create an Experience Cloud Site from the Service Provider Portal Template in Public Sector Solutions

Use a template to create an Experience Cloud site that includes pages for providers to process referral requests, track service delivery, and manage their information.

Enable Chatter Feeds for Providers

Turn on Chatter feed tracking for these objects so that record updates are available in a feed on the record page: Benefit Assignment, Benefit Schedule, Benefit Session, Referral. Also, enable Chatter on the provider site so that providers can view the feeds.

SEE ALSO:

Experience Cloud User Licenses

Experience Cloud

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions at an extra cost. For more information, see Public Sector Solutions Products: User, Feature, and Permission Set Licenses.

Provider Site Prerequisites

Before you create a provider portal from the Experience Cloud site template in Public Sector Solutions, complete the prerequisites.

Org Setup

Start by completing some basic configuration tasks.

1. Enable Program and Case Management. See Enable Program and Case Management Settings in Social Program Management Prerequisites.

2. Enable Provider Management. See Provider Management Prerequisites.

3. Confirm that the page layouts for these objects include the listed field. If necessary, add the field to the page layout.

Object	Field
Benefit Schedule	Approval Status
Referral	Authorization Status

> 📝 Note: Only users with Provider Management Access permission set have read-write access to the Approval Status field, which means only caseworkers or internal org users can approve a benefit schedule. Other users have read-only permission to the field.

General Site Setup

Complete the setup tasks that apply to all Experience Cloud sites.

1. Review and understand Experience Cloud licenses. See Experience Cloud User Licenses, Industries Object Access by Community License, and Public Sector Solutions Products: User, Feature, and Permission Set Licenses.

2. Enable Digital Experiences.

3. Set up templates for your welcome email and other communications to site members. See Create an Email Template in Lightning Experience.

4. Configure optional Service Cloud features such as embedded chat and Salesforce Knowledge. See Embedded Chat and Create a Knowledge Base with Salesforce Knowledge.

5. For additional site setup tasks, see Experience Cloud Site Setup Checklist.

Customize the Partner Community User Profile

Clone and customize the Partner Community User profile to grant provider users access to required objects and data on the site.

> 📝 Note: Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select User Management Settings, and then turn Enhanced Profile User Interface on or off as needed. These instructions assume you're working with the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.

2. Next to the Partner Community User profile, click **Clone**.

3. Enter a name for the profile, such as *Provider Site User*, and save your changes.

4. Click **Edit**.

5. In the Field-Level Security section, next to the Healthcare Provider object, click **View**.

6. Click **Edit**.

7. For the Practitioner field name, enable **Read Access**, and save your changes.

Create Partner Users for the Site

To allow providers to access your Experience Cloud site, enable them as partner users and assign them the required permission sets.

1. From the App Launcher, find and select Accounts, and then click a provider's account.

2. Click ▾ , and then select **Enable As Partner**.

3. Click **Related**, and then select a contact.

4. Click ▾ , and then select **Enable Partner User**.

> 📝 **Note:** External users must have a role assigned to them. See Create Roles for Public Sector Solutions Users and Create Experience Cloud Site Users.

5. Assign these permission sets to partner users. See Manage Permission Set Assignments.

   - OmniStudio User
   - Provider Management For Partner

   When you assign the Provider Management For Partner permission set to the user, they're automatically assigned the required permission set license, Provider Management For Partner.

SEE ALSO:
Create a User Role
Create Partner Accounts
Create Partner Users
Manage Permission Set Assignments
Customize Page Layouts

Configure Sharing Settings for Providers in Public Sector Solutions

Review and edit the org-wide default sharing settings for the objects that Public Sector Solutions uses to determine the level of access that users have to each others' data.

1. From Setup, in the Quick Find box, enter *Security*, and then select **Sharing Settings**.

2. Click **Edit**.

3. Set organization-wide defaults based on your needs, using the table as a guide.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Benefit Assignment	Private	Private	Yes

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Benefit Schedule	Private	Private	Yes
Benefit Session	Controlled by Parent	Controlled by Parent	Yes
Benefit Type	Public Read Only	Public Read Only	Yes
Healthcare Provider	Public Read Only	Public Read Only	Yes
Program	Public Read Only	Public Read Only	Yes

4. Save your changes.

5. For caseworkers and other internal users to be able to access the schedules created by the provider users, create share groups to grant access to these objects: Benefit Schedule, Recurrence Schedule.

   See Use Share Groups to Share Records.

   You can use other ways to share records, such as Salesforce queues or flows.

Create an Experience Cloud Site from the Service Provider Portal Template in Public Sector Solutions

Use a template to create an Experience Cloud site that includes pages for providers to process referral requests, track service delivery, and manage their information.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Click **New**.

3. Select **Service Provider Portal**, and then click **Get Started**.

4. Enter a site name.

5. Complete the URL.

    The string that you enter is appended to the Experience Cloud site domain that you created when you enabled Digital Experiences. For example, if your site domain is `CosvilleGov.my.site.com`, and for URL you enter `sunprovider`, then your site URL is `CosvilleGov.my.site.com/sunprovider`.

6. Click **Create**.

7. Add members to the site.

    a. In the Administration workspace, click **Members**.

    b. Under Select Profiles, for Search, select **Partner**.

    c. Move the profile that you cloned from Partner Community User to the Selected Profiles list.

    d. Save your changes.

8. (Optional) Customize the pages for your needs, preview the site, and activate and publish it when you're ready. See Build and Customize Your Experience Cloud Site.

Enable Chatter Feeds for Providers

Turn on Chatter feed tracking for these objects so that record updates are available in a feed on the record page: Benefit Assignment, Benefit Schedule, Benefit Session, Referral. Also, enable Chatter on the provider site so that providers can view the feeds.

Enable Chatter Feed Tracking

1. From Setup, in the Quick Find box, enter `Chatter`, and then select **Feed Tracking**.

2. From the list of objects, select **Referral**.

3. Select **Enable Feed Tracking**.

4. Select **Authorization Status**, and any other fields that you want to track.

5. Similarly, enable chatter feed tracking for the other objects.

6. Save your changes.

Enable Chatter on the Provider Site

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

2. Next to your site name, click **Workspaces**.

3. Select **Administration**, and then select **Preferences**.

4. Under General, give guest users access to public Chatter API requests.

5. Save your changes.

Configure Referral Authorization

Download and deploy the Authorize Referral for Provider Salesforce flow that enables caseworkers to authorize the service delivery by a provider. The flow updates a referral's authorization status, and shares the benefit assignment record related to the referral and the account of the benefit assignment enrollee with the provider user. The provider user can then easily track service delivery as benefit disbursements against the benefit assignment. This flow isn't available in the org and you must download it from GitHub. Make sure that caseworkers have the appropriate permissions to run the flow, and configure a custom action to initiate the flow.

Download and Deploy the Flow

Get the Salesforce flow from GitHub and deploy it in your org.

1. From the Public Sector Solutions process library, download the Authorize_Referral_for_Provider_Flow_250.zip file.

> **✎ Note:** The virtual processes and digital assets in the Public Sector Solutions process library are Non-SFDC Applications and not part of your Services under your Master Subscription Agreement with Salesforce or any of its affiliates. They are provided as-is and not supported by Salesforce..

2. Deploy `Authorize_Referral_for_Provider_Flow_250.zip`.

   • Deploy `Authorize_Referral_for_Provider_Flow_250.zip` by using a file-based call. See deploy().

   • Deploy `Authorize_Referral_for_Provider_Flow_250.zip` by making a REST request. See Deploy Metadata with Apex Testing Using REST.

> **👁 Example:** This sample request deploys a Salesforce flow by using the `Authorize_Referral_for_Provider_Flow_250.zip` file.

```
curl https://host/services/data/v61.0/metadata/deployRequest -X POST -H 'Authorization:
 Bearer token' -F 'json={
      "deployOptions" :
           {
           "allowMissingFiles" : false,
           "autoUpdatePackage" : false,
           "checkOnly" : false,
           "ignoreWarnings" : false,
           "performRetrieve" : false,
           "purgeOnDelete" : false,
           "rollbackOnError" : false,
           "runTests" : null,
           "singlePackage" : false,
           "testLevel" : "NoTestRun"
           }
      };type=application/json; charset=US-ASCII' -F
'upload=@Authorize_Referral_for_Provider_Flow_250.zip;type=application/zip;
charset=US-ASCII'
```

Here's the response to the request. The status shows that the deployment is pending:

```
{
  "id": "0AfSB000005lCyv0AE",
  "validatedDeployRequestId": null,
  "deployOptions": {
    "checkOnly": false,
    "runTests": null,
    "testLevel": "NoTestRun",
    "singlePackage": true,
    "allowMissingFiles": false,
    "performRetrieve": false,
    "autoUpdatePackage": false,
    "rollbackOnError": false,
    "ignoreWarnings": false,
    "purgeOnDelete": false,
    "runAllTests": false
  },
  "deployResult": {
    "id": "0AfSB000005lCyv0AE",
    "messages": null,
    "retrieveResult": null,
    "success": false,
```

```
    "checkOnly": false,
    "ignoreWarnings": false,
    "rollbackOnError": false,
    "status": "Pending",
    "numberComponentsDeployed": null,
    "numberComponentsTotal": null,
    "numberComponentErrors": null,
    "numberTestsCompleted": null,
    "numberTestsTotal": null,
    "numberTestErrors": null,
    "details": null,
    "createdDate": null,
    "startDate": null,
    "lastModifiedDate": null,
    "completedDate": null,
    "errorStatusCode": null,
    "errorMessage": null,
    "stateDetail": null,
    "createdBy": null,
    "createdByName": null,
    "canceledBy": null,
    "canceledByName": null,
    "done": false,
    "runTestsEnabled": false,
    "runTestResult": null
  }
}
```

This sample request verifies the status of the deployment request.

```
curl https://host/services/data/v61.0/metadata/deployRequest/0AfSB000005lCyv0AE -X GET
 -H 'Authorization: Bearer token'
```

Here's the response confirming that the component was deployed successfully.

```
{
  "id": "0AfSB000005lCyv0AE",
  "validatedDeployRequestId": null,
  "deployOptions": null,
  "deployResult": {
    "id": "0AfSB000005lCyv0AE",
    "messages": null,
    "retrieveResult": null,
    "success": true,
    "checkOnly": false,
    "ignoreWarnings": false,
    "rollbackOnError": false,
    "status": "Succeeded",
    "numberComponentsDeployed": 1,
    "numberComponentsTotal": 1,
    "numberComponentErrors": 0,
    "numberTestsCompleted": 0,
    "numberTestsTotal": 0,
    "numberTestErrors": 0,
    "details": {
```

```
        "componentFailures": [],
        "componentSuccesses": [],
        "retrieveResult": null,
        "runTestResult": null,
        "allComponentMessages": []
    },
    "createdDate": "2024-05-15T10:03:30.000+0000",
    "startDate": "2024-05-15T10:04:02.000+0000",
    "lastModifiedDate": "2024-05-15T10:04:02.000+0000",
    "completedDate": "2024-05-15T10:04:02.000+0000",
    "errorStatusCode": null,
    "errorMessage": null,
    "stateDetail": null,
    "createdBy": "005SB0000031rrl",
    "createdByName": "Admin User",
    "canceledBy": null,
    "canceledByName": null,
    "runTestsEnabled": false,
    "runTestResult": null,
    "done": true
  }
}
```

Configure User Access to the Flow

Make sure that caseworkers have the appropriate permissions to run the flow.

1. From Setup, in the Quick Find box, enter *Process Automation*, and then select **Flows**.

2. From the Show Actions dropdown for the Authorize Referral for Provider flow, select **Edit Access**.

3. Select **Override default behavior and restrict access to enabled profiles or permission sets**.

4. Add the Standard User and System Administrator profiles to the Enabled Profiles section.

5. Save your changes.

6. From Setup, in the Quick Find box, enter *Profiles*, and then select **Profiles**.

7. For the Standard User profile, click **Edit**, under General User Permissions, select **Run Flows**, and then save your changes.

8. Similarly, assign permission to run flows for the System Administrator profile.

📝 Note: The Authorize Referral for Provider flow uses these permission sets: Provider Management Access, Provider Management For Partner.

If you assigned a cloned instance of any of these permission sets to users, make sure that you update the Authorize Referral for Provider flow to use the cloned permission set before using the flow.

USER PERMISSIONS

To edit profiles:
- Manage Profiles and Permission Sets

Configure a Custom Action to Authorize Referrals from Referral Record Pages

Create a quick action that caseworkers can use in the org to easily authorize a referral for a provider. The quick action uses the Salesforce flow. Create an additional page layout for the provider site. Configure the quick action to be available only to the caseworkers and administrators, and not to the providers.

1. Create a quick action.

    a. From the Object Management settings for **Referral**, go to **Button, Links, and Actions**.

    b. Click **New Action**.

    c. Select **Flow** as the action type.
        The Authorize Referral for Provider flow is automatically populated in Flow.

    d. Enter **Authorize Referral** as the label, and then press Tab to automatically populate the API Name.

    e. Enter a description.

    f. Save your changes.

2. Create a page layout for the provider site.

    a. Select **Page Layouts**, and click **New**.

    b. Select **Referral Layout** as the existing page layout.

    c. Enter a name for the page layout.
        For example, Referral Layout for Site.

    d. Save your changes.

3. Add the quick action to the Referral layout.

    a. To add the action to the referral record page, select **Page Layouts**, and then select **Referral Layout**.

    b. In the palette, select **Mobile & Lightning Actions**, and then drag **Authorize Referral** to the Salesforce Mobile and Lightning Experience Actions section as the first action.

        If the Salesforce Mobile and Lightning Experience Actions section isn't editable, first select **override the predefined actions**, and then drag the **Authorize Referral** custom action to it.

    c. Save your changes.

4. Assign the page layouts to the profiles.

    a. Click **Page Layout Assignment**, and then click **Edit Assignment**.

    b. For the partner community user profile, say Provider Site User, select the **Referral Layout for Site** page layout.
        For the Standard User and System Administrator profiles, make sure that the Referral Layout is selected.

SEE ALSO:

REST API Developer Guide: Quick Start

Authorize Referrals for Providers in Public Sector Solutions

Review referral authorization requests and authorize a provider to serve a constituent.

1. From the App Launcher, find and select **Referrals**, and then select the referral that you want to authorize.

2. Click **Authorize Referral**.

    If you don't see the Authorize Referral button, work with your Salesforce admin to make sure that they have configured referral authorization. See Configure Referral Authorization on page 305.

    Success and failure messages of a referral's authorization are available on Chatter. Make sure that the Salesforce admin has configured Chatter feeds. See Enable Chatter Feeds for Providers on page 304.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To authorize referrals:
*   Case Referral permission set

    AND

    Program and Benefit Management Access permission set

    AND

    Provider Management Access permission set

Approve Schedules from Providers in Public Sector Solutions

Review and approve benefit schedules from providers to create benefit sessions for every instance of a delivered service.

1. From the App Launcher, find and select **Benefit Schedules**, and then select the schedule that you want to approve.

2. Click **Approve & Create Sessions**.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To approve schedules:
*   Program and Benefit Management Access permission set

    AND

    Provider Management Access permission set

Considerations for Caseworker and Provider Collaboration

Review these considerations to help you collaborate effectively with providers to deliver services to constituents in Public Sector Solutions.

- Don't manually reassign a referral that has been authorized for a provider. The related benefit assignment and account, which are shared with the originally authorized provider, aren't updated with the new provider's related records.

  To change an authorized provider for a constituent, start a new provider referral guided flow for the new provider. See Provider Referral Guided Flow. Alternatively, manually create another benefit assignment and share it with the new provider.

- Don't share the benefit assignment in Referral Outbound Source in a referral with multiple providers. If you do, the related benefit disbursements become visible to those providers.

- Only users with the Provider Management Access permission set have read-write access to the Approval Status field in a benefit schedule, so only caseworkers or internal users can approve a benefit schedule. Other users have read-only permission to Approval Status.

- Before authorizing a referral, make sure that you identify a primary representative for every provider, and specify their contact or healthcare provider lookup in the Provider field of the referral. If you specify a healthcare provider, make sure that the Practitioner field on the provider contains a contact who is enabled as a partner user.

- Ask your admin to configure in-app notifications for providers. For example, ask your admin to create a flow that sends notifications when their referral requests are authorized, or when their benefit schedules are approved.

SEE ALSO:

Provider Service Delivery Workflow

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Justice and Investigative Case Management in Public Sector Solutions

Manage all aspects of case proceedings, including civil and criminal proceedings, appeals, mediation, and arbitration, and effectively collaborate with stakeholders to track proceedings from complaint filing to investigations to results and outcomes.

Public Sector Solutions offers a suite of objects and functionality that provide a framework for efficient, digital-first justice and investigative case management. Intake officers, caseworkers, court clerks, and other Public Sector Solutions users can:

- Capture complaint details
- Screen and assess complaints
- Document and investigate cases
- Record participants and their roles, and record violations
- Collect information regarding evidence and track the chain of custody
- Track the details of proceedings
- Capture service requests and motions related to case proceedings, such as a request for an extension
- Document and track the court's rulings by using enforcement actions, case episodes, and care plans

Here are some examples.

EDITIONS
Available in: Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

Judicial Cases

A constituent or their attorney files a civil complaint with a court. For example, an apartment owner files a complaint against a tenant for breaching the rental agreement contract by not paying rent and refusing to vacate the apartment. The complaint describes the constituent's grievance, identifies participants, including the tenant who's being sued, and includes supporting evidence, such as the rental agreement and relevant bank statements.

A court clerk creates a case, reviews it, and uses assessments to evaluate its completeness. The clerk records the case participants and assigns them a role, such as judge, attorney, plaintiff, or defendant. The clerk also documents relevant laws, regulatory codes, details, qualified evidence, and potential infractions.

When the proceeding concludes, the court's ruling is recorded as a case proceeding result. The court clerk uses case episodes to track and manage actions for the proceeding, such as detention, probation, placement, removal, or suspension. If necessary, the court clerk creates a care plan to assist participants in accordance with the judge's ruling.

Other examples of judicial or civil cases include property and housing disputes, family law disputes, consumer debt cases, and corporate negligence.

Investigative Cases

A constituent files a complaint. For example, they file a fraud complaint against a company for non-receipt of assured benefits. An incident manager reviews the complaint and uses assessments to evaluate the severity of the allegations.

If the initial examination reveals potential wrongdoing, an investigative officer conducts a formal inquiry that includes collecting evidence, tracking the chain of custody, visiting the site, and interviewing participants. The investigator may also request additional information from other agencies in other jurisdictions.

Agencies can resolve an investigative case:

- Internally, outside of the court system. For example, the agency addresses the issue by creating an enforcement action or a care plan for one or more participants.
- Through a court case proceeding. The agency tracks the case and the results of the court hearing by using case proceeding information.
- By referring the case to another agency.
- Without taking action.

Other examples of investigative cases include permit non-compliance, misuse of grant funds, illegal market practices, illegal issuance of medical prescriptions, and employee behavioral complaints.

Justice and Investigative Case Management Prerequisites

Before you set up justice and investigative case management in Public Sector Solutions, complete the prerequisites.

Complaint Intake for Justice and Investigative Cases

Enable constituents and their legal representatives to easily file complaints for justice and investigative cases from your benefit assistance portal.

Capture and Fulfill a Service Request for a Case Proceeding

Enable constituents and their legal representatives to request case proceeding deferrals by using a guided flow on the benefit assistance portal, and configure an approval process for caseworkers to easily review the requests.

Create a Case Proceeding

Create case proceeding records to track the details of criminal or civil legal proceedings in Public Sector Solutions.

Create a Case Proceeding Result

Record and track decisions and rulings of legal proceedings as enforcement actions, episodes, or care plans in Public Sector Solutions.

Record and Track Events Using Case Episodes

Create case episodes to represent events related to legal proceedings, such as remanding a defendant to detention, suspending a driver's license, or temporarily placing a child in foster care for the duration of legal proceedings.

Create a Custody Item

Create a custody item to track physical or digital evidence in a case or case proceeding.

Create a Custody Item Relation

Use the Custody Item Relation junction object to connect a custody item to one or more cases or case proceedings.

Create a Custody Item Regulatory Code Violation

Use the Custody Item Regulatory Code Violation object to connect a custody item to a regulatory code violation.

Create a Custody Chain Entry

Create a custody chain entry to track the possession of a custody item.

Justice and Investigative Case Management Prerequisites

Before you set up justice and investigative case management in Public Sector Solutions, complete the prerequisites.

Enable Case Proceedings

Turn on case proceedings settings so that you can manage and track legal proceedings and their related investigations.

1. From Setup, in the Quick Find box, enter `Program and Case Management`, and then select **Case Proceedings Settings**.

2. Turn on Create and manage case proceedings.

3. Select **Program and Benefit Management Settings**. and make sure that Create and manage your programs, benefits, and goals is enabled.

4. Select **Care Plan Settings**, and make sure that Create and manage care plans is enabled.

Enable Evidence Management

Turn on evidence management so that you can create and manage custody items.

1. From Setup, in the Quick Find box, enter `Evidence`, and then select **Evidence Management Settings**.

2. Turn on Evidence Management.

Add Case Proceedings Related Lists to Cases

Make the Case Proceedings and Case Episodes related lists available on the case page layout.

1. From the object management settings for cases, select **Case Page Layouts**.

2. Click **Case Layout**.

3. In the palette, click **Related Lists**.

4. Drag **Case Proceedings** and **Case Episodes** to the Related Lists area of the layout.

5. Save your changes.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To enable case proceedings and evidence management:
- Customize Application

To edit page layouts:
- Customize Application

Complaint Intake for Justice and Investigative Cases

Enable constituents and their legal representatives to easily file complaints for justice and investigative cases from your benefit assistance portal.

When you enable case proceedings in Public Sector Solutions, an easy-to-use complaint form and other justice and investigative case management–related pages are automatically available on your benefit assistance portal.

The complaint form uses the CaseProceeding/ComplaintIntake OmniScript, which in turn uses a Discovery Framework sample template to capture complaint information. The Discovery Framework sample template, Public Sector Justice and Investigative Case Management, includes some assessment questions and these OmniScripts:

CaseProceeding/RCVDetails

Captures the details of the regulatory codes that are relevant to the complaint.

CaseProceeding/ParticipantDetails

Captures the details of the participant, such as role, first name, and last name.

CaseProceeding/Allegations

Captures the details of the allegation, such as date, location, and description.

When a constituent submits a complaint on the portal, Public Sector Solutions automatically creates these records:

- Public complaint, which stores the complaint information such as incident and reporter details.
- Assessment question responses, which store regulatory codes, allegations, and participant details from the complaint.
- Custody item relations, which store the digital evidence files for the complaint.

[Prerequisites for Justice and Investigative Case Management Complaint Intake](#)

Before you set up complaint intake for justice and investigative cases, complete the prerequisites.

[Set Up Complaint Intake for Justice and Investigative Case Management](#)

Deploy the Discovery Framework sample template and activate the Complaint Intake and other required OmniScripts.

Prerequisites for Justice and Investigative Case Management Complaint Intake

Before you set up complaint intake for justice and investigative cases, complete the prerequisites.

1. Enable case proceedings and evidence management. See Justice and Investigative Case Management Prerequisites.

2. Assign permissions for complaint intake.

    a. Assign the Case Proceedings permission set to admins who configure complaint intake for justice and investigative cases.

    b. Assign these permission sets to caseworkers and other users who work with complaints for justice and investigative cases.

      - Case Proceedings
      - Complaints Management Access
      - Evidence Management
      - Interaction Summary
      - OmniScript User

      See View and Assign Permission Sets in Public Sector Solutions.

3. Configure regulatory authorizations and create regulatory codes.

4. Create an Experience Cloud site based on the Benefit Assistance template. See Benefit Assistance Site Prerequisites and Build a Benefit Assistance Experience Cloud Site in Public Sector Solutions.

5. On your Customer Community profile, for the Case and Public Complaint objects, enable read, create, and edit access. See Edit Object Permissions in Profiles.

6. Configure these sharing settings so that constituents can use the case proceedings OmniScripts on your benefit assistance site. See Sharing Settings.

Option	Description
Object	**Default External Access**
Assessment	Public Read/Write
Assessment Question	Public Read Only
Assessment Question Response	Public Read/Write
Omni Data Transformation	Public Read Only
Omni Process	Public Read Only
Omni UI Card	Public Read Only
Regulatory Authority	Public Read Only
Regulatory Authorization Type	Public Read Only

After completing the prerequisites, Set Up Complaint Intake for Justice and Investigative Case Management.

Set Up Complaint Intake for Justice and Investigative Case Management

Deploy the Discovery Framework sample template and activate the Complaint Intake and other required OmniScripts.

Deploy the Discovery Framework Sample Template for Justice and Investigative Cases

Enable Discovery Framework and deploy the Public Sector Justice and Investigative Case Management template to make the required OmniScripts and assessment questions available on your benefit assistance portal.

1. From Setup, in the Quick Find box, enter `Discovery Framework`, and then, under Discovery Framework, select **General Settings**.

2. Make sure that Discovery Framework is enabled.

3. Turn on Enhanced Questions, Import or Export, and Sample Templates.

Next, deploy the Discovery Framework sample template for justice and investigative cases.

4. From Setup, in the Quick Find box, enter `Discovery Framework Sample Templates`, and then select **Discovery Framework Sample Templates**.

5. Optional: To see the assessment questions and OmniScripts that are included in the template, click **View Details**.

6. For the Public Sector Justice and Investigative Case Management template, click **Deploy**.

7. Optional: To check the progress, go to the Deployment Status Setup page.

Activate the Complaint Intake OmniScripts

Activate the OmniScript flows that capture complaints related to justice and investigative cases.

1. From the App Launcher, find and select **OmniScripts**.

2. Expand **CaseProceeding/ComplaintIntake** and then select **Complaint Intake (Version 1)**.

3. Click **New Version** and then click **Activate Version**.

4. From the OmniScripts page, activate the available version, Version 1, of these OmniScripts.

- CaseProceeding/Allegations
- CaseProceeding/ParticipantDetails
- CaseProceeding/RCVDetails

SEE ALSO:

[Discovery Framework and Assessments]

Set Up the Add Case Proceeding Participants Quick Action

Configure a quick action that caseworkers can use to easily find and select case participants, specify their role, and add them to a case proceeding. The quick action uses the Add Participants OmniScript to find existing case participants in your org.

1. From Setup, in Object Manager, select **Case Proceeding**.

2. Click **Button, Links, and Actions**, and then click **New Button or Link**.

3. Specify these details.

   a. For Label, enter **Add Participants** and then press Tab to automatically populate the API Name.

   b. If desired, enter a description.

   c. For Display Type, select **Detail Page Button**.

   d. For Content Source, select **URL**.

   e. For Behavior, select **Display in new window**.

   f. In the field formula box, enter the URL for the Add Participants (Version 2) OmniScript followed by an ampersand and the contextId for the target object, Case Proceeding.

      To get your URL, in OmniStudio, go to the Add Participants OmniScript and, in the highlights panel, select **How To Launch**. Look for the Lightning URL. The formula looks something like this: `[Lightning-URL]&c__ContextId={!CaseProceeding.Id}`.

4. Save your changes.

5. To add the button to the case proceeding record page, select **Page Layouts**, and then select **Case Proceeding Layout**.

6. In the palette, select **Buttons**, and then drag **Add Participants** to Custom Buttons in the Case Proceeding Detail section.

7. Save your changes.

Capture and Fulfill a Service Request for a Case Proceeding

To create request forms by using Service Process Studio:	Case Proceedings AND Public Sector Access
To set field-level security and to edit profiles:	Manage Profiles and Permission Sets AND Customize Application
To customize OmniScripts:	OmniStudio Admin
To create an Action Launcher deployment:	Composable Case Management Community Access OR Public Sector Access
To give Experience Cloud site users access to case management:	Composable Case Management Community Access
To open, edit, and run flows in Flow Builder:	Manage Flow
To create approval processes:	Customize Application

Enable constituents and their legal representatives to request case proceeding deferrals by using a guided flow on the benefit assistance portal, and configure an approval process for caseworkers to easily review the requests.

Reduce administrative overhead and provide an easy way to request deferrals on case proceedings by using Service Process Studio, an OmniScript request form, a flow, and an approval process. Public Sector Solutions provides a service process request and an OmniScript form that constituents use to request a case proceeding deferral. The Defer a Case Proceeding Flow replaces the dates on a case proceeding record with the extended dates from a service request.

Configure the service process, customize the OmniScript request form, and then activate the flow. Next, configure an Action Launcher deployment to add a button to your benefit assistance portal that calls the OmniScript request form. Finally, configure an approval process to review the submitted requests.

Update Field-Level Security on the Case Source Field

To prevent errors from occurring when you set up the request form, make the Case Source field on the Case object visible to all profiles.

1. From the object management settings for cases, go to **Fields & Relationships**.

2. Select **Case Source**.

3. Click **Set Field-Level Security**.

4. Select **Visible** for all of the profiles in the table.

5. Save your changes.

Customize and Activate the Case Proceeding Deferral OmniScript

Prepare the Case Proceeding Deferral OmniScript that constituents and their legal representatives use on the benefit assistance portal to request an extension in a case proceeding.

The case deferral request form uses the Case Proceeding Deferral OmniScript, which captures the extended start and end dates for a case proceeding. Before you can use it in the portal, create a new version and customize the application reference ID URL on the Confirmation step of the OmniScript. Then, customize the OmniScript further as required, and activate it.

1. In the OmniStudio app, from the app navigation menu, select **OmniScripts**.

2. Expand **CaseProceeding/ServiceRequest**, and then select **Case Proceeding Deferral (Version 1)**.

3. Click **New Version**.

4. Customize the link on the Confirmation page to work on your site.

    a. Select the **Confirmation** step.

    b. In the step, select the text block that indicates the service request was submitted successfully. Then, in the Text Block Properties, click the Text box.

    c. In the rich text editor, select the link text for the application reference ID, and then click 🔗.

    d. Replace the URL with `<sitename>/s/detail/Case/%apiResponse:apiResponse:caseId%`, where `<sitename>` is the name of your Experience Cloud site.

    e. Save your changes.

5. Optional: Edit the OmniScript as needed for your organization.

6. When you're ready, click **Activate Version**.

Create the Request Form from the Case Proceeding Deferral Template

Configure the Case Proceeding Deferral service process that captures the extended dates that a constituent requests. Service Process Studio then creates a case record with the request details.

1. From Setup, in the Quick Find box, enter *OmniStudio*, and then select **OmniStudio Settings**.

2. Turn on **OmniStudio Metadata**.

3. Turn off **Managed Package Runtime**.

4. In the Quick Find box, enter *Service Process*, and then select **Service Process Studio**.

5. Click **New Service Process**.

6. Select **Create from Template**, and then select **Case Proceeding Deferral**.

7. Click **Save & Launch**.

8. Optional: Change the process name.

9. For API Name, enter *CaseProceedingExtension*.

10. Optional: Enter short and long descriptions.

11. Save your changes.

12. Click **Activate**.

Prepare the Case Proceeding Deferral Flow

Clone and activate the Defer a Case Proceeding flow, which updates the start and end dates in a case proceeding record with the extended dates requested by the constituent.

1. From Setup, in the Quick Find box, enter *Flows*, and then select **Flows**.

2. Select **Defer a Case Proceeding**.

3. Click **Save As**.

4. Enter a flow label. For example, enter *Defer Case Proceeding Flow*.

5. For Flow API Name, enter *defer_caseproceeding_flow*.

6. Save your changes.

7. Optional: Customize the flow as needed.

8. Activate the flow.

Create a Request Deferral Button on Your Benefit Assistance Portal

Enable constituents to request a deferral by clicking a button and completing a guided flow. Configure an Action Launcher deployment that uses the Case Proceeding Deferral OmniScript, and then add an Action Launcher component that calls the deployment to the case proceedings detail page on your benefit assistance portal.

1. Create an Action Launcher deployment that uses the Case Proceeding Deferral OmniScript.

    a. From Setup, in the Quick Find box, enter *Action Launcher*, and then select **Action Launcher**.

    b. Click **New Deployment**, and then click **Next**.

    c. Enter a label, and then press Tab to automatically populate the API name. For example, enter *Request Deferral*.

    d. For Guidance to Show, select **OmniScripts**.

    e. Click **Next**.

    f. Add **Case Proceeding** to the Selected Objects list, and then click **Next**.

    g. Make sure that only the **Request Deferral** action is selected, and then click **Next**.

    h. To select an action for the deployment, under Available Actions, click ┼ for Request Deferral.

    i. Save your changes.

2. Configure the Action Launcher component on an Experience Cloud site created from the Benefit Assistance template.

    a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.

    b. For the Experience Cloud site based on the Benefit Assistance template, click **Builder**.

    c. From the Pages menu, select **CaseProceeding Detail**.

    d. From the Page Variations menu, select **Record Detail**.

    e. Drag the **Action Launcher** component to the page canvas.

    f. In Action Launcher properties, for Action Launcher Deployment, select **Request Deferral**.

    g. Preview your changes, and publish the page when you're ready.

Set Up an Approval Process for Case Proceeding Service Requests

Configure an approval process for caseworkers to use to approve or deny a constituent's request for a case proceeding deferral.

Upon submission, the service process creates a case record for the case proceeding deferral request, so base the approval process on the Case object. Start by confirming or customizing the Status picklist values for cases.

1. From the object management settings for cases, go to **Fields & Relationships**.

2. Click **Status**.

3. Review the picklist values and, if necessary, customize them for your needs.

4. Set up the approval process.

    a. In Setup, in the Quick Find box, enter `Approval Processes`, and then select **Approval Processes**.

    b. For Manage Approval Processes For, select **Case**.

    c. Click **Create New Approval Process** and then select **Use Jump Start Wizard**.

    d. Enter a name for the approval process, and then press Tab to automatically populate the unique API name. For example, enter `Case Deferral Request Approval Process`.

    e. Specify the approval process criteria and select the approver.

    f. Save your changes and activate the process.

SEE ALSO:

[Set Up an Approval Process](#)
[Service Process Studio](#)
[Add or Edit Picklist Values](#)

Create a Case Proceeding

Create case proceeding records to track the details of criminal or civil legal proceedings in Public Sector Solutions.

Before you create a case proceeding, make sure that you have a public complaint and a case for it. See:

- Document a Constituent Concern in a Public Complaint Record
- Document a Constituent Concern by Using a Public Complaint Guided Intake
- Create a Case Related to a Public Complaint

To create a case proceeding:

1. From the App Launcher, find and select **Cases**.

2. Select a case.

3. On the Case Proceedings related list, click **New**.

4. Enter a name. For example, enter `Child Welfare and Protection`.

5. Select a case filing date and time.

6. Select a type. For example, select **Court Action**.

7. Optionally, add a description and specify a sub type, start and end date and time, and status.

8. Save your work.

Add Participants

Add the parties related to a case proceeding and assign roles to them.

Add Case Participants to a Case Proceeding by Using a Quick Action

Use a quick action to find existing case participants and add them to a proceeding.

1. From the App Launcher, find and select **Case Proceedings**.

2. Select a case proceedings record.

3. From the action menu, select **Add Participants**.

4. Select the participants to add, and select a role and status for each person.

5. Click **Next**.

Add Participants to a Case Proceeding One at a Time

Add individual participants to a case proceeding.

1. From the App Launcher, find and select **Case Proceedings**.

2. Select a case proceedings record.

3. On the Case Proceeding Participants related list, click **New**.

4. For Participant, find and select an account or contact.

5. For Status, select **Active**.

6. Select a role for the participant.

7. Optionally, select a participation type.

8. Save your work.

Add an Infraction

Record offenses or violations related to case proceedings.

1. From the App Launcher, find and select **Case Proceedings**.

2. Select a case proceedings record.

3. On the Case Proceeding Infractions related list, click **New**.

4. For Infraction, find and select a regulatory code violation.

5. Optionally, enter an infraction reporting reason, select an infraction reporting type, and select a status.

6. Save your work.

Create a Case Proceeding Result

Record and track decisions and rulings of legal proceedings as enforcement actions, episodes, or care plans in Public Sector Solutions.

1. From the App Launcher, find and select **Case Proceedings**.

2. Select a case proceeding.

3. On the Case Proceeding Results related list, click **New**.

4. Enter a descriptive name. For example, enter `Enforcement Action - Parent`.

5. Select a Type. For example, select **Enforcement Action**.

6. Optionally, add a description and select a status.

7. Save your work.

Record and Track Events Using Case Episodes

Create case episodes to represent events related to legal proceedings, such as remanding a defendant to detention, suspending a driver's license, or temporarily placing a child in foster care for the duration of legal proceedings.

1. From the App Launcher, find and select **Cases**.

2. Select a case.

3. On the Case Episodes related list, click **New**.

4. Enter a name. For example, enter *Short-Term Foster Care*.

5. For Subject, select the account or contact for the appropriate case participant. For example, select the child's person account.

6. Select an Episode Type. For example, select **Placement**.

7. Specify a start date and time.

8. Optionally, add a description and specify an episode reason, episode sub type, end date and time, and status.

9. Save your work.

Create a Custody Item

Create a custody item to track physical or digital evidence in a case or case proceeding.

1. From the App Launcher, find and select **Custody Items**.

2. Click **New**.

3. Specify these details.

    a. Enter a descriptive name. For example, enter *DNA sample*.

    b. Enter a collection date.

    c. Enter an external identifier. For example, enter a code that aligns with an external record keeping system.

    d. Select a category. For example, select **Physical**.

    e. Select a status. For example, select **New**.

    f. Optionally, add a description.

4. Save your work.

On the custody item record, you can add attachments, such as photos, or create an interaction summary to record correspondence regarding the evidence.

Create a Custody Item Relation

Use the Custody Item Relation junction object to connect a custody item to one or more cases or case proceedings.

Before you create a custody item relation, make sure that you have a case or case proceeding and a custody item. See Create a Case Proceeding and Create a Custody Item.

1. From the App Launcher, find and select **Custody Item Relations**.

2. Click **New**.

3. Specify these details.

   a. For Context, select **Case** or **Case Proceeding**, and then search for and select a case or case proceeding record.

   b. Search for and select a custody item.

   c. Select a status. For example, select **Qualified**.

   d. Optionally, add a description.

4. Save your work.

Create a Custody Item Regulatory Code Violation

Use the Custody Item Regulatory Code Violation object to connect a custody item to a regulatory code violation.

Before you create a custody item regulatory code violation, make sure that you have a custody item. See Create a Custody Item.

1. From the App Launcher, find and select **Custody Item Regulatory Code Violations**.

2. Click **New**.

3. Specify these details.

   a. Search for and select a custody item record.

   b. Optionally, enter a description.

   c. Select a status. For example, select **New**.

   d. Search for and select a regulatory code violation.

4. Save your work.

Create a Custody Chain Entry

Create a custody chain entry to track the possession of a custody item.

1. From the App Launcher, find and select **Custody Chain Entries**.

2. Click **New**.

3. Specify these details.

    a. For Custodian, select **Account**, **Contact**, or **User**. Then, search for and select a record.

    b. Search for and select a custody item.

    c. Optionally, search for and select a reference record.

    d. Select a status. For example, select **New**.

    e. To track the duration of custody, enter start and end dates.

    f. Optionally, select a status category. For example, select **New**.

    g. For Item Custody Site, select **Address** or **Location**. Then, search for and select a record.

    h. Select an item verification type.

    i. Optionally, enter a description.

4. Save your work.

Experience Cloud Sites for Public Sector Solutions

Create Experience Cloud sites where constituents can apply for licenses, permits, benefits, and programs; engage with government services; and gain insight into processes.

Public Sector Solutions provides these Experience Cloud site templates.

Benefit Assistance

Includes pages that allow constituents to apply for benefits, view and file complaints, access care plans and tasks, and report a change of circumstances. The Benefit Assistance template is also used for complaint intake for justice and investigative case management.

See Build a Benefit Assistance Experience Cloud Site in Public Sector Solutions.

Emergency Response Site

Allows constituents to request emergency assistance and get information during times of crisis. Businesses can also request critical supplies to help ensure the health and safety of employees and customers.

See Set Up Emergency Program Management Sites.

Grantmaking

Creates a site where grantmakers can post and manage funding opportunities and grantseekers can apply for and report back on grants. Allows external reviewers to assess grant applications.

See Set Up a Grantmaking Experience Cloud Site.

Licenses And Permits

Includes pages that allow constituents to assess their license or permit needs, apply for licenses and permits, renew licenses and permits, search for license or permit holders, file and view complaints, and view their inspection history.

See Build a License and Permit Experience Cloud Site in Public Sector Solutions.

Service Provider Portal

Includes pages that allow providers to process referral requests, track service delivery, manage their information, and collaborate with agencies and constituents.

See Build a Provider Experience Cloud Site in Public Sector Solutions on page 300.

CRM Analytics for Public Sector Solutions

Use CRM Analytics to gain intelligent insights that help licensing and permitting agencies improve departmental productivity and constituent satisfaction, and to gain insights into caseloads, case trends, community impact, and caseworker efficiency.

Public Sector Solutions provides these CRM Analytics apps.

Analytics for Licenses, Permits, and Inspections

The Analytics for Licenses, Permits, and Inspections app to gain intelligent insights that help your agency improve departmental productivity and constituent satisfaction. It includes these dashboards.

- Compliance Insights
- Executive Summary
- Department Summary
- Account Insights

Caseworker Productivity App

The Caseworker Productivity App helps you monitor case worker performance and assess the impact of your benefit programs in the community. It includes these dashboards.

Workload Management Analytics

See caseloads, case trends and distribution, performance, and community impact. Use the analytics to make staffing decisions, improve the team's productivity and efficiency, and meet service-level agreements (SLAs). Prioritize cases based on community impact and allocate resources to assistance programs based on the amount or quantity of benefits disbursed.

Case Analytics

See how long it takes to process cases to help ensure that you meet SLA requirements.

Set Up Analytics for Public Sector Solutions

Deploy analytics apps by assigning permissions, enabling CRM Analytics, and creating and sharing apps with users.

Use License, Permit, and Inspections Analytics in Public Sector Solutions

Gain insights that help you effectively manage agencies and departments and improve constituent satisfaction.

Use Workload Management Analytics in Public Sector Solutions

Gain insights that help you prioritize and distribute cases to improve efficiency, productivity, and community impact.

Use Case Analytics in Public Sector Solutions

Gain insights into how long it takes to process a case and help ensure that you meet service-level agreement requirements.

Set Up Analytics for Public Sector Solutions

Deploy analytics apps by assigning permissions, enabling CRM Analytics, and creating and sharing apps with users.

Complete these tasks to set up the analytics in Public Sector Solutions.

Assign Admin Permissions for Analytics in Public Sector Solutions

Allow admins to create and manage analytics apps.

Assign User Permissions for Analytics in Public Sector Solutions

Allow users to view analytics apps.

Enable Analytics in Public Sector Solutions

Before you create or install an analytics app, enable CRM Analytics in your org.

Data Requirements for License, Permit, and Inspections Analytics

Understand the data that license, permit, and inspections analytics use in Public Sector Solutions.

Data Requirements for Caseworker Productivity Analytics

Understand the data that caseworker productivity analytics use in your Public Sector Solutions org.

Set Field-Level Security for License, Permit, and Inspections Analytics

Give the Analytics Cloud Integration User profile access to the fields that license, permit, and inspections analytics use.

Create and Share the License, Permit, and Inspections Analytics App

Create an app from the Analytics for Licenses, Permits, and Inspections template, and share the app with your Public Sector Solutions users.

Install the Caseworker Productivity Analytics App by Using Guided Setup

Use Guided Setup to install the caseworker productivity analytics app and automatically add the Workload Management Analytics dashboard to the Public Sector: Benefit Management app.

Add License, Permit, and Inspections Analytics to Lightning Pages

Give users visibility into license, permit, and inspections analytics by adding the analytic app's dashboards to Lightning pages in Public Sector Solutions.

Add the Case Analytics Dashboard to the Case Record Page

Give caseworkers insight into the time taken to process a case by adding the Case Analytics dashboard to the case record page.

Keep Analytics Data Up to Date in Public Sector Solutions

Keep your analytics current by scheduling the app to refresh on a daily basis, or by scheduling a regular data sync.

Understand Access Levels for Analytics in Public Sector Solutions

See the Analytics Studio capabilities and features that the Analytics for Licenses, Permits, and Inspections app supports.

Assign Admin Permissions for Analytics in Public Sector Solutions

Allow admins to create and manage analytics apps.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.

2. Click the name of a user with the System Administrator profile.

3. Click **Permission Set Assignments**, and then click **Edit Assignments**.

4. In the Available Permission Sets list, select **CRM Analytics Plus Admin** and **TCRM for Public Sector Admin**.

5. Click **Add**, and then save your changes.

6. Repeat these steps for other admins who create and manage analytics apps in Public Sector Solutions.

Assign User Permissions for Analytics in Public Sector Solutions

Allow users to view analytics apps.

1. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.

2. Click the name of a user who needs access to the Analytics for Licenses, Permits, and Inspections app.

3. Click **Permission Set Assignments**, and then click **Edit Assignments**.

4. In the Available Permission Sets list, select **CRM Analytics Plus User** and **TCRM for Public Sector User**.

5. Click **Add**, and then save your changes.

6. Repeat these steps for other users who need to view analytics apps in Public Sector Solutions.

Enable Analytics in Public Sector Solutions

Before you create or install an analytics app, enable CRM Analytics in your org.

1. From Setup, in the Quick Find box, enter `Feature Settings` and then, under Analytics, select **Getting Started**.
   If you see the Launch CRM Analytics button, then Analytics Studio is already enabled in your org. Otherwise, turn it on.
2. Click **Enable CRM Analytics**.

Data Requirements for License, Permit, and Inspections Analytics

Understand the data that license, permit, and inspections analytics use in Public Sector Solutions.

Your org must have at least one record in any one of these objects.

- Business License Application
- Individual Application
- Public Complaint
- Regulatory Transaction Fee
- Visit

If your org doesn't have at least one record in at least one of these objects, then you'll get an error when you try to create the Analytics for Licensing, Permits, and Inspections app. Follow the instructions in the message to add the required data, and then try to create the app again.

Data Requirements for Caseworker Productivity Analytics

Understand the data that caseworker productivity analytics use in your Public Sector Solutions org.

The Workload Management Analytics and Case Analytics dashboards show metrics, charts, and widgets based on two datasets, PSS Benefit Management and PSS Workload Management, and two recipes, PSS Trending Recipe and PSS Workload & Benefits Management Recipe.

The datasets and recipes use information stored in these objects.

- Account
- Benefit
- Benefit Assignment
- Benefit Disbursement
- Care Plan
- Case

- Goal Assignment
- Goal Definition
- Individual Application
- Party Relationship Group
- Program
- Program Enrollment
- Public Complaint
- Referral

Make sure that the objects have records to populate the metrics, charts, and widgets in the dashboards.

Set Field-Level Security for License, Permit, and Inspections Analytics

Give the Analytics Cloud Integration User profile access to the fields that license, permit, and inspections analytics use.

1. From Setup, in Object Manager, select an object that's used in the Analytics for Licenses, Permits, and Inspections app. For example, select **Business License Application**.
2. Click **Fields & Relationships**.
3. Click the field name and then click **Set Field-Level Security**.
4. For the Analytics Cloud Integration User profile, select **Visible**, and then save your changes.
5. Repeat these steps for:

    - Account
    - Business License
    - Business License Application
    - Business Type
    - Case
    - Individual Application
    - Inspection Type
    - Public Complaint
    - Regulatory Authority
    - Regulatory Authorization Type
    - Regulatory Code
    - Regulatory Code Violation
    - Regulatory Transaction Fee
    - Violation Enforcement Action
    - Violation Type
    - Visit
    - User

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

USER PERMISSIONS

To set field-level security for the Analytics for Licenses, Permits, and Inspections app:
- Customize Application

SEE ALSO:

Field-Level Security

Create and Share the License, Permit, and Inspections Analytics App

Create an app from the Analytics for Licenses, Permits, and Inspections template, and share the app with your Public Sector Solutions users.

1. In Analytics Studio, click **Create** and then select **App**.

2. Select the **Analytics for Licenses, Permits, and Inspections** template, then click **Continue**.

3. Review the preview page, then click **Continue**.

4. To create an app or use settings from an existing app, make a selection and then click **Continue**. Analytics Studio runs a compatibility check of the data in your Salesforce org.

5. If the compatibility check uncovers any issues, follow the instructions in the error message to resolve them. Then, try to create the app again. When the compatibility check completes successfully, click **Looks good, next**.

6. Name your app, then click **Create**.

    The process takes a few minutes. When it completes, refresh the page. If you receive an error saying the Analytics Integration User doesn't have access to selected fields, then update the field-level security for the app.

    When Analytics Studio finishes creating the app, share it with your users. You can share it only with users who are assigned the admin or user permission sets for Analytics for Licenses, Permits, and Inspections.

7. In your app in Analytics Studio, click ⌄ .

8. On the Give Access tab of the share window, under Invite others, add the names of users in your org.

9. For every user, select their level of access: Viewer, Editor, or Manager.

10. Save your changes.

Install the Caseworker Productivity Analytics App by Using Guided Setup

Use Guided Setup to install the caseworker productivity analytics app and automatically add the Workload Management Analytics dashboard to the Public Sector: Benefit Management app.

> 📝 **Note:** You can also use Guided Setup to assign analytics permissions to users, to enable CRM Analytics, and to update the caseworker productivity analytics app.

1. From Setup, in the Quick Find box, enter `Caseworker`, and then select **Set Up Caseworker Productivity Analytics**.

2. Expand **Install the App**.

3. To install the Workload Management Analytics and Case Analytics dashboards, turn on **Install Caseworker Productivity App**.

   Auto-installation of the app begins.

4. To monitor installation progress, in the Quick Find box, enter `Auto-Installed Apps`, and then select **Auto-Installed Apps**.

5. Click **Requests**.

   When installation completes, confirm that the Workload Management Analytics dashboard is on the homepage of the Public Sector: Benefit Management app.

6. From the App Launcher, find and select **Public Sector: Benefit Management**.

To make the Case Analytics dashboard available to users, add it to the case record page.

SEE ALSO:

Monitor Auto-Installed Apps

Add the Case Analytics Dashboard to the Case Record Page

Add License, Permit, and Inspections Analytics to Lightning Pages

Give users visibility into license, permit, and inspections analytics by adding the analytic app's dashboards to Lightning pages in Public Sector Solutions.

You can add any CRM Analytics dashboard to any Lightning page in Public Sector Solutions. Here's how to add the Account Insights license, permit, and inspections dashboard to your home page.

1. In a Public Sector Solutions app, click the app navigation menu and select **Home**.

2. Click ⚙, and then select **Edit Page**.

3. From the list of standard components, drag **CRM Analytics Dashboard** to the page canvas.

4. Use the Dashboard dropdown list to select the Account Insights dashboard.

5. Specify the component's attributes. Enter:

```
{"datasets":{"Account":[{"fields":["Id"],"filter":{"operator":"in","values":["$Id"]},"locked":null,"hidden":null}]}}
```

6. Save your changes and exit Lightning App Builder.

SEE ALSO:

> Embed Dashboards in Lightning Pages

Add the Case Analytics Dashboard to the Case Record Page

Give caseworkers insight into the time taken to process a case by adding the Case Analytics dashboard to the case record page.

1. From the App Launcher, find and select **Cases**.

2. Select a case record.

3. Click ⚙ , and then select **Edit Page**.

If you don't have a case in your org, from Setup, create a case record page by using Lightning App Builder and then follow these steps to embed the dashboard in the page.

4. Drag **CRM Analytics Dashboard** component onto the page canvas.

5. In the Properties pane, for Dashboard, select **Case Analytics**.

6. Save your changes and activate the page.

SEE ALSO:

> Create and Configure Lightning Experience Record Pages
> Embed Dashboards in Lightning Pages

Keep Analytics Data Up to Date in Public Sector Solutions

Keep your analytics current by scheduling the app to refresh on a daily basis, or by scheduling a regular data sync.

To keep license, permit, and inspections analytics up to date, schedule a data refresh for the app. See Schedule Data Refresh for a CRM Analytics Template. Select a time outside normal work hours so the refresh doesn't interrupt business activities.

To keep caseworker productivity analytics up to date, schedule a data sync and recipes to run at regular intervals. See Run Data Sync and Recipes to Create and Refresh Datasets.

Understand Access Levels for Analytics in Public Sector Solutions

See the Analytics Studio capabilities and features that the Analytics for Licenses, Permits, and Inspections app supports.

Capability	Supports
Data sources	Salesforce and external data
Object support	Standard and custom objects
Data volume	10 billion rows for CRM Analytics Plus
Customize existing dashboards	Yes
Create dashboards	Yes
Customize existing datasets	Yes
Create datasets	Yes
Create custom CRM Analytics apps	Yes
Supports Einstein Discovery and Experience Cloud integration	Yes
Supports bulk actions and Apex steps	Yes
Supports Sales Cloud Einstein AI features	No
Supports Salesforce Inbox	No
Einstein Prediction Builder	Yes
Einstein Discovery in Reports	Yes
CRM Analytics Platform	Yes
Fast Start Templates	Yes

Use License, Permit, and Inspections Analytics in Public Sector Solutions

Gain insights that help you effectively manage agencies and departments and improve constituent satisfaction.

To access the Analytics for Licenses, Permits, and Inspections app and its dashboards:

1. From the App Launcher, select **Analytics Studio**.

2. On the Analytics home page, under Browse, select **All Items**.

3. Select the **Apps** tab, then click your app. For example, select **LPI**. If you can't find it, ask your Public Sector Solutions administrator for the name of the app, or ask them to deploy it.

4. Click the **Dashboards** tab to see the list of dashboards.

Compliance Insights

The Compliance Insights dashboard tracks your agency's performance and provides insights into the impact of inspections and enforcement actions on violations. The dashboard charts answer these questions.

- How's my team performing based on inspections?

- What's the trend of inspections and violations over a selected time period?

- What's the trend of inspections and enforcement actions over a selected time period?

- How's my agency performing based on inspections, violations, complaints, and enforcement actions?
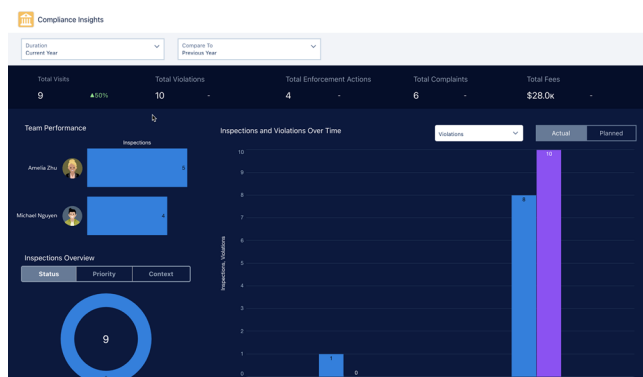
Executive Summary

The Executive Summary dashboard monitors your agency's performance and constituent satisfaction. The dashboard charts answer these questions.

- What's the trend of applications and application licenses over time?

- How are the applications distributed across business types, license types, and regulatory authorities?

- What are the top five accounts based on license issued?

- What's the total fees charged over time based on fee sources?

- What's the trend of inspections over time?

- What are the top five accounts based on total fees?
- How's my agency performing based on inspections, violations, and complaints?

Department Summary

The Department Summary dashboard monitors your department's performance and identifies applications and inspections that need attention. The dashboard charts answer these questions.

- How's my department performing when compared to a previous period?
- What's the total number of licenses issued by regulatory authorities?
- Which applications and inspections need my attention?
- What's the distribution of inspections and violations by inspection type?
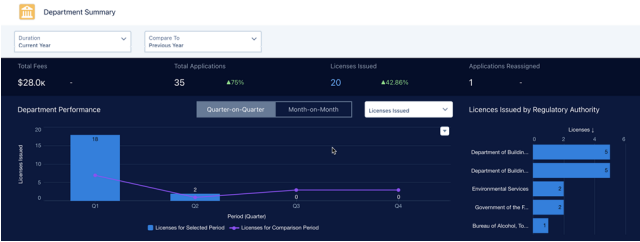
Account Insights

The Account Insights dashboard provides insights into the status of applications, licenses, complaints, inspections, and violations associated with the account. The dashboard charts answer these questions.

- How many open violations does this account have?
- What's the duration for which the violations are open?
- What's the status of applications, licenses, inspections, violations, and complaints?
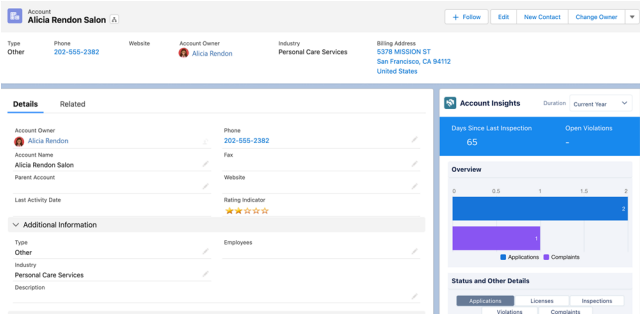
Use Workload Management Analytics in Public Sector Solutions

Gain insights that help you prioritize and distribute cases to improve efficiency, productivity, and community impact.

1. From the App Launcher, find and select **Public Sector: Benefit Management**.

    The Workload Management Analytics dashboard shows on the home page. The dashboard has these four tabs: Summary, SLA Management, Benefits, and Leaderboard.

2. On the Workload Management Analytics dashboard, select a tab. Filter a tab for specific caseworkers, time frames, ZIP codes, and other criteria.

    - **Summary**

        See an overview of the caseloads, case trends, and case distribution. Summary data answers these questions:

        - How many total cases were assigned to a caseworker or team of caseworkers reporting to a manager in a selected time period?
        - How many new cases were assigned to caseworkers in a selected time period?
        - How many cases were open at any time in a selected time period?
        - How many cases were closed during a selected time period?
        - What's the average time taken to close a case?
        - What's the average number of new cases received per day?
        - How does the number of new, open, and closed cases vary over time?
        - How does the conversion of referrals, complaints, and applications to cases vary over time?
        - How are cases distributed over different categories?
        - How many cases are in each stage and what's the average time that cases are in a stage?
        - Do any cases need immediate attention?

    - **SLA Management**

        See whether you're meeting the service agreements. SLA Management data answers these questions:

        - What's the average time taken for a case to transition from one stage to another?
        - How are cases of a particular status distributed over time and what's their priority?
        - What's the average time that a case is in a particular stage?

    - **Benefits**

        See how your work impacts the community. Benefits data answers these questions:

        - How many individuals and households were served?
        - How many benefits are disbursed?
        - What is the amount of monetary benefits paid out?
        - How many nonmonetary benefits are delivered?
        - How many active care plans are you managing?
        - How are benefit disbursements distributed over various programs?

- **Leaderboard**

    Get insight into caseworker performance. Leaderboard data answers these questions:

    - How does caseworker performance vary by the new, open, and total cases assigned to them?
    - How does the performance compare between caseworkers?
    - What is each team member's caseload?
    - What is the impact that each team member makes?

Use Case Analytics in Public Sector Solutions

Gain insights into how long it takes to process a case and help ensure that you meet service-level agreement requirements.

1. From the App Launcher, find and select **Cases**.

2. Select a record.

3. Use the charts in the Case Analytics dashboard to answer these questions:
    - How many days has the case spent in each status?
    - How many days have been spent to process the case?

Grantmaking

Streamline the grant management process for both funders and applicants. Built on the Salesforce platform, Grantmaking provides a 360-degree view of stakeholders, helps you manage funding opportunities, includes an online portal for applications, and lets you track award metrics.

Introduction to Grantmaking
Extend the Salesforce platform to engage grant seekers and manage the full grant life cycle with Grantmaking.

Grantmaking Setup
Turn on Grantmaking in your Salesforce org, give your users access to the Grantmaking features, and set up additional features such as your Experience Cloud site, Action Plans, and automation.

Manage Funding Opportunities for Grantmaking
Create and manage your grant funding opportunities.

Budget Management

Manage and track complex budgets broken down by category and period. Allocate actual budget expenditures at a high level or at the category and period level.

Review and Manage Grant Applications

Use the applications framework to track and review applicants' submissions with Grantmaking.

Manage Funding Awards with Grantmaking

Track details about a grant that's been awarded.

Define and Measure the Impact of Grants with Outcome Management

Use Outcome Management to make a measurable and actionable impact strategy for your grants. Define your impact strategy, collect data, and track the progress of your grants. Monitor your grant impact strategy by setting time-bound targets and monitoring ongoing results.

Introduction to Grantmaking

Extend the Salesforce platform to engage grant seekers and manage the full grant life cycle with Grantmaking.

⊘ **Important:** This documentation provides information about Grantmaking, a platform solution in Salesforce. For information about the Grants Management managed package, see the Grants Management Product Documentation. If you're not sure which solution your organization uses, check with your Salesforce administrator.

Get Started with Grantmaking

Grantmaking streamlines the grant management process for grant makers and grant seekers. Built on the Salesforce platform, Grantmaking extends your existing license to give you a 360-degree view of your stakeholders, funding opportunities, online portal, grantee applications, and award metrics. Explore a trial org to learn what's included, the recommended setup, and how to get ready for your implementation.

What's Included with Grantmaking

Grantmaking streamlines the entire grant management process for grant makers and grant seekers alike.

Grant Maker Experience

Discover how Grantmaking supports your work to create and manage funding opportunities and grant submissions.

Grant Seeker Experience

Discover how Grantmaking provides an online platform for applicants to find, apply for, and report back on funding opportunities and budgets.

Create a Grantmaking Trial Org

Explore Grantmaking by signing up for a full-featured trial experience. Trial orgs are intended for proof of concept and guided self-exploration. They expire in 30 days. To explore Grantmaking, get a Public Sector Solutions or Nonprofit Cloud trial.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions for Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions for Public Sector Solutions

Get Started with Grantmaking

Grantmaking streamlines the grant management process for grant makers and grant seekers. Built on the Salesforce platform, Grantmaking extends your existing license to give you a 360-degree view of your stakeholders, funding opportunities, online portal, grantee applications, and award metrics. Explore a trial org to learn what's included, the recommended setup, and how to get ready for your implementation.

GRANTMAKING

Get Oriented

What Is Grantmaking?

Trailhead: Grantmaking: Quick Look

Create a Nonprofit Cloud and Grantmaking Trial Org

Dive In: Learn About Recommended Core Features

Create and Manage Funding Opportunities

Manage Budget Proposals and Allocations

Set Up a Grantmaking Experience Cloud Site

Guide Applicants and Reviewers Through the Grantmaking Process

Manage Funding Awards

Go Deeper: Learn About Features for Specific Business Needs

Configure Compliant Data Sharing for Grantmaking

Set Up Action Plans and Document Checklists for Grantmaking

Extend Further: Learn About Additional Capabilities & Add-Ons

Measure Grant Performance with Outcome Management

Create Grant Agreements with Omnistudio Document Generation

Manage the Contract Lifecycle with Salesforce Contracts

Visualize Grant Awards, Requirements, and Disbursements with Timelines

Visualize Record Connections with Actionable Relationship Center (ARC)

Unify Grantmaking Data with Data Cloud

Get Ready for Your Implementation

Grantmaking Setup

Turn On Grantmaking

Understand Grantmaking Permissions

Know Your Resources & Get Help

Trailhead: Manage Grantmaking with Salesforce

Grantmaking Developer Guide

Trailblazer Community: Nonprofit Cloud for Grantmaking

What's Included with Grantmaking

Grantmaking streamlines the entire grant management process for grant makers and grant seekers alike.

Grantmaking organizations manage funding opportunities, set grant budgets, review grant applications, award grants, and manage disbursements on an ongoing basis. Grant seekers find grants to apply for, enter their proposed budget, and report back on their successes after being awarded the grant.

Salesforce Platform

Grantmaking is built on the Salesforce platform to work with your existing license. This combination means that Grantmaking is equipped with features and capabilities that give you a 360-degree view of your stakeholders so that you can serve them best. And Grantmaking is secure, flexible, and customizable, letting you implement it in your institution and customize it to meet your needs.

Grantmaking Data Model

Grantmaking extends your Salesforce license to include access to grant and budget management objects and components. The Grantmaking data model is designed to help you support and manage the entire grant lifecycle. Create funding opportunities, manage applications and reviews, track grant applicant budgets and results, and more. The data model supports the work of everyone in your institution, including grant managers, reviewers, grant applicants, collaborators, and Salesforce admins.

Experience Cloud for Grantmaking

Grantmaking includes the Grantmaking Experience Cloud template that's preconfigured and includes the objects you need for grant applications and post-award engagement. Alternatively, add the Grantmaking objects to your existing site or create a site and add the Grantmaking and Budget Management objects to your Experience Cloud site.

The Automation Toolkit

Grantmaking works with feature sets available in your license that put the platform and data model to work. OmniStudio, Action Plans, Document Tracking and Approvals, Business Rules Engine, and other components, services, and tools help you automate paper-based and cumbersome processes. For example, you can create dynamic forms to speed up application or review processes.

SEE ALSO:

Developer Guide: Grantmaking and Budget Management Data Model

Nonprofit Cloud

Grant Maker Experience

Discover how Grantmaking supports your work to create and manage funding opportunities and grant submissions.

Grant makers need one place to manage everything involved in your organization's grants, but too often the details they need are in disparate systems. Bringing the details together to see the cohesive whole is nearly impossible. With Grantmaking, you can manage it all with the Salesforce Stakeholder-360 Solution.

- Track organizations and people involved in grants and grant applications.
- Create funding opportunities that include application details.
- Manage reviews and approvals of grant applications and budgets.
- Use Salesforce reporting and dashboards to track the entire grants process.

Grant Seeker Experience

Discover how Grantmaking provides an online platform for applicants to find, apply for, and report back on funding opportunities and budgets.

Grant seekers want an online experience to discover and manage their grant applications for funding opportunities you offer. Gone are the days of printing and mailing applications and using antiquated systems to submit periodic reports. The heart of the grant seeker experience in Grantmaking is an online portal that lets applicants:

- Learn about and apply for funding opportunities.
- Submit a proposed budget.
- Upload supporting documents and materials.
- Report back about their use of the funds and their progress against goals and KPIs.

Create a Grantmaking Trial Org

Explore Grantmaking by signing up for a full-featured trial experience. Trial orgs are intended for proof of concept and guided self-exploration. They expire in 30 days. To explore Grantmaking, get a Public Sector Solutions or Nonprofit Cloud trial.

1. Do one of the following.

   - Go to Developer Free Trials and, in the Industry-Based Trials area, find the Public Sector Solutions or Nonprofit Cloud Free Trial.
   - Get a Public Sector Solutions learning trial or Nonprofit Cloud learning trial. The learning trials are fully configured orgs that include sample data. Use them to experiment with comprehensive enablement.
   - Get a Public Sector Solutions prerelease trial or Nonprofit Cloud prerelease trial. The prerelease trials include features in the upcoming release and are only available during sandbox preview.
   - Get a Public Sector Solutions base trial or Nonprofit Cloud base trial. The base trials are unconfigured orgs with only the necessary licenses and permissions. Use a base trial for proof-of-concept projects or general testing.

2. Enter your contact details, and click **Next** as prompted.

3. Read and agree to the service agreement.

4. Click **Submit** or **Start my Free Trial**.

After your org is created, look for an email with login details. Your trial org includes pre-enabled Grantmaking features and industry common components included in Grantmaking.

Grantmaking Setup

Turn on Grantmaking in your Salesforce org, give your users access to the Grantmaking features, and set up additional features such as your Experience Cloud site, Action Plans, and automation.

Turn On Grantmaking

Turn on Grantmaking in your Salesforce org.

Configure Application Record Types for Grantmaking

To see Grantmaking-specific fields and layouts, configure individual application record types for Grantmaking.

Grantmaking Editions and Permissions

Review the supported product and editions for Grantmaking and the required permissions.

Set Up a Grantmaking Experience Cloud Site

Use Experience Cloud to let your stakeholders view your funding opportunities and manage their applications.

Create a Grantmaking Form

Use Omnistudio components with Grantmaking objects to create multi-section or multi-phase grant applications and forms. Use Action Plan Templates to define the sections of an application, and create Individual Application Tasks to add ad-hoc sections to an application form.

Grantmaking Form and Application Components

Grantmaking includes form components that you can add to Experience Cloud for applicants and recipients and use in CRM for grant reviewers. Learn what the components do and how to configure them.

A Flow That Launches a Grant Application

Make it easy for grant seekers to apply for funding by using a multi-section application. After you set up Grantmaking forms and applications for your Experience Cloud site, create a flow by using the Grantmaking: Apply for Funding Opportunity template. Launch the flow from your own button in your Experience Cloud site.

Securely Share Grantmaking Records in CRM or Experience Cloud Using Compliant Data Sharing

Use Compliant Data Sharing so admins and grant managers control and monitor what data gets shared in Experience Cloud and CRM without writing complex code.

Add the Budget Component to the Budget Page Layout

Help Grantmaking users enter budget category values quickly by adding the Budget component to the budget page layout.

Add Grantmaking Components and Fields to the Individual Application Page Layout

Show the Budget component and Funding Opportunity field on individual application record pages.

Set Up Action Plans and Document Checklists for Grantmaking

Create Action Plan templates to manage repeatable tasks for reviewing and approving grant applications.

Use Automation for Grantmaking

Determine which Salesforce automation tools you want to use to guide applicants and reviewers through the grant management process.

Learn about Grantmaking details, such as the API name for the budget component and budget states, to use when configuring Flow Builder or OmniStudio automation.

Turn On Grantmaking

Turn on Grantmaking in your Salesforce org.

1. From Setup, in the Quick Find box, enter `Grantmaking`, and then select **Grantmaking Settings**.

   📝 **Note:** After you turn on Grantmaking, you can't disable it. We recommend that you don't turn on Grantmaking in an org with the Grants Management managed package installed. Using Grantmaking and Grants Management in the same org can confuse users. If you're not sure which solution your organization uses, check with your Salesforce administrator.

2. Turn on Grantmaking.

Now configure the application record types. See Configure Application Record Types for Grantmaking.

Configure Application Record Types for Grantmaking

To see Grantmaking-specific fields and layouts, configure individual application record types for Grantmaking.

1. Create an Individual Application record type for Grantmaking and copy the Record Type Label to use later in these instructions.

2. Depending on the product you're using, use one of the instructions below.

   - If you're using Grantmaking with Public Sector Solutions, from Setup, in the Quick Find box, enter `Usage Based Pricing`, and then select **Usage Based Pricing**.

   - Otherwise, in the Quick Find box, enter `Application RecordType Config`, and then select **Application RecordType Config**.

3. Click **New Application RecordType Config**.

4. In Label, enter a name for the record.

5. For Application Usage Type, select **Grantmaking**.

6. For Object Name, select **Individual Application**.

7. For Record Type Name, enter the name of the record type on the Individual Application object. If no record types exist, create the record type prior to this step.

8. Save your changes.

SEE ALSO:

Create a Record Type

Add Grantmaking Components and Fields to the Individual Application Page Layout

Grantmaking Editions and Permissions

Review the supported product and editions for Grantmaking and the required permissions.

Default Permissions

The products in your org determine whether you have Grantmaking. Typically, a Salesforce admin assigns the default Grantmaking Manager permission set to CRM users and the Grantmaking for Experience Cloud permission set to Experience Cloud users.

These permission sets include access to Grantmaking objects and fields, the Grantmaking system permissions, and auto-assigns the Grantmaking permission set license. To see what's included in a permission set, click **View Summary** on the permission set's detail page in Setup.

Customizing Permissions

If you customize this feature, such as adding fields, create a custom permission set. If you want to remove user permissions from the default permission set, create a muting permission set. Then, use permission set groups to assign users the default permission set in addition to your custom permission sets. This approach ensures users always have the latest default permissions and is an alternative to cloning permission sets.

SEE ALSO:

Manage Permission Set Assignments

User Permissions

Permission Set Groups

Set Up a Grantmaking Experience Cloud Site

Use Experience Cloud to let your stakeholders view your funding opportunities and manage their applications.

To set up sites, ensure that you have enabled and configured Experience Cloud in your org. To use the Grantmaking Experience Cloud template, enable Chatter in your org.

Refer to Considerations for Grantmaking Automation when building automation for your site using Flow Builder or OmniStudio.

You can use the predefined Grantmaking Experience Cloud template to create a site for applicants and reviewers. You can also use an existing site in your org or create a site and add the Grantmaking and Budget Management objects to the site. Contact your account executive to learn which Experience Cloud license fits your needs.

1. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites** under Digital Experiences.

2. Click **New**.

3. Select the **Grantmaking** template, and click **Get Started**.

4. Enter a name and a URL for the site.

5. Click **Create**.

6. To customize and design the workspace, on the landing page, click **Builder**.

7. Preview and test the site.

8. To finalize your changes, click **Publish**.

Experience Cloud Site User Permissions

Assign the Grantmaking for Experience Cloud permission set to site users to give them access to Grantmaking records.

The Grantmaking for Experience Cloud permission set provides your site users with access to Grantmaking objects, fields, and features. Review this permission set to learn which Grantmaking objects are available in Experience Cloud.

SEE ALSO:

Experience Cloud

Create a Grantmaking Form

Use Omnistudio components with Grantmaking objects to create multi-section or multi-phase grant applications and forms. Use Action Plan Templates to define the sections of an application, and create Individual Application Tasks to add ad-hoc sections to an application form.

1. Add the form components to relevant objects.

   See Grantmaking Form and Application Components

2. Use Omniscripts and Flexcards to create editable and viewable form sections.

   See Omniscripts and Flexcards.

3. Indicate which Omniscripts and Flexcards to use for editable or viewable form sections by creating application render method records.

   See Create Application Render Method Records.

4. Link the application render method to an application stage definition.

   a. From the App Launcher, find and select **Application Stage Definitions**.

   b. Click **New**.

   c. Enter a name for the application stage definition. For example, Letter of Interest.

   d. Select the name of the owner of the application stage definition.

   e. If necessary, enter a description for the application stage definition.

   f. Select **Grantmaking** as the type.

   g. Enter the application render method you're using for the edit type application render method.

   h. Enter the application render method you're using for the view type application render method.

   i. Save your changes.

5. Create a form template by creating an action plan template.

   See Create Action Plan Templates.

6. Add sections to a form by adding tasks to your action plan template.

   a. From the App Launcher, find and select **Action Plan Templates**.

   b. Click your action plan template.

   c. Click **New Individual Application Task**.

   d. To label this task as required, select **Required**.

   e. Save your changes.

   f. Repeat this process for each stage of the application.

   g. To change the order of the stages, click **Reorder**, drag the stages to the desired position, and save your changes.

   h. Publish the template.

7. To add tasks that aren't associated with action plans, create individual application tasks. To designate the order that these sections show on the form, use the Sequence field on individual application tasks.

   These ad-hoc tasks are shown under the Additional Sections header on the form.

8. To automatically create a multi-section application for a funding opportunity, use the Grantmaking: Apply for Funding Opportunity flow template to create a flow.

    See A Flow That Launches a Grant Application .

Grantmaking Form and Application Components

Grantmaking includes form components that you can add to Experience Cloud for applicants and recipients and use in CRM for grant reviewers. Learn what the components do and how to configure them.

Form Overview

This component organizes the form sections into a clear set of tasks to help the applicant focus and quickly see the sections that require attention. The default compact layout for Individual Application Tasks determines the fields that Salesforce shows to the applicant in each section. When the applicant clicks **Edit** or **View** in a form section, the app sends the applicant to the Form Section component. When site admins configure this component, they set the form section path. They can also group required and optional sections, or add required and optional badges to the sections. The Grantmaking Experience Cloud template includes this component on the Individual Application record page.

Form Review

This component displays all the sections and the details that the applicant provides on one page. When site admins configure this section, they can set the form section path. The Grantmaking Experience Cloud template includes this component on the Individual Application record page. You can add this component to the Individual Application, Application Review, and Funding Award Lightning record pages in CRM for reviewers and other internal users.

Form Section

This component displays a single section of the form. When site admins configure this section, they can dynamically show the sections that aren't submitted in edit mode and show sections that are submitted in view mode. Individual application tasks create sections, which are considered submitted when the Submitted field is selected. Alternatively, the site admin can have the section always show in edit mode or always show in view mode regardless of the submission status. The Grantmaking Experience Cloud template includes this component on the Individual Application Task record page.

Form Section Paths on Grantmaking Form Components

At first glance, form section paths are a little confusing, but the flexibility they provide is worth it. When you add the Form Overview or Form Review component to a record page, use the form section path to point the component to the tasks that come from the object's child records.

👁 **Example:** Individual application tasks are the children of individual applications. When you add the Form Overview or Form Review component to the Individual Application record page, use Form Section Path to point the component to the ID of the record that you're on (individual application) and then to the individual application tasks that store the form sections. In this case, set the **Form Section Path** to `Id > IndividualApplicationTasks`.

Alternatively, use the form section path to point the component to the related object through a lookup field and then point the component to the related object's child records that contain tasks.

👁 **Example:** Individual application tasks aren't direct children of an application review, but you can display individual application tasks on application reviews by using Form Section Path. Use Form Section Path to first point the component to the individual application related to the application review. Then, point the component to the individual application tasks that are related to the individual application. In other words, set the **Form Section Path** to `ApplicationId > IndividualApplicationTasks`.

A Flow That Launches a Grant Application

Make it easy for grant seekers to apply for funding by using a multi-section application. After you set up Grantmaking forms and applications for your Experience Cloud site, create a flow by using the Grantmaking: Apply for Funding Opportunity template. Launch the flow from your own button in your Experience Cloud site.

When you create a flow using the Grantmaking: Apply for Funding Opportunity template, read the descriptions in each flow component to learn how to customize the flow for your organization's needs.

The final screen in the flow provides a link to the individual application that the flow creates. We recommend that you replace this link with a local action that takes the applicant directly to the new individual application.

SEE ALSO:

> Redirect Flow Users with a Local Action

Securely Share Grantmaking Records in CRM or Experience Cloud Using Compliant Data Sharing

Use Compliant Data Sharing so admins and grant managers control and monitor what data gets shared in Experience Cloud and CRM without writing complex code.

To let CRM and Experience Cloud users share Grantmaking records, turn on and configure Compliant Data Sharing for the objects that you want to use. See the Grantmaking objects that are available for Compliant Data Sharing in Setup where you turn on the feature. Review the Compliant Data Sharing documentation for steps to use the feature in CRM and Experience Cloud.

Use Compliant Data Sharing in Grantmaking so that:

- Grant seekers can add collaborators in Experience Cloud to help complete grant applications.
- Grant managers can add specific applicants in Experience Cloud for private funding opportunities.
- Grant managers can add grantees as collaborators to manage funding awards.
- In orgs with strict sharing policies, admins and grant managers can internally share records in Salesforce CRM.

SEE ALSO:

Compliant Data Sharing

Add the Budget Component to the Budget Page Layout

Help Grantmaking users enter budget category values quickly by adding the Budget component to the budget page layout.

1. Create a Lightning record page or update an existing page for budgets. Learn more in Create and Configure Lightning Experience Record Pages.

2. Drag the Budget component onto the page.

   a. In Budget State, select **Budget Planning**.

   b. To hide the Submit button for this budget state, select **Hide the Submit Budget button**.

3. Save your changes and, if necessary, activate the page for your users.

SEE ALSO:

Considerations for Grantmaking Automation

Add Grantmaking Components and Fields to the Individual Application Page Layout

Show the Budget component and Funding Opportunity field on individual application record pages.

1. Create a Lightning record page or update an existing page for Individual Applications.

2. Drag the Budget component onto the page.

    a. In Budget State, select **Budget Planning**.

    b. To hide the Submit button for this budget state, select **Hide the Submit Budget button**.

3. Save your changes and, if necessary, activate the page for your users.

4. From the object management settings for individual applications, go to Page Layouts.

5. Select your page layout.

6. Drag **Funding Opportunity** and **Budget** from the panel to the layout.

7. Save your changes.

SEE ALSO:

Create and Edit Page Layouts

Create and Configure Lightning Experience Record Pages

Considerations for Grantmaking Automation

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions for Nonprofit Cloud for Grantmaking

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions for Public Sector Solutions

USER PERMISSIONS

To create and edit Lightning pages in the Lightning App Builder in Setup:
- View Setup and Configuration system permission

    AND

    Customize Application system permission

To customize page layouts:
- Customize Application system permission

To access Grantmaking components and fields:
- Grantmaking Manager permission set

Set Up Action Plans and Document Checklists for Grantmaking

Create Action Plan templates to manage repeatable tasks for reviewing and approving grant applications.

Create Action Plans templates to define and manage the repeatable tasks that grant makers need to complete, review, and approve applications. Include document checklist items in action plans to help ensure that applicants submit all of their required supporting documents. Learn more in Action Plans and Document Tracking and Approvals.

Use Automation for Grantmaking

Determine which Salesforce automation tools you want to use to guide applicants and reviewers through the grant management process.

Salesforce offers a powerful set of automation tools that make it easy to apply for a grant, follow consistent approval processes, and manage application reviews. Your Grantmaking license includes both Flow Builder and OmniStudio. Determine the best tool for your needs in Automate Your Business Processes.

📝 **Note:** We recommend working with a trained Salesforce consulting partner to set up automation for your needs. Contact your account executive to learn more about partners experienced in using Salesforce automation.

Consider using OmniStudio to create grantees' application forms. The forms can use conditional logic to ask questions depending on an applicant's answer to a previous question. Then, use Flow Builder to automatically email the applicant to let them know you received their application.

Or use automation to manage the upcoming requirements after you approve a grant application. Flow Builder can create a disbursement schedule or upcoming reporting requirements for a funding award when you approve a grant application.

Considerations for Grantmaking Automation

Learn about Grantmaking details, such as the API name for the budget component and budget states, to use when configuring Flow Builder or OmniStudio automation.

Use *runtime_industries_budget:budget* as the fully qualified name for the Budget Lightning Web Component when setting up OmniStudio automation. You can use the Budget component in an OmniStudio FlexCard.

Use these component states to select the appearance of the Budget component for different phases of the grant application or awarding process.

Component State	When to Use	Additional Information
budgetPlanning	When you want to make Planned Amount and Reason editable.	Control whether the Submit button shows for the planning state with the `hideSubmit` setting.
actualsReporting	When you want Planned Amount read-only and allow the user to edit the Actual Amount.	The Reason field and Submit button are hidden.

We recommend setting up automation for Experience Cloud users to submit their report of actual budget spent and whether the submitted actual amounts can be edited for that budget period. Build this automation based on the state of the Submitted checkbox on Budget Period.

Manage Funding Opportunities for Grantmaking

Create and manage your grant funding opportunities.

1. From the App Launcher, find and select **Funding Opportunity**.

2. Create a funding opportunity.

3. Complete fields for your needs.

   When completing fields on the funding opportunity, consider if the information is available publicly, such as in your Grantmaking Experience Cloud site. A few likely fields to show in your Grantmaking Experience Cloud site are the funding opportunity Name, Description, and Application Instructions.

   If you want applicants to complete a budget that's associated with this Funding Opportunity, add a budget to the Budget Template field.

   > ✏️ Note: To enter budget category values, add budget categories and budget periods.

   To use a more complex timeline than a start and end date, add an application timeline.

4. Save your work.

SEE ALSO:

[Budget Management](#)

Budget Management

Manage and track complex budgets broken down by category and period. Allocate actual budget expenditures at a high level or at the category and period level.

Budget management starts with creating a budget and its related budget periods and categories. After you spend the budgeted money, track your spending with budget allocations that are associated with each category value.

🛑 Important: If you manage budgets with many category values, avoid data skew by archiving budgets that you aren't actively using. The number of category values is tied to the number of budgets and how many categories and periods are associated with each budget. For example, you can have a large number of category values if you have 250 budgets and one budget is associated with 170 categories and five periods. Or you can have a large number of category values if you have 1,000 budgets and each budget is associated with 17 categories and three periods.

Create Budget, Category, and Period Records

Set up a budget and the budget's related records.

Enter a Planned Budget

Enter the details of a planned budget in one easy-to-use form.

Track Actual Budget Spent in Experience Cloud Site

In Experience Cloud, report the actual budget spent in an easy-to-use form.

Track Actual Budget Spent in CRM

To track an actual budget spent in Salesforce CRM, use budget allocations.

Create Budget, Category, and Period Records

Set up a budget and the budget's related records.

Budgets include the details about the budget—such as the start and end dates and amount or non-monetary quantity—the categories you want to budget for, and the time periods for the budget cycle.

1. From the App Launcher, find and select **Budget**.

2. Create a budget.

3. Give the budget a name and enter other details about the budget.

4. Save your work.

5. On your budget record, in the Budget Category related list, click **New**.

6. Enter details about the budget category.

    To control the order the category appears in the budget component, enter a sequence number. If you don't enter a sequence, the categories show in the order you created them.

7. Save your work. If you want to add another category, click **Save & New**.

8. On your budget record, in the Budget Period related list, click **New**.

9. Enter details about the budget period. Don't select Submitted. Your Salesforce admin can use this checkbox in automation for your Experience Cloud site.

To control the order the period appears in the budget component, enter a sequence number. If you don't enter a sequence, the categories show in the order you created them.

10. Save your work. To add another period, click **Save & New**.

Enter a Planned Budget

Enter the details of a planned budget in one easy-to-use form.

Enter the values for each budget period and category. For example, create a budget with categories or rows, for Personnel, Supplies & Materials, and Indirect Costs. Create periods or columns for each financial quarter.

1. In the grid, enter the values for each category's period. To add more details about the budget's category, enter a reason.

The values are saved as you move through the form.

2. When you're satisfied with your entries, submit the budget.

You can't edit a budget after you submit it.

Track Actual Budget Spent in Experience Cloud Site

In Experience Cloud, report the actual budget spent in an easy-to-use form.

1. Open the individual application or budget record where you want to report the actual budget spent.

2. In the grid, enter the actual amount for each category's period.

The values are saved and the variance between the planned budget and what you actually spent shows as you move through the form. Variance is Actual Budget minus Planned Budget. If the variance is negative, that's how much that you have left to spend.

3. If your admin set up the automation for showing the Submit button, click **Submit**.

Track Actual Budget Spent in CRM

To track an actual budget spent in Salesforce CRM, use budget allocations.

Track budget expenditures with budget allocations. Budget allocations can be related to budgets or to budget category values.

1. From a budget or a budget category value, in the Budget Allocations related list, click **New**.

2. Enter details about the budget allocation.

3. Save your work. To add another allocation, click **Save & New**.

SEE ALSO:

   Developer Guide: Grantmaking and Budget Management Data Model

   Add the Budget Component to the Budget Page Layout

   Add Grantmaking Components and Fields to the Individual Application Page Layout

Review and Manage Grant Applications

Use the applications framework to track and review applicants' submissions with Grantmaking.

When applicants submit their applications on your site, Grantmaking creates an individual application record. Alternatively, manually enter details about an application and budget in Salesforce. Talk to your Salesforce admin about how to manage applications and reviews in your org.

When you approve an application, create a Funding Award to track the money you're granting to the applicant. Learn more in Manage Funding Awards with Grantmaking.

Manage Funding Awards with Grantmaking

Track details about a grant that's been awarded.

1. From the App Launcher, find and select **Funding Award**.

2. Create a funding award.

3. Complete fields to track high-level details such as Amount, the Contract Timeframe, and Budget for how the funds are spent.

4. Save your work.

5. Add related records to the funding award. For example, add application requirements, the fund disbursement schedule, or documents such as contracts or reports.

6. If the terms of the awarded grant change, add a Funding Award Amendment to the Funding Award.

With Experience Cloud for Grantmaking, include Funding Awards on your Grantmaking site so that recipients can track upcoming deadlines and report back to you online. You can also allow grant seekers to submit a funding award amendment, which you can review and approve or deny.

Define and Measure the Impact of Grants with Outcome Management

Use Outcome Management to make a measurable and actionable impact strategy for your grants. Define your impact strategy, collect data, and track the progress of your grants. Monitor your grant impact strategy by setting time-bound targets and monitoring ongoing results.

Use Outcome Management to:

- Evaluate the outcomes of your grants with consistent and time-bound measurements.
- Collaborate with grantees in your Grantmaking Experience Cloud site to propose and demonstrate the impact of their project as a result of the grant they received.
- Communicate the results of your grants to your stakeholders on your Grantmaking Experience Cloud site.
- Review and assess the applications that best align to your impact strategy.

📝 **Note:** To make it easier to report on Grantmaking-related records for Outcome Management, add the names of the Grantmaking objects in the type fields on Outcome Management objects. The type fields include Outcome Activity Type on Outcome Activity and Indicator Assignment Type on Indicator Assignment.

SEE ALSO:

Outcome Management

Developer Guide: Grantmaking and Budget Management Data Model

Emergency Program Management in Public Sector Solutions

Provide constituents with emergency program information, incident updates, and applications for services and aid during times of crisis.

Deploy Emergency Program Management in Public Sector Solutions

Quickly deploy a digital destination for constituents to access emergency program information and incident updates.

Deploy Emergency Program Management in Public Sector Solutions

Quickly deploy a digital destination for constituents to access emergency program information and incident updates.

Create an Experience Cloud site to highlight emergency programs and services that are available to public agencies, hospitals, and individual constituents. Allow constituents to request permits for building access and to apply for assistance programs such as food delivery services. Using the Inspection App field, responders can deliver emergency services efficiently. Businesses can use the Experience Cloud site to request permits to reopen to the public. After the permit is approved, inspectors can use the Inspection app to verify that the site complies with local health and safety ordinances.

For information on how to set up and use Emergency Program Management in Public Sector Solutions, see Emergency Response Management for Public Sector.

Employee Experience for Public Sector Solutions

Help government employees be more connected, effective, and productive with centralized, scalable, and secure IT and HR processes.

With Employee Experience for Public Sector Solutions, you can provide the same level of support to your internal employees as you do for the constituents you serve. Use Employee Experience to digitize any common intake processes and forms, automate workflow and approval processes, and generate required documents for increased productivity. Streamline internal processes such as recruiting and onboarding, talent management, and ethics complaints and reporting. You can also leverage capabilities to create goal-centric support plans for employees, administer benefits and services, such as training, coaching or education reimbursements, manage internal training credentials, track employee relocation, retirement, or position changes, and more.

Employee Experience includes these tools and features.

Employee Workspace
   A central digital hub for employees to access tools and resources.

Employee Concierge
   An employee support app in the Employee Workspace.

Employee Concierge Bot
   An Einstein bot to use to search Concierge articles and tickets in the Workspace chat.

HR Service Center
   Tools for HR specialists to manage cases and automate employee-facing HR processes with out-of-the-box workflows.

Set Up Employee Access to Employee Experience

Give government employees the permissions they need to use Employee Experience for Public Sector Solutions.

To access the Employee Field Access page in Setup, you must be assigned a permission set, such as Employee Workspace Admin, that includes the Employee Experience permission set license. Employee Workspace Admin is added to your org when you install Employee Productivity and Service packages.

> 📝 **Note:** Employee Experience packages are not IL4 accredited.

1. Install Employee Workspace, Employee Concierge, and Employee Concierge Bot from work.com.

2. In Public Sector Solutions, from Setup, assign these permission sets to employees.

   - Employee Experience for Public Sector
   - Employee Productivity Plus Access
   - Employee Productivity Plus User Data Access

3. Based on the capabilities that employees need, assign them these additional permission sets.

   - Assessment for Employee Community: For supervisors who administer assessments and employees who complete the assessments
   - Benefits and Care Plans for Employee Community: For supervisors who create care plans, and assign benefits and goals to employees, and for employees to view their care plans, benefits, and goals

- Case Management for Employee Community: For employees and supervisors who create and manage cases, applications, complaints, and referrals, and need access to provider, person, and household information, life events, timelines, and relationship graphs
- Case Proceedings for Employee Community: For employees and supervisors who are participants in case investigations and need access to case proceedings
- Evidence Management for Employee Community: For employees and supervisors who track evidence for complaint and case investigations, and case participants who need access to the evidence in a case

Set Up Service Team Access to Employee Experience

Give the service teams that support government personnel the permissions they need to use Employee Experience for Public Sector Solutions.

1. Install HR Service Center from work.com.

2. In your Public Sector Solutions org, from Setup, assign these permission sets:

   - Employee Experience Plus for Public Sector
   - Employee Service Agent Access
   - Employee Service Agent User Data Access

SEE ALSO:

Enhance Employee Operations with Employee Service

Accounting in Public Sector Solutions

Track how and where funds are received, paid, and allocated by using Accounting Subledger with Public Sector Solutions. Access and act on insights from financial data, and work with accurate, up-to-date financial projections.

Configure and Use Accounting Subledger in Public Sector Solutions
Map financial transactional data to Accounting Subledger objects and bring the data into your accounting system of record.

Configure and Use Accounting Subledger in Public Sector Solutions

Map financial transactional data to Accounting Subledger objects and bring the data into your accounting system of record.

Consolidate Public Sector Solutions financial transactional data with your accounting system by using Accounting Subledger. Set up a pipeline that uses Data Processing Engine to generate accounting data, and assign a user to run Accounting Subledger jobs using flows or invocable actions. Capture financial transactions such as regulatory transaction fees, funding awards, and

benefit disbursements and map them to Accounting Subledger objects by using accounting sets. Then, bring the data into your accounting system by using reports, a custom integration, or a middleware solution.

SEE ALSO:

[Accounting Subledger](#)