



Redacted Response to Puerto Rico Medicaid Program (PRMP)

Medicaid Eligibility and Enrollment System Request for Information (RFI)

20 October 2023

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Puerto Rico Department of Health Medicaid Program
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San Juan, Puerto Rico 00918

October 20, 2023

Re: Response to Puerto Rico Medicaid Program Medicaid Eligibility & Enrollment System RFI

Ms. Otero Martinez

Salesforce appreciates the opportunity to respond to the Puerto Rico Medicaid Program (PRMP) request for information for innovations in the Medicaid Eligibility and Enrollment (E&E) market. We understand that PRMP is seeking information from vendors on other Medicaid E&E solutions that may be used for future modernization of Puerto Rico's Medicaid Program. While Salesforce system integrators will also be responding directly, Salesforce is providing an RFI response that provides an overview of our recommendations and platform based on our work in the Medicaid marketplace.

Salesforce is pleased to present our capabilities to help PRMP deliver innovative solutions supporting the Medicaid Enterprise. Salesforce is the world's enterprise cloud computing leader, dedicated to helping companies and government agencies transform and connect through cloud, social, and mobile technologies. Our 150,000+ customers include over 3,400 government agencies worldwide, representing all federal cabinet level agencies and the majority of the United States. Cloud computing offers a tremendous opportunity to consolidate and innovate, freeing up time, money and resources towards agency productivity. Salesforce provides the #1 ranked Platform as a Service (PaaS) and the World's #1 Software as a Service (SaaS) CRM solution. Salesforce's world leading, trusted cloud platform allows agencies and partners to build applications that achieve a 59% accelerated time to value, implementing solutions in weeks and months vs. months or years, compared to on-premise system implementations. *It's one of the many reasons why Forbes named Salesforce one of the World's Most Innovative Companies nine years in a row and Innovator of the Decade.*

We look forward to building a long lasting relationship to support the PRMP in your technology and program innovation efforts and the opportunity to meet with you and provide a formal demo to further educate your team on our capabilities. I can be contacted at (954) 410-8326 or bbyrnes@salesforce.com with any questions or clarifications.

Thank you for your time and interest in our solution.

Sincerely,



Blair Byrnes
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Executive Summary



Salesforce understands the Puerto Rico Medicaid Program (PRMP) is seeking information about innovative, forward-thinking approaches to Medicaid Enterprise Systems modernization as it pertains to PRMP's recently US Centers for Medicare & Medicaid (CMS)-certified Eligibility and Enrollment System (MEDITI3G). The focus of our response is on how PRMP might augment and incrementally modernize components of its MEDITI3G system without necessarily replacing the entire E&E system. Salesforce has had the opportunity to work with [REDACTED], as they executed innovative approaches to modernizing their E&E systems without full system replacement of existing or legacy systems. The key opportunities Salesforce has seen used successfully to modernize the Medicaid enterprise that PRMP can take advantage of while still maximizing its MEDITI3G investment are:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

The following response provides insight into how other states have leveraged these approaches to successfully drive better Member experiences and program outcomes.

Impact of the Legacy of Medicaid Modularity

The 2016 guidance provided by the CMS outlined recommendations for the development of modular MMIS components. It was driven by the intention of reducing the risk of large, lengthy projects and to facilitate incremental updates and changes to IT systems. In CMS' letter to State Medicaid Director to supplement CMS-2392-F, "Mechanized Claims Processing and Information Retrieval Systems (90/10)," which became effective January 1, 2016, CMS defined a module as "...a packaged, functional business process or set of processes implemented through software, data, and interoperable interfaces that are enabled through design principles in which functions of a complex system are partitioned into discrete, scalable, reusable components."

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

There is an opportunity to transform PRMP's external-facing web presence to create a modern, citizen-centric Digital Front Door that offers a single, personalized, and intuitive self-service entry point for Medicaid Members as well as applicants and recipients of broader HHS services and programs across the Commonwealth - that:

- Provides a **unified external web access point** for citizens across the Commonwealth's HHS agencies, programs, and services, including Medicaid.
- Leverages a single source of truth about each citizen's data to **personalize the person's experience** and provides contextual knowledge, recommendations, and next steps.
- Drives **better participation in government HHS programs** with a seamless, consolidated online digital government services experience guiding citizens to the right services at the right time.
- **Reduces the impact on contact centers & other channels** by providing easy to use self-service tools, chatbots, & easy to access program information.
- **Improves efficiency and reduces frustration** by automating remaining manual or paper-based processes or data entry.

The Digital Front Door is where Members and other HHS clients interact with their record with a complete view of inquiries, applications, services, programs, and interaction data. The Digital Front Door will:

- Help individuals submit their applications for programs and services using an integrated, user-friendly filing process
- Provide personalized assistance throughout the process across multiple channels
- Allow citizens to electronically upload information
- Offer mobile-based options for accessing all the same capabilities available on the desktop Digital Front Door
- Proactively notify of status changes, requests for information, new programs, or information relevant to the citizen sent via email or text channels.

A Digital Engagement Platform allows PRMP and other HHS agencies to serve citizens as they inquire about government HHS programs and services and when they want information from their government quickly, through their channel of choice. This approach offers a secure, multi-channel enterprise application that puts the citizen experience at the center of all organizational services, knowledge, and experts, providing a personalized journey,

which enables scalable access to services, more streamlined government services processes and effective mission execution.



64% of state
*government employees say that having the right tools empowers them to meet the needs of their customers.*¹ To provide the best possible citizen experience, it is critical PRMP maintains a comprehensive view of the Member and their interactions over time across channels, as well as across all Commonwealth HHS programs and services. Whether a Member engages with a chatbot on the HHS Digital Front Door portal, calls into a contact center, or walks into an office, it is critical that PRMP demonstrates an understanding of the Member, their history, and circumstances in order to build trust, limit frustration, and act efficiently. This requires a Customer Relationship Management (CRM) solution that puts the Member at the center of all interactions and transactions.

For example, Salesforce offers a truly person-centric CRM, built on a low-code platform, with a complete 360 degree view of the Member by connecting data and processes seamlessly across the HHS enterprise. With a single 360 view of Members across systems, employees and contact center agents have a complete view of the Member - their case data, a history of their interactions, documentation, recertification dates, eligibility data, program data, as well as service requests and complaints. Other CRM solutions focus on process, tasks, and workflows, but do not have the ability to easily connect Member data across the enterprise into a 360 degree view. As a result, customer service becomes very transactional, rather than focusing on the Member, their broader circumstances, and potential opportunities to provide service above and beyond what they expect.

The Medicaid Member contact center does not need to operate in a silo. With a person-centric CRM, there is an opportunity to unify and consolidate all Commonwealth HHS contact centers across programs and services, such as SNAP, TANF, Child Welfare, and Child Support. Contact center agents are able to better service Members or recipients of other HHS programs if they have a complete view of their interactions across agencies and programs, not limited to one agency or back-office system. With Salesforce, Puerto Rico can track citizen needs holistically and quickly respond to support citizen well-being regardless of which HHS programs or services they are receiving or applying for. A unified Agent Console provides a single desktop view of the citizen and their history.

For example, the New Mexico Human Services Department (HSD) administers services to more than 1 million low-income New Mexicans through programs such as Medicaid, Supplemental Nutrition Assistance Program (SNAP), Cash Assistance, Energy & Utilities Assistance, Child Support, and Behavioral Health. When the HSD team looked at customer complexity: data analysis highlighted that the majority of NM HSD customers were enrolled in more than one public assistance program, requiring people to connect with different employees separately due to each program having its own area of expertise.

HSD has been working to realign public assistance programs, benefits and services around an individual or family via its Health and Human Service (HHS) 2020 Vision. HHS 2020 is about a transformational, enterprise approach

¹ Alan Webber, *Driving Value for Government Through Digital Services*, IDC, November 2017.

to the health and human services business. Fundamentally, HHS 2020 is about moving from a program-centric structure to a stakeholder-centric structure. This involves moving away from program and technology silos into an integrated, flexible framework that supports service provision and Stakeholder interaction across HHS programs and organizations. The HHS 2020 strategy is threefold: customer engagement, customer portal, and the consolidated customer service center, with the Unified Portal Interface (UPI) planned for the next phase. In response to *Question 3.1*, learn how the New Mexico Human Services Department (HSD) created a consolidated contact center across the state’s human services programs or read their story [here](#).

[REDACTED] In the context of the Medicaid Enterprise, a customer Data Platform allows PRMP to synthesize and integrate Member data in real-time across Puerto Rico’s government agencies, programs, and systems and use it to personalize the agency’s engagement with the Member - communicating proactively about services or needs the Member should be aware of, making intelligent recommendations of services they may want or need and tailoring offerings to target populations. This platform leverages the power of API-led integration to systems of record for Member data (e.g. MEDITI3G) and creates a harmonized “golden record” reconciling data across systems to create an accurate, unified 360 degree view of the Member. This data can then be used to provide PRMP employees with an accurate complete view of the individual for purposes of providing the best possible service experience.

A Member 360 sits at the center of all Medicaid services providing a unified view of the Member, their benefits and services, and a chronological view of all interactions with their care ecosystem (e.g., enrollments, plan selection, primary care provider, claims, conditions, payments, activities, notes, etc.), which allows the Department a single comprehensive view of all encounters with each constituent over time. A Member 360 goes beyond presenting a consolidated view. With the help of Artificial Intelligence and automated workflows, PRMP can leverage Member data to quickly identify the most at-risk populations to prioritize. Identifying members with the highest risk enables PRMP to focus their health intervention strategies and create campaigns to target them. By automating tasks in a Member-centric way, employees become more efficient and are able to personalize service at scale.

[REDACTED] Salesforce believes a Member-centric approach to the modernization of state Medicaid Enterprise Systems will enable interoperability and integrated service delivery enabling insights that drive better health and economic outcomes. Salesforce recommends an API-Led connectivity approach. This means connecting a network of system, process, and experience APIs together, decoupling systems to provide more flexibility, agility, and legacy modernization. We suggest leveraging technology that provides integration templates built with best practices in mind using industry standard message formats like HL7 v2 and FHIR, and reference architectures that follow professional services guidelines.

With an API-Led approach to connectivity, you will be able to consistently access all systems (modern and legacy) via real-time APIs. This allows legacy systems to be consumed into modern systems and processes with ease by developers. It also allows for immediate legacy modernization with the flexibility to retire legacy systems when appropriate with minimal disruption to the overall integration landscape.

Partnering with Salesforce

To deliver on the PRMP’s objective of modernizing its E&E systems without replacing its existing MEDITI3G system, Salesforce is uniquely positioned to deliver on this objective with an offering on a single, industry-leading platform. We look forward to the opportunity to continue this dialogue and identify new and innovative ways to leverage our technology to ensure the citizens of Puerto Rico receive the best possible service experience. We have outlined the details of our solution in the following *Our Solution* section.

Our Solution



A Modern, Complete Digital Engagement Platform. Salesforce offers a proven Digital Engagement Platform and solutions to meet the complex needs of Health and Human Services (HHS) agencies. Salesforce provides a secure, multi-channel enterprise platform that puts the person at the center of all government services providing a 360 degree view of the individual, their family, and a chronological view of all person interactions (e.g., applications, benefit cases, activities, notes, etc.), which allows PRMP to build out to a complete single record of all encounters with each person over time. The digital engagement platform meets people where they are - on a mobile device, via text message, live chat, phone, email, or social media - reducing time in office locations and paper-based applications.

Salesforce lets Medicaid and other HHS agencies gain data-driven insights and meet or exceed service delivery expectations. With all personal information (for example, benefits, preferences, and claims) accessible via a single source of truth or 'golden record', every PRMP employee has the information they need at their fingertips regardless of the system of record. Complete 360 degree views of a person enable anyone involved in a Member or client's health coverage, social assistance or other services to easily identify behavior patterns, missing services, and more. But Salesforce goes beyond presenting a consolidated view. With the help of AI and automated workflows, care team members can quickly identify the most at-risk populations to prioritize. Identifying people with the highest risk enables PRMP and supporting teams to focus their social and health intervention strategies and create campaigns to target them.

Unified Digital Front Door to Medicaid and All HHS Services and Programs. Salesforce offers a self-service community portal to provide a user-friendly online interface for Members or other HHS clients to learn about, apply and manage benefits for which they may be eligible and fill out an application. Self-service functionality can be configured for application, enrollment, payment, and change of circumstance reporting. With a knowledge base, PRMP can also share information with Members via an online channel and via chatbots. With this feature, users can easily set up different knowledge base views including creating a Member-facing view and a separate internal view.



Salesforce supports intake through all channels (web, email, call center, mobile). PRMP can take applicants, enrollees, staff, providers, or participants through a step-by-step process to ensure the necessary information is captured correctly the first time and reduce redundant data entry. The solution provides the ability to create forms that make a user's experience easy by guiding them step-by-step through capturing the information that is necessary to complete intake.

HHS agencies require real-time eligibility determination in compliance with federal and state program rules including rule periodicity (e.g. multiple rules set their own effectuation date ranges and the ability to retroactively calculate and enforce rule changes). Puerto Rico can compute eligibility for benefits based on the data provided in the individual's application and track a full history of eligibility determinations. For example, eligibility and benefit levels can be determined one of two ways to support multiple health coverage and financial benefit programs:

1. For very complex eligibility, such as Medicaid, Salesforce can collect all of the required information and submit it to an existing (or newly implemented) rules engine (e.g. MEDITI3G) which determines eligibility. Salesforce supports web standards such as REST and SOAP and can integrate with any rules engine that also supports these standards.
2. For less complex programs, eligibility and benefits can be determined directly within Salesforce using calculation procedures, which are multi-step, table driven calculation services.

Salesforce provides Medicaid agencies with the resources it needs from initial program eligibility intake to plan assignment and selection, all the way through enrollment completion, benefit issuance, and managing care plans.

Salesforce Benefits Management. Applying for benefits are among the most tangible interactions people have with their government. For many individuals and their families, finding and applying for the right public assistance programs can be challenging, which in turn prevents them from getting the support they need in a timely fashion.

This is why Salesforce introduced Public Sector Solutions Benefit Management. It's designed to help governments connect eligible individuals to the right social safety net programs faster by increasing access to essential public assistance program information and reducing administrative burden on both case workers and the constituents they serve.

Focus on people, not processing paper.

- **Simplify benefit search, enrollment, and notification** - Improve the applicant experience with guided pre-screening and application processes.
- **Automate eligibility determination and benefit disbursement**- Eliminate manual processing errors with rules-based logic and guided workflows.
- **Boost case worker productivity with data** - Minimize administrative burden with digital-first case management.
- **Serve the people faster with AI and insights** - Help case workers prioritize work and understand program performance.

Pre-built Benefits Management accelerators available with Salesforce Benefits Management can help PRMP:

Accelerate time to value - Launch benefit programs quickly with best practice data models and site templates for the government.

Serve individuals on their preferred channel - Allow individuals to update information from anywhere — eliminating the need for office visits.

Scale impact with self service capabilities - Share public benefit program details and eligibility requirements via searchable articles.

Recommend relevant government benefits - Help individuals quickly determine which government programs benefit to apply for with guided prescreening.

Reduce administrative burden- Provide responsive forms so applicants only have to enter data once, reducing duplication.

Help applicants submit the right information the first time - Eliminate back-and-forth with intelligent document checklists and digital uploads.

Share eligibility determination quickly - Explain benefit eligibility and calculation decisions with individuals.

Provide a single view of the participant - Deliver essential insights to case workers, from life events through engagement history.

Surface meaningful relationships - Get a better understanding of an individual's situation by tracking family, community, employment, provider relationships and more.

Speed up benefit reviews - Drive caseworker efficiency with prioritized lists, task notifications, and a rules engine to help with accessing eligibility.

Reduce benefit calculation errors - Use best practice rule sets to guide eligibility determination and benefits calculations.

Automate benefit disbursements - Ensure timely distribution of benefit entitlements with scheduling based on benefit policy.

Provide holistic service - Define, manage, and measure multiple benefits, services, and care plans in a single system.

Capture every case detail - Help case workers document interactions and access information faster with digital-first notes and collaboration tools.

Digitize supporting documents - Transform paper into searchable digital records with AI.

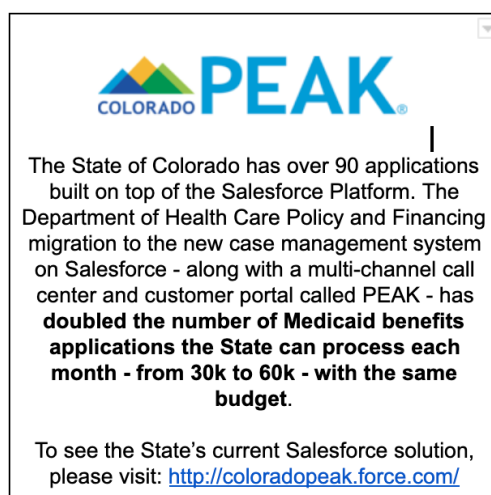
Contact Center. The Salesforce Contact Center solution allows HHS organizations to serve their residents as they inquire about human services or Medicaid and when they want information from their government quickly, through their channel of choice. The pandemic only magnified this need and growing resident requests quickly overwhelmed most government call centers – with the exception of those who already had a cloud foundation. This solution offers a secure, multi-channel enterprise application that puts the customer experience at the center of all organizational services, knowledge, and experts, providing a personalized journey, which enables scalable access to services, more streamlined intake processes and effective mission execution -- all while delivering an engaging consumer experience.

Today's members expect a faster, more personalized service experience than ever before. There has never been a more critical time for HHS agencies to leverage Salesforce to ensure not only the health coverage of the member, but also their participation in the broader set of available services. Using native capabilities like CTI/telephony integration, intelligent call routing, chat, two-way SMS, knowledge articles, portals, video and predictive intelligence, your clinical team will be equipped with relevant member information the moment they engage the member. PRMP will be able to unlock data from legacy systems of record, give your team the tools they need to collaborate more efficiently, understand patients and members more deeply, and build 1-to-1 relationships across entire care journeys.

Contact centers can also offer an opportunity to drive overall cost savings through call deflection tools. Salesforce provides customer service chatbots to tackle simple, repetitive tasks that don't require the soft skills and experience of an agent. For example, if a customer asks how to reset a password or wants to know their application's status, a customer service chatbot quickly answers the question by accessing relevant information automatically. At the same time, your agents stay focused on solving complex problems and building relationships with customers.

Using Salesforce, DOH can create personalized Member journeys, extend reach across all channels and devices, deliver consistently relevant and personalized messaging, optimize benefits and services, gather better events data, and educate its target populations. DOH can develop a "physical and mobile front door" to engage Members at every stage of their relationship with the organization, enabling a personalized experience that delivers relevant content and functionality to each end user in alignment with their preferences and needs. This engagement can be done through phone, email, chat, SMS, video, or integration of data such as medical device monitoring or emergency alert systems tied right into the member profile. DOH will know where the Member is in their journey and provide the right touchpoint with the right message at the right time.

Salesforce provides a secure, multi-channel enterprise platform that puts the Member at the center of all



government services providing a 360 degree view of the Member. Our solution can help DOH enhance its mission to improve the quality of life for individuals and families in need while deploying in an accelerated fashion. Salesforce's highly flexible, open-platform can enable the Department to modernize rapidly, and deliver unprecedented service. Salesforce ranks as the Leader in the Gartner Magic Quadrant for "[CRM Customer Engagement Center](#)" (SaaS).

Salesforce Data Cloud. Citizens engage with the Commonwealth in many ways, across many different systems, and each time they interact, they create data. To provide a truly personalized citizen experience that showcases how well the Commonwealth understands the citizen and their needs, it is critical the Commonwealth be able to surface citizen data from across systems for creating a personalized experience. With a complete real-time picture of a citizen's data across the Commonwealth's HHS enterprise, Puerto Rico can proactively guide citizens to the right services or programs, target programs to specific citizen segments, and create contextually relevant online digital experience. Instead of citizens having to know what is available or relevant to their circumstances, the system and employees can seamlessly connect citizens to the right resolution to solve their challenge or answer their question.

Salesforce's Data Cloud allows the Commonwealth to integrate these sources and systems (both first and third party) to create a real-time connected view of each individual. With the Salesforce Data Cloud:

- Agencies can use large streams of data to identify citizens that may be in need of their services.
- Agencies can create smarter segments and activate them across channels, providing a personalized, relevant experience for ever stakeholder at enormous scale
- Programs teams can identify and prioritize program participants with urgent needs and respond quickly
- Operations teams can identify trends as they happen to address gaps and maximize opps

To provide a truly personalized Member experience that showcases how well PRMP understands the citizen and their needs, it is critical the agency be able to surface Member data from across systems for creating a personalized experience. With a complete real-time picture of a Member's data across the government enterprise, PRMP can proactively guide citizens to the right services or programs, target programs to specific citizen segments, and create contextually relevant online digital experience. Instead of citizens having to know what is available or relevant to their circumstances, the system and employees can seamlessly connect citizens to the right resolution to solve their challenge or answer their question.

Salesforce's Data Cloud allows PRMP to integrate these sources and systems (both first and third party) to create a real-time connected view of each individual. With the Salesforce Data Cloud:

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- Programs teams can identify and prioritize program participants with urgent needs and respond quickly
- Operations teams can identify trends as they happen to address gaps and maximize opps

Unifying citizen data across State systems, the Salesforce Data Cloud takes the Member 360 built into Salesforce's Customer Relationship Management system and adds real-time data streams, so that you can capture and ingest data from anywhere and at high scale. It's a real-time Member truth with unified profiles that connect identities, engagement data, applications or any program data. Salesforce has built-in connectors that bring in data from every single channel - mobile, web, APIs - even legacy data through MuleSoft and historical data from proprietary data lakes - in real time. Salesforce harmonizes all of this data - billions of profiles - into unified profiles that are your real-time customer truth. This becomes a Customer Truth or 'golden record' that evolves as your data does for real-time personalization, workflows, and engagements.

Outreach. With Salesforce's Marketing Cloud, state Medicaid agencies can manage its entire member population outreach process and activities. Agencies have 360° of each member outreach and enrollment interaction and activity. The functionality that can be leveraged for outreach and enrollment includes, but is not limited to:

- **Campaigns.** A campaign is an outbound effort that agencies can plan, manage, and track within the Salesforce Campaign tab. The goal of a campaign is to generate member participation in the program. Examples of types of campaigns include outbound emails, events, print advertising, and webinars.
- **Contacts.** Contacts contain information about the Member including: contact name, how to reach them, and related information such as logged calls, contact interactions, and interviews scheduled. A contact record has standard and customizable fields and includes fields such as: phone calls, tasks and events, meetings, and emails.
- **Mass Email.** Agencies can send and manage personalized outreach email messages to segmented, targeted Member contact lists. Agencies can analyze and optimize outreach efforts and improve external and internal communication.

States like Kentucky, Wisconsin, and Arizona used the Salesforce Marketing Cloud during the Public Health Emergency (PHE) unwinding to proactively communicate and connect with Members to ensure proper instructions were provided for the redetermination process along with follow-up with populations that were not completing their applications.

Integration and Interoperability. Salesforce is an open, API-led Enterprise Platform that makes integrating to other solutions far easier than the present legacy solution. For more information about Salesforce's ability to support interoperability, as well as see how Salesforce's Training solution works (Trailhead), see the link [here](#) for Get to Know the Salesforce Platform API's Course for tons of helpful information about how Salesforce supports REST, SOAP, BULK API's and more!

In addition to the Salesforce Platform being highly interoperable with other technologies, our MuleSoft Platform provides API and integration capabilities to solve challenges that organizations face with insulated legacy technologies, abstracting limitations that come with the inability to share data across systems, patterns, customers, etc. MuleSoft's API-led connectivity approach drives organizations with EDI constraints to adapt to real-time patterns by providing a multi-layered approach to connect, orchestrate, and interact across their ecosystem. MuleSoft helps organizations with API capabilities expand their current channels, simplify developer onboarding, and retain security and governance standards with three-layered components:

- **Connectivity** - Defining a System API layer to wrap key systems of record to access underlying data and expose the data while providing downstream insulation to minimize risk from any interface changes.
- **Orchestration** - Combining core assets with business logic and templated solutions to extract the data from System APIs.
- **Interface** - Providing features, like Anypoint Partner Manager and Anypoint Community Manager, to create portals that can be templated and reused across similar EDI formats for consumption by a specific end-user application or device.

End-to-end real-time visibility into dependencies, application performance, logs, and business operations metrics is enabled across the Platform. Performance can be managed and monitored to ensure transactions are compliant with SLAs.

We have thousands of customers who have integrated legacy applications with Salesforce as well as take advantage of an Enterprise Integration strategy with our API-led MuleSoft Platform. [Learn how](#) the State of Colorado leveraged MuleSoft to connect data across its eligibility and enrollment enterprise. MuleSoft's Anypoint Platform was chosen as the integration backbone to enable communication with other critical systems. Using the Salesforce connector, developers easily connected the PEAK portal with the other key systems required to support the Medicaid application and determination process. This developer-first experience, combining out-of-the-box functionality, reusable integration templates and graphical data mapping capability meant developers could be productive almost immediately.

Dashboards and Analytics. Salesforce's Tableau Platform is designed for the business user to get answers to

questions instantly through powerful, interactive visualizations of any data, on any device. Tableau is designed to analyze data not just from within Salesforce, but from across different sources, and be surfaced across PRMP. The Tableau Platform is already deployed at the New York State Department of Health OHIP/Medicaid and is a core tool for the Medicaid Data Warehouse. In addition to NY DOH, many other larger State Health departments use Tableau such as State of California, State of Florida, State of Texas, State of Ohio and several others. Public and commercial healthcare providers and payers use Tableau's self-service analytics to drive improved outcomes within defined populations. Tableau's easy-to-use advanced visual analytics such as

- Segmentation & cohort analysis
- Scenario & what-if analysis
- Time-series analysis
- Predictive analysis

Tableau has supported multiple payers in the shift from fee-for-service to value-based payment models. Specific use cases supported include rapidly identifying avoidable complications, comparing cost of services between organizations, such as an MCO or IPA, and others treating the same episodic bundle and viewing high risk/high cost patient information to better manage care and outcomes over time.

Tableau's self-service reporting/visualization flexibility and built-in array of graphical charts and displays will allow Puerto Rico to quickly build and deploy a variety of dashboards and analysis capabilities for virtually all envisioned use cases. Tableau includes a wide variety of optimized data connectors, including Salesforce, making Tableau the ideal choice for environments where multiple data sources are required in order to bring clarity on a given business problem. Tableau supports and works in conjunction with standard security mechanisms, assuring only those with appropriate access are capable of interacting with specific projects, dashboards and reports. As the leading visual analysis software company, Tableau has been built on the principles of ease of use for all knowledge workers. Everyday users should not be encumbered by or limited by the capacity of the IT shop to develop and provide data analytics. As discussed below, Tableau's products are built on breakthrough technologies that allow PRMP users to quickly create visually compelling ways to see and understand one's data.



Response to RFI Requirements



All Respondents must send completed responses to all questions contained in Section 3. All Respondents must use the template contained in Attachment A of this RFI to submit their responses.

Within this document Salesforce has provided you with a proposed approach to PRMP’s requirements from our solution’s perspective. While the majority of the requirements in Attachment A would typically be addressed by a Salesforce Partner who would act in the capacity of a System Integrator (SI), we have provided some relevant details to our recommendations and solution.

3.1 History of Medicaid Eligibility and Enrollment (E&E) Systems

- a. List the Respondent’s current or previous contracts that showcase experience implementing or operating Medicaid E&E system(s) in states or territories, with particular emphasis on those of similar size to Puerto Rico.**

Please provide the name of the state or territory in which the Respondent holds a contract, and the start and end dates for each contract described.

Additionally, please note if any of the listed contracts involve a Curam system, and if the E&E system has been certified through the Centers for Medicare & Medicaid Services (CMS) certification process.

As a software solution provider, Salesforce does not implement or operate Medicaid E&E systems. We rely on our Salesforce Certified System Integrator partners to serve in this role. Our solutions have been part of a number of state’s overall E&E, Medicaid, and/or integrated benefit eligibility solutions. We’ve shared some examples of those customers below that represent customers taking the approaches we reference above in our Executive Summary recommendations.



[Redacted text block]

[Redacted text block]

[Redacted text block]

[Redacted text block]

The **Colorado Department of Human Services** provides needed services to Colorado’s most vulnerable populations by providing the right services to the right people at the right time. Programs include food and cash assistance, heat assistance, child care, child support, disability assistance, employment services, and refugee services. With the establishment of its own health insurance marketplace in 2013, Colorado expanded Medicaid coverage for low-income citizens, putting pressure on the state’s public assistance programs to screen and enroll more applicants and deliver food, cash and medical services to more people.

The state's existing eligibility system was outdated, relying primarily on manual, paper-based processes and data entry, taking up to 45 days to determine eligibility, delaying critical assistance to residents. The state needed to build a modern platform to streamline the eligibility process and scale its Colorado Benefits Management System (CBMS). With the launch of its new insurance marketplace looming, the State of Colorado mobilized quickly to replace its manual system with a modern online portal that would allow citizens to easily and quickly apply for welfare benefits online.

The State's web-based portal, PEAK, powered by Salesforce, provides a self-service delivery model for eligibility services, allowing constituents to apply for welfare benefits online, via mobile apps, and through portal-connected contact centers for medical, food, and cash assistance programs. Built in just six months, Colorado PEAK reduces manual, paper-based application processes, speeds eligibility screening, and delivers vital health care benefits to 2.5 million citizens. Currently the app attracts more than 200,000 logins per month, and successfully integrates with numerous legacy ERP systems. PEAK is dramatically improving operational efficiencies, increasing staff productivity, and accelerating the eligibility and enrollment process. Eligibility screening and approval processing was reduced from 45 days to real-time. The number of applications processed per month doubled with the same number of employees and budget. Citizens can access and manage their account and benefit information anytime. Salesforce driven contact centers give citizens additional methods of applying for benefits. Community-based organizations (like food pantries and nursing homes) can link to the portal, helping citizens access additional services and resources. The solution was extended to include a provider module whereby hospitals are provided with an automated method to help newborns receive benefit coverage. To see the State's current Salesforce solution, please visit: <http://coloradopeak.force.com/>.

The State continued down their transformation path with the goal to modernize the entire eligibility and enrollment environment and added full case management functionality for over 4,700 caseworkers. The fully modernized Colorado Benefits Management System went live in 2019. It incorporates Medicaid, SNAP, TANF, Children's Basic Health Plan, and case management for work programs. Colorado, together with Salesforce and Deloitte, developed and deployed an incremental modernization strategy for this large, statewide system that included the addition of Salesforce applications for complex case management and legacy conversion to the Salesforce platform.

Colorado was grappling with rising caseloads combined with aging legacy issues - rising hardware and on-premise data center costs, meeting and maintaining Federal security requirements, increased release time for fixes and enhancements due to a large custom codebase, batch extending into primetime, limited mobile support, and overall system complexity that affected usability and caseworker training. The state moved away from the existing on-premise legacy system to a Salesforce solution, using configuration rather than custom code, driving more efficient business processes, reducing overall maintenance costs, and improving ease of use for caseworkers. The architecture also includes the MuleSoft integration engine that synchronizes Salesforce data with a backend database in real-time. The CBMS modernization effort achieved a 70% reduction in the code base, reduced 8 million lines of code into the configurable Salesforce platform, and migrated 450 million rows of data. Since the system went live in August 2019, the state has experienced reductions in application appeals and untimely application processing, decreases in client ID merges due to data entry errors, and improved user experience and satisfaction.

Colorado Health Care Policy and Financing focuses on delivering customer-centric health and human services: increasing access to care, improving health outcomes, and containing health care costs. The department has six programs, including Health First Colorado (Colorado's Medicaid program) and Child Health Plan Plus, that together deliver on the mission "to improve healthcare access and outcomes for the people we serve while demonstrating sound stewardship of financial resources." As of August 2020, over 1.3 million Coloradans were enrolled in Health First Colorado and 73,000 enrolled in Child Health Plan Plus (CHP+). Other programs include home and community based services, dental programs, indigent care and other buy-in services.

HCPF used a federal grant to fund improvements to its contact center and invested in the cloud, re-platforming its contact center on Salesforce. The new system, launched in three months, enables agents to deliver better service faster, opens up new service channels, and supports the Department's vision of having a single platform that connects Medicaid clients and applicants, service providers, community partners, local government, larger public health programs, and more. Call-handling time was cut in half, going from an average of 12.5 minutes to 6 minutes. Call abandonment rate dropped from 54% to 12%. Tasks that once took hours were reduced to minutes, and tasks that once took minutes were reduced to seconds.

[Redacted content]

[Redacted content]

[Redacted content]

3.5 Cost Estimates and Models for the Replacement or Takeover of a Medicaid E&E System

b. Describe how system enhancements are typically managed. What recommendations do you have for controlling enhancement costs?

We would rely on our System Integrator partners to determine how system enhancements are managed in a replacement or take-over scenario.

3.7 Alternative Approaches

- a. **The current Puerto Rico E&E System is a CMS Certified system, running on a Curam platform. What do you recommend as PRMP considers options for modernizing and enhancing their solution? Please provide any additional information regarding alternative approaches that may be beneficial for PRMP to consider ahead of a potential future procurement.**

[Redacted]

[Redacted]

[Redacted]

[Redacted]

We have created a sample of what an incremental Transformation Roadmap could look like for PRMP. This reflects conversations we have had with other states and industry specialists experienced in issues similar to those faced by PRMP.



[Redacted text block]

3.7 Alternative Approaches

- b. Considering the layouts of the existing solution depicted in Section 2 of the RFI, do any modules lend themselves well to enhancements or modernization?

[Redacted text block]

[Redacted text block]

[Redacted text block]

3.7 Alternative Approaches

- c. Is the Respondent willing to provide an E&E system demo or provide additional information upon PRMPs request?



Salesforce would be pleased to provide a demo of any of the functionality described in this document or provide additional information upon PRMPs request, as well as demos of other supporting MES capabilities including contact center, provider management, analytics and data visualization, and integrations. A sample of the capabilities Salesforce can bring can be viewed [here](#). These guided tours include samples of capabilities supporting [Program Eligibility](#), [Integrations](#), and [Analytics](#), among other capabilities. In addition, DOH can view demos of using Salesforce to [Personalize Member Management](#) and [Scale Member Care Management](#).

Who Are We



Salesforce Company Overview

Salesforce is the #1 CRM, bringing the public sector and customers together in the digital age. Founded in 1999, Salesforce enables organizations of every size to take advantage of powerful technologies—cloud, mobile, social, voice, and artificial intelligence—to connect to their customers in a whole new way.

The Salesforce Customer 360 for Public Sector is an integrated platform for public services that brings mission-critical capabilities to life - enabling relationship management, case management, team collaboration, integration, analytics and business intelligence, engagement and outreach and modern application development both within Salesforce and for third-parties. It gives decision-makers and teams a single, shared view of their customers so they can work together to build lasting, trusted relationships and deliver the personalized experiences their customers expect.

With thousands of customers and an ecosystem that includes over 2.5 million developers as well as hundreds of certified partners, Salesforce demonstrates how trusted, agile cloud applications help public sector organizations build trust and deliver better digital services.

The FedRAMP-authorized Salesforce Government Cloud - the world's #1 enterprise cloud, built for the government – gives stakeholders the mobile, self-service tools they need to connect data, process, and people while also reducing the risk, cost, and the complexity of traditional IT. Salesforce's trusted Government Cloud, delivered in an isolated infrastructure to meet Government Certification requirements, accelerates government transformation to rapidly and securely deploy solutions with a multi-tenant cloud infrastructure that meets all security and compliance requirements.

Recognition for Leadership in the Cloud

Salesforce has received multiple awards and recognition for its expertise and leadership in the cloud. From Salesforce's beginnings over 22 years ago, their 150,000+ customers have responded to their cloud computing offerings with overwhelming enthusiasm. Such success has propelled Salesforce to be #1 in Enterprise Cloud Computing and #1 in CRM according to International Data Corporation (IDC). Salesforce also ranks as the Leader in the Gartner Magic Quadrants for "[Field Service Management](#)" (SaaS), "[Sales Force Automation](#)" (SaaS), "[Personalization Engines](#)", and "[Multichannel Marketing Hubs](#)". In addition to the recognition from leading Industry Analysts, Forbes Magazine named Salesforce "Innovator of the Decade" and has named Salesforce one of the World's Most Innovative Companies nine years in a row.

	The Leader in Sales Force Automation Platforms for the 16th consecutive year, 2022		A Leader in The Forrester Wave™: Enterprise Marketing Suites, Q3 2022
	A Leader in Field Service Management, 2022		A Leader in The Forrester New Wave™: Marketplaces for SaaS Sourcing, Q1 2022
	A Leader in Analytics & Business Intelligence Platforms, 2022		A Leader in The Forrester New Wave™: Sustainability Management Software, Q1 2022
	A Leader in Multichannel Marketing Hubs for the fifth consecutive Year, 2022		A Leader in The Forrester Wave™: Digital Experience Platforms, Q3 2021
	Salesforce ranked #1 in CRM Market Share for the ninth consecutive year, 2022		Salesforce ranked #1 CRM provider for nine consecutive years in its Worldwide Semiannual Software Tracker
	Salesforce recognized as One of the World's Most Admired Companies, 2022		Salesforce ranked #1 on The World's Most Innovative Companies List, 2022
	Fortune's Best Workplaces in Technology™, 2022		Salesforce recognized as one of the Top Companies for Technology & Information, 2022

The Magic Quadrant Gartner reports reflected in this graphic are available upon request from Salesforce. To access these reports, please go to: <https://www.salesforce.com/company/recognition/analyst-reports/>.

Rated #1 by IDC, Gartner, and Forrester, the Salesforce Platform has been designed to provide customers with high levels of performance, reliability, and security. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the service to scale reliably, and cost-effectively to accommodate millions of users. Your organization will not need to maintain any hardware or software. The Salesforce cloud based architecture will allow your organization to deploy the proposed solution.

The Salesforce Advantage

Salesforce provides a single enterprise platform that delivers multiple services and enables state Medicaid agencies to rapidly configure solutions specifically tailored to your mission and requirements. Salesforce solutions free data from legacy systems, empower customers, and connect organizations, and employees to administer services in powerful new ways. The Salesforce Platform is the lowest risk and fastest way to securely build, connect, optimize, and deploy every kind of app tailored for any type of use case.

The key advantages of Salesforce solutions include:

Enterprise Cloud Platform. State Medicaid agencies can optimize mission activities by managing all interactions and data through a [customer success “platform of engagement.”](#) Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively. Salesforce’s multi-tenant cloud solutions provide a single, shared infrastructure, one code base, one platform that is all centrally managed, with platform-based Application Programming Interfaces (APIs) to support all integration traffic, and (3) three major

A True Multi-tenant Cloud Platform

- Single, shared infrastructure and common code base that is consistent across all customers
- Platform-based APIs to support all integration traffic
- Scalable, metadata-driven architecture to rapidly configure, test, and deploy apps on any device with clicks and not code
- 3 major release upgrades a year included in the service with no impact to your configurations and customizations

release upgrades a year included as part of the subscription service at no additional cost. The Salesforce Platform offers a core set of technologies that not only power the Salesforce Software as a Service (SaaS) and high-productivity application Platform as a Service (PaaS) products, but also allows organizations to build and rapidly deploy custom apps with just a few clicks all from a single canvas, connecting data from any system, and managing it from anywhere on any desktop and mobile device.

Secure, Private, Scalable, and Reliable. The Salesforce service has been designed to provide customers with 100% trusted privacy with the highest levels of performance, reliability and security. Salesforce has built, and continues to invest in a comprehensive security infrastructure, including firewalls, intrusion detection systems, and encryption for transmissions over the Internet, which Salesforce monitors and tests on a regular basis. Salesforce built and maintains a multi-tenant application architecture that has been designed to enable the Salesforce service to scale securely, reliably and cost-effectively. The Salesforce multi-tenant application architecture maintains the integrity and separation of customer data while still permitting all customers to use the same application functionality simultaneously. With multi-tenancy, all Salesforce customers run their applications on a common infrastructure. This means that every customer is always on the latest release of Salesforce applications, and has access to the latest technology. Multi-tenancy means that it is easier to scale new users and applications. With multi-tenancy, customers don’t have to worry about managing infrastructure.

FedRAMP Certified SaaS/PaaS At the Highest Level. One of the reasons for Salesforce’s success in government is their investment in delivering a secure Cloud experience. The service has been designed to provide Salesforce customers with privacy and high levels of performance, reliability, and security. Salesforce cloud-based solutions, Software as a Service (SaaS) and Platform as a Service (PaaS), are FedRAMP certified at the High Impact level to provide DHCD with the assurance that your data is secure. Focusing on a cloud-based application platform allows you to minimize internal administration, while providing organizational agility, speed-to-value, and ease-of-use for a broad range of stakeholders.

AppExchange and Private AppExchange. Developed in 2006, the Salesforce AppExchange is an enterprise cloud marketplace of over 5,000 pre-built enterprise cloud computing solutions that are integrated with Salesforce's SaaS/PaaS solutions and developed on the Salesforce Platform. To date, our customer community has utilized these solutions more than 5 million times. With just a mouse click and a Salesforce account, DHCD can extend your initial investment and easily find, test, and install hundreds of pre-integrated apps from the Salesforce partner community. With the Salesforce Private AppExchange offering, DHCD can create a secure, customized, branded application store location to host customized apps and distribute apps across users. Role-based access allows DHCD's users instant access to any mobile or cloud application they need to be productive, on any device. And what is truly unique to Salesforce is that any application built on the Salesforce Platform can be reused and can also be utilized in a [Private AppExchange](#). This allows organization CIOs to foster reuse of applications and drive down development costs. Visit the public Salesforce application store at: <https://appexchange.salesforce.com/>. View a private AppExchange Demo: [Salesforce AppExchange demo](#).

Collaboration is Embedded into all Aspects of the Solution. Collaboration is critical to organizational effectiveness and productivity. Salesforce provides numerous standard collaboration capabilities that are embedded into the fabric of how users work within the system with a complete record of activity. This includes unstructured communications, reports, dashboards, triggered alerts, document management, universal search, knowledge management, mobility and much more.

Rapid App Development Using the Salesforce Platform. The Salesforce Platform allows customers to build apps fast with just a few clicks, designed for desktop and mobile devices, all from a single canvas, including pre-built AppExchange solutions. To help IT deliver apps faster, the Salesforce Platform offers a simple yet powerful set of declarative, point-and-click tools that anyone can use to achieve business goals at lightning speed.

Without writing code, developers and business users alike can quickly and easily create custom apps on the Salesforce Platform with complex business logic and beautiful user interfaces designed specific to every screen. Salesforce Lightning Builder tools allow your organization to work in alignment with agile development methodologies as IT meets business demands faster.

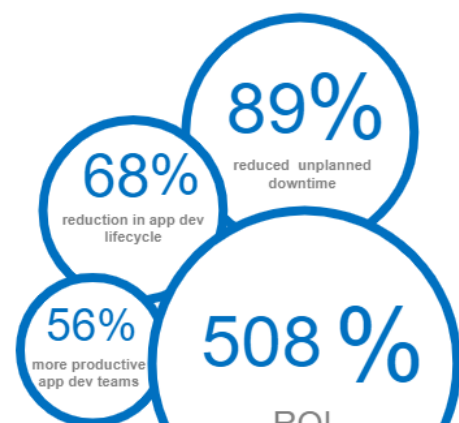
Salesforce's trusted cloud platform allows customers to deliver 63% more new features per year generating an additional \$5.7 million in new revenue per year on average according to IDC.

Accelerated Time to Value. The Salesforce service can be deployed rapidly since customers do not have to spend time procuring, installing or maintaining the servers, storage, networking equipment, security products, or other infrastructure hardware and software necessary. Salesforce's trusted cloud platform offers customers 63% more new features per year generating an average of \$5.7 million in new revenue per year. Additionally, customers are able to develop entirely new applications with greater frequency (111% more applications) and user adoption (a 95% increase) ([according to IDC](#)).

Lower Total Cost of Ownership and Dramatic Return on Investment (ROI). Salesforce enables customers to achieve significant up-front savings relative to the traditional enterprise software model. Customers benefit from the predictability of their future costs since they generally pay for the service on a per subscriber basis for the term of the subscription contract. Because Salesforce deploys all updates on Salesforce servers, new features and functionality automatically become part of the Salesforce service (on the update release date) and therefore benefit all Salesforce customers immediately.

Independent studies conducted by leading Industry Analysts such as Gartner, Forrester and IDC (International Data Corporation) show the cost effectiveness and the large ROI potential of the Salesforce Platform. In IDC's study published in October 2020, the following key Business Value results were cited:

- 508% five-year ROI
- 6 months to payback



- 56% more productive application development teams
- 2x more applications released annually
- 68% reduction in application development lifecycle
- 63% more new features released per year
- \$5.7 million additional new revenue generated per year
- 89% reduced unplanned downtime
- 63% more efficient application management teams

[View IDC Report](#) for more information and complete details.

Salesforce provides the benefit of three new product releases each year, including features for Health and Human Services agencies. Our customers have the opportunity to provide input into the new features included in each release, to help ensure the solution evolves with your changing needs. DOH can quickly launch customized engagement portals (supporting your Members, Providers, employees, and State or community partners) on the Salesforce Platform that incorporate real-time data, complex business logic, tailored, self-service components, and user interfaces designed specific to every screen. Salesforce SaaS/PaaS solutions have been designed to provide Salesforce customers with privacy and high levels of performance, reliability, and security. Salesforce’s highly flexible, open platform can enable DOH to modernize rapidly and deliver unprecedented service.

Salesforce Values

Salesforce operates with a set of core values: trust, growth, innovation, equality, and sustainability. At Salesforce, we believe nothing is more important than the trust of our customers. Customers trust our technology to deliver the highest levels of security, reliability, and availability at scale. We continuously innovate on our platform and empower our customers to innovate, which drives customer success and mutual growth.

Salesforce also believes in giving back. We pioneered, and have inspired other companies to adopt, an integrated philanthropy model called the 1-1-1 model, which leverages 1% of a company’s equity, employee time, and product to help improve communities around the world. In addition, we have spearheaded initiatives that foster equal pay, equal advancement, equal opportunity, and equal rights for our employees and to serve as an example for the broader world. We also strive to play a meaningful role in creating a sustainable, low-carbon future by delivering a carbon neutral cloud, operating as a net-zero greenhouse gas emissions company and by working to achieve our goal of 100% renewable energy for our global operations.

Trust.

Trust is our #1 value. Nothing is more important to our company than the privacy of our customers’ data. Hence we are committed to trusted long term stakeholder relationships, reliable infrastructure, and data privacy. We are working on rolling out Hyperforce globally which enables Salesforce clients to adhere to data residency and privacy issues as GDPR, CCPA, CDPA & CPA.

Customer Success.

We put our customers first, acting as trusted digital advisors and creating the right solutions along their digital transformation journeys. At Salesforce we estimate that we will be successful if we can make our customers successful.

Innovation.

We apply a beginner’s mind, creativity, and continuous learning to disrupt and transform all that we do. We offer three releases a year, so our customers always have access to the latest technologies, allowing them to innovate, build, and stay ahead of their industries.



Equality.

Salesforce strives for a more equal, inclusive, sustainable, and better world. We believe equality and diversity make us a better company.

In addition to our four core values, **Sustainability** is also an important focus area for Salesforce as we believe that the business should be the biggest platform for change.

Finances

Salesforce is a publicly owned US corporation (CRM on the NYSE). All our financial records are publicly available at [this link](#).

Salesforce Isn't Just a Business. It's an Economy of Trust.

Philanthropy and Giving back to the Community Salesforce practices integrated philanthropy, giving back 1% of our time, equity, and product to nonprofits. We encourage employees to volunteer; we fund grants for organizations in need, and we make our products available at low or no cost to qualified nonprofits. More information on our 1-1-1 philosophy is available at [this link](#).

Through Trailblazers' efforts, we're helping to create **9.3 million** new jobs and more than **\$1.6 trillion** in new business revenue by 2026. We're all helping to build trust with our communities and customers. When our customers choose to work with Salesforce, they become a part of this incredible community to learn from, share with, and provide these amazing opportunities.

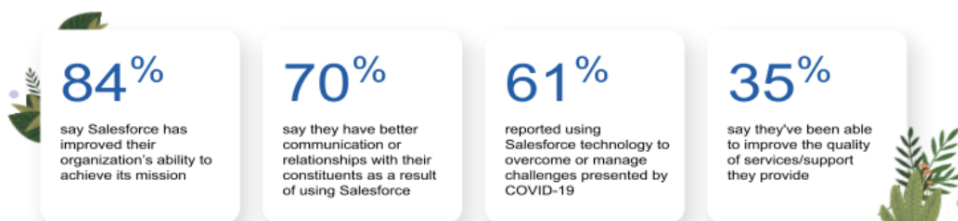
Salesforce Isn't Just a Business

It's an Economy of Trust



Social Values

We believe that technology can create a better and more equitable future for all. Salesforce contributes approximately \$1.5 billion in FY21 in social value to the global community, partnering with organizations of all sizes to tackle the world's biggest problems. Our Annual Social Value metric represents the potential for meaningful, measurable, sustainable change that our customers are able to create as a result of our technology and resources. We believe that defining social value in a way that can be standardized across sectors will help increase transparency and accountability.



Thank You

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