



# PegaWorld

JUNE 7-9 | LAS VEGAS

[PEGAWORLD.COM](https://pegaworld.com)



# Applied Agentic AI: How enGen is Orchestrating Next-Gen Care for Payors

From fragmented CM/UM tools to **an intelligent care orchestration hub**

PegaWorld 2026



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**Healthcare pressures are converging to usher in a period of profound transformation** - one that is fundamentally reshaping how care must be managed, delivered, and experienced.



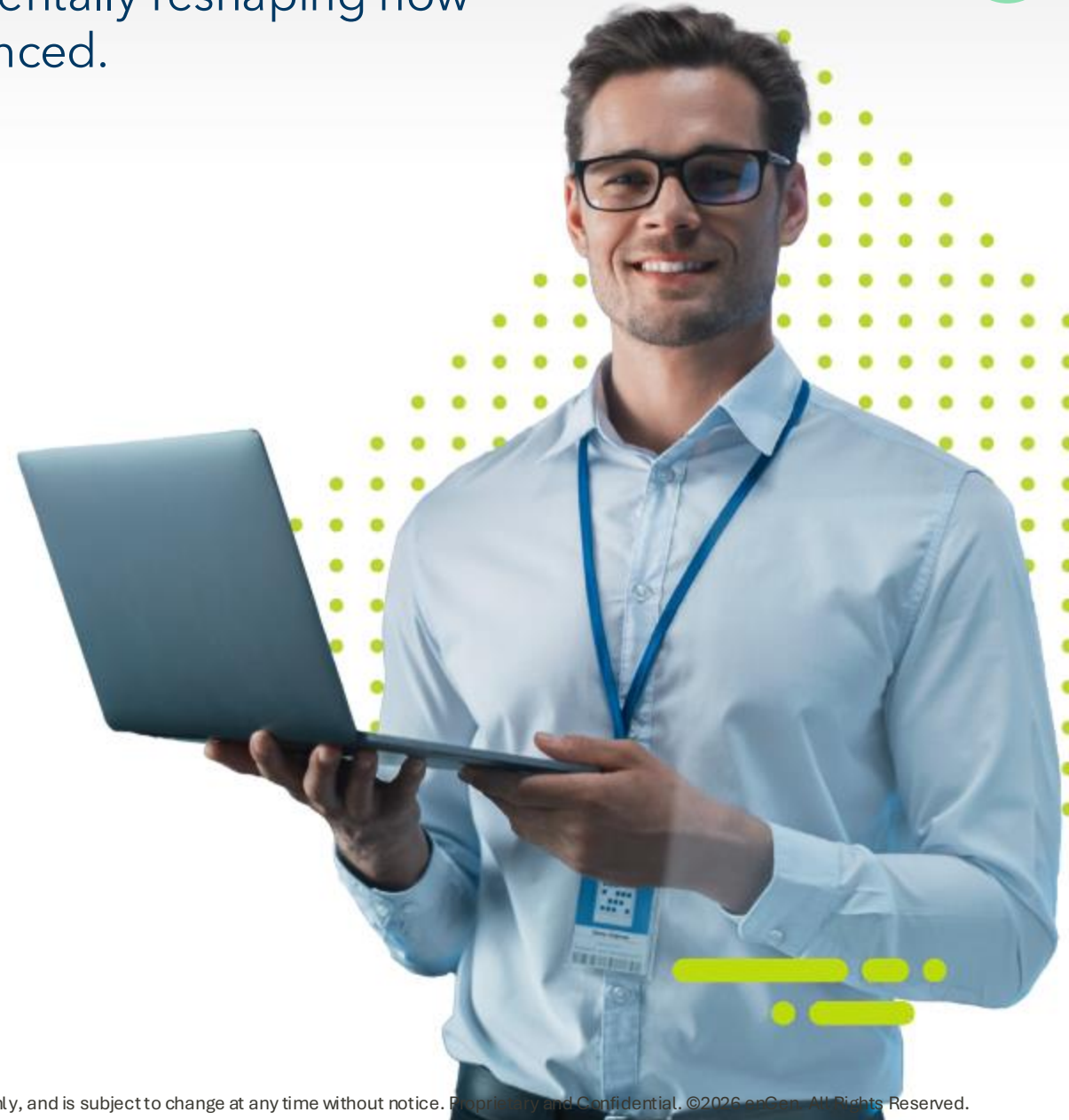
 **Demographic shifts**

 **Workforce shortages**

 **Rising costs and economic pressures**

 **Regulatory pressure and policy shifts**

 **Customer expectations**





**Current Reality:**

## **Traditional care management can't keep up.**

Most care management platforms today weren't designed for this environment resulting in friction everywhere

- × **Data is fragmented**
- × **Workflows are manual**
- × **Clinicians waste time navigating systems**
- × **Limited real-time insight**

The problem isn't effort – *it's architecture.*

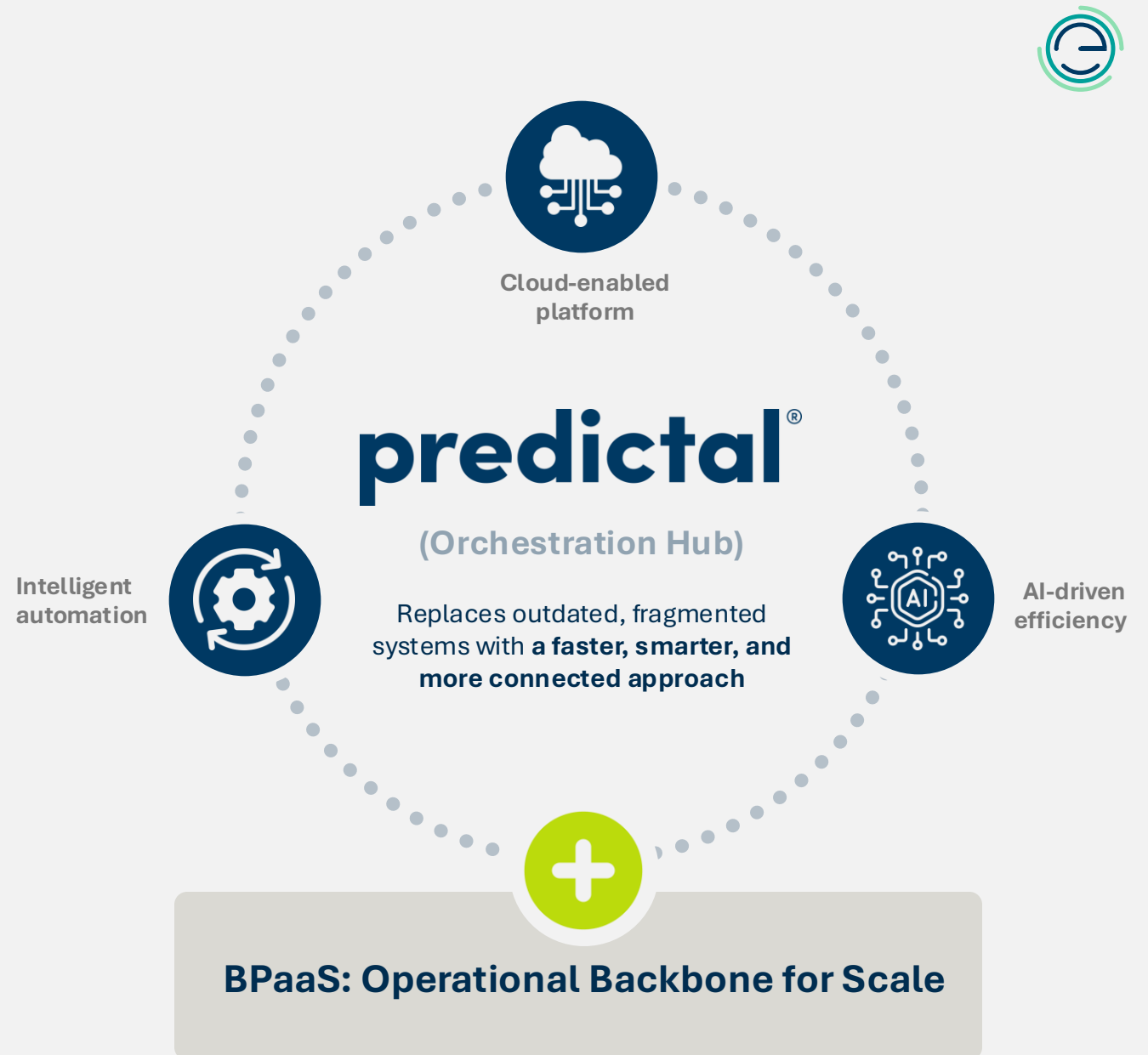
**This moment demands a new operating model – one centered on care orchestration. Predictal represents this next evolution.**

# Predictal as the Intelligence Layer for Care

**Predictal is purposefully combining AI, data, and interoperability to orchestrate care** – accelerating access, improving care, and reducing friction across the ecosystem.

## Predictal is designed to respond:

- Orchestrates care across UM, CM, and downstream workflows
- Unifies clinical data, medical policy, and AI into intelligent, end-to-end workflows
- Enables earlier, higher-confidence decisions – with clinicians in control



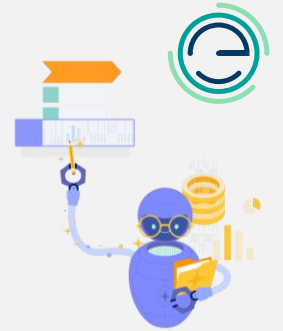
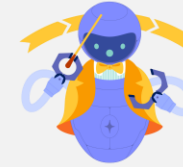


**Transactional**



**Orchestrative**

Coordinating data and actions across people, systems, and settings.



**Rigid**



**Modular**

Enable plug-&-play integrations and adaptability across diverse data sources.

## The Required Shift:

## Preparing for Agentic AI

**Care orchestration isn't aspirational anymore - it's required.**



**Manual**



**AI-Powered**

Automating tasks and embedding intelligence into everyday decisions.



**System-Centric**



**Consumer-Centric**

Designing around real member journey and personalized care plans.

**Predictal's strategic product architecture is powering its evolution**, from traditional CM/UM to a person-centric data and workflow hub that enables whole-person care.

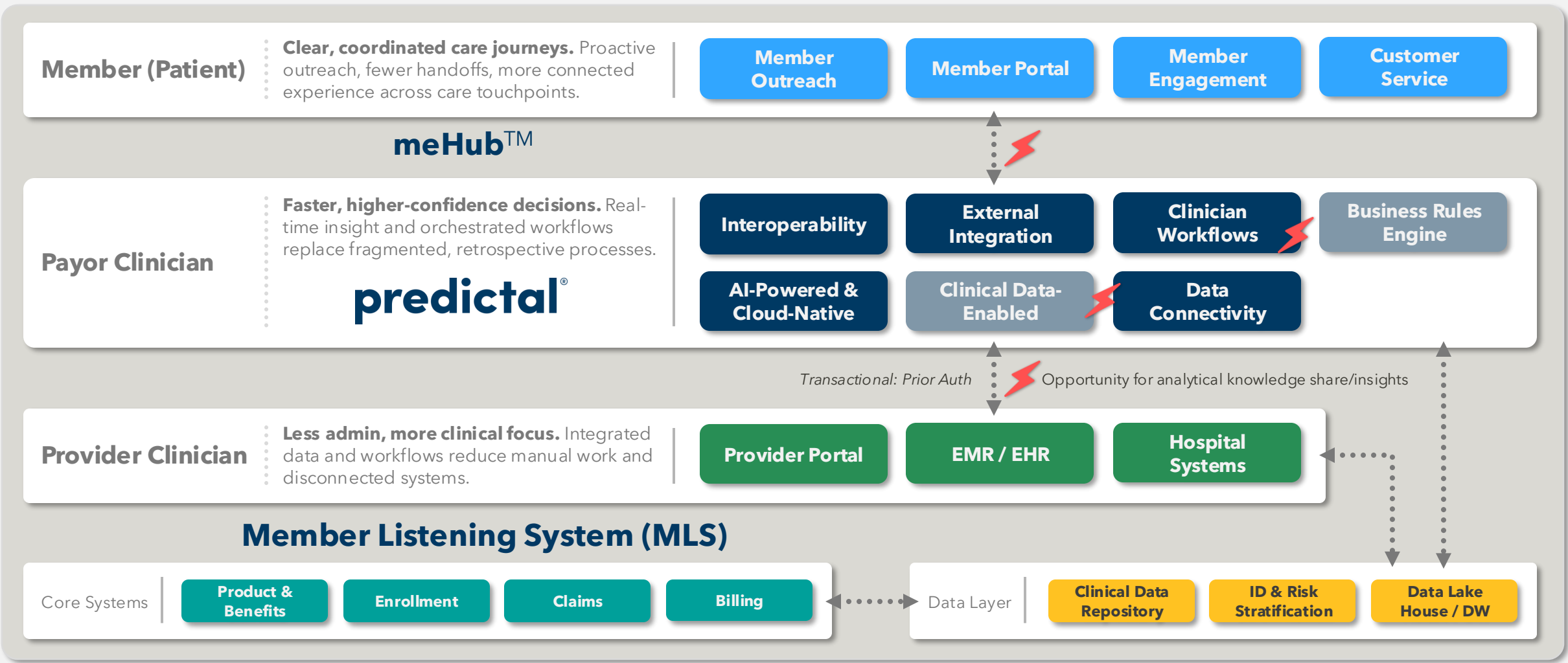


Predictal's evolution is anchored in **five platform strengths** and four strategic plays

- 1 Diverse Data Connectivity**
- 2 External Integration**
- 3 Interoperability**
- 4 AI-Powered, Cloud-Native Intelligence**
- 5 Clinician-Centric, Configurable Workflows**



# Predictal's orchestration removes friction for everyone involved in care.



# Predictal core capability ⚡ Opportunity or pain point

**This architecture enables Predictal to close care gaps, coordinating data and actions across all three personas and turning fragmented processes into orchestrated care.**

**Predictal's AI strategy is already moving from concept to production,** embedding intelligence directly into care management workflows.



## Capabilities

## Features

## Outcomes

### AI-Driven Care Planning & Engagement

- CM Intelligent Care Plan Generation
- CM Care Plan Pre-Population
- CM Ambient Listening and Call Summarization

Reduced clinician effort with more personalized care

### Real-Time Clinical Insight & Decision Support

- Member Clinical, Auth, and Claims History Conversational AI
- CM Case Summarization

Faster, higher-confidence clinical decisions

### AI-Assisted Utilization Management

- UM Quality Agent
- UM Authorization Recommendation Support

Improved accuracy, consistency, and throughput in UM

### AI Governance & Performance Monitoring

- AI Metrics & Model Performance Tracking

Scalable, responsible AI adoption

# Investments in AI and Clinical Data Integration form Predictal's intelligence foundation, enabling whole-person care and scalable automation across the platform.



## Artificial Intelligence

*Embedding intelligence directly into UM/CM workflows*

**Auth Quality AI** - AI driven secondary quality check

**GenAI-enabled Care Management** - care plan generation and RAG-based clinical data assistants

## GenAI & Modern UX Enablement

**Pega Cloud-based GenAI** supports workflow design, automation, insights, and optimization to accelerate innovation and user experience

### Pega Constellation delivers:

- Consistent, intuitive UX
- Modular, API-first architecture
- Improved performance and extensibility

## Clinical Data Integration

*Creating a holistic, real-time view of the member*

- Ingests **clinical, EMR, SDOH, risk, and supplemental benefit data**
- Enables a **whole-person, integrated model of care**
- Serves as **the data backbone** for automation and decision support

Data is the oxygen for our AI engines, enabling automation, accuracy, and scale

## Future GenAI capabilities enabled by a Pega Cloud foundation:

GenAI Blueprint

GenAI Analyze

GenAI Auto Pilot

Process AI

GenAI Knowledge Buddy

Process Mining

GenAI Coach



**Steven Pretend**  
(Member)



**Steven** is admitted to the hospital for a cardiovascular event



**Steven** is discharged from the hospital



Conversational outreach supported by AI

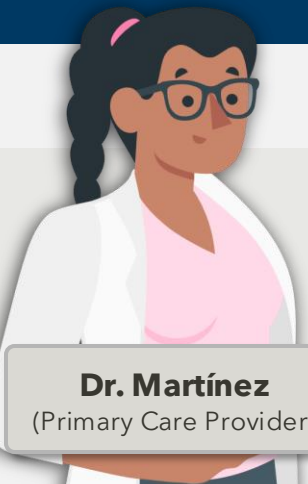
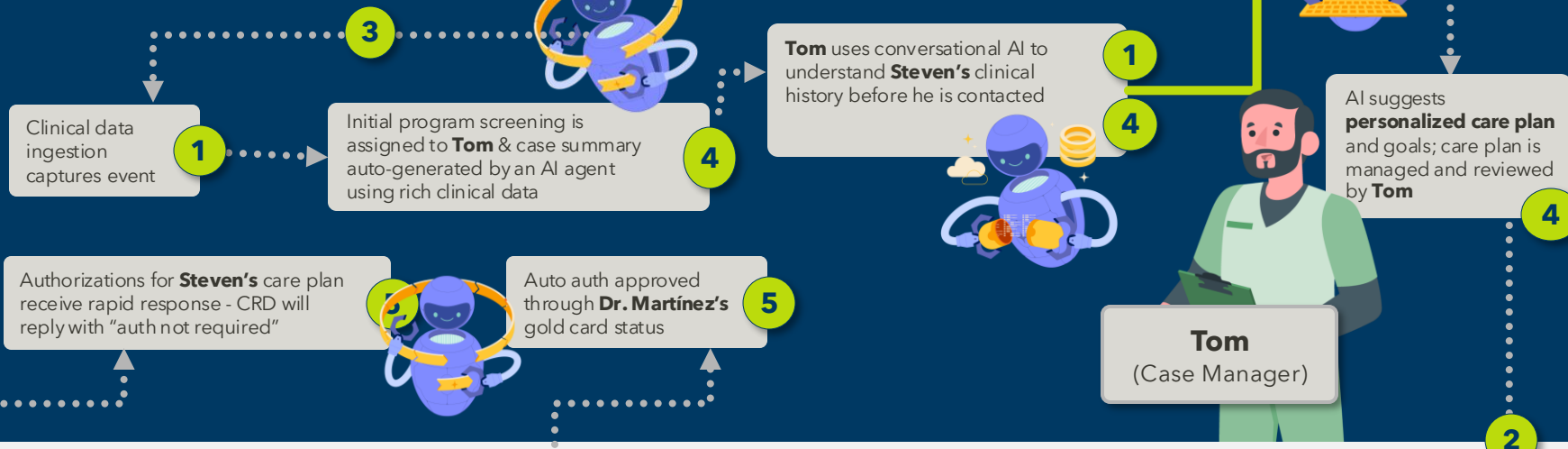
**Tom** engages **Steven** for consent and assessment



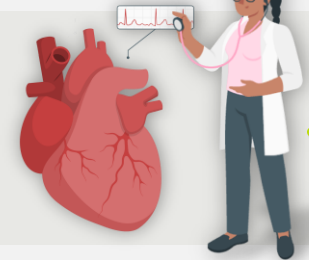
# predictal<sup>®</sup>

Care doesn't move in silos. Neither does Predictal.

From event to outcome, Members experience a clear, connected care journey, Providers spend more time delivering care, and Payers gain real-time insight and automated decisioning. **This is care orchestration at scale – powered by Predictal.**



**Dr. Martínez**  
(Primary Care Provider)



**Dr. Martínez** provides care for **Steven**



**Dr. Martínez** schedules a follow-up stress test



**Dr. Martínez** views **Steven's** care plan via the provider portal or EMR



**Steven's** care plan is reviewed, finalized, and published

**Published via multiple channels:** available to PCP, multidisciplinary team, and Steven (myHighmark)

# Pre-Call Conversational AI Agent, enabling the case managers ability to quickly access the members background and converse for full understanding.



**predictal™ Case Management**

**Clinical Program Screening -Post Discharge -Transition of Care (TOC)**

**STEVEN PRETEND**  
 57 Year(s) Male | 120 FIFTH | PITTSBURGH, PA 15222 | \* (724) 351-7775 (j)

UMI: K2L5172994580010 | Preferred Language: — | COB Indicator: Unavailable | **ACTIVE** Effective Date: 01/01/2025  
 ECID: 800015207 | ASO Fund Mode: Fully Insured | LOB: PPO | Govt Indicator: Commercial

View in Laguna | Alerts | Actions

SHOW MORE

INTAKE | SCREENING

**Clinical Program Screening Details**

⌚ Your Clinical Program Screening is due in 2d 22h on 05/11/2026 09:57 AM

Referred Clinical Program: Post Discharge

Primary Referral Reason: Transition of Care (TOC)

Secondary Referral Reason(s): —

Referral Source: Utilization Management

Reason for Outreach: —

Authorization ID: AUTH-80002 Refresh

Authorization Determination: Approved

Discharge Date: 06/02/2026

Thomas D Mcpherson  
 CDM Case Manager  
 Assigned To: CM\_Commercial

**Non-Clinical Screening Details**  
 Completed on 05/08/2026 09:05 AM

Do Not Contact	- No
Active Coverage	- Yes
Is Blue Primary Coverage	- Yes
FEP Screening	- N/A
Follow Discharge	- Yes-Refer to Screening Note
Phone Number Lookup	- N/A
Disease Management	- Yes
Case Management	- Yes
Active Vendor Engaged Program	- No

**AI Summary**

Here is a summary of the Clinical Program Screening case and Member Clinical data:

**Clinical Program Screening Case Details**

- Referred Clinical Program: Post Discharge
- Primary Referral Reason: Transition of Care (TOC)
- Referral Source: Utilization Management
- Reason for Outreach: New Post Discharge
- Related Authorization ID: AUTH-80002
- Discharge Date: 2026-06-02
- Discharge Disposition: Home Self Care

**Member Details**

- Name: STEVEN PRETEND
- Member ID: MBR-5091
- Date of Birth: 1968-05-15
- Address: 120 FIFTH AVENUE, PITTSBURGH, PA 15222
- Member Contact: (724) 351-7775
- Plan Name: Commercial

# Pre-Call Conversational AI Agent, enabling the case managers ability to quickly access the members background and converse for full understanding.



**predictal** Case Management

**AI Summary**


- Claim ID: 22516520880
  - Service Date(s): 2025-08-18 to 2025-08-20
  - Provider: christus good shepherd medical
  - Billed Amount: Information not available
  - Approved Amount: \$90.72
  - Status: Approved
- Claim ID: 22516520900
  - Service Date(s): 2025-08-18 to 2025-08-20
  - Provider: east texas medical specialist
  - Billed Amount: Information not available
  - Approved Amount: \$167.72
  - Status: Approved
- Claim ID: 748741111502013571
  - Service Date(s): 2025-12-19
  - Provider: KAM'S CLUB #8175
  - Billed Amount: Information not available
  - Approved Amount: \$0.00
  - Status: Approved

Based on the members latest claims, what are his active medications?\*

Based on the member's latest claims, here are his active medications:

- LISINOPRIL 10 MG TABLET
- PLAVIX 75 MG TABLET
- ATORVASTATIN 20 MG TABLET




Write a message



**Traditional Care Plan Generation**, drives toward problems/goals based only on primary assessment.



# Predictal



[Help](#) [Sign out](#) 05/08/2024

### Assessment Outline

Initial Questions	2 / 2
Introduction	0 / 3
SDOH	2 / 18
Assessment Question Selection	0 / 1
Basic and Special Needs	0 / 5
Medical History	0 / 7
Medical History	0 / 4
Alcohol/Drug Use	0 / 2
Treatment Indications	0 / 1
Behavioral Health Symptoms	0 / 0
Medical and Behavioral Health Providers	0 / 3
HRQOL	0 / 3
ADLs and IADLs	0 / 14
Cognitive and Emotional Health	0 / 9
Resources	0 / 4
Labs / Pain	0 / 2
Medication	0 / 1
Self Management	0 / 5

### Clinical Reference

- Attention-Deficit/Hyperactivity Disorder (ADHD)
- Bipolar Disorder
- Bone Marrow/Stem Cell Transplant
- Cancer
- Cerebrovascular Disease Including History of Stroke or TIA
- Chronic Kidney Disease
- Chronic Obstructive Pulmonary Disease
- Chronic Pain
- Chronic Traumatic Brain Injury (TBI) Including Concussion
- Chronic Wound
- Cocaine Use Disorder
- Coronary Artery Disease
- Crohn's Disease
- Cystic Fibrosis
- Low Back Pain
- Lupus
- Migraine Headache
- Multiple Sclerosis
- Myasthenia Gravis Disorder
- Myositis Disorder
- Obesity
- Obstructive Sleep Apnea
- Opioid Use Disorder
- Panic Disorder
- Parkinson's Disorder
- Rheumatoid Arthritis
- Schizophrenia
- Scleroderma Disorder
- Seizure Disorder

PreviousSave For LaterCompleteCare Plan 1

# Dynamic Care Plan Generation Utilizes AI Agent, drives toward problems/goals that effectively supplement the case manager review.



**predictal** Case Management

**STEVEN PRETEND**  
57 Year(s) Male | 120 FIFTH | PITTSBURGH, PA 15222  
05/15/1968 | \* (724) 351-7775 ()

UMI: K2L5172994580010  
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COB Indicator: Unavailable  
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**ACTIVE**  
Effective Date: 01/01/2025  
Govt Indicator: Commercial

View in Laguna | Alerts (1) | Actions

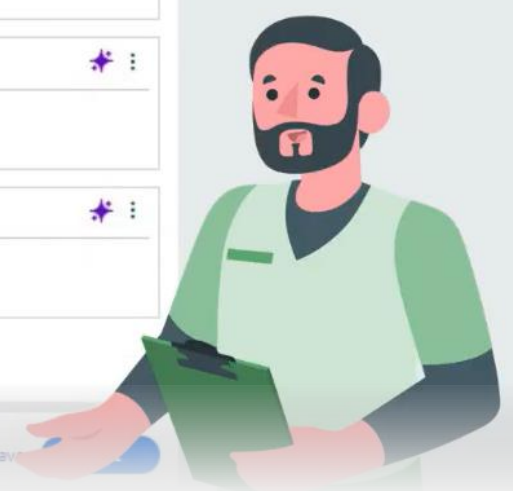
SHOW MORE

Priority: Low | Date: | Progress: Not Started

- Problem: Needs counseling on chronic pain symptom recognition**  
Priority: Low | Target Completion Date: | Progress: Not Started
- Problem: Needs chronic pain self-management overview for headache condition**  
Priority: Low | Target Completion Date: | Progress: Not Started
- Problem: Needs counseling on low sodium diet** ✨  
Priority: Medium | Target Completion Date: | Progress: Not Started
- Problem: Needs counseling on high-risk medications (antiplatelet, antico+)** ✨  
Priority: Medium | Target Completion Date: | Progress: Not Started

Click "Next" to continue and reschedule call if needed

Exit | Save



# Dynamic Care Plan Generation Utilizes AI Agent, drives toward problems/goals that effectively supplement the case manager review.



**predictal** Case Management

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Preferred Language: —  
ASO Fund Mode: Fully Insured

COB Indicator: Unavailable  
LOB: PPO

**ACTIVE**  
Effective Date: 01/01/2025  
Govt Indicator: Commercial

View in Laguna | Alerts (3) | Actions

SHOW MORE

Priority: Low | Date: | Progress: Not Started

**Problem: Needs counseling on chronic pain symptom recognition**

Priority: Low | Target Completion Date: | Progress: Not Started

**Problem: Needs chronic pain self-management overview for headache condition**

Priority: Low | Target Completion Date: | Progress: Not Started

**Problem: Needs counseling on low sodium diet**

Priority: Medium | Target Completion Date: 6/7/2026 | Progress: In Progress

**Goal: Has received counseling on low sodium diet**

Short-term | Priority: Medium | Target Completion Date: 6/7/2026 | Progress: NOT MET

**Intervention: Discuss low sodium diet**

Priority: Medium | Target Completion Date: | Progress: Not Started

**Intervention: Facilitate skill building**

Priority: Medium | Target Completion Date: | Progress: Not Started

Suggested by

# AI Agent Validates Care Plan Problems Against Call Summary, enabling the case managers to finalize a care plan that aligns with the member.



**predictal™ Case Management**

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57 Year(s) Male | 120 FIFTH | PITTSBURGH, PA 15222  
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ECID: 800015207 | ASO Fund Mode: Fully Insured | LOB: PPO | Govt Indicator: Commercial

Alerts: [!]

View in Laguna | Actions

SHOW MORE

### Identified Care Plan Items for Selection

TM Thomas D Mcpherson  
CMDM Case Manager

Your task is due in 12d on 05/21/2026 11:40 AM

Assigned To: Thomas D Mcpherson

**ATTENTION!** No Assessment responses have been saved. Select applicable care plan items if generated, reschedule the assessment and continue with the Documentation Only Flow to re-enter your responses

Selection of at least one Care Plan Item is recommended to proceed: Expand All

- Problem: Needs counseling on cardiovascular risk**  
Priority: Medium | Target Completion Date: [ ] | Progress: Not Started
- Problem: Needs positive depression screen addressed**  
Priority: Low | Target Completion Date: [ ] | Progress: Not Started
- Problem: Needs counseling on CAD symptom recognition**

### Validate Care Plan

Care Plan Validation

Here is the Care Plan Problems Validation against the Laguna Call Summary:

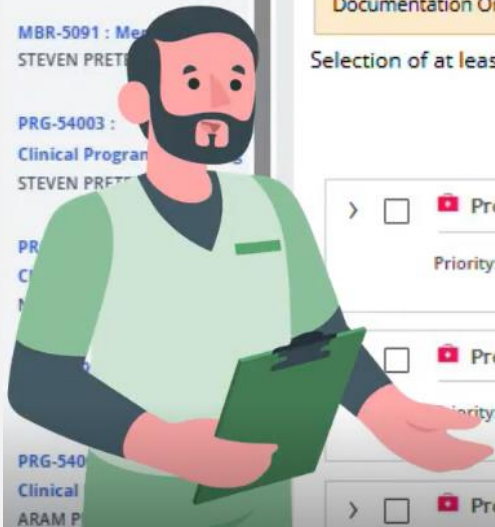
**Problem Alignment:**  
**Partially.** Most Suggested Problems are supported by the Call Summary; however, two AI-suggested problems have limited direct support, and several Call Summary topics lack corresponding problems in the care plan.

**Suggested Problem: Needs counseling on cardiovascular risk**  
Call Summary Support: Member was discharged post acute STEMI; confirmed active CAD and hypertension, both key cardiovascular risk factors requiring counseling.  Supported

**Suggested Problem: Needs positive depression screen addressed**  
Call Summary Support: Member reported low interest "several days" and hopelessness "more than half the days," indicating a positive PHQ-2 depression screen.  Supported

**Suggested Problem: Needs counseling on CAD symptom recognition**  
Call Summary Support: "Counseling on CAD symptom recognition and self-management overview" is explicitly listed under Topics for Next Outreach.  Supported

Write a message



# AI Agent Validates Care Plan Problems Against Call Summary, enabling the case managers to finalize a care plan that aligns with the member.



The screenshot displays the Predictal Case Management interface. On the left is a navigation sidebar with options: Dashboard, Worklist, Members, Providers, Calendar, Reports, Recents (with a 'Show All' link), and a list of tasks and members including TASK-60001, MBR-5091, PRG-54003, and PRG-540. An illustration of a healthcare worker in a green uniform holding a clipboard is overlaid on the left side of the interface.

The main content area is titled "Care Plan Validation" and contains a message: "Validate the Suggested Care Plan Problems with the Laguna Call Summary". Below this, a section titled "Here is the Care Plan Problems Validation against the Laguna Call Summary:" lists several items:

- Problem Alignment:** Partially. Most Suggested Problems are supported by the Call Summary; however, two AI-suggested problems have limited direct support, and several Call Summary topics lack corresponding problems in the care plan.
- Suggested Problem:** Needs counselling on cardiovascular risk  
**Call Summary Support:** Member was discharged post acute STEMI; confirmed active CAD and hypertension, both key cardiovascular risk factors requiring counseling. ✔ Supported
- Suggested Problem:** Needs positive depression screen addressed  
**Call Summary Support:** Member reported low interest "several days" and hopelessness "more than half the days," indicating a positive PHQ-2 depression screen. ✔ Supported
- Suggested Problem:** Needs counselling on CAD symptom recognition  
**Call Summary Support:** "Counseling on CAD symptom recognition and self-management overview" is explicitly listed under Topics for Next Outreach. ✔ Supported
- Suggested Problem:** Needs hypertension self-management overview  
**Call Summary Support:** BP was 138/76 mmHg (outside target range); "Hypertension self-management overview and goal setting for BP" listed under Topics for Next Outreach. ✔ Supported
- Suggested Problem:** Needs counselling on losing weight  
**Call Summary Support:** Member's BMI is 27.2 kg/m<sup>2</sup>, indicating overweight status; "Discuss weight management strategies and healthy eating habits" is listed as a next outreach topic. ✔ Supported

At the bottom of the interface is a "Write a message" input field with a send button.

# Q&A





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