The AI Checklist

What to Know, What to Ask, and How to See ROI in Community Based Care

Learn how AI-driven documentation tools—from admissions through visit notes—can help home health agencies improve operational efficiency, compliance, and care quality.

Presented by

PATRIUM

Linda Scott
RN, MSHA

Bianca Giusto
MBA, PMP

CHAP Community Health Accreditation Partner

Today's Agenda

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6 min — **AI Primer**
Defining terms and concepts

8 min — **Why Now? AI's Role in Home Health**
Overview of AI trends, regulatory shifts, and pressures driving adoption

8 min — **Smarter Starts: AI in Admissions**
Faster, more accurate intake processes with improved coordination

8 min — **Everyday Efficiency: Clinical Notes**
AI-driven tools for documentation, voice capture, and note quality

15 min — **Voices of Concern: Addressing Risks**
Implementation, accuracy, privacy, change management, vendor evaluation

8 min — **Implementation & KPI Impact**
Best practices, training, and tying AI features to meaningful KPIs

7 min — **Key Takeaways**
Address questions and collect feedback

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AI Primer: Understanding the Basics

What is AI? ❯❯❯❯❯

AI (Artificial Intelligence) refers to technology that mimics human intelligence—like recognizing patterns, making decisions, and improving over time. In healthcare, this can involve anything from **voice recognition** to **predictive analytics**.

Types of AI

Machine Learning (ML)

Analytical AI that enables systems to learn without explicit programming. Uses data to improve accuracy, like predicting patient needs.

Generative AI (Gen AI)

Creates new content, like visit notes, based on input data.

Large Language Models (LLMs)

Understand and generate human-like language, used in voice transcription.

Related Concepts

The Application Layer

AI works behind the scenes—users interact with it through applications that translate complex algorithms into practical tools and features.

APIs & Integration

Application Programming Interfaces (APIs) allow AI to connect with systems like EHRs, ensuring smooth workflows.

Data Quality

AI's performance depends on data from sources like EHRs and intake forms. The better the data, the more accurate and effective the AI.

"Garbage in, garbage out"

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Why Now? AI's Role in Home Health

Regulatory Evolution ▶▶▶▶▶

2000 — OASIS & PPS introduced; fraud oversight (OIG, ZPIC); quality reporting begins; outcomes made public—foundation for outcome-based payment.

2003 — Publicly reported outcomes launched via Home Health Compare

2009 — Introduction of Home Health CAHPS (Consumer Assessment of Healthcare Providers and Systems)

2016-2021 — Home Health Value-Based Purchasing (HHVBP) pilot program launched in 9 states

2018 — Revised Conditions of Participation (CoPs) took effect, emphasizing QAPI and person-centered care

2020 — PDGM implementation increases documentation scrutiny

2022 — Value-based purchasing expansion requiring outcomes documentation

2023 — CMS guidance supporting AI adoption for administrative burden reduction

Industry Pressures ▶▶▶▶▶

Documentation Burden — Too much time on paperwork

Clinician Burnout — Overworked, overwhelmed, emotionally drained

Staffing Shortages — Not enough hands on deck

Margin Compression — Rising costs, tighter reimbursement rates

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Emerging AI Technologies

AI Innovations Shaping the Future of Home Health & Hospice ❯❯❯❯❯❯

On-Device AI

AI that runs on local devices (like smartphones, tablets, or in-home sensors) rather than relying entirely on cloud computing—perfect for visits with limited connectivity

Real-Time AI in Clinical Settings

Systems that process and act upon data as it is generated, delivering instant insights or actions without manual effort and allowing clinicians to focus on patient care without workflow disruption.

Self-Learning Systems

AI systems that continuously improve from new data and user interactions, without needing manual reprogramming--adapting to your agency's documentation patterns and workflows

Agentic AI Systems

Autonomous AI agents can perform routine tasks like rescheduling visits, reordering supplies, or updating care plans—within guardrails set by the agency.

Predictive Diagnostic Insights

Analyze clinical data to flag potential conditions early—enabling timely, accurate care decisions in the home

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Smarter Starts: AI in Intake & Admissions

Transforming the intake process for better outcomes and efficiency

AI-Powered Intake ❯❯❯❯❯

Smart Document Capture
Automated extraction from referral docs with 95% accuracy

Eligibility Verification
Confirm active insurance coverage with minimal effort

Outreach to Patient
Automatically prompt clinicians to reach out to patients ahead of visit

Impact Metrics ❯❯❯❯❯

Referral Partner Confidence
+32% increase

Due to faster processing and response times, leading to faster time to start of care

Processing Time
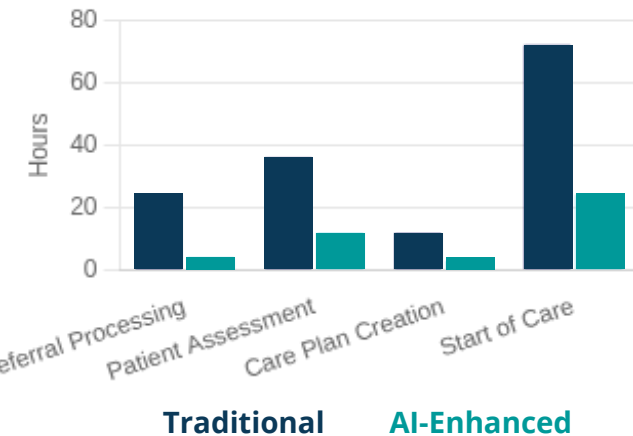**-45%** reduction

Through automated data entry and templates

Patient satisfaction
12% higher HHCAHPS scores

Clinicians walk in prepared—patients notice the difference

Process Timeline & Key Benefits ❯❯❯❯❯

Timeline Comparison: Traditional vs. AI-Enhanced

Bar chart with y-axis "Hours" (0, 20, 40, 60, 80) and x-axis categories: Referral Processing, Patient Assessment, Care Plan Creation, Start of Care. Legend: **Traditional** / **AI-Enhanced**

✓ **Faster time-to-first-visit improves patient satisfaction**

✓ **Real-time coordination between intake and clinical staff**

✓ **Data-driven scheduling optimizes clinician routing**

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Source: Industry research and case studies

Everyday Efficiency: Clinical Notes

AI-driven documentation tools that enhance quality while reducing clinician burden

AI Documentation Tools ▶▶▶▶▶▶

🎤 Voice Capture & Transcription

Converts natural clinician narratives into structured documentation with 98% accuracy, even with medical terminology
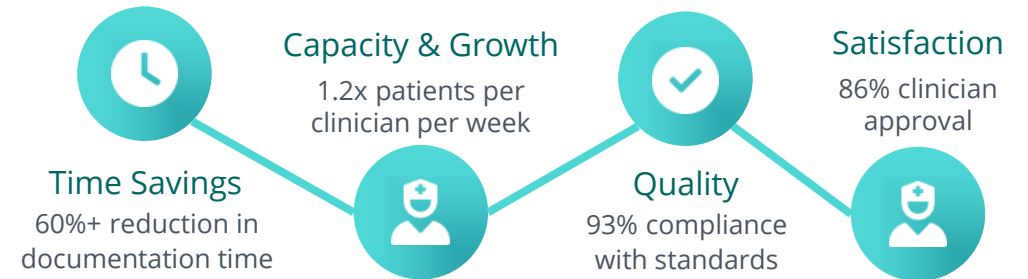
📄 Smart Auto-Summarization

Automatically extracts key clinical findings, organizes into appropriate sections, and highlights potential concerns
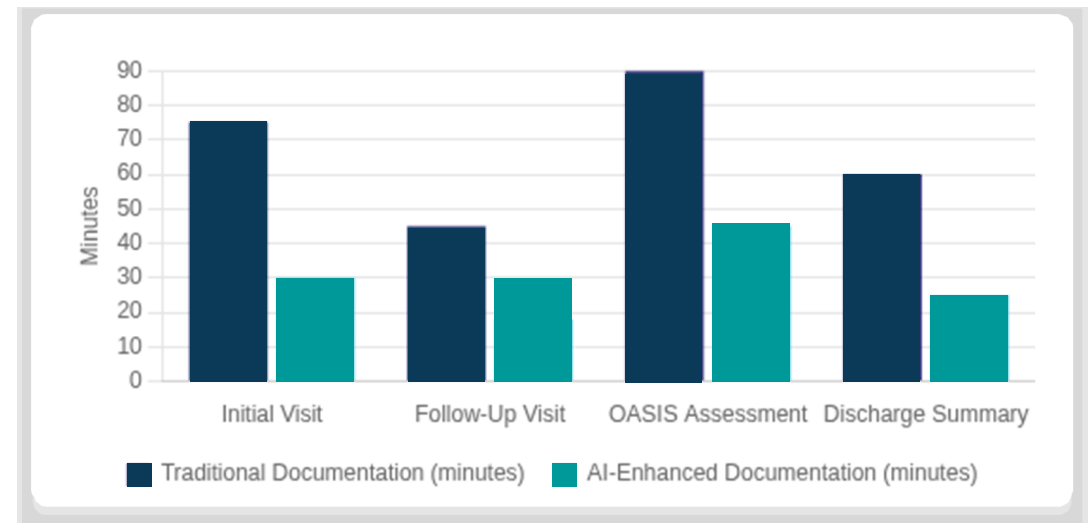
📋 Comprehensive, discipline-specific clinical assessments including OASIS items

Pre-built templates with intelligent suggestions based on patient condition, history, and assessment findings

Key Benefits ▶▶▶▶▶▶

Capacity & Growth
1.2x patients per clinician per week

Satisfaction
86% clinician approval

Time Savings
60%+ reduction in documentation time

Quality
93% compliance with standards

Documentation Efficiency Gains ▶▶▶▶▶

Bar chart — Minutes (y-axis 0–90):
- Initial Visit: Traditional 75, AI-Enhanced 30
- Follow-Up Visit: Traditional 45, AI-Enhanced 30
- OASIS Assessment: Traditional 90, AI-Enhanced 46
- Discharge Summary: Traditional 60, AI-Enhanced 25

■ Traditional Documentation (minutes) ■ AI-Enhanced Documentation (minutes)

Source: Industry research and case studies

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Voices of Concern: Addressing Risks

Navigating common challenges with AI documentation and ensuring compliance ▶▶▶▶▶

1. Accuracy Concerns

AI may misinterpret clinical terminology or patient context

High Risk

Solution: Clinician validation workflow, accuracy safeguards & continuous AI training

3. Implementation

Integration challenges, workflow disruption, training gaps

Medium Risk

Solution: Phased rollout & dedicated implementation team

5. Generic Notes

AI-generated content lacks patient- specific details

Medium Risk

Solution: Customization tools & patient-specific templates

2. Privacy & Security

PHI handling, data sovereignty, mobile security and 3rd-party access

High Risk

Solution: BAAs, policy updates, on-premise deployment & encryption standards

4. Organizational Resistance

Technology anxiety, trust issues, fear of job displacement

Medium Risk

Solution: Champion programs & demonstrable time savings

6. Regulatory Shifts
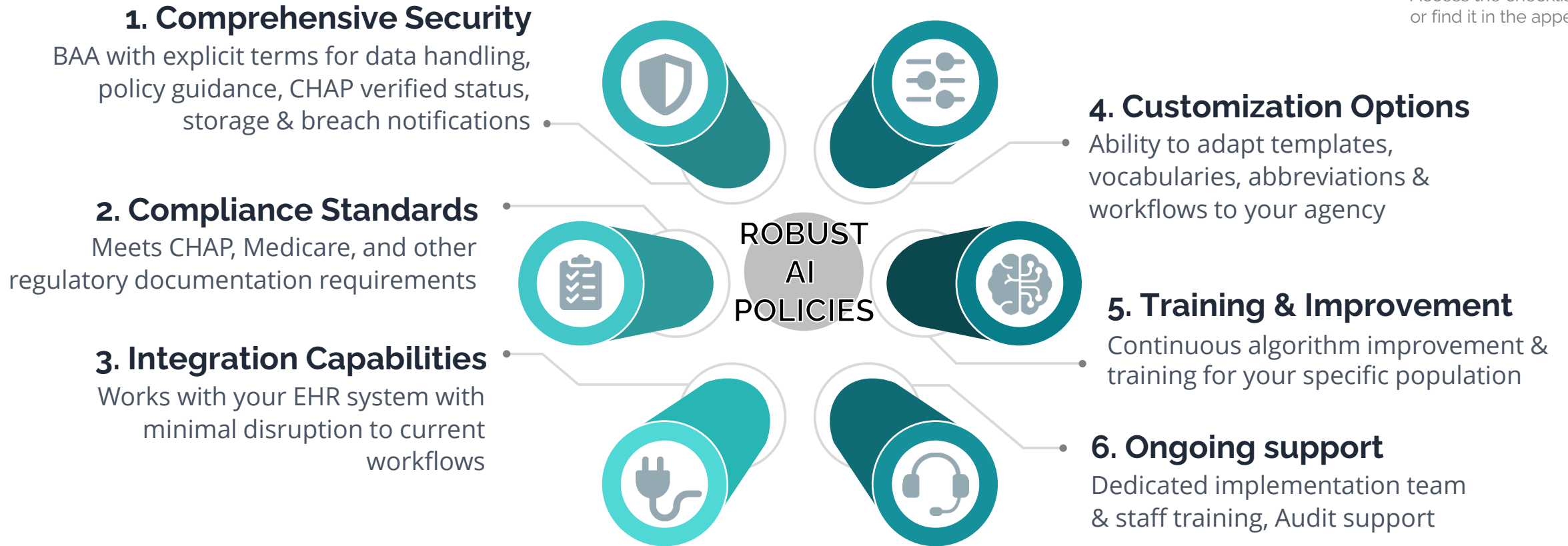
Evolving legislation, compliance req'ts

High Risk

Solution: Vendor compliance guarantees & flexible contracts

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AI Vendor Evaluation Checklist

What to Look for When Choosing a Partner ⟫⟫⟫⟫⟫

ROBUST AI POLICIES

1. Comprehensive Security
BAA with explicit terms for data handling, policy guidance, CHAP verified status, storage & breach notifications

2. Compliance Standards
Meets CHAP, Medicare, and other regulatory documentation requirements

3. Integration Capabilities
Works with your EHR system with minimal disruption to current workflows

4. Customization Options
Ability to adapt templates, vocabularies, abbreviations & workflows to your agency

5. Training & Improvement
Continuous algorithm improvement & training for your specific population

6. Ongoing support
Dedicated implementation team & staff training, Audit support

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What great AI rollouts have in common—and how to replicate them ❯❯❯❯❯

Implementation Roadmap

1   **2**   **3**   **4**

Strategic Planning

- Define clear goals & success criteria / Identify KPIs
- Executive sponsorship & steering committee
- Update agency policies to ensure alignment with standards

Phased Rollout

- Pilot with clinician champions (2-4 weeks)
- Rapid feedback cycles & adjustment
- Gradual expansion to full team
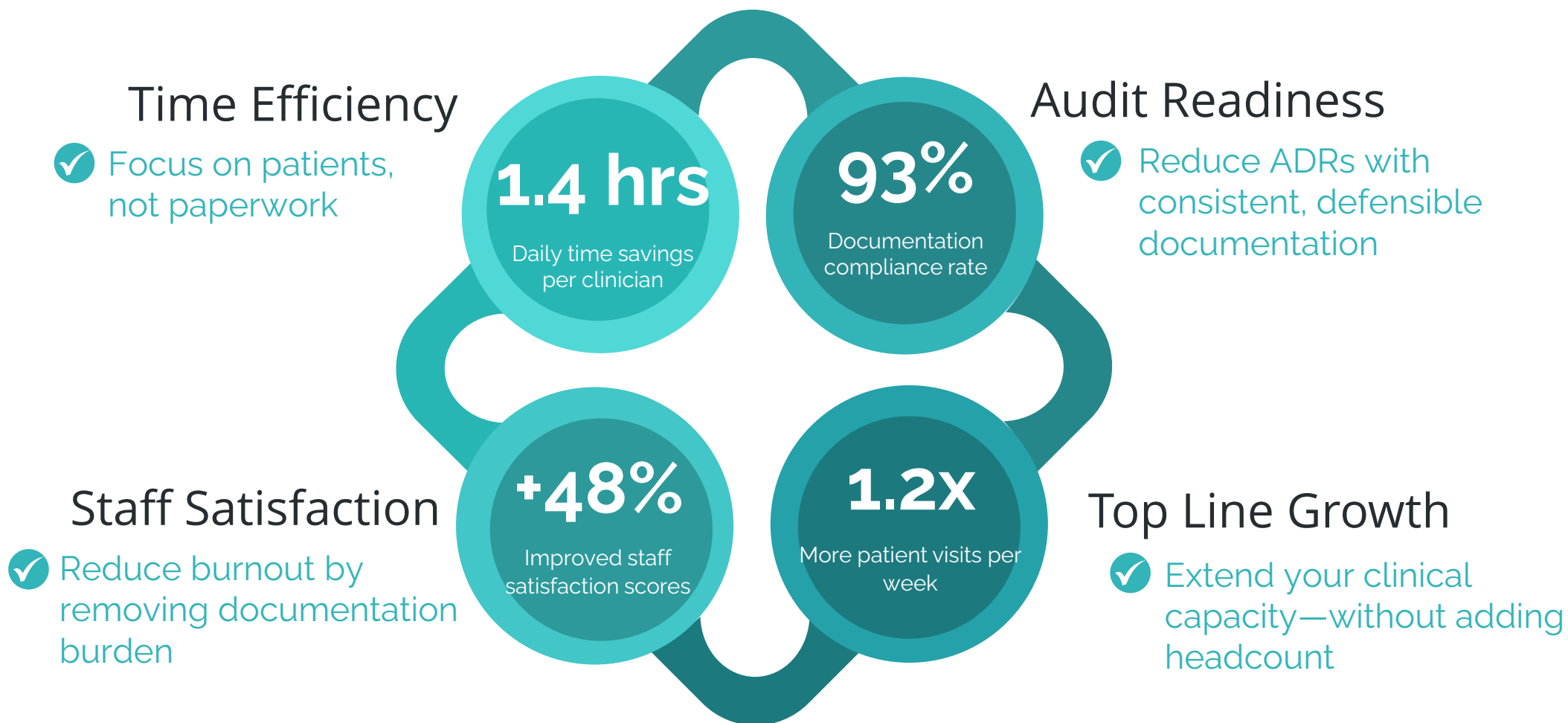
Training & Support

- Role-specific training modules
- Super-user program for peer support
- Ongoing learning resources & refreshers in various formats

Continuous Improvement

- Clinical compliance monitoring at the visit level
- Regular KPI review & dashboard monitoring via QAPI program
- Systematic feedback collection

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Measurable Outcomes

Connect AI investments to key performance indicators ❯❯❯❯❯

Time Efficiency

✔ Focus on patients, not paperwork

1.4 hrs
Daily time savings per clinician

Audit Readiness

✔ Reduce ADRs with consistent, defensible documentation

93%
Documentation compliance rate

Staff Satisfaction

✔ Reduce burnout by removing documentation burden

+48%
Improved staff satisfaction scores

1.2X
More patient visits per week

Top Line Growth

✔ Extend your clinical capacity—without adding headcount

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Key Takeaways

Still have questions? Find us at patriumhealth.com or
email **team@patriumhealth.com**

Access the checklist here
or find it in the appendix

1 Clinical Focus

AI tools must address everyday clinical needs with specific workflows for intake, OASIS, and visit notes

2 Vendor Evaluation

Use the AI Checklist to evaluate vendors against compliance, accuracy, and integration requirements

3 Measurable ROI

Connect AI capabilities directly to operational metrics like documentation time, staff satisfaction, and compliance scores

4 Strategic Implementation

Focus on phased rollouts with champions and clear KPIs. Change management is crucial to success

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Linda Scott, RN, MSHA
linda@patriumhealth.com

Bianca Giusto, MBA, PMP
bianca@patriumhealth.com

Thank you!

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AI Tool Evaluation Checklist

1. HIPAA & Data Security

- ☐ Does the vendor sign a Business Associate Agreement (BAA)?
- ☐ Do they offer policy templates or guidance to support HIPAA-compliant AI adoption?
- ☐ Is all Protected Health Information (PHI) encrypted at rest and in transit?
- ☐ Where is data stored?
  - ☐ U.S.-based servers
  - ☐ Compliant with HIPAA/HITECH)
- ☐ Does the vendor conduct regular security audits and penetration testing?
- ☐ Is there role-based access control and audit logging?

2. Regulatory Compliance

- ☐ Does the documentation output meet CMS, CHAP, and relevant state or payer standards? (Check for CHAP verification)
- ☐ Has the tool been reviewed or validated by clinical compliance experts?
- ☐ Is documentation considered audit-ready, meaning it's complete, traceable, and time-stamped?
- ☐ Can you track and attribute any manual changes to AI-generated documentation?
- ☐ Does the tool support QAPI goals with measurable quality or compliance metrics?

3. EHR Integration & Workflow Fit

- ☐ Can the AI tool integrate with your current EHR or systems?
- ☐ Does it fit into your existing workflows, or would it require significant change management?
- ☐ Can it populate documentation using existing clinical data or templates?
- ☐ Is the interface optimized for use in the field, including mobile or tablet use?
- ☐ Does the tool have an offline mode or will it require internet access?

4. Customization & Clinical Relevance

- ☐ Are templates, terminology, and documentation logic customizable to reflect your agency's specific workflows?
- ☐ Can it support various visit types, such as SOC, Recert, PRN, or Discharge?
- ☐ Is the tool designed to reflect both home health and hospice-specific clinical workflows?
- ☐ Can it be tailored to accommodate specific patient populations, diagnoses, or clinical disciplines?
- ☐ Does it support a team-based care model with appropriate clinical nuance?

5. Training & Support

- ☐ Is training (both technical and behavioral) tailored to different roles—such as clinicians, QA, and intake coordinators?
- ☐ Does the vendor offer multiple types of training, including live sessions, on-demand materials, and written guides?
- ☐ Is there ongoing support after implementation, not just during onboarding?
- ☐ Will there be internal "super users" or clinician champions to support adoption?
- ☐ Are follow-up trainings or onboarding refreshers available for new hires or after go-live?

6. Ongoing Improvement & Transparency

- ☐ Is the AI model updated based on your agency's specific feedback and usage data?
- ☐ Do you have visibility into how the AI system is evolving or being improved?
- ☐ Can you understand how outputs are generated or edited (e.g., through transparent AI logic or change logs)?
- ☐ Does the vendor provide regular product performance updates or usage insights?
- ☐ Is there a commitment to keeping the technology aligned with both clinical workflows and regulatory expectations?

How to Use This Checklist

Use this guide when exploring new vendors, conducting demos, or reassessing current tools. It helps ensure you're asking the right questions, aligning your internal teams, and choosing a solution that fits your clinical, operational, and compliance needs—not just your IT wish list.

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