

CHARTA HEALTH X

PREVENTIVE MEASURES

Transforming Behavioral Health Compliance: How Preventive Measures Streamlined Documentation with Charta Health



Preventive Measures is a leading national behavioral health provider delivering mental health and home health services in wellness centers and patient homes. With over a million annual encounters, Preventive Measures is dedicated to preventing out-of-home placement by offering critical support services to individuals, families, and communities.

The Challenge: Documentation Bottlenecks & Compliance Burdens

Managing clinical documentation at scale, without a substantial increase in resourcing, was a significant challenge.

- **25 clinical supervisors** oversee **200+ community support workers (CSWs)**, managing **4000+ clients**, resulting in approximately **500 to 600 services per week** that require manual review.
- This workload meant supervisors **spent 5,000+ hours per week** reviewing notes, providing feedback, & following up on documentation corrections—time that could otherwise be spent on supervision and patient care.
- Ensuring compliance and mitigating audit risks required a substantial **investment in QA specialists**, yet manual audits covered only a **fraction of total documentation**.

Success by the Numbers: Enhancing Efficiency & Compliance

By implementing Charta for **AI-powered doc review**, Preventive Measures significantly streamlined their workflows. Instead of manually reviewing each note, supervisors now focus **only on flagged documentation**, allowing them to prioritize high-risk areas.

Charta Health's platform **integrates seamlessly with their EHR system**, automating compliance checks and enabling efficient feedback loops through **manual red X triggers**—alerting community support workers to update documentation in real time.

- **25% reduction in documentation review time**, cutting supervisor workload from **5000+ hours to under 3000 hours per week**
- Shift of focus from admin work to clinical services, **allowing for 5-10 more billable services per week** (increased focus on patient care)
- Automated compliance oversight, **eliminating the need for 10-15 additional QA specialists**
- Improved risk mitigation, catching fraud, waste, and abuse in **real time** rather than *after the fact*

CHARTA HEALTH X PREVENTIVE MEASURES

Seamless Integration & Real-Time Compliance

One of the key advantages of Charta Health's platform was its ability to integrate directly with Preventive Measures' **existing EHR system**. This eliminated the need for cumbersome manual data entry and ensured that compliance checks occurred in real-time. With AI-powered documentation review, **supervisors now instantly flag issues**, reducing the back-and-forth corrections that once consumed hours of administrative time. This streamlined approach enabled supervisors to provide more **immediate, actionable feedback to CSWs**.

Impact: Increased Revenue & Focus on Patient Care

Since deploying Charta's **AI-assisted first-pass review**, Preventive Measures drastically reduced the time required for compliance oversight, increasing both revenue & their focus on patient care.

- Charta Health's solution enabled Preventive Measures to **cut documentation review time by 25%**, reallocating hours towards **clinical supervision and patient care**.
- By **automating compliance oversight**, the organization reduced its reliance on an ever-growing QA team while enhancing its ability to mitigate fraud, waste, and abuse.
- The efficiency gains translated directly into financial benefits, as supervisors could now dedicate more time to billable services, increasing overall revenue.



“ We would need at least 10-15 QA specialists to review documentation at scale, but with Charta, we don't have to... Instead of reviewing documentation, [each CSW] may be able to do 5-10 more billable services per week. And that was a shift from the administrative work to focusing on some of the clinical work that our providers love to do as well. ”

- Anthony Thompson,
Chief Operating Officer, Preventive Measures

Looking Ahead

Scaling Innovation in Behavioral Health

With Charta Health's AI-driven compliance tools in place, Preventive Measures is poised to scale its operations without compromising on quality. Next steps include **further automation of audit processes**, leveraging AI to enhance external compliance reviews, & expanding AI-assisted workflows to additional areas of the organization.

By continuing to optimize documentation and risk management, Preventive Measures is reinforcing its commitment to delivering high-quality behavioral health services at scale.