



Texas Association for
Home Care & Hospice
Leading ★ Advancing ★ Advocating

56th Annual Meeting
Tuesday, August 26, 2025
2:00pm-3:00pm

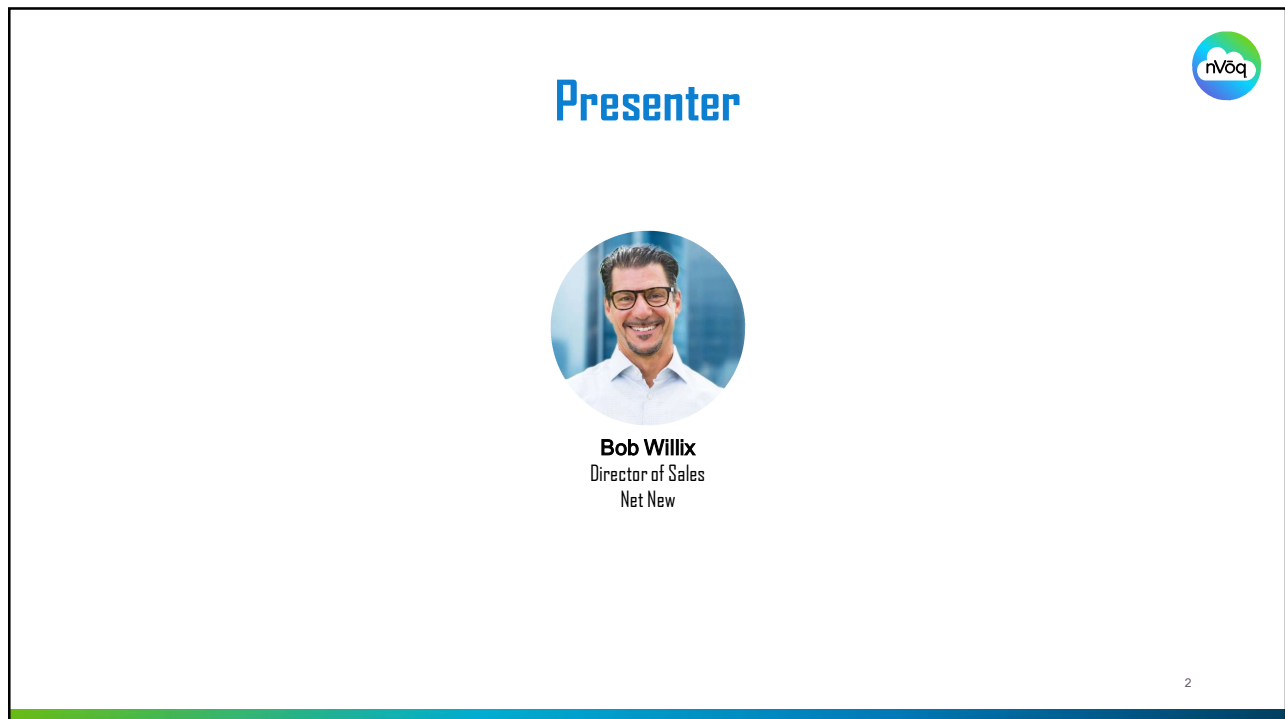
PC2a. Practical AI for Home Health: From Frontline Impact to Strategic Growth

Presented by:

Bob Willix, Director of Net New Sales, nVoq

Thank you to our Sponsors:





A Practical Approach to AI

Agenda

- AI Foundations: What is AI and Where are We Headed?
- The Documentation Challenge
- Real-World Workflow Walkthrough
- The Clinician's Role
- Responsible Adoption and Scaling
- Operational, HR, and Financial Impact
- Future Trends
- Practical Discussion Framework
- Key Takeaways

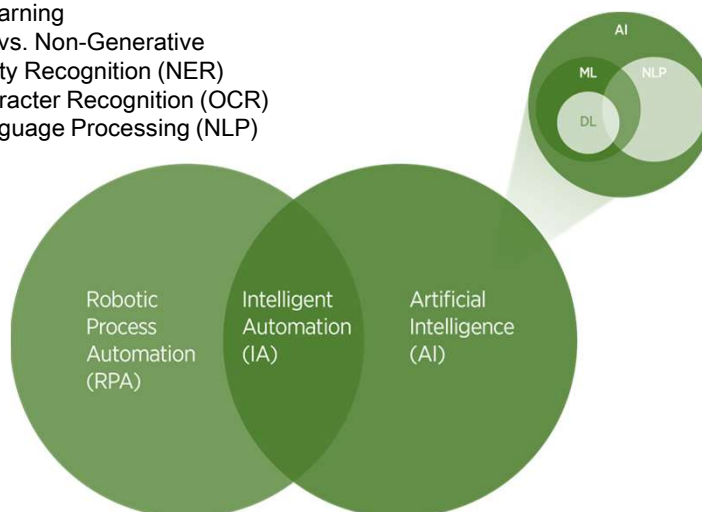
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What is AI?

- Large Language Model (LLM)
- Machine Learning
- Generative vs. Non-Generative
- Named Entity Recognition (NER)
- Optical Character Recognition (OCR)
- Natural Language Processing (NLP)

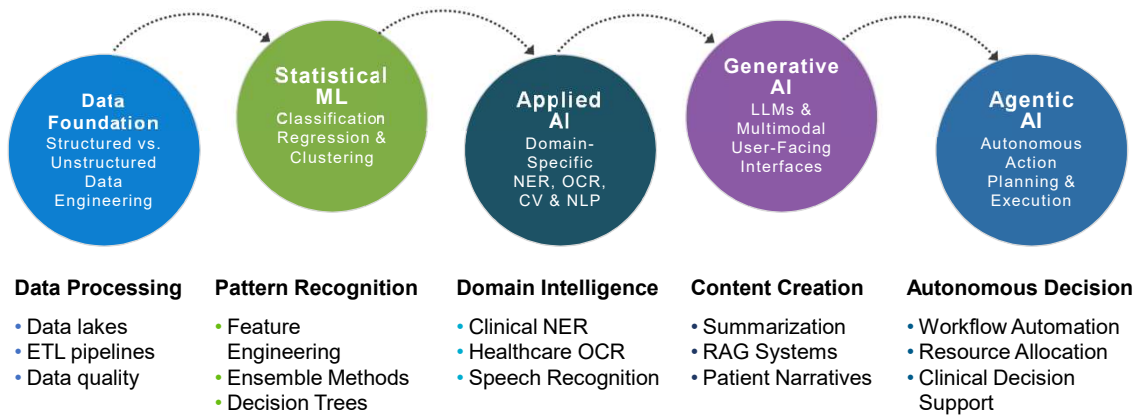
AI

- Machine Learning
- Natural Language Processing
- Deep Learning



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AI Journey Map



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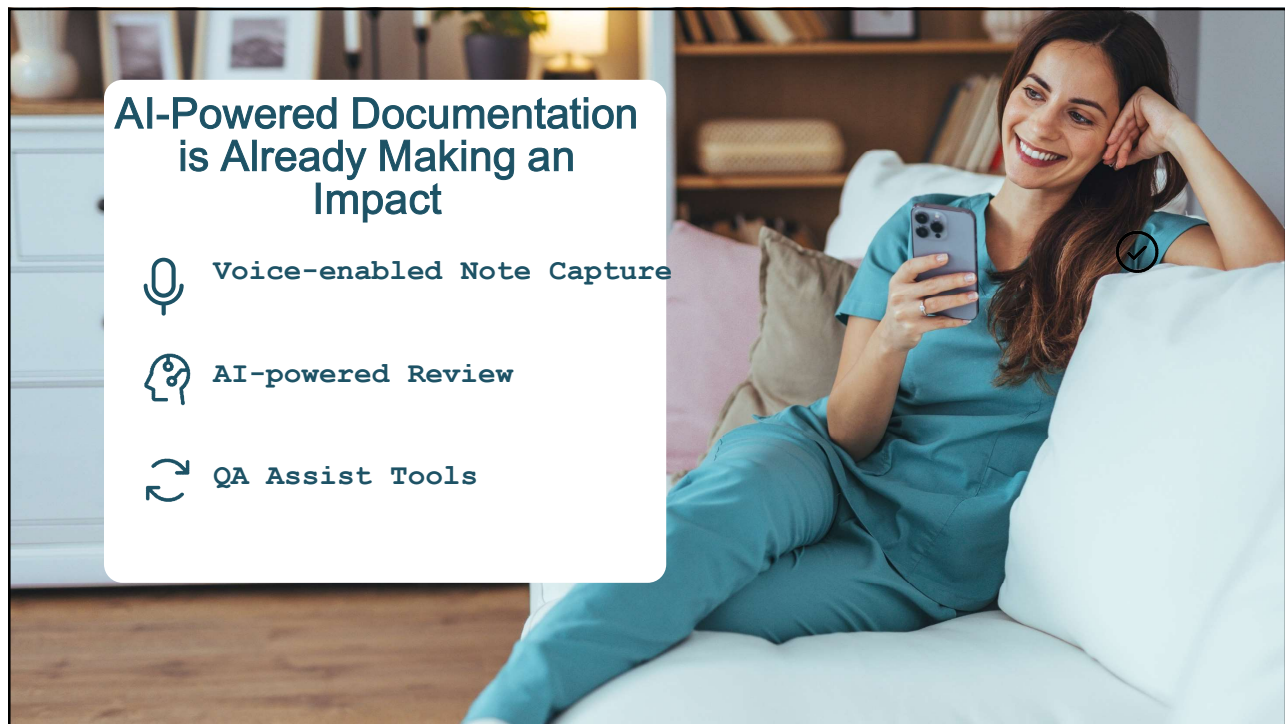
The Documentation Burden in Home Health

Long hours
after visits




Burnout and
clinician
fatigue

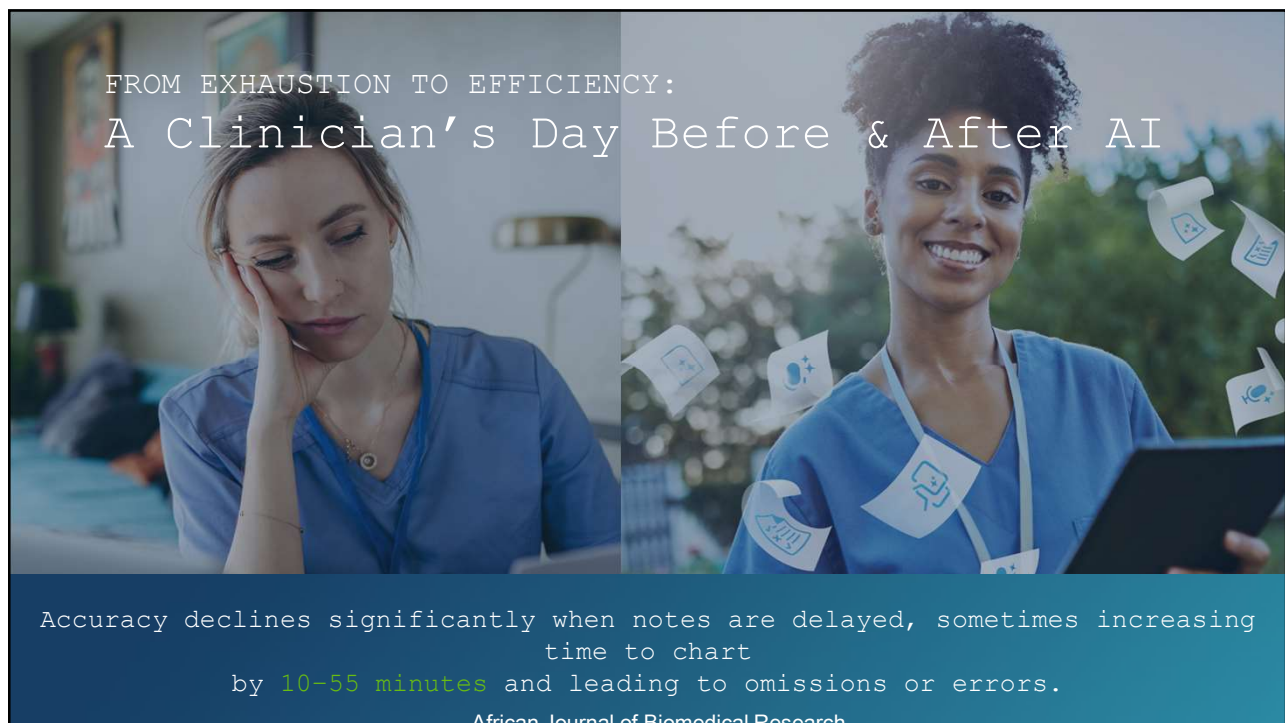
Compliance
demands

QA
bottlenecks



AI-Powered Documentation is Already Making an Impact

-  Voice-enabled Note Capture
-  AI-powered Review
-  QA Assist Tools



FROM EXHAUSTION TO EFFICIENCY:
A Clinician's Day Before & After AI

Accuracy declines significantly when notes are delayed, sometimes increasing time to chart by 10-55 minutes and leading to omissions or errors.

—African Journal of Biomedical Research

Real Results from Real Agencies with AI Documentation Tools

Each clinician at
St. Croix Hospice saved

31+

minutes a day in
documentation time

ST. CROIX
HOSPICE

Amedisys
achieved

97%

accuracy rate on
Hospice CTIs over
a 9-month period

 amedisys

LHC clinicians
saw a

20%

reduction in their
documentation
workload after visits

LHC
GROUP

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Clinician Buy-In is Not Optional - It's Foundational

Trust in a
solution
is key

- Workflow alignment
- Ease of use
- Trust drives outcomes

Leadership
guidance

- Involve clinicians early
- Make training relevant

Up to 70% of technology adoption failures in healthcare are due to lack of clinician engagement, not the tool itself.

How to Adopt AI Thoughtfully (and Avoid Overload)

The 3 Pillars of Responsible Adoption: Transparency, Compliance, Collaboration

Covenant Health Rollout

- Phased Pilot
- Cross-functional Leadership Team
- Hands-on Onboarding
- Ongoing Coaching
- Data-Driven Encouragement

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Where Agencies Stumble with AI Adoption



No
clinician
involvement

Wrong tool
for home
health
workflows

Poor
training
and
support

Not
measuring
outcomes

Over-reliance
on vendor
promises

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Operational Impact: Faster, Cleaner Documentation Workflows

Reduce QA Burden



Improve first-pass accuracy, cut down on repetitive QA review

Save Clinician Time



Shift documentation back into the workday, cutting down afterhours work

Unlock Efficiency



A 10-15% improvement in accuracy translates to hundreds of hours saved per month

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Improving Retention and Revenue Through Smarter Documentation



HR Impact

- Lighter documentation load reduces burnout
- Better workflows improve clinician satisfaction and retention



Financial Impact

- Cleaner notes mean cleaner claims
- Proven results in revenue protection

"I knew I needed it because there was a downstream impact of revenue recovery. But I never thought about the capabilities and opportunities around QA, around clinician satisfaction,

The Triple Win: Operations, People, and Finance

Operational Efficiency

Faster documentation, quicker QA turnaround

Workforce Well-being:

Less burnout, better morale and retention

Financial Strength

Fewer write-offs, stronger cash flow.

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Future Trends: What's Next for AI?

Ambient AI tools

- Listen and process conversations securely
- Surface inferred answers to documentation questions
- Keeps clinicians in control, allowing them to review and approve

Industry Trends for AI documentation technology

- Expect increasing guidelines for AI use
- Future clinicians will expect modern AI-powered documentation workflows

"The next generation is what always keeps me up at night, both clinical workforce and patients. AI tools are becoming increasingly necessary. And if we don't provide it, I think we're going to have trouble providing and taking care of our community in this country."

—Steve Baur, MedStar Health Home Care

Start Your AI Journey Thoughtfully

DEFINE PAIN
POINTS

INVOLVE
STAKEHOLDE
RS

CHOOSE
RIGHT-SIZED
TOOLS

TEST AND
MEASURE

BUILD
ITERATIVELY

Key Takeaways

AI tools are
already making a
difference in
home health
documentation

AI-powered
documentation
tools improve
quality and
streamline QA


Clinician trust
and leadership
engagement are
critical for
success

“Right-sized AI”
means starting
where you are
and scaling
responsibly

AI adoption is
inevitable – but
you can shape
how it happens
at your agency

You have tools
to begin this
conversation
today

AI Readiness Checklist



AI READINESS CHECKLIST

Helping Your Organization Prepare for Responsible Adoption

Artificial intelligence (AI) is becoming an important tool in healthcare, streamlining documentation, reducing administrative burden, and helping staff focus on patient care. But, like any innovation, its success depends on thoughtful planning, collaboration, and clear goals.

This checklist is designed to help teams assess where they are today and identify the most helpful next steps. It's not about having everything in place from the start. It's about building alignment, asking the right questions, and moving forward with confidence.

You can use this check list as you're beginning to consider your AI strategy and prepare your organization. It will help you explore five key areas that contribute to long-term success:

- Leadership Alignment and Organizational Governance
- Problem Identification and Use Case Selection
- Staff Readiness and Workflow Integration
- Data and Technology Infrastructure
- Operationalizing AI: Sustain, Scale, Improve

Need help getting started? We're here to support thoughtful, responsible AI adoption.

Let's continue the conversation.

SCHEDULE A QUICK MEETING WITH AN EXPERT

How to Use This Checklist:

Review each section and talk through it with your team.

Check off what's already in place and note areas that may "need more discussion or planning."

Use this as a roadmap to guide next steps and support ongoing learning, not everything needs to be perfect from the start.

Revisit the checklist over time as your AI journey evolves.

By starting with clear intentions and shared understanding, your organization can adopt AI in a way that supports your staff, aligns with your mission, and ultimately enhances the care you provide.

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AI READINESS CHECKLIST

- 1. Leadership Alignment and Organizational Governance**
 - Executive leadership is engaged in AI conversations and supports exploring its potential.
 - There is space for open dialogue about how AI fits into your organization's goals and values.
 - A shared intention in developing teams can clearly state the "why" behind considering AI.
 - Governance structures are emerging or in place to support responsible use, ethics, policies, clinical outcomes.
 - Leaders or change sponsors are ready to guide the effort and bring others along.
 - Competing priorities are being considered to assess timing and capacity.
- 2. Problem Identification and Use Case Selection**
 - A clear high-priority challenge is identified (e.g., reducing clinician burnout through documentation support).
 - An AI solution is evaluated after exploring other approaches - it's the right fit for the need.
 - The AI's scope of use cases should be reasonable, clear, in-scope (task, quality, time saved, satisfaction).
 - A phased approach is being discussed, from pilot to evaluation to scale.
- 3. Staff Readiness and Workflow Integration**
 - Staff are part of the conversation and understand a role in supporting their work.
 - There's a plan for training and communicating any changes to workflow.
 - Teams understand their roles, duties, ownership, and supporting organizational values around their responsibility.
 - AI tools are being evaluated for your workflow by day-to-day operations without adding burden.
 - Feedback loops are planned or in place so staff can share their experiences and help improve the tools.
 - Leadership is meeting a supportive environment that encourages learning and adaptation.
- 4. Data and Technology Infrastructure**
 - Work with a vendor to check if core systems (like your EHR or scheduling platform) can connect with AI tools or store data in a secure, accessible format.
 - Ask vendor if services and connectivity to the AI's support module is real-time AI use without disruption.
 - Discuss privacy, security, and compliance considerations with a vendor or lawyer.
 - The AI vendor meets high standards for security and reliability (SOC 2 Type I certification).
 - Your vendor data storage aligns with regulatory requirements (e.g., HIPAA and GDPR compliance).
 - The vendor's solutions work within existing clinical workflow.
 - The vendor has a proven track record in healthcare with similar customers and use cases.
 - Vendor or partner has a transparent support or escalation process and clear SLAs.
 - Vendor is selected for long-term support and a transparent, not just future, help.
- 5. Operationalizing AI: Sustain, Scale, Improve**
 - Leadership sees AI as part of a long-term strategy.
 - There's a basic framework for making outcomes (e.g., efficiency, quality, satisfaction).
 - Plans are in place to evaluate AI's impact, monitor what's working, and continue improving over time.
 - Internal teams are building comfort with AI to ensure AI use responsibly.
 - Consistent efforts for maintaining performance and ensuring tools stay accurate and useful.
 - Success is not just about productivity - it's also about safety, trust, and staff well-being.

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Thank You!

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Sources

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- ☐ A shared intention is developing: teams can clearly state the "why" behind considering AI.
- ☐ Governance structures are emerging or in place to support responsible use (ethics, policies, clinical guidance).
- ☐ Leaders or change sponsors are ready to guide the effort and bring others along.
- ☐ Competing priorities are being considered to assess timing and capacity.

2. Problem Identification and Use Case Selection

- ☐ A clear, high-priority challenge is identified (e.g., reducing clinician burnout through documentation support).
- ☐ AI is being considered after exploring other approaches – it's the right fit for the need.
- ☐ There's a sense of how success would be measured, even in early stages (cost, quality, time saved, satisfaction).
- ☐ A phased approach is being discussed, from pilot to evaluation to scale.

3. Staff Readiness and Workflow Integration

- ☐ Staff are part of the conversation and understand how AI may support their work.
- ☐ There's a plan for training and communicating any changes to workflows.
- ☐ Teams understand they retain control, reviewing and validating AI-generated outputs remains their responsibility.
- ☐ AI tools are being evaluated for how well they fit into day-to-day operations without adding burden.
- ☐ Feedback loops are planned or in place so staff can share their experiences and help improve the tools.
- ☐ Leadership is creating a supportive environment that encourages learning and adaptation.

4. Data and Technology Infrastructure

- ☐ Work with a vendor to check if core systems (like your EHR or scheduling platform) can connect with AI tools or share data in a secure, usable format.
- ☐ Ask vendor if devices and connectivity in the field support mobile or real-time AI use without disruption.
- ☐ Discuss privacy, security, and compliance consideration with a vendor, as needed.
- ☐ The AI vendor meets high standards for security and reliability (SOC 2 Type II certification).
- ☐ Your vendor's data storage aligns with regulatory requirements (U.S.-based and HIPAA-compliant).
- ☐ The vendor's solutions work within existing clinician workflows.
- ☐ The vendor has a proven track record in healthcare, with current customers and references.
- ☐ Internal or partner-based IT/informatics support is available to troubleshoot and maintain the solution.
- ☐ Vendors are selected for long-term support and transparency, not just feature lists.

5. Operationalizing AI: Sustain, Scale, Improve

- ☐ Leadership sees AI as part of a long-term strategy.
- ☐ There's a basic framework for tracking outcomes (e.g., efficiency, quality, satisfaction).
- ☐ Plans are forming to scale what works, revise what doesn't, and continue improving over time.
- ☐ Internal teams are building comfort skills to oversee AI use responsibly.
- ☐ Ownership is defined for maintaining performance and ensuring tools stay accurate and useful.
- ☐ Success is not just about productivity – it's also about safety, trust, and staff well-being.