



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

**56<sup>th</sup> Annual Meeting**  
**Tuesday, August 26, 2025**  
**3:15pm-4:15pm**

## **PC3b. AI as a Care Partner: Enhancing Workforce Productivity and Care Outcomes**

Presented by:

Erin Vallier, Director, Sales, Alayacare

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ALAYACARE

# AI as a Care Partner:

Enhancing workforce productivity and care outcomes



**Erin Vallier**  
Regional Director | AlayaCare



## Agenda for today

- Setting the Context & Fundamentals
- Why AI in Home-Based Care
- Where We are Going Next
- Considerations for Implementation

## What is (AI) Artificial Intelligence?


AI is a branch of computer science focused on building systems that mimics

**human intelligence—  
reasoning, problem-solving,  
language understanding,  
pattern recognition, and  
decision-making.**

## What is (AI) Artificial Intelligence?

In short...

**Software that can make  
sense of information, think  
and act.**



### Artificial Intelligence is Not

- **AI is not automation:** Traditional automation doesn't adapt or reason
- **If-then workflows:** Rigid logic trees that break with edge cases
- **Macros & scripts:** Useful but limited — no learning or context
- **RPA (Robotic Process Automation):** Great for repetitive, rules-based tasks

**AI as a field, has been doing wonderful things in health over the past decade. We will continue to invest.**

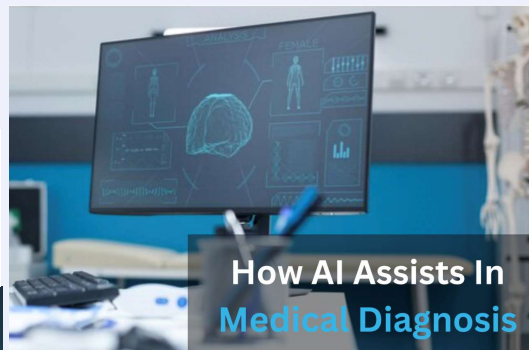
#### ***North Carolina Hospital System Reduces Sepsis Cases Using Predictive Analytics***

Published on April 29, 2024

Predicting Hospitalization Risk Among Home Care Residents in the United Kingdom: Development and Validation of a Machine Learning-Based Predictive Model

May 2024 · Home Health Care Management & Practice

**AI-powered** oncology operations





## Do you remember your first prompt?

✓ November 20, 2022



Welcome to ChatGPT

Log in with your OpenAI account to continue

Log in

Sign up

## LLMs are **AMAZING!**

### Why are they so popular?

- ✓ **Unlocking knowledge at scale** with instant answers, 24/7
- ✓ **Boosting productivity everywhere** from coding to customer service
- ✓ **Making tech more accessible** using natural language instead of techy jargon

### How do they do it?

- ✓ **Pattern-matching at massive scale** spotting structure in everything they read
- ✓ **Trained to guess the next word** and usually get it right
- ✓ **Amazingly fluent and fast** like your best-ever first draft, on demand

Meta AI

OpenAI

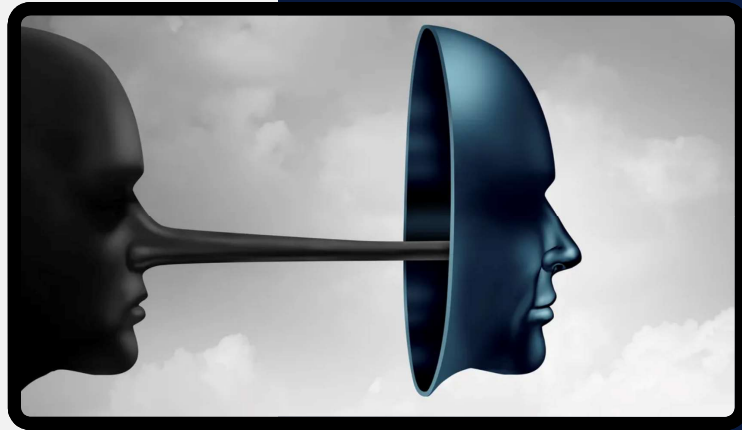
Claude

deepseek

Gemini

## LLMs can make some surprising and amusing mistakes

- ✓ Prompt engineering
- ✓ Guardrails
- ✓ Fact checking
- ✓ RAG



## LLMs are great at summarizing

- ✓ Summarize these progress notes

The patient has been experiencing headaches and fatigue for the past month and hasn't seen much improvement despite using over-the-counter pain medication. She is interested in scheduling an appointment with a doctor to explore other treatment options. Additionally, she reported feeling tired, ate some dates, and then went to bed but experienced hip pain.

## LLMs are great at translating

Layla

Here's a summary of the progress notes:

The patient has been experiencing headaches and fatigue for the past month and hasn't seen much improvement despite using over-the-counter pain medication. She wants to schedule an appointment with the doctor to discuss other treatment options. Additionally, she reported feeling tired, ate some dates, went to bed, but complained of hip pain.

6:40 PM

6:59 PM Layla can you translate that summary to Spanish?

Layla

Aquí tienes un resumen de las notas de progreso en español:

La paciente ha estado experimentando dolores de cabeza y fatiga durante el último mes y no ha visto mucha mejoría a pesar de usar medicamentos para el dolor de venta libre. Quiere programar una cita con el médico para discutir otras opciones de

⋮

## LLMs are great at retrieving information and generating responses

✓ Retrieval Augmented Generation

6:32 PM Is it ok to take Tylenol and Metformin at same time?

Layla

Generally, there are no known significant interactions between Tylenol (acetaminophen) and Metformin. However, individual health conditions and other medications you might be taking could affect this.

6:32 PM

Please consult your healthcare provider or pharmacist to get personalized advice based on your specific health situation.

## LLMs are great at extracting structured information

Shower routine completed. Helped client get dressed. We didn't help with the bath as **the client fell yesterday morning and his coccyx area is sore. There does not appear to be any broken bones** and the client is able to walk slowly but more slowly than usual.

```
1 [
2   {"fall": True, "confidence": .9354},
3   {"pain_mention": True, "confidence": .8903},
4   {"fracture": False, "confidence": .1245},
5   {"body_part": ["coccyx area", "coccyx"]},
6   {"routine_care_completed": True, "confidence": .9123}
7 ]
```

Brian Lewis   
Aug 16, 2024, 2:58 AM

The patient has called twice in the past week for shortness of breath and chest pain. She has a history of coronary artery disease, diabetes and high blood pressure. She takes medication for these conditions. She lives alone and has no nearby family or support. Her daughter is out of town and unable to provide...

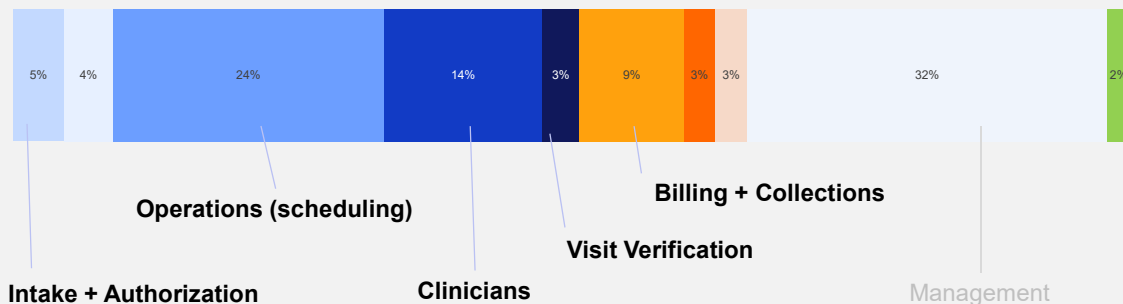
Emergency

Employee  
Tyler Jensen

Note Type  
General (Client Note)

## Operational Activities

A typical agency's back-office



Note: these figures are intended to provide directional insights vs precise estimates

# Agents categorized by Business Impact and Task Size

	Efficiency Agents	Opportunity Agents	Intelligence Agents	Integrity Agents
	Save time	Tackle value-adding tasks that staff don't currently have time for	Analyze data and identify patterns that can act as trigger	Improve data quality
Primary Completes workload for staff	Auto-offers Auto-adjust EVV	Service Optimization Agent	N/A	Chart Audits
Secondary Augments staff performance	Care Plan Creation	Employee Availability	Intake Insights	APR agent

## Potential Use Cases

## Home-Based Care's Challenges



**Workforce  
shortages  
and retention  
pressures**



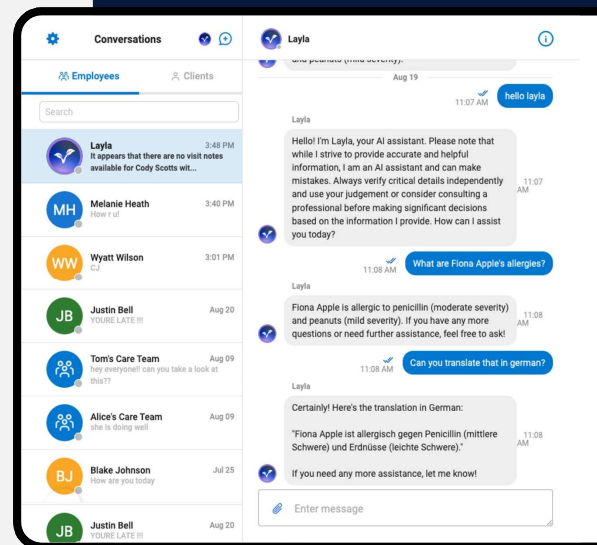
**Rising costs  
and operational  
inefficiencies**



**The transition  
to value-based  
care**

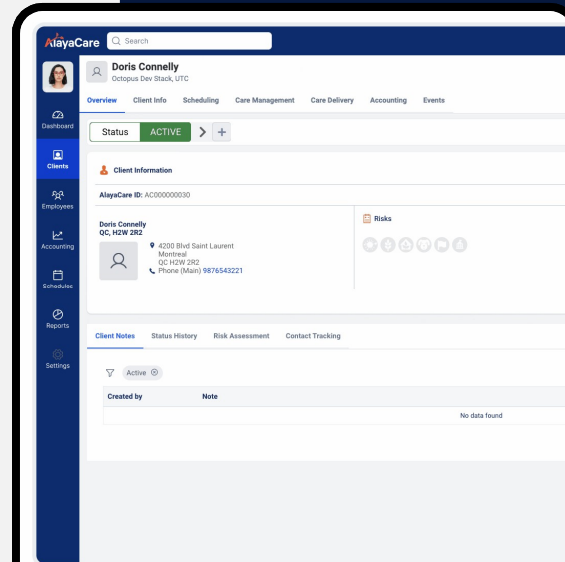
## Secure Messaging for conversational use cases

- ✓ Conversational assistants targeted towards the caregiver (PSW, Nurses, Therapists)
- ✓ Similar to having conversations with any other conversational assistant, but your very own running within your EMR
- ✓ Maintains conversation history for natural interactions and conversations



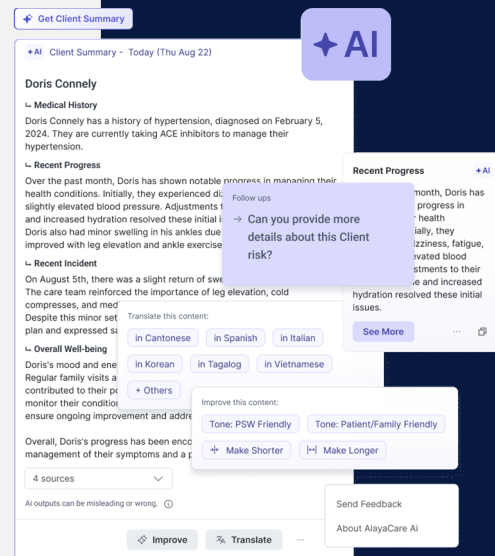
## Integration points in-app

- ✓ Adding generative AI capabilities into your EMR seamlessly using the same microservice
- ✓ More narrow and defined use cases that are closer to the UI and workflows



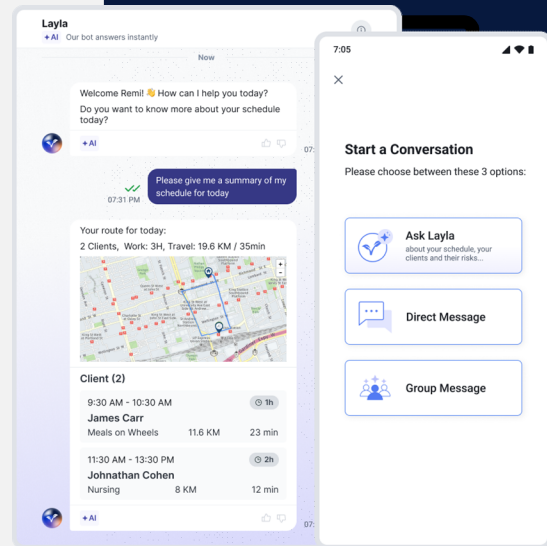
## With follow on actions

- ✓ Ask for more detailed information
- ✓ Translate the content
- ✓ Improve the content
- ✓ Cut and paste the text



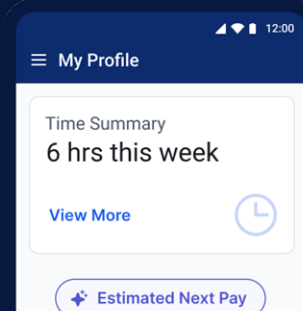
## Use AI to make your Field Staff More Efficient

- ✓ In-app includes mobile decision support for caregivers in the field
- ✓ Information retrieval on the go



## Providing key information while on a shift

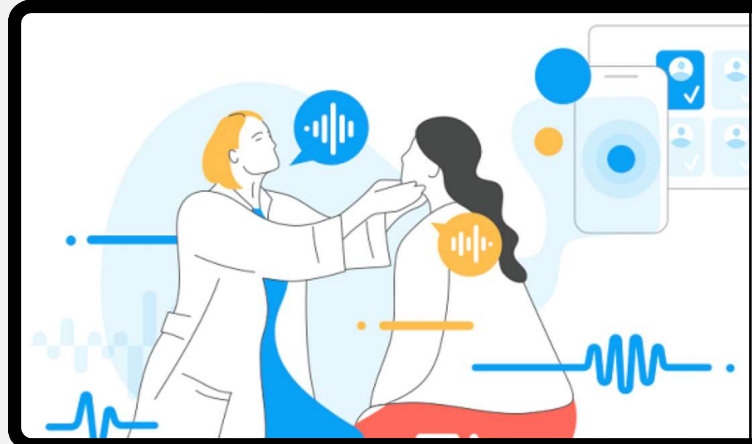
- ✓ Delight your caregivers



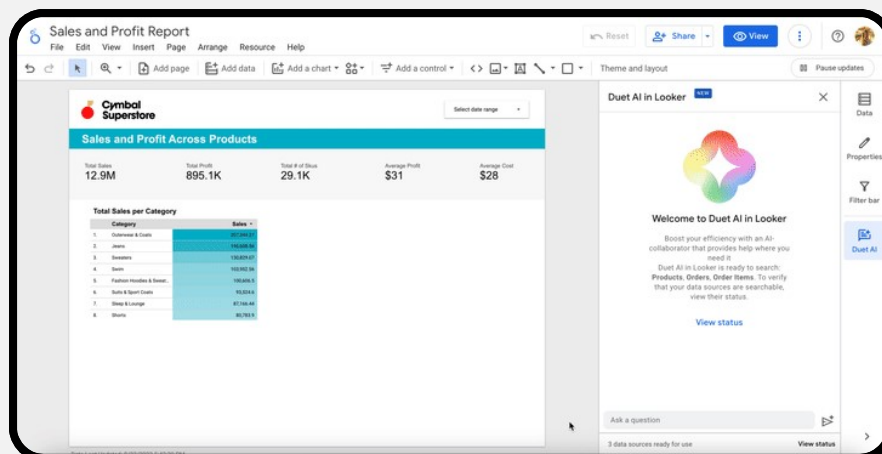


## AI Scribe

- ✓ Complete accurate, compliant routine visit documentation, leveraging generative AI to do the heavy lifting
- ✓ Ambient listening during the visit or when commuting in the field

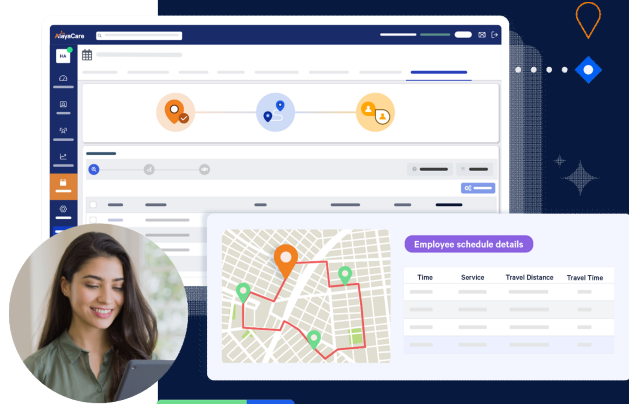


## Data Exploration assistant Talk to your data, tell it what to build



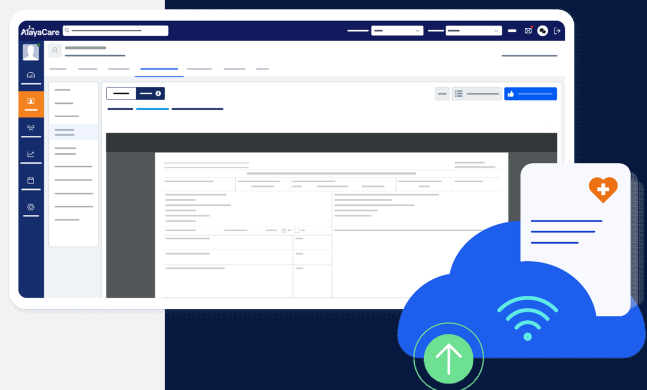
## Schedule Optimization & Caregiver Matching

- ✓ Minimize drive time and maximize schedules
- ✓ Match caregivers to clients based on metrics most important to your business



## Reading Emails & Faxes

- ✓ Create new client records from a referral message
- ✓ Update authorizations
- ✓ Alert the right staff member of what is missing
- ✓ Task staff members to go after missing information
- ✓ Alert schedulers of the new intake



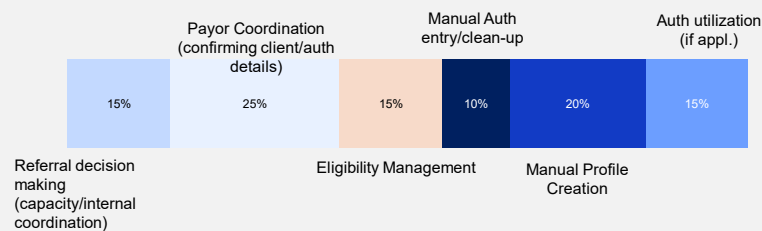
# A Practical Example

Enhancing the intake process...



## Intake - Current State of the union

Time Spent:



Current State:

- ✓ **Manual Entry:** In most markets intake teams face extensive manual coordination and data entry required for new client onboarding.
- ✓ **Cross-department coordination:** Lengthy and cumbersome coordination across teams, payors, and providers.
- ✓ **Capacity Management is challenging:** Intake teams struggle to determine organizational capacity to accept new clients. Most organizations lack visibility. At best: burden by extensive data digging, at worst: simply guess.
- ✓ **Complex decisions:** Decisions require numerous variables, insights, and cross-department communication.
- ✓ **Held to high standard of accuracy:** Entry must be accurate for billing/scheduling/care delivery.

## Intake – Possibility with an Agent

### Start: Referral

- Primary: Automatically Assess Capacity
  - Evaluate an organization's ability to accept new clients by analyzing variables such as staff availability, service demand, and geographic considerations without manual intervention.
- Primary: Automate Client Creation and Coordination with Other Internal Teams
  - Automate the intake process by receiving referrals, communicating with payors to confirm and validate information, checking authorization requirements, and seamlessly creating complete client profiles in the system.
- Secondary: Payor Portal Integration
  - Highest proportion of EVV errors come from inaccurate data from payor source (patient not found/ID invalid). Establish direct connections with payor portals to retrieve and process accurate, real-time information for client onboarding.
- Secondary: Provide Intake Insights
  - Deliver actionable data on intake trends, such as regional growth or skillset gaps, to support strategic hiring and resource allocation decisions.
- Secondary : Automate Eligibility Checks
  - Instantly verify client eligibility through automated systems, reducing manual validation efforts.

### End: Authorization Agent

## Other Ideas for AI Applications

- ✓ Emergency Plan Creation
- ✓ Wound Care
- ✓ Remote Patient Monitoring
- ✓ Diagnostics
- ✓ Imaging and instant interpretation
- ✓ In Home Therapy Enhancement
- ✓ Automate marketing emails & responses to service inquiries





## The Future is Upon us



### So where to start?

#### According to our recent poll:

- **58% of home-based care providers** have not started using AI, and
- **Only 5%** are scaling it across their organization.

## Why AI matters in home-based care



**\$634.9B**

Size of global home health market by 2030



**77%**

want to age at home



**50%**

Nurses spend up to half of their time on documentation rather than caregiving

## Evolving Intelligence Types of AI

Embedded Intelligence



Client Risk, Notable, Optimizer

Assistants



Assistants, Q&A bots, Siri/Alexa

Co-Pilots



Client Summary Button, Form Dictation

Agentic Process Automation



Agentic workflows with human-in-the-loop escalations

## Not all AI is created equal



### General Assistants - ChatGPT

- Give recommendations on best restaurants to try
- Draft client communications, help with translations
- Summarize complex information from clinical notes
- Generate and draft care plans with multiple layers of complexity



### Specialized AI & agents – Wound Tracking

- Transcribe & analyze calls (e.g., Gong)
- Optimize schedules and route planning
- Proactive risk analysis to enable timely interventions
- Scrape visit data in your environment to automate visit verification

## The Real ROI

### What AI is solving for home care teams

- ✓ **Saving time, reducing burnout:** Automate repetitive tasks like visit verification, billing submission, or scheduling.
- ✓ **Unlocking growth opportunities:** AI scans across notes and patterns to highlight service gaps or missed care revenue.
- ✓ **Uncovering hidden patterns + repeat offenders:** Spot billing anomalies or high-risk clients earlier.
- ✓ **Boosting quality and compliance:** Generate care plans based on assessments, reduce variation, and standardize documentation.
- ✓ **Enhancing client experience:** Automate shift summaries, translate communications, and keep the full circle of care informed and connected.

## Considerations for Implementation

### How can agentic products help you win?

You want to win? Agentic products are your edge.

#### ✓ Built-in beats Bolt-on. Every. Day.

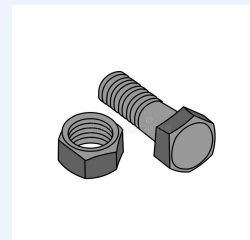
- Point solution AI is a bolt-on. They are disconnected and disjointed
- Agents should be built INTO the platform. They see everything, act with context, and scale with your growth and usage

#### ✓ Out-of-the-box Agents

- Scheduling Agents, Billing Agents, Clinical Agents, all with customization and observability

#### ✓ Agents can ask for help!

- Escalations! Escalations! Escalations!
- For approval or for clarification, agents can involve humans at any step of the process and then continue once they get what they need.





## Choosing the right tools

- ✓ Built-in vs bolt-on?
- ✓ Access to data?
- ✓ Autonomous actions?
- ✓ Human-in-the-loop escalations?
- ✓ Observability & audibility?
- ✓ Change management implications?

## Trust, compliance, and transparency

- ✓ **Aligned with HIPAA, PHIPA, PIPEDA:** Secure data handling, retention, and privacy by design.
- ✓ **Explainable & Auditable AI:** See how decisions were made—no black boxes.
- ✓ **Regional Data Hosting:** U.S. and Canadian data centers support regulatory compliance and peace of mind.
- ✓ **Clinical Accountability Maintained:** AI supports decisions, but humans remain in control.



# Responsible AI Use in Home-Based Care: U.S. Compliance Considerations

Category	What It Means
HIPPA Compliance	Must comply with the <b>Health Insurance Portability and Accountability Act (HIPAA)</b> : safeguards for privacy, security, and breach response..
Data Security & Breach Safeguards	Requires administrative, technical, and physical safeguards to protect ePHI (electronic PHI).
Transparency & Explainability	Any AI used to influence care decisions must be explainable and auditable, especially under OCR guidance.
Minimum Necessary Use	AI must only access the minimum necessary health data for its purpose—central to HIPAA's data use principle.
Clinical Oversight	AI cannot independently make clinical decisions—clinicians must retain final responsibility for care outcome

Sources:

- U.S. Department of Health and Human Services – HIPAA Privacy Rule
- HHS: Strategic Plan for the Use of Artificial Intelligence in Health, Human Services and Public Health

## 3 themes we see

Agents need to *earn* the trust of our clients. Starts narrow

Change management is Core Strategy, not an after thought

Value must be clear and measurable

## Do not underestimate the change management required

Concerns reported at the creation of this Note

☒ Medication Non-Adherence
 ☒ Infections
 ☒ Worsening Conditions

☒ Emergency

Add a Concern

Covid-19

Cancel Update

Add your Review:

06-12-2024 Kostya Almeida 10:30 AM 240min No Required ☐ John Snow ☒ Ben Porter ☐ Donald Duck

	Employee	Job Title	Continuity	Seniority	Skills	Availability	Current Work Hours	
<input checked="" type="radio"/>	Ben Porter	Nurse	51%		1/1	77/77	40 16.33 35	Assign
<input type="radio"/>	John Snow		0%		0/1	77/77	40 1.75 35	Assign
<input type="radio"/>	Donald Duck		0%		0/1	0/77	40 0 35	Assign

Find 3 more employees Send Offers to All



## Clear Problem Definition

F

### Find the Friction

*What is actually going wrong?  
Who is feeling the pain*

R

### Root Cause Analysis

*5 whys*

A

### Articulate Impact

*Why does this matter? Quantify problem*

M

### Map Ideal State

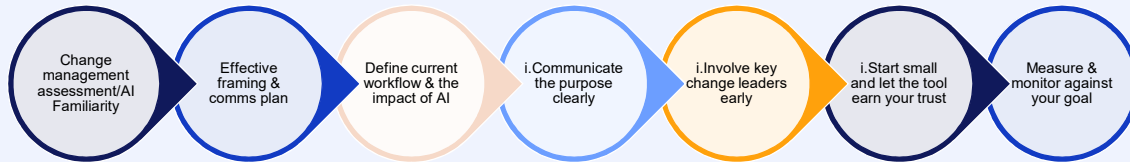
*Magic wand  
Keep the outcome in mind*

E

### Evaluate Solution

*Tool selection + success criteria*

## How will you roll it out?



## Poll Question



**Where do you see the greatest need for AI innovation in your organization?**

- Reducing manual tasks
- Unlocking new revenue streams
- Early risk detection
- Standardizing care processes
- Improving family and client communication



## Thank You & Q&A



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