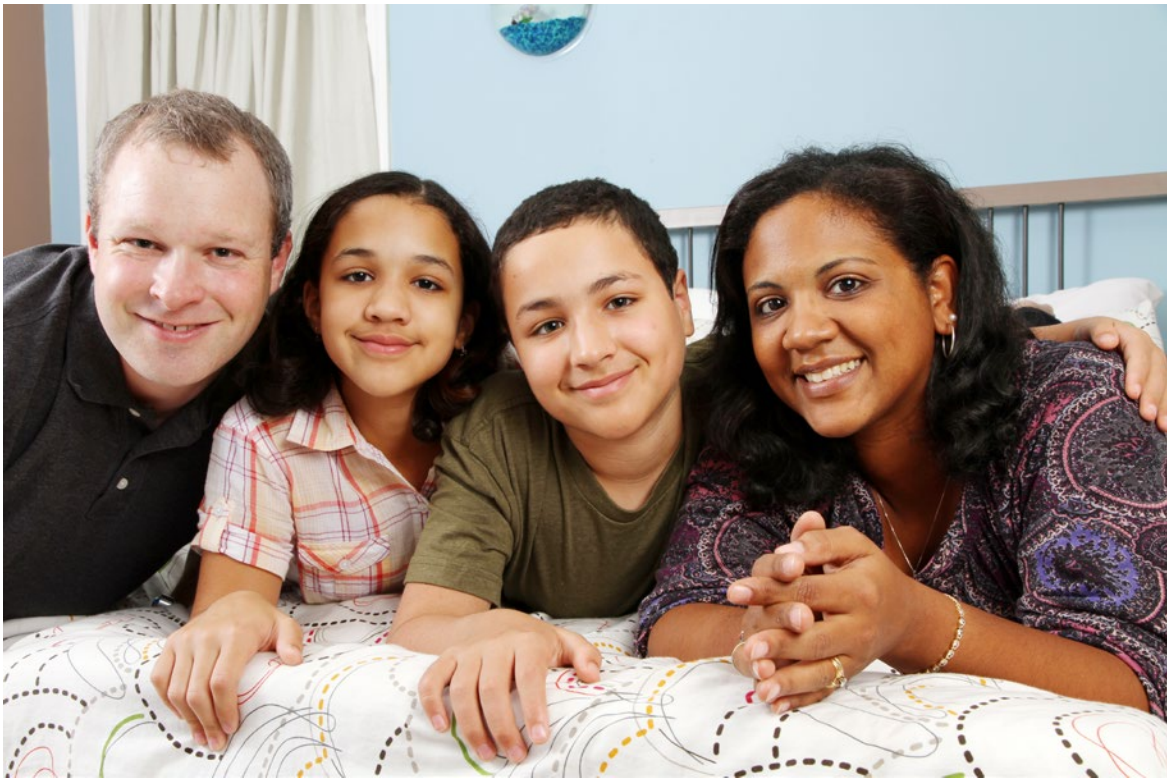
Use Case: Family Support & Preventative Services



Agencies that provide family support and preventative services can benefit from Artificial Intelligence and Care Coordination Technology in many different ways.

AI is used to assist in case preparation, planning and decision support, alerting staff with updates about their clients, and enabling supervisors and leadership to improve quality control.

Care Coordination Technology is used to assist in care plan management, care team communication, provider management, client engagement, data integration and reporting.

The following table describes the various AI applications that can be used by agencies that provide family support and preventative services. Each column contains a category of applications.

Summarization / Case Preparation	Planning & Decision Support	Alerting	Quality Control
Client History Timeline This application provides case managers with a visual timeline of relevant events in a client's history, raising confidence that they are aware of as much information and context as possible -- while saving preparation time for client meetings.	**Program Recommender** This application provides case managers with recommendations on which programs may be most effective in supporting case managers' decisions, based on their own training and experience. The goal is to align any recommendations with the case manager's intuition and experience, thereby increasing confidence about the assigned program (including for managed care).	**Change in Circumstance Identifier** To help case managers determine if action is required for a specific client, this application alerts them to documented changes in the client's circumstances that require review -- and can communicate it to others in the agency or on the client's care team who should also be aware of the alert.	**Assessment Validator** To ensure the fidelity of data in a client's record, this application confirms that answers provided in assessments align with information contained in case notes. This enables continuous monitoring and quality improvement at an individual/client level, which is a common requirement of prevention programs.
Client Case Progression Timeline This application provides case managers with a visual timeline of how the client is progressing compared to agency benchmarks and metrics. This tool is similar to the Client History Timeline, but shows a different aspect of the case.	**Goal Recommender** This application provides recommendations that case managers can factor into their thinking/decisions on the goal(s) that could yield the best outcomes for a specific client. Like the Program Recommender, it is designed as a tool to supplement assessment data, training and experience/intuition.	**Safety Issue Identifier** To help behavioral health professionals determine if action is required for a specific client, this application alerts them to documented client safety issues -- and can communicate it to others in the agency or on the client's care team who should be aware of the alert. This tool is comparable to the Change in Circumstance Identifier above.	**Case Notes Quality Monitor** To ensure the integrity of data in a client's record, this application warns leadership if case notes have been copied and pasted, or if people are billing for services outside of guidelines and are not eligible for particular programs. The result is to enable continuous monitoring and improvement of program quality, which is a common requirement of prevention programs.
Case Notes Summarization This application provides case managers with concise summaries of client histories in specific timeframes and domains.	**Action Recommender** This application recommends actions that can best support assigned goals. Like the Program Recommender and Goal Recommender, this tool provides case managers with additional input to inform their decision making.	**Confidentiality Warning** This application provides important guidance to case managers by highlighting information within case notes that is or may be considered confidential (recognizing that the ability to share sensitive data is of primary concern to any professional interacting with a client).	**Service Duplication Notifier** Because a client often receives services from multiple agencies -- or from multiple programs within an agency -- this application highlights if/when any of these services are duplicative or conflicting. Case managers can use the resulting information to refine a client's plan, streamline processes and, potentially, save money.

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Summarization / Case Preparation	Planning & Decision Support	Alerting	Quality Control
Client Strength, Interest and Value Identifier This application provides a list of the client's strengths, interests and values to help case managers tailor their communications and planning.	**Resource Finder** This application identifies information in the case notes that can inform which resource(s) would be a good fit for the client, such as a foster family, permanent/adoptive family, behavioral health provider or other service provider. This application can also be extended to search for these resources.		**Case Manager Policy and Procedure Adherence Monitor** This application reviews an agency's policy and procedure documentation, then reviews individual client progress described in case notes, and finally checks to make sure that the services being provided are following prescribed guidelines. This tool offers a systematic way to ensure that all professionals are continually trained to provide services according to agency policies, procedures and standards of practice.
Social Determinants of Health and Well-Being Status Identifier This application enables the agency to track the status and change(s) in the social determinants of health and well-being relevant to a specific client. If/when appropriate data-sharing agreements are in place, this data can be shared with the client's physical and/or behavioral health provider to inform a treatment plan.			**Agency Policy, Procedure and Contact Adherence Monitor** This application checks to ensure that agency-level guidelines pertaining to the population served are being followed with respect to contractual obligations.

The following table describes the major features of our care coordination technology platform that benefit agencies that provide family support and preventative services. Each column contains a category of features.

Care Plan Management	Provider Management	Client Engagement	Data Integration, Reporting & User Management
Care Plan Creation The care manager creates a client's care plan, including enrollment into programs, assignment of goals, actions and tasks, and tracking of the plan's execution.	**Provider Registry** The agency maintains a registry of external providers. Via a portal, external providers can also keep information about their agencies up to date, including which services they offer and their associated capacity.	**Client Task Management** The care manager assigns actions and tasks directly to a client, who can view and manage those assignments on a personal device.	**Care Team Management** Administrators manage organizational structures, including the specific teams and individuals with authorized access to client care plans.
Assessments The care manager completes assessments that include automatic scoring, as well as the ability to automatically assign goals and actions based on those scores.	**Assignment of Providers** The agency assigns providers to be responsible for the execution of specific services associated with a client's care plan.	**Client Self-Service** Via a portal, the client can research and select services and providers to help accomplish tasks and actions.	**Care Manager Assignment** Supervisors assign an individual or team to each client.
Case Notes The care manager can collect data, including narrative case notes, forms, reports, audio and video.	**Referrals** Referrals to and from external providers are tracked.	**Client Budget Management** The care manager assigns a budget to a client and works with the client to manage it.	**Dashboards** Care managers, supervisors and administrators all have unique dashboards to help them manage their work.
Case History The care manager receives a summary of a client's history, including key issues that may impede/prevent success of the care plan.	**Provider Payments** Management of payments to and from external providers are tracked.		**Data Sharing** Administrators utilize APIs to share data with external systems.
Risk Flags The care manager can create risk notification flags, which can also be generated automatically based on designated criteria.			
Care Plan Recommendations The care manager receives suggestions for best practices, evidence-based solutions and outcome-based actions.			

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