

# EXPANDING I/DD AGENCY HARNESSSES ARTIFICIAL INTELLIGENCE TO OPTIMIZE OPERATIONS

## BACKGROUND

Access: Supports for Living is dedicated to helping people live the healthiest and fullest lives possible. Founded in 1963, Access, along with its affiliate organizations: The Guidance Center of Westchester, New York Families for Autistic Children, and Meaningful NY, serves more than 20,000 children, adults, and families annually across the Hudson Valley, New York City, and Long Island. With a mission grounded in partnership and possibility, Access provides behavioral health, intellectual and developmental disability, housing, employment and community-based services—empowering individuals to achieve independence, recovery, and meaningful connection in their communities.

## CHALLENGE

Access is continually seeking ways to improve operational efficiency, particularly in areas that directly impact service delivery and billing. One persistent challenge has been the documentation process required for the programs they support. Monthly Summaries require that staff review and compile notes from each session throughout the month into a comprehensive report detailing interventions and observed progress. This process is not only intricate but also time-consuming - often requiring numerous hours per staff member each month.

Given that each staff member supports 5–6 individuals, documentation alone could consume up to 12 hours monthly per person. Once completed, summaries then must be reviewed by supervisors for approval or revision. If any questions or issues arise, more time is added to that timeline. In turn, every delay affects the Finance team's ability to submit billing, ultimately slowing down the organization's revenue cycle.



*eVero's HIPAA-Compliant AI Assist streamlines service documentation & delivers cohesive, easy-to-read monthly summaries.*

## SOLUTION

Access's leadership team always takes a forward-thinking approach to technology and recognized the potential of Artificial Intelligence to streamline their workflows. However, they were cautious about HIPAA compliance, data privacy, and security, and how AI could impact each.

They were excited when they learned that eVero had integrated AI into its digital AGENCY EHR platform, which Access was already using. During a trial their staff experienced how eVero's AI Assist engine could automatically aggregate individual-specific data and staff notes collected throughout the month into precise, editable, and insightful summary reports that staff could easily review and refine. They also discovered that each eVero client is assigned a dedicated AI instance, which would ensure that all data remains isolated, secure, and fully HIPAA compliant.

### BEFORE eVero

- Each staff member spends 12+ hrs/mo on service documentation
- Up to 2 hours required to create a single monthly summary
- Manual reviews slowed down the revenue cycle
- Inconsistent writing styles across multiple DSPs

### AFTER eVero

- Service documentation completed in **less than half the time**
- Monthly summaries compiled in **under 30 minutes**
- Reports are **cohesive, concise, and easy to read**
- Efficient documentation **accelerates the revenue cycle**

## IMPLEMENTATION

When eVero's AI Assist tool was first introduced, many staff members were understandably hesitant—AI was new and unfamiliar. To support a smooth rollout, Access partnered with eVero to deliver comprehensive training and required each staff member to sign an AI Acceptable Use policy.

After a few months of hands-on experience and seeing the tangible benefits, their staff fully embraced the system. They quickly realized that the more detail they provided in their daily notes, the richer and more impactful the resulting reports became. By incorporating personalized examples, they could better highlight individual accomplishments, key interventions, and meaningful progress throughout the year.

A particularly valuable improvement was seen in programs like Day Hab, where individuals work with multiple DSPs throughout the month. Previously, each DSP's unique writing style and varying levels of detail made it time-consuming for supervisors to review and consolidate notes into a cohesive, useful summary. The AI-powered workflow has dramatically streamlined this process, saving time and providing more detailed, and more actionable, summaries that supervisors can review easily and return for revision until it accurately represents the work.

## RESULTS

Before implementing AI Assist, staff members often spent up to two hours completing a single monthly summary. Now, Access reports that summaries are typically completed in just 30 minutes. These reports are more comprehensive and cohesive, with significantly fewer being returned for revisions. This improvement saves each staff member an estimated 10–12 hours per month and enables the Finance team to submit billing more quickly—greatly accelerating the revenue cycle.

Supported individuals have noticed and appreciated the change as well. They've observed improvements in the quality and timeliness of their documentation and are excited to see Access using AI in such a meaningful and responsible way, especially with the assurance that their personal information remains protected.

*“ We've received overwhelmingly positive feedback from our staff about AI Assist. It takes a lot off their plate by using their notes to create a summary of all the sessions that they had over the month. This makes things much easier for them and saves a significant amount of time. ”*

*“ The overall quality of our notes and summaries has significantly improved. Staff members now generate more comprehensive documentation in a shorter amount of time, resulting in fewer rejections. This streamlined process has accelerated our revenue cycle, as the finance team can process claims more quickly and effectively. ”*