



# Automation & AI Technology Assessment

Enable Care Transformation:  
Intelligence, Efficiency, and Growth

## Advancing Care-at-Home Intelligence

Automation and AI are transforming home-based care, from intake workflows to revenue cycle and workforce planning. While technology can reduce administrative burden, improve visibility, and support growth, true impact requires more than tools. Success depends on governance, consistent data standards, and integrated architecture. The Maxwell TEC Automation & AI Technology Assessment evaluates the technology ecosystem, identifying automation, analytics, and AI opportunities aligned with strategic priorities. The result is a clear, actionable roadmap for sustainable, technology-enabled modernization.

**Operational Clarity • Strategic Alignment • Automation Efficiency • Financial & Data Insights**

**Driving Efficiency, Alignment, and Insight Through Targeted Automation.**



### Automation Opportunity Map

Prioritized automation areas across intake, clinical documentation, revenue cycle, analytics, and workforce management.



### Architecture Blueprint

Recommended system architecture detailing automation tools, integration needs, and data governance considerations.



### Implementation Roadmap

A phased roadmap aligning governance, standardizing data, and deploying automation to drive sustainable modernization.



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## Evaluating Automation and AI Operational Readiness

### Technology Architecture

- Current EMR landscape and supporting platforms.
- Integration architecture and data flow between systems.
- Vendor ecosystem complexity and automation readiness.

### Operational Workflows

- Intake, scheduling, documentation, and billing workflows.
- Manual processes that create administrative friction.
- Opportunities for automation to improve throughput and consistency.

### Revenue Cycle & Financial Operations

- Revenue validation and reconciliation processes.
- Claims processing and denial management workflows.
- Opportunities for automated monitoring and predictive financial analytics.

### Data & Analytics Infrastructure

- Reporting reliability and KPI governance maturity.
- Data ingestion practices across EMR and operational systems.
- Readiness for predictive analytics and AI-enabled decision support.

### Workforce Intelligence

- Productivity measurement and staffing capacity visibility.
- Scheduling and route optimization opportunities.
- Predictive staffing and workforce analytics capabilities.

### Intake & Referral Management

- Referral intake automation opportunities.
- Eligibility verification and documentation processing.
- AI-assisted referral parsing and workflow optimization.

## Ready to Transform Your Care Operations?

Contact us today to schedule your assessment  
and start driving efficiency and growth.



Learn more about our solutions at [www.MaxwellTEC.com](http://www.MaxwellTEC.com)



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