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Bringing it all together:

Explore how AI enhances reporting and analysis, and how to manage data long-term.

What We'll Cover

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1. Introductions
2. Series Recap
   - Foundations of EHR data and Platforms
   - Turning Data into Insights
3. Data Lifecycle Management
4. Using AI to analyze large volumes of data
5. Use Cases
6. Roadmap for implementing advanced analytics and AI
7. Bringing it all together
8. Q & A
9. DEMO

Introduction

PrecisionCare: Human Services Software

Technology should make care easier, not harder. **PrecisionCare** delivers a platform built for human service providers, helping agencies streamline operations, stay compliant, and focus on what matters most... people.

Today's Presenters

Christine Casillo

Founder and President of PrecisionCare software. Christine has over 35 years of experience in New York Human Services.

Brian May

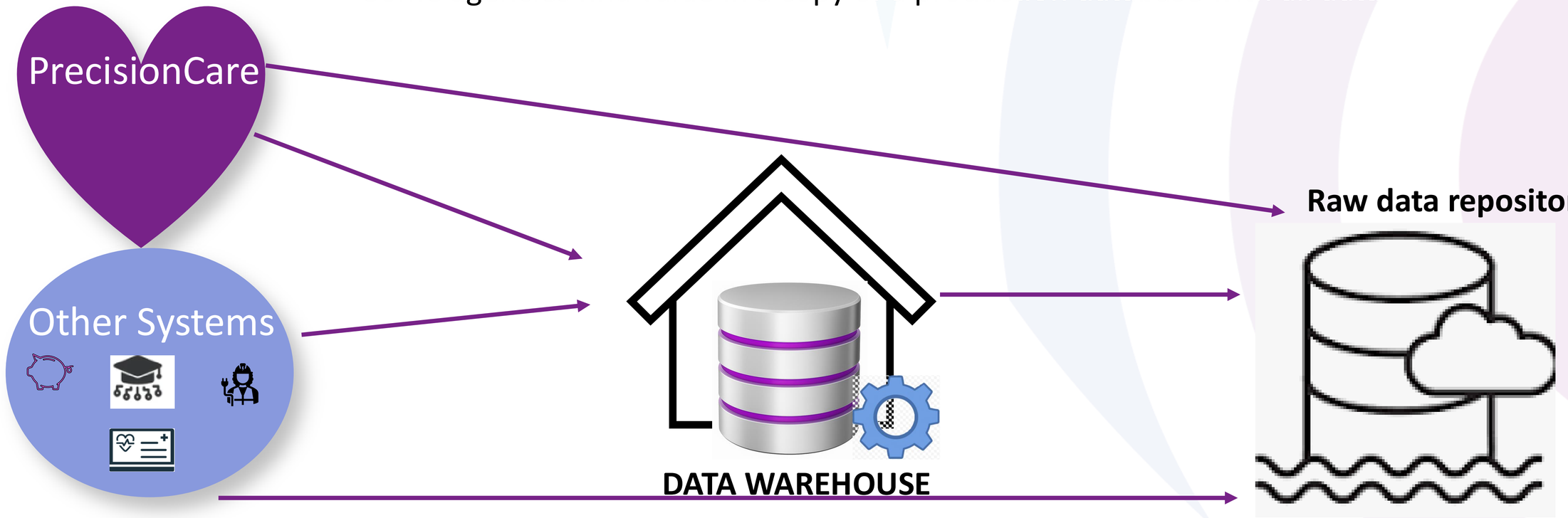
Vice President of PrecisionCare Software. Brian has 15 years of experience with Electronic Health Records and Human Services.

Nicole Reisig

Power Bi Coordinator at PrecisionCare Software. Nicole has 20 year of experience in New York Human Services and 10 years in Data Analysis.

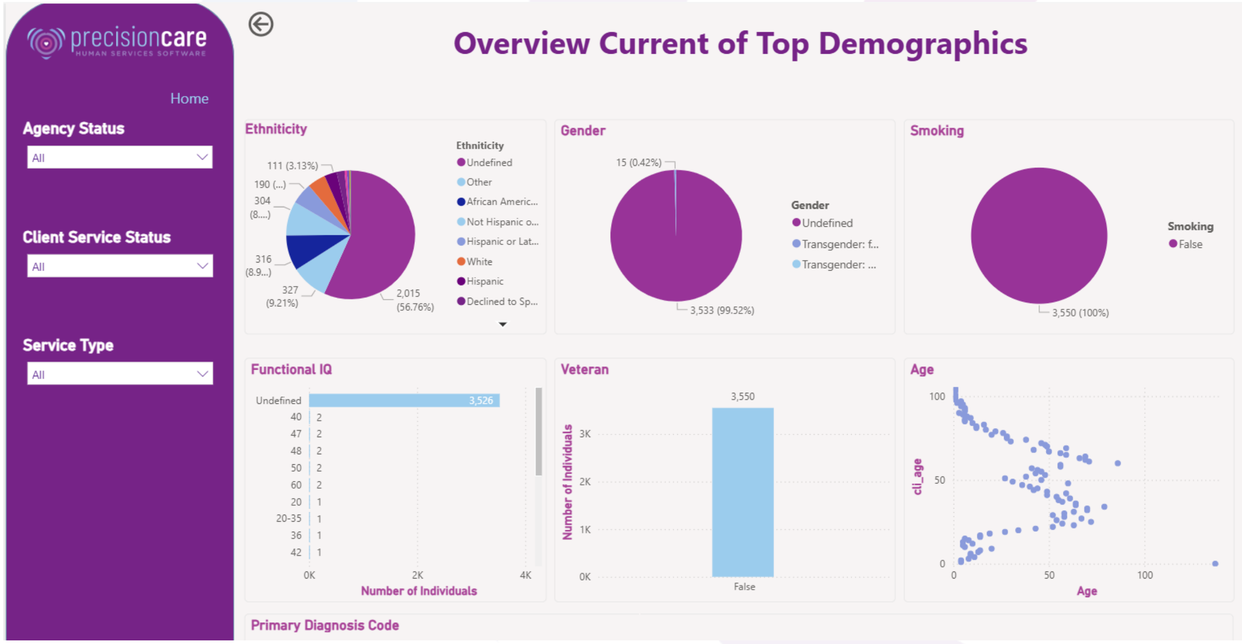
The role of data platforms in simplifying and securing data access

- Data into a separate, secure system without impacting production systems
- Centralized, trusted, single source of truth
- Handles large volumes of historical data
- This can be a data warehouse transforms and standardizes data for easier, faster reporting
- Some agencies find value in a copy of a production database with all data



Tuning data into insights

- Power BI, Tableau, Looker, Sisense and more
- All of the tools can transform data for analysis
- These tools can be used to create libraries of views, dashboards and reports
- Allow data to be presented in many ways including interactive visuals
- Data can be filtered
- Data can be Isolated and drilled down to see more specific data
- Allows for exporting of data
- Insights and asking questions about the data



Business Intelligence and Data Analysis

- Business Intelligence- Dashboards and reports to view organized repeatable data. Illustrates what is happening now and what has happened historically

- Data Analysis-Exploring data to find patterns or relationships. Used to answer questions or investigate a problem. Used in creating predictive models

Business Intelligence tells you what is happening .
Data Analysis can tell you why it is happening

Views, Dashboards and Reports

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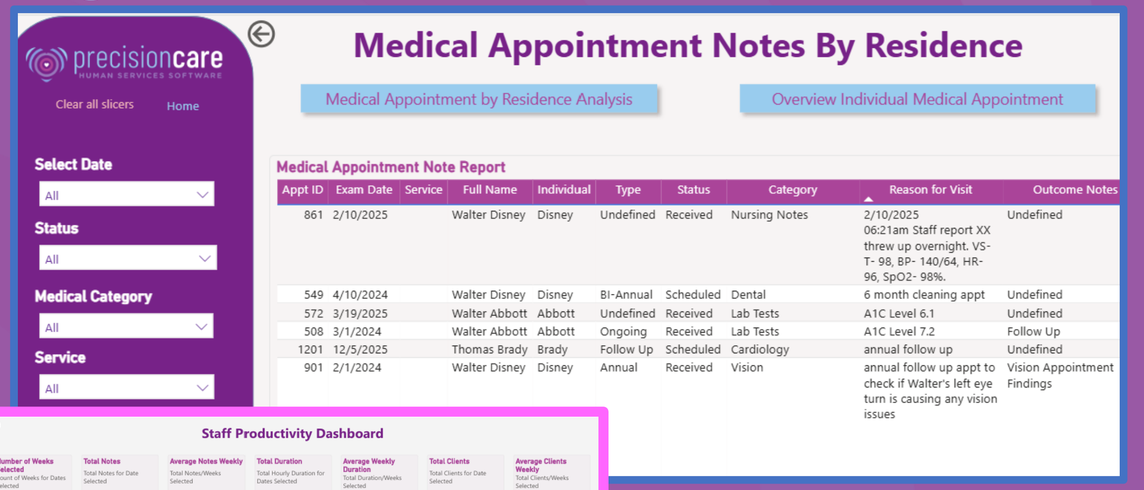
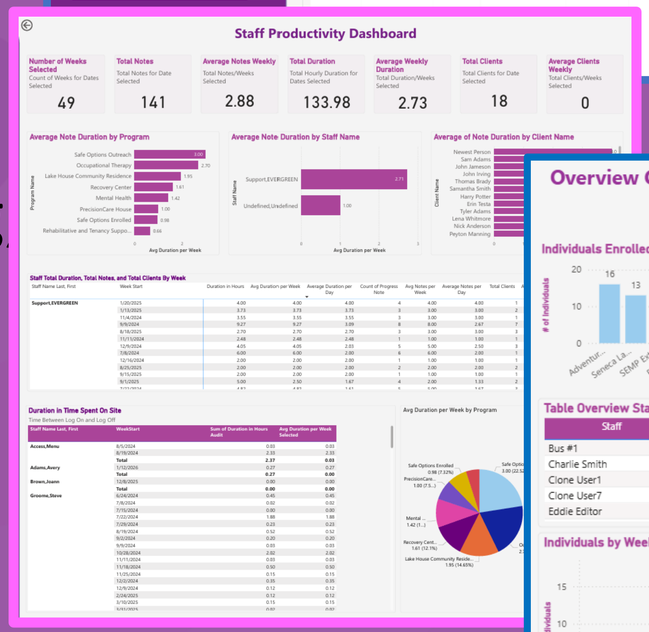
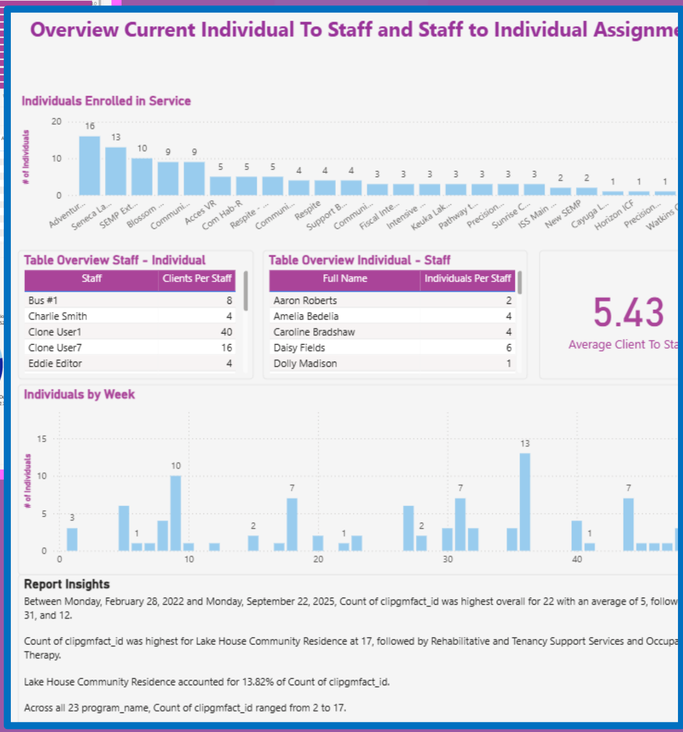
Views: Filtered perspectives on data. Shows clean controlled data set.

Dashboards: High-level summaries and KPIs. Visuals at a glance. Made for decision making, not for detail.

Reports: Detailed tables and visuals. Contains tables, charts and filters are used. Great for operational monitoring







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Data Lifecycle Management and Governance

Managing data creation to deletion and Why Data Lifecycle Management Matters More in the Age of AI

What is Data Lifecycle Management?

- Data Lifecycle Management is the **practice of managing data from creation to deletion** to ensure it is **accurate, secure, compliant, and useful throughout its life.**

- In **Power BI and analytics environments,** DLM ensures that the **right data is available at the right time**—without creating risk or unnecessary cost.

The Data Lifecycle — Simplified

At a high level, data moves through these stages

1. **Create / Collect**

   Data is generated from systems, users, devices, or integrations.

2. **Store**

   Data is saved in databases, data warehouses, or cloud storage.

3. **Use / Analyze**

   Data is consumed in reports, dashboards, KPIs, and decision-making (e.g., Power B

4. **Maintain / Retain**

   Data is validated, refreshed, archived, or retained according to policy.

5. **Archive / Delete**

   Data that is no longer needed is archived or securely deleted.

Key Compliance Principles

- **Data Privacy**
  Protect patient information and ensure appropriate use
- **Data Security**
  Prevent unauthorized access through controls and monitoring
- **Data Integrity**
  Maintain accuracy, consistency, and reliability across systems
- **Data Governance**
  Establish clear ownership, accountability, and decision controls

Why Data Lifecycle Management Matters More in the Age of AI

AI doesn’t just consume data — it amplifies whatever data you give it. Good lifecycle management produces trustworthy AI outcomes. Poor lifecycle management produces fast, confident, wrong answers.

- **Accuracy & Trust**
  AI amplifies errors — healthcare data must be current, governed, and reliable
- **Security & Compliance**
  Strict regulations + sensitive data demand controlled access and retention
- **Performance & Cost Control**
  Growing data volumes and AI workloads increase cost without lifecycle discipline
- **Audit & Governance**
  AI insights must be explainable, defensible, and auditable across systems

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Using AI to Analyze Large Volumes of Data

Turning complex healthcare data into actionable insight

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Healthcare generates massive data volumes over very long periods of time resulting in too much data and not enough insights

AI changes this by:

- Identifying patterns humans miss
- Automating analysis at scale
- Accelerating decision-making

AI doesn’t replace expertise; it amplifies it!

Ask Mode vs Agent Mode

Ask Mode (Reactive AI): User asks then AI responds

Examples: “Summarize this report”

“Find anomalies in attendance data”

Agent Mode (Proactive AI):AI acts independently toward goals

Example: Monitors data and flags issues automatically

Identifies trends and alerts teams

Shift from “AI as a tool” to “AI as a teammate”

Risks & Considerations

- Data quality matters (garbage in → garbage out)
- Requires governance
- Not all outputs are 100% accurate
- Needs human validation

AI Maturity Model

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Level 1:
Reporting

Level 2:
Dashboards

Level 3:
AI-assisted Insights

Level 4:
Predictive analytics

Level 5:
Autonomous AI (agent-based)

A Practical Path to Data-Driven Decision Making

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Identifying Documentation Gaps & Potential Risk

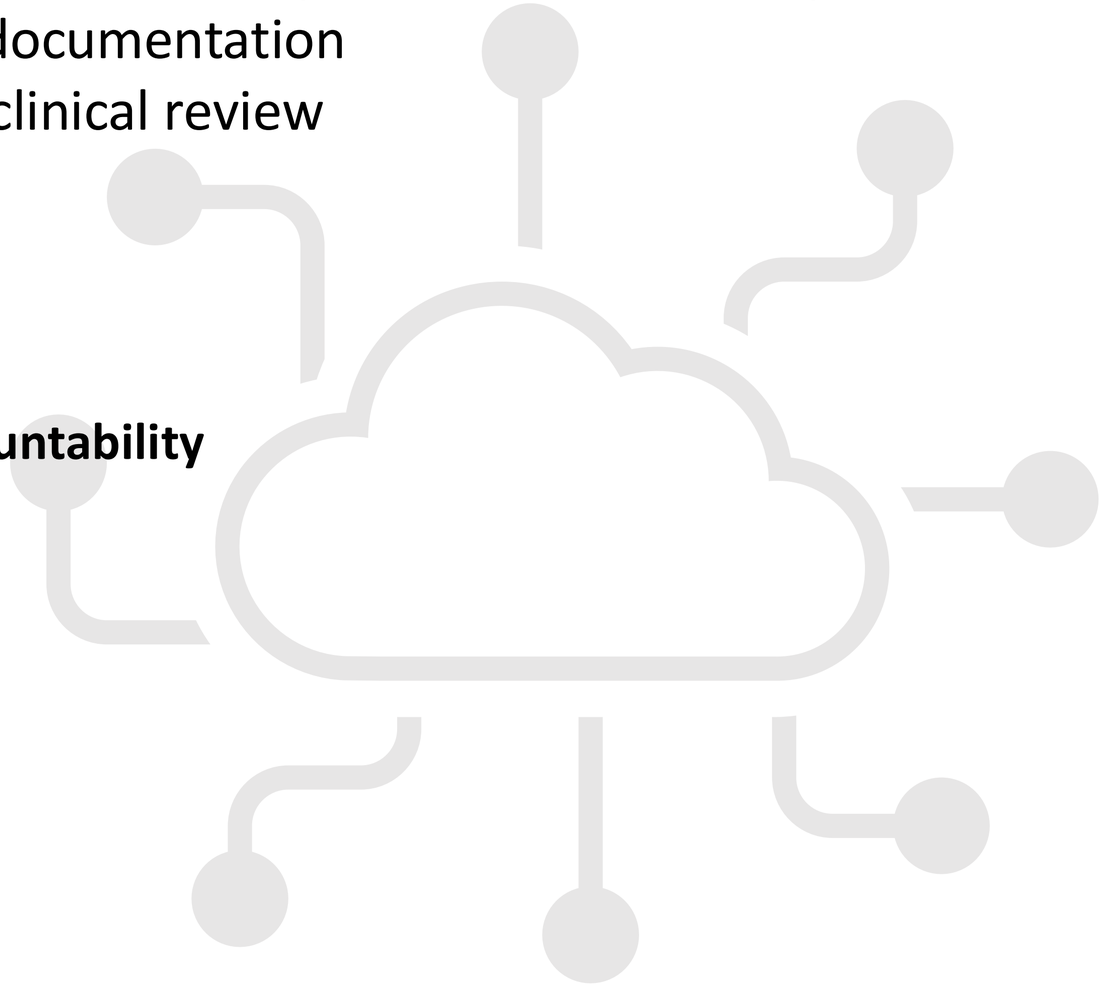
- **Machine Learning** identifies individuals at higher risk for hospitalization based on patterns
- **Pattern Detection** flags missing or inconsistent documentation
- **Generative AI** summarizes findings for efficient clinical review

AI + Data Lifecycle Management

- AI depends on **high-quality, well-governed data**
- Poor data leads to **inaccurate and risky AI outputs**
- Requires strong **governance, transparency, and accountability**

Best Practices for Success

- Define clear **data ownership**
- Standardize **data definitions**
- Implement **access controls**
- Monitor **data quality regularly**
- Establish **retention and deletion policies**



Use Cases

1. Behavior Tracking Pattern Analysis

Identify behavior frequency trends and conditions over time to support care planning and proactive interventions.

“Are there specific times of day or days of the week when targeted behaviors occur more frequently?”

2. Progress Note Insight & Consistency Review

Use AI to summarize thousands of free-text notes to surface themes, progress, or gaps in documentation.

“Summarize common themes from progress notes over the past month.”

3. Individual Outcome & Goal Progress Monitoring

Track progress toward individual goals and identify when progress stalls or accelerates.

“Which types of goals show the strongest improvement over time?”

4. Staff Productivity & Support Coverage Insight

Understand how staffing patterns relate to service outcomes, behaviors, documentation quality, and staff productivity.

“Analyze staffing levels across programs and summarize any notable patterns.”

5. Equity & Consistency Monitoring Across Programs

Use AI to identify inconsistencies in outcomes, services, or documentation across regions or providers.

“Create a plain-language summary highlighting areas where outcomes differ significantly.”

“This insight was already in the data — AI just helped us see it faster and more clearly.”

Roadmap for Implementing Advanced Analytics & AI

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1. **Assess Data Readiness**
   - Identify data silos and gaps
   - Ensure tidy, reliable data (ongoing discipline)
   - Confirm leadership commitment to data-driven decisions
2. **Build the Data Foundation**
   - Choose or build the data platform
   - Establish governance, security, and access controls
3. **Develop Analytics Capability**
   - Learn the basics
   - Use standardized Views, Dashboards, and Reports
   - Enable self-service analytics across teams
4. **Leverage Advanced Analytics & AI**
   - Apply AI to accelerate insights and decision-making
   - Scale responsible, governed AI use cases
5. **Continuous Improvement**
   - Iterate on data quality, models, and insights
   - Adapt as data, use cases, and technology evolve

Organizational Readiness

- **Assess Data Readiness**

  Clarify the business problems, identify data gaps, and confirm leadership alignment
- **Build the Right Foundation**

  Ensure data quality, platforms, security, and governance are fit for purpose
- **Enable Analytics Adoption**

  Set realistic expectations for self-service analytics, reporting, and insight use
- **Prepare for Scalable AI**

  Treat analytics and AI as long-term capabilities, not one-time initiatives

Bringing it all together

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Foundations Matter

- Strong EHR data structure enable reliable reporting and analytics
- Data Platforms centralize and secure access to historical and operational data

Turning Data into Insights

- Tools like PBI transform raw data into dashboards, reports and actionable visuals
- Business Intelligence shows what is happening; Data Analytics uncovers why it is happening

AI Elevates Analysis

- Tools like PBI transform raw data into dashboards, reports and actionable visuals
- Business Intelligence shows what is happening; Data Analytics uncovers why it is happening

Governance & Lifecycle Management

- Proper governance ensures accurate, compliant and secure use of data throughout its lifecycle
- Clear processes support trust, consistency, and long term adoption

Governance & Lifecycle Management

- Start with readiness: data quality, leadership alignment, and clear goals
- Build a scalable data platform
- Layer in AI and advanced models
- Commit to continuous improvement

Looking Ahead: AI Options & Ecosystem Exploration

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Microsoft-Aligned Options

- **Microsoft Fabric**
  Unified analytics and AI platform tightly integrated with Power BI
  Considerations: licensing, compute cost, and governance maturity
- **Copilot (Outside Power BI)**
  Leverage Copilot across Microsoft 365 to analyze, summarize, and explore data without altering BI models

Cloud-Based AI & Data Platforms (Under Evaluation)

- **Databricks**
  Advanced analytics and machine learning at scale; strong for large, complex datasets
- **Snowflake**
  Cloud data platform optimized for performance, sharing, and AI-ready analytics
- **HubSpot**
  AI-enabled analytics primarily for CRM, marketing, and engagement data; potential downstream data source

Analyst-Driven & Transitional Options

- **Export to Excel + Copilot**
  Rapid insights using familiar tools with AI assistance
- **Unstructured Data Integration**
  Combine datasets with email notes and PDFs (e.g., narrative context) to enrich analysis and clinical review

Questions?

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Demo

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