



Workflow Automation for Home Care Agencies The Human + AI Edge

Live Webinar

24th Sept 2025



Before we get started

- This webinar is being recorded
- Link to recording and slide deck will be shared after the webinar
- All attendees will be muted during the session
- Handling Q&A at the end

Agenda



About Caresmartz



Introduction



Panelists



Panel Discussion



Q&A

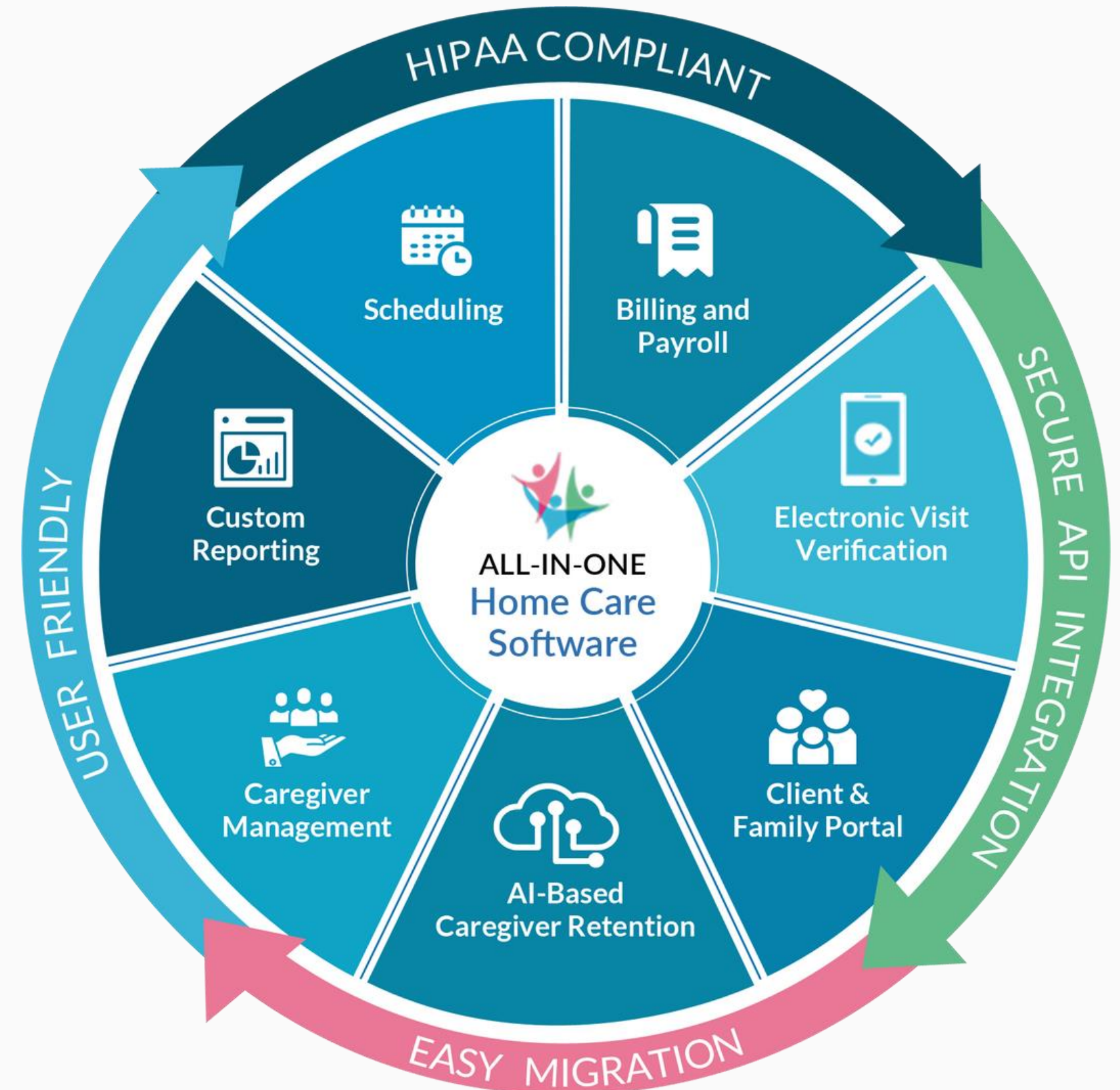


Resources



About CareSmartz360

Whether you are a home care franchisor or an independent agency, our HIPAA-compliant, AI-powered software is designed to make care easier for you through advanced features like scheduling to billing, client & family portals, and mobile apps.



Presented by



Guest Speaker



Bob Roth

Managing Partner,
Cypress HomeCare Solutions

Moderator



Ruby Mehta

VP of Sales,
CareSmartz360



Improve administrative workflow

- Use digital forms for new clients & integrate systems to manage billing and payroll.
- Implement automated alerts for certification renewals and regulatory changes.
- Automate repetitive data entry and paperwork to free up administrative staff.



Data Capture & Insights

- AI auto captures data that would've otherwise been missed, giving actionable insights.
- These insights lead to smarter decisions and a deeper operational understanding.
- Align team members in real-time by using AI to communicate operational changes & insights





Efficiency Gains by Cypress

- New processes support **over 3,000** extra work hours annually without adding staff.
- Human capital needs are reduced by **100–120 hours per month** through automation.
- **Automation** and **AI** have been key to achieving these significant efficiency gains.



Empower Your Caregivers

- Use a mobile app for caregivers to easily submit notes and track activities.
- Send automated alerts for appointments and care plan updates.
- Reduce paperwork so caregivers can spend more quality time with clients.

The use of mobile apps can lead to a 12.5% decrease in the probability of a caregiver feeling overwhelmed by their tasks, and a 9.1% decrease in the probability of spending over 30 hours weekly on caregiving.

– [ResearchGate](#)



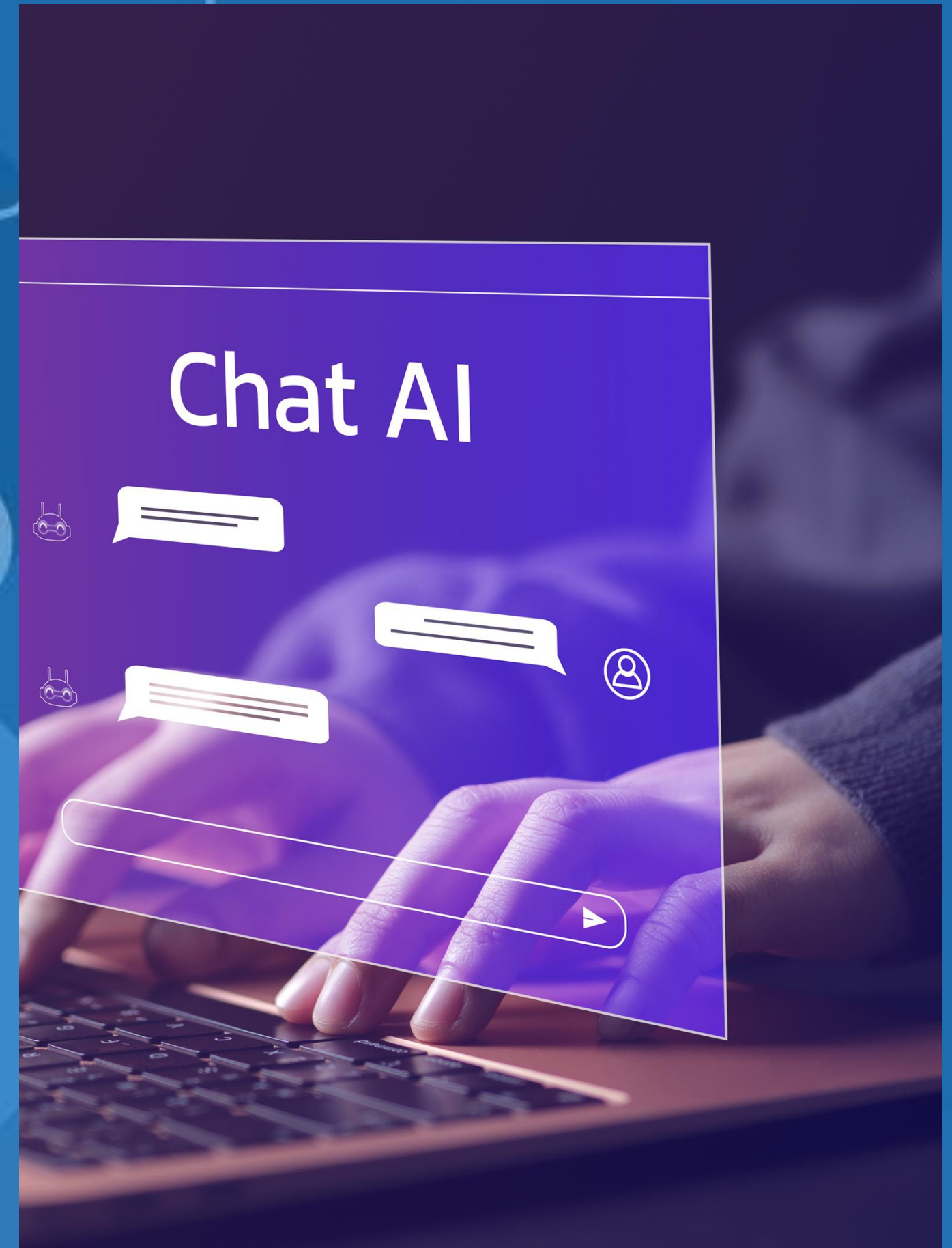
Optimize with Predictive AI

- Use AI to analyze data and proactively adjust care plans based on predicted changes in a client's health.
- Use machine learning to match the right caregiver to the right client.
- Implement AI to identify potential problems like no-shows or scheduling conflicts before they occur.



Build Trust in Technology

- Position automation as a tool that supports your team, not a replacement for human judgment.
- Ensure human review is required for all critical decisions, like care plan changes.
- Use technology to free up time for connection while maintaining clear accountability.





Get Started: A Phased Approach

- Start by automating the most time-consuming or error-prone tasks.
- Test new tools with a small group of staff to gather feedback.
- Provide comprehensive training and ongoing support for new technology.





Q&A

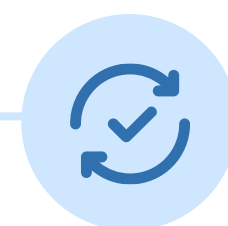




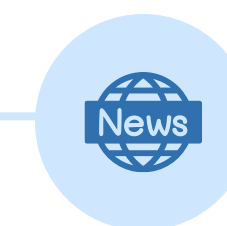
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Thank You!

Stay tuned for updates...

- This webinar was recorded
- Recording will be shared within 1–2 business days with registered attendees.

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