From Burnout to Breakthrough

How AI Empowers Mental Health Professionals

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Presenters

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Carin Shuford, Texana Center



Jessica Burger, Texana Center

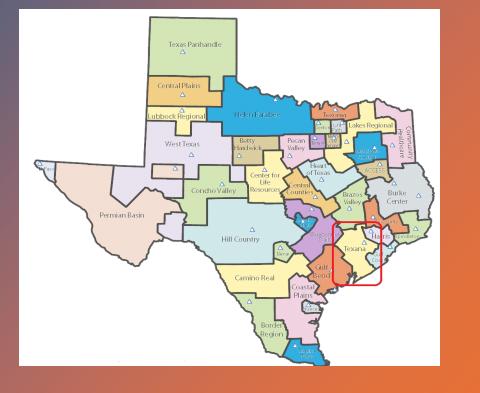
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Tera Stallard, Integral Care

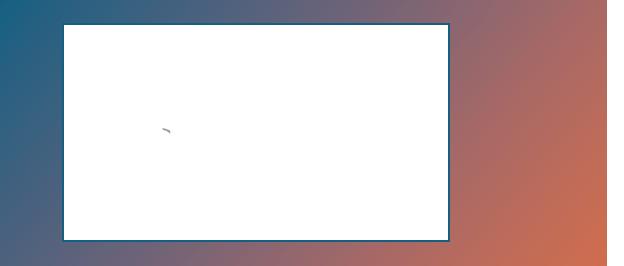
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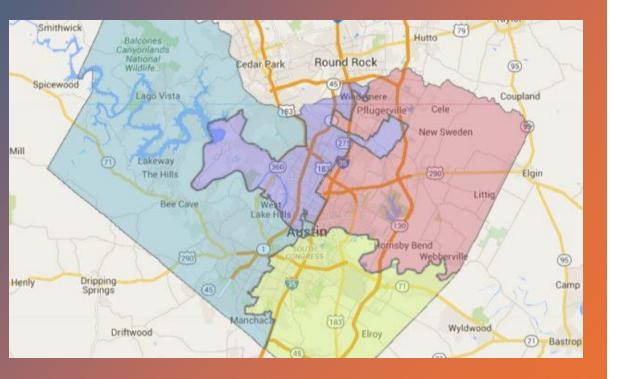
Damien Speaker, Integral Care





- 6 counties in Southeast Texas
 - Austin
 - Colorado
 - Fort Bend
 - Matagorda
 - Waller
 - Wharton
- Served Annually (FY24)
 - 15k
- Annual Operating Budget (FY25)
 - \$73,891,755
- CCBHC
- NCQA Certified





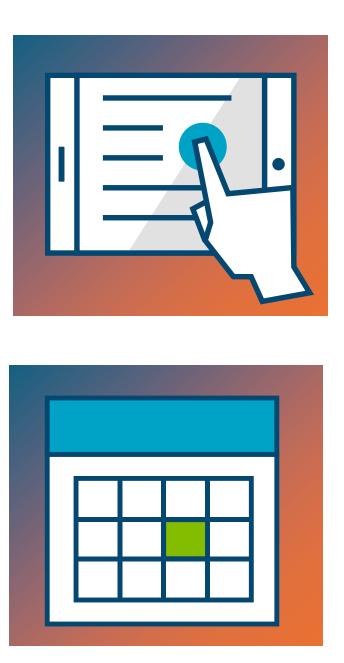
- Serving Travis County Texas
- Served Annually (FY24)
 - 29K
- Annual Operating Budget (FY25)
 - \$140M
- Staff size
 - ~1000
- CCBHC
- NCQA Certified

Agenda

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- Industry Challenge
- Why AI? A Strategic Choice for Workforce Empowerment
 - About Eleos
 - About Bells
- How It's Going: Real-World Impact and Lessons Learned
 - Texana's Journey with Eleos
 - Integral Care's Journey with Bells
- On the Horizon
 - Looking Ahead to the Future of AI in Mental Health
- Closing





The Industry Challenge

- Providers spend 40% of their time or 2 days a week on clinical documentation
- Average time from session-to-note signing is over 3 days
- Between 15 and 45% of clinical documentation has mission or erroneous information
- Deficit of 15,000 clinicians in the next couple of years
- 78% of providers in counseling centers reported burnout

Why Al?

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Note Expectation 2002

Client Narratives

Client Narrative

S: Met face to face with consumer to monitor her progress and update her MTP. O: Consumer was dressed and groomed poorly according to most standards. A: Consumer reported no change in her identified problems. Consumer reported she lost a great deal of medications and the pharmacy will not give her a refill. She has been out for some time, but overall is still able to functions. I will staff with Dr. Markette to see if he wants to continue her without the meds or prescribe her another. Explained most of her current problems stem from her inability to communicate effectively with other people. People reported that rehab services were helping her. P: Marginal progress towards goals on MTP.

Signatures

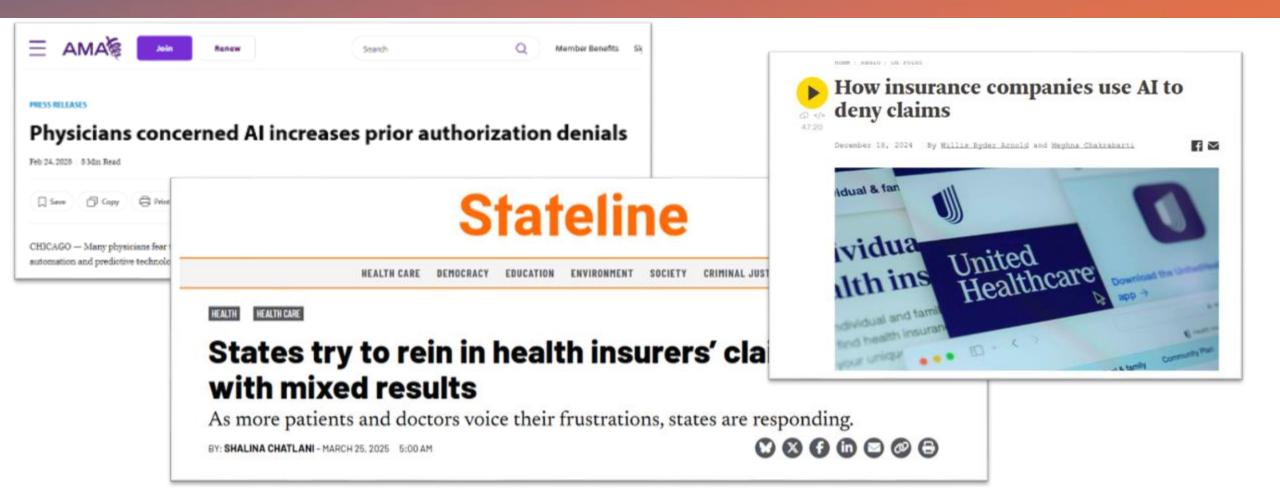
PN Staff Signature- Electronic, Staff CARIN SHUFORD, QMHP-CS

on 05/13/2002 at 04:46 PM

Why AI? Note Expectation 2025

✓ Clinical Information				
Select T.P. Version	Note Addresses Which Treatment Plan Problem			
Select X V				
Select T.P. Item Note Addresses	V T.P. Version			
	Select T.P. Version		Note Addresses Which Treatment Plan Problem	
Clear 'Note Addresses Which Treatment Plan Problem' Text.	Select	× ~		0
	Select T.P. Item Note Addresses			
Was there a need to link individual to Texana services and/or other agencies? * Yes	Select 17. Hell Note Addresses			
No-No Need Identified	Clear 'Note Addresses Which Treatment Plan Problem' Text.			
O No-Previous Referral Completed				
○ No-Referral Declined	✓ Curriculum			
	Title of Curriculum Used (Details must be included in th	e normative of the note)	MR Curriculum	
Explain Linkage to Services	*		All IClear Search	Q
	Supported Employment Evidenced Based			~
	SAMSHA Permanent Supported Housing Toolkit		Topic 01: Recovery Strategies	
Describe details of case management service	IMR Cognitive Behavioral Therapy (CBT)		Topic 02: Practical Facts about Mental Illnesses	
	Trauma Focused CBT (TF-CBT)		Topic 02a: Practical Facts about Schizophrenia	
	Skillstreaming in Early Childhood		Topic 02b: Pactical Facts about Bipolar Disorder	-
	Skillstreaming the Elementary School		Topic 02c: Practical Facts about Depression	
	Skillstreaming the Adolescent		Topic 02d: Strategies and Resouces for responding to Stigma	
Clinical Observations *			Topic 03: The Stress- Vunerability Model and Treatment Strategies	
	⊖ Seeking Safety		Topic 04: Building Social Supports	-
	Barkely Defiant Child (Ages 2-12) Barkely Defiant Teen (Ages 13-17)	L.	Nurturing Parenting	
Individuals Responses *	Preparing Adolescents for Young Adulthood			
	O Postpartum Depression CBT		Parents and their Infants, Toddlers and Preschoolers	
	OPostpartum Depression Client Education		Parents and their School-Age Children 5-11 Spanish Speaking Parents and their Children 4-12	
	○ N/A ○ Cognitive Processing Therapy (CPT)		Parents and Adolescents	
Progress Towards Recovery Plan Objectives *			It's all About Being a Teen	
	Skillstreaming in Early Childhood		killstreaming the Elementary School	
Timeline for Next Service *	All (Clear Search	Q	All IClear Search	Q
	Group I - Beginning Social Skills: Asking a Favor	<u>.</u>	Group I - Classroom Survival Skills: Asking a question	
	Group I - Beginning Social Skills: Asking for Help		Group I - Classroom Survival Skills: Asking for help	
	Group I - Beginning Social Skills: Ignoring		Group I - Classroom Survival Skills: Bringing materials to class	

Why AI? Health Insurers' usage of AI



About Eleos

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Serve Providers Wherever Your Clients Are



Seamlessly embeds within your EHR and telehealth workflows



Compliant with relevant privacy regulations



Compatible with all* EHRs and no APIs required



Desktop | Laptop | Mobile

Capture live session

Create your note in realtime using generative AI. Review session insights to improve care delivery.

Enter text summary

Create your note using a minimum of 6 bullet points when audio capture is not available

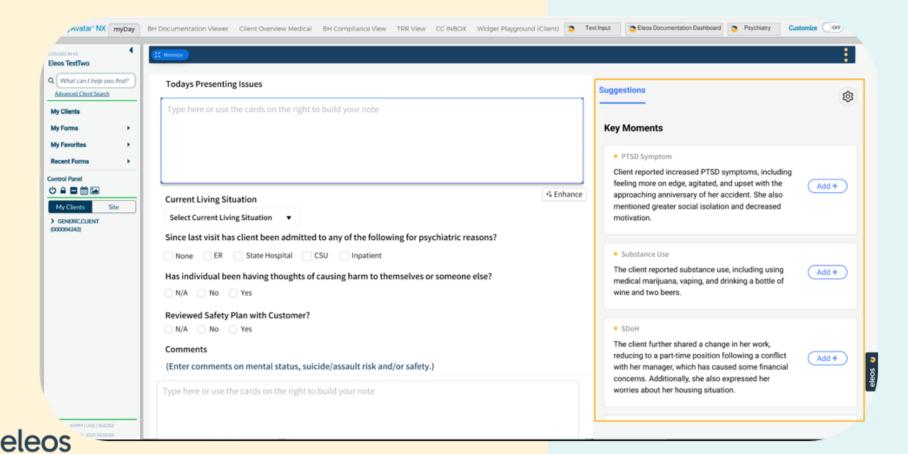
Mobile

Document on-the-go and finalize notes in your EHR for a seamless documentation experience.

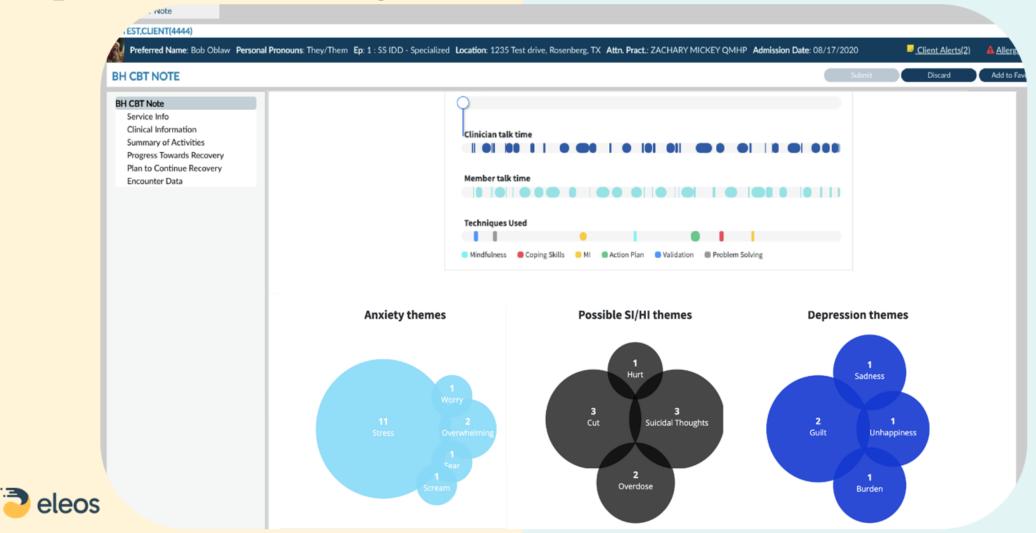
Eleos Documentation - Live Sessions

Session Intelligence embedded within the EHR

Captures sessions by mobile or desktop in over 100+ languages and receive suggestions in English



Supervisor Visibility into Evidence Based Practices



Embedded Approach Before Eleos

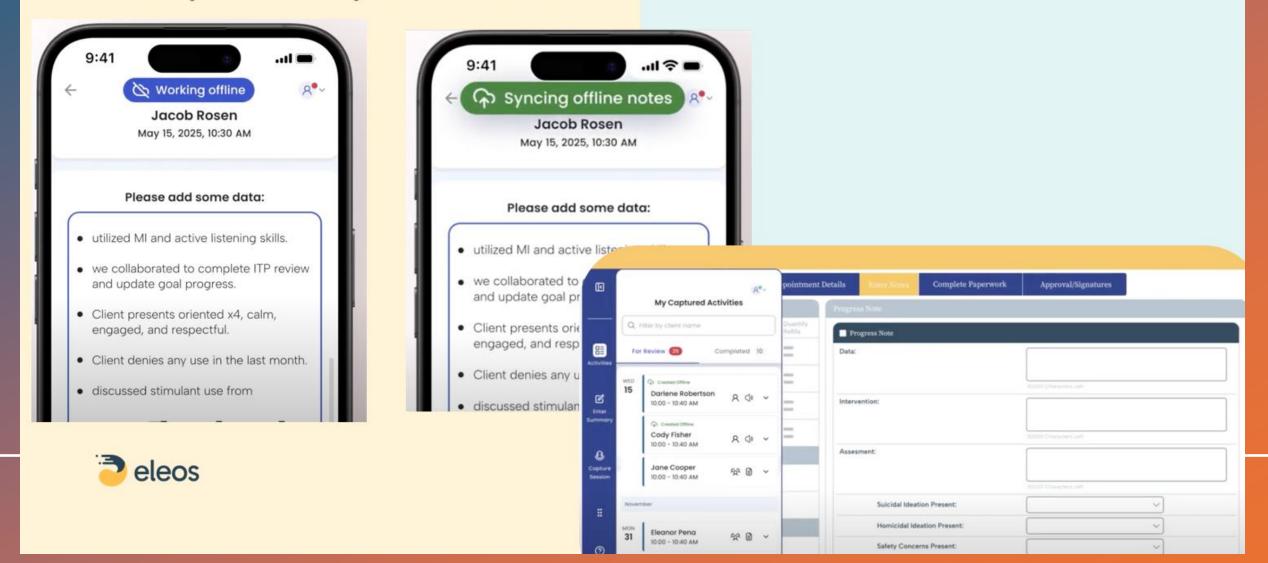
A SHUBERRY, BRAD(4242)					
SHUBERRY, BRAD (0000042: Preferred Name: BOOGIE Personal Pronouns: they/the F, 24, 06/07/2000, Transgen Ht: -, Wt: -, BMI: -	Problem P: - em/their/ DX P: -	Location: - Address: 7404 Town Center drive Phone Number: 281-238-6790 Guardian: OBLAW,BOB Relationship: Aunt	Communication Pref.: - - Emergency Contact: NAME,ECTWO Relationship: Aunt Phone: 281-238-6790	 Do not change name due to testing form specific alert Selected Client is Enrolled in the 	Allergies (1)
Demographics-TEX Additional C Dem BH CASE MANAGEMENT NOT		Auth PRV Additional 🕜 🛛 All Emergence	cy Contacts 🖸 Reimb Curr Stateme		
BH CASE MANAGEMENT NOT	C		Submi	t Backup	Discard Add to Favorites
BH Case Management Note	Describe details of case management ser	rvice			A
Service Data Clinical Information Encounter Data DO NOT USE - FOR TESTING ONLY					•
UNLI	Clinical Observations *				•
	Individuals Responses *				Ð
	Progress Towards Recovery Plan Objectiv	ves *			•
	Timeline for Next Service *				Ð

Embedded Approach After Eleos

SHUBERRY, BRAD(4242)					
SHUBERRY, BRAD (000004242) Preferred Name: BOOGIE Personal Pronouns: they/them/t F, 24, 06/07/2000, Transgender Ht: -, Wt: -, BMI: -	their/theirs/ Problem P: - DX P: F34.81 Disruptive mood dysregul FTM Attn. Pract.: ELEOS TESTONE LCSW, Q Admission Date: 05/01/2022	Location: 7404 Town Center drive apt 1 Address: 7404 Town Center drive apt 1 Phone Number: 281-238-6790 Guardian: OBLAW,BOB Relationship: Aunt	Communication Pref.: - - Emergency Contact: NAME,ECTWO Relationship: Aunt Phone: 281-238-6790	 Do not change name due to testing form specific alert Selected Client is Enrolled in the 	Allergies (1) Allergies Reviewed=Yes (01/12/2024) No Known Food Allergies NO KNOWN DRUG ALLERGIES - NKDA 1) ASPEN - Confirmed
	raphics-BH Additional 🖸 🛛 Demographics-Auth PRV Additio	onal 🕻 All Emergency Contacts 🕻	Reimb Curr Statement Address 🗗		
BH CASE MANAGEMENT NOTE				Submit Backup	Discard Add to Favorites
BH Case Management Note Service Data					
Clinical Information Encounter Data	Powered By Deleos				בא Expand to Full Screen
DO NOT USE - FOR TESTING ONLY	Describe details of case management service	e	î	(Nite and	
				✓ Note saved	
			I	Generate Note	? 🕸
			I	Session Type V Popu	Ilation V
	Clinical observations			 Quickly generate notes by capture highlights and leveraging smart 	- X
			I	 Jot down bullet points during or Include details that you want ind 	
			I	like specific themes or topics cove • Try and include as much detail a	
	Individuals responses				
				Be sure to add 4 or more bullet po	ints.
	Progress towards recovery plan objectives			Smart Suggestions 🔊	
			•	Interventions	

Eleos Documentation - On The Go

Start your notes on your mobile device



Free up providers to focus on care with AI built for behavioral health.







About Bells

- Making documentation faster, easier, and higher quality
- Tools that deliver immediate and ongoing ways to:
 - Reduce errors
 - Eliminate redundancy
 - Improve quality
 - Decrease rejected claims
 - Staff recruitment and ensure faster onboarding

Before Bells

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- 15-minute individual notes
- Session to sign time average ~24 hours
- Low staff satisfaction
- Complicated documentation requirements

Meet Bells Al

Meet Bells, the first and only AI-powered documentation tool, integrated with the EHR to support staff through documentation ease of use.



Clinicians are completing a note in **4 minutes**



Staff are finalizing progress notes within **2 hours** of a session



I drove the client to their job interview this afternoon.

Suggestions:

Driving is not a billable service.

Replacement suggestions:

"I accompanied the client to their job interview this afternoon"

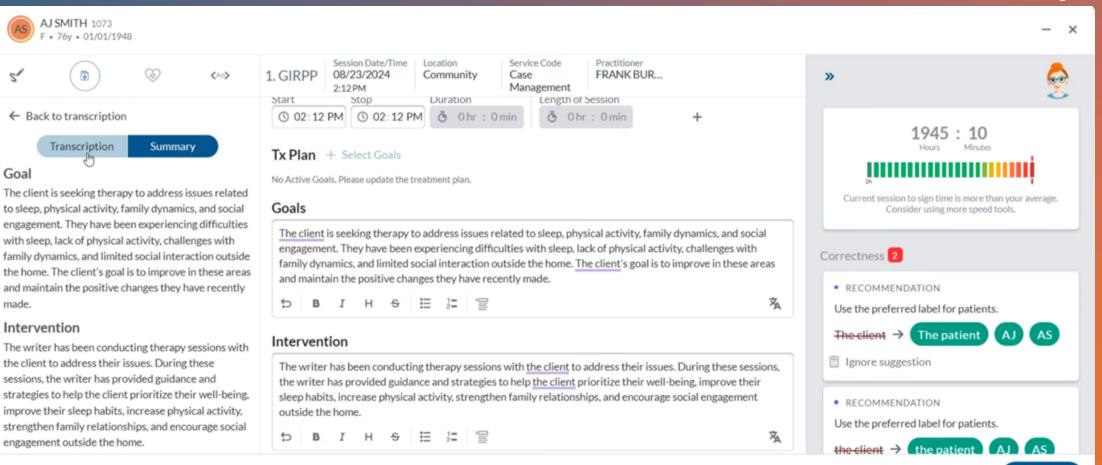
Bells Progress Note Entry

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Sign Note

Save and finish later



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Goal

made.

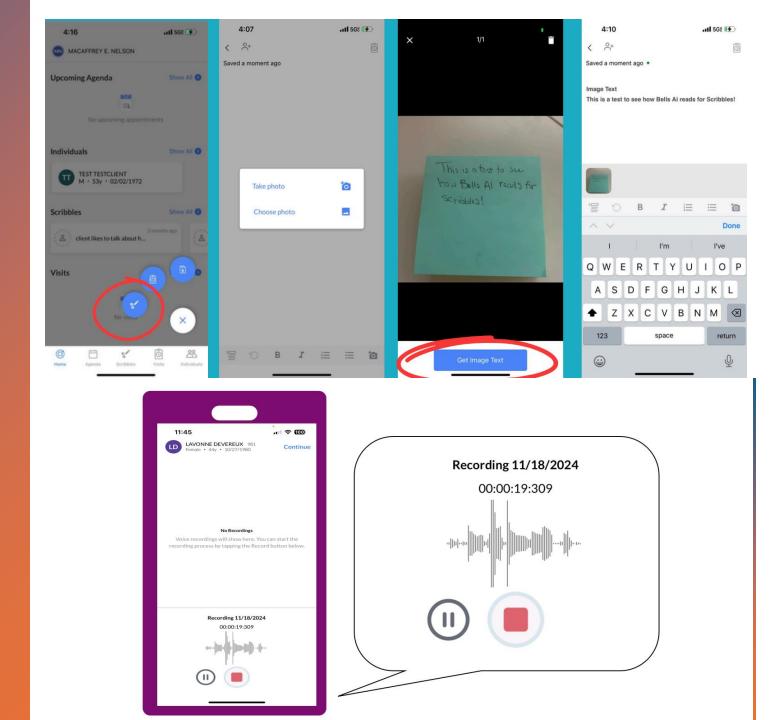
Multi-Device Support



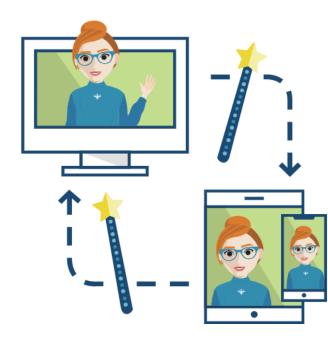
Bells Mobile

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Features & Functionality of Bells



- Accelerated Documentation: Reduces note-writing time by up to 67%, allowing clinicians to focus more on patient care.
- **Faster Onboarding**: Decreases training time for staff from three weeks to just three days due to its intuitive design.
- **Multi-Device Support:** Fully functional across a mobile app, iPad, and browser-based desktop application— allowing clinicians to document care anytime, anywhere.
- **Real-Time Clinical Recommendations**: Provides contextual suggestions to enhance documentation quality and support accurate billing.
- **Assisted Data Capture**: Supports various input methods, including typing, voice-to-text, and photo imports, facilitating seamless data entry across devices.
- **Enhanced Compliance and QA**: Identifies and helps correct documentation errors early, simplifying quality assurance processes and reducing claim rejections.
- **Multi-Participant Support**: Accommodates documentation for sessions involving up to 10 participants, beneficial for diverse care settings.
- **Improved Staff Retention**: By reducing administrative burdens, it helps alleviate burnout and supports better work-life balance for healthcare providers.
- **Increased Revenue Capture**: Enhances billing accuracy and accelerates reimbursement cycles, contributing to improved financial performance.
- **Flexible Integration**: Works across various devices and care settings, including offline capabilities, ensuring adaptability to different workflows. Fully integrated with our EHR application.
- **HIPAA-Compliant Security**: Ensures patient data privacy and security through advanced, cloud-based measures.



Bells Virtual Scribe Makes Al Meaningful

Ambient Listening designed for human service providers



Thoughtful Consent Model

Inform and empower clients to make care and privacy decisions



Supervisor Overlay

Boost accuracy and minimize rework with real-time editing

Ambient Listening + Provider Dictation

Ensure comprehensive session documentation with accuracy and context



Clinical Recommendations

Drive better decision making with servicespecific insights

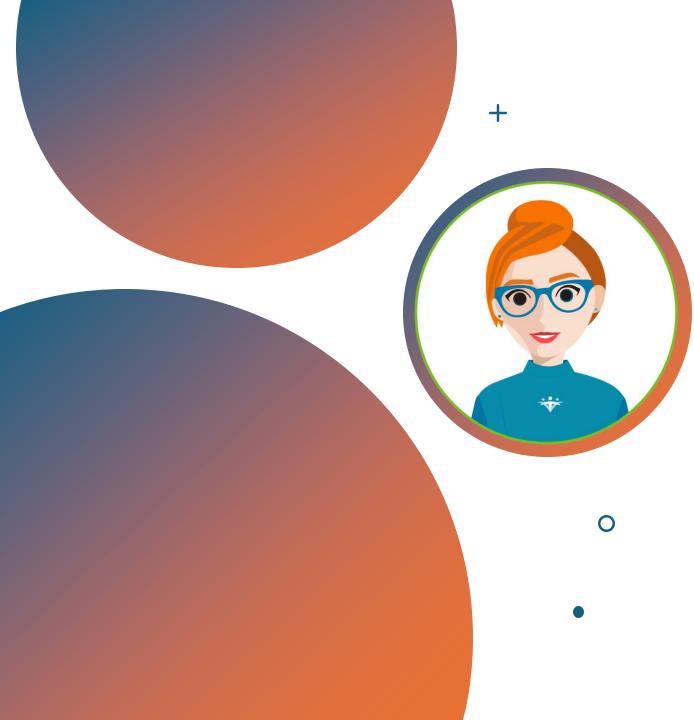


Workflow Validations

Detect quality issues and support correction for compliance



Validate session details captured through ambient listening



Bells Virtual Scribe

Supercharge your documentation with ambient listening

- Ambient listening generates a transcript and summary from client sessions and/or provider dictations
- Simple addition to existing workflows to improve documentation speed, quality and accuracy
- Utilizes trustworthy, HIPAAcompliant AI
- Meet the provider where they are:
 - any device
 - any care setting
 - offline capable



Medical Note Virtual Scribe

Enhancing the E&M process for medical providers

MEDICAL NOT	E							
Medical Not	e version 2025.04.0	01[29fae2b3]		Today's Ap	pts/Notes (0)	My Draft Notes (4)	▲ Unreviewed Results (0)	=
SPECIAL MIT Client ID 3	TTENS Note De	etails: 11/21/2024 3:0	DPM Episode: Episode # 21 A	Admit:09/16/2020) Discharge : None F	Program : LOC 1	✔ Edit Note Det	tails
	Preferred Name IM ACAT Date of Birth 2/2/72 (53 years old	Sex Male Gender Identity d)	Attending Provider SCHOLL, SHERRY (001252)	Home Phone 123-123-1236	Address Homeless Test Homeless AUSTIN, TX 7874	10		
Facesheet	Document	Finalize	Bells Virt	ual Scribe	Send To I	Do Bave Draft	Select Note ⊕Add N	lote

edical Note vers	ion 2025.04.01 [29fae2b3]				Today's Appts/Notes (0)	My Draft Notes (4)	Unreviewed Re	sults
My Draft Note	es							
Showing all unsig	ned appointments/notes f	for the past 365 days (4)						
Date 🔅	Time 💠	Name	Program	Visit Type	Reason for Visit	Bells Virtual Scribe	Actions	
11/21/2024	3:00 PM - 4:00 PM © 60 minutes	Special Mitter Male, 53 O	2571-St. John ABH Clinic-LOC 1 Ep. 21	99203 E & M New Px Level 3 9 Dove Springs Clinic - 5015 S. IH 35	Add Reason for Visit	Ready for Review	ľ	
03/26/2025	1:30 PM - 2:00 PM © 30 minutes	Special Mitten Male, 53 O	2511-E. 2nd MHC- LOC 1 Ep. 21	99213 E & M Est Px Level 3 P East Second St Clinic - 1631 - E. 2nd St	Medication course changed		ľ	1
05/01/2025	12:13 PM - 12:43 PM © 30 minutes	Special Mitten Male, 53 O	2572-St. John ABH Clinic -LOC 2 Ep. 3	99214 E & M Est Px Level 4 9 St. John ABH Clinic - 6937 N IH35	Add Reason for Visit		đ	1
05/01/2025	12:51 PM - 1:21 PM © 30 minutes	Male, 53 O	4253-Road to Recovery-LOC 3 Ep. 12	99215 E & M Est Px Level 5 Residential Facility	Add Reason for Visit		ľ	;

Bells Virtual Scribe	SPECIAL MITTENS 5/12/2025 Expires in 30 Days	3:51:48 PM
Sessions (3) Clear Name Status Name Appt Status	Close Remove Small Talk (0%) Silences (4)	296) ₩ ∰ ∯\$H\$H + ~ ~ +111+ +004 - +0+┣ {#+ ↓= ┣ ┣
SPECIAL 5/12/2025, MITTENS 03:51 PM	Transcript	Note Add to Note
SPECIAL 5/7/2025, MITTENS 01:29 PM Pending Review SPECIAL 5/12/2025, MITTENS 03:42 PM Pending Review	Clinici:I'm glad you came back in. I thought the smell of the blood work that we did after your checkup. And before we go over any of that I really wanted to find out from you how things are going and what you're concerned about. Patien Well, I mean, I'm, I'm, I'm curious about them because II haven't been very well. Right. I haven't been feeling very last week.	Chief Complaint Hematemesis. History Of Present Illness The patient presents to the clinic today with concerns regarding recent episodes of hematemesis (vomiting blood). They report having thrown up blood last week, as well as again yesterday. The patient states they have not been feeling well over the past week. Review Of Systems Gastrointestinal: Nausea, Vomiting

Telehealth Virtual Scribe

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Telehealth	Front Desk Dashboard	Dashboard I	Bells Virtual	I Scribe Settings	Welcome TRENT Metcome TRENT Solutions Experience - ms/
ider					
RESS, TRENT (astorm@ntst.co	om)	•			
a Bells Virte	ual Scribe			DHNSON 8/26/2024 9:30:00 AM	Pending Review Expires in 12 Days Close
Sessions (9)		C Clea		all Talk (8%) Silences (8%)	have been been been a second se
Nome I	Status		· · · · · · · · · · · · · · · · · · ·	nes Belet net bereb ides bete fendes Made i des Berei	Nd++ 190000 - 1410-144 42000 (b+
		< 1 >	0		
Name 🗢	Appt Date/Time	7 Status			Note Finalize Edit
Zach Smith	8/23/2024, 04;10 PM	O Pending Revi	Clinician Hey, A	shley, how are you doing?	Goal
Zach Smith	9/2/2024.01:15 PM	Pending Revi	Patient Good. How ar		The client, a young adult, is seeking therapy to address their worsening anxiety issues.
AJ Smith	10/2/2024, 01:10 PM	O Pending Revi		e 100.	They report experiencing panic attacks approximately once a week that disrupt their sleep, with the frequency increasing to
AJSmith	10/3/2024, 09:10 AM	Pending Revi		let's go ahead and get started. what, um, brings you here today?	twice a week over the past two weeks.
AJSmith	10/3/2024, 09:10 AM	Pending Revi		t been feeling really anxious lately.	The client states they have always been an anxious person, but their anxiety has significantly intensified over the past month.
Sarah Maasen	10/30/2024, 10:00 AM	Pending Revi	l've alv	vays, um, been just an anxious person but the obably a month it's just gotten really worse and	In addition to the panic attacks causing sleep disturbances, the client feels and us throughout the day and failured due to lack of
Alex Prince	11/4/2024.01:00 PM	Pending Revi	been h	aving panic attacks that have woken me up at um, and just been really stressed at my job too.	client feels anxious throughout the day and fatigued due to lack of sleep.
Alex Prince	11/4/2024.01:00 PM	Pending Revi	Clinician Oh wo		Their job has become more stressful recently due to increased workload resulting from colleagues guitting without being
Nex Prince			Sorry t	o hear that. v, how frequent are you having these, uh, panic	replaced.
			HAV .		
ASHLEY JOHNSON	8/26/2024, 09:30 AM	Pending Revi	attacks	s?	The client's reasons for seeking therapy are to manage their heightened anxiety symptoms, panic attacks, and improve their



Bells Quality Coach

- Al consumes the entire clinical note to evaluate documentation quality
- Single-question prompts trigger comprehensive review against care standards
- Automatically assigns confidence scores and provides direct evidence text
- Integrated interface enables real-time audit feedback for providers

Unlocks a **new** frontier in quality monitoring. Insights we've never been able to measure before.

Review Quality Audit

TEST TESTCLIEN M • 53y • 02/02/1	IT 3 1972			
Practitioner DAMIEN SPEAKER	Location Clinic/Office	Service Code Continuity of Services	Visit Date/Time 06/02/2025 1:04-1:10PM	
Goals No data has been ent Service Time	ered in the secti	on.		

StartStopDurationLength of Session1:04 PM1:10 PM00:0600:06

Notes Field

Client was seen in clinic today for an urgent behavioral health session following identification of suicide risk. During the session, the clinician worked collaboratively with the client to develop a comprehensive **Safety Plan**, including identification of warning signs, internal coping strategies, external supports, and restriction of access to means. The client engaged in the process and verbalized understanding of the plan components.

A C-SSRS was completed, and based on findings, the client was assessed to be at moderate risk. Evidencebased interventions consistent with CBT-SP were applied during the session to support emotion regulation and safety planning. The provider remained with the client through completion of the safety plan and confirmed that the client was stable and able to maintain safety upon discharge.

The 24/7 National Suicide Prevention Lifeline and local crisis services were reviewed with the client, and printed materials with contact numbers were provided. The client acknowledged understanding of how and when to use these supports.

The provider **recommended enrollment in the Zero Suicide Pathway**, which the client accepted, and documentation was completed accordingly. A **follow-up appointment** was scheduled within 7 days to monitor risk and continue care planning.

Individual Custom Note Section

	Question	Weight	78
•	Did provider remain with client until safety plan (to include means restritction) w	1	YES
2			VEC
•	If indicated, is there documentation that supports efforts to transition care?	1	YES
•	Does documentation indicate evidence based suicide care interventions were pr	1	YES
•	Does documentation indicate resources to include the 24/7 hotline were provide	1	YES

Question

Does documentation indicate resources to include the 24/7 hotline were provided?

Answer

YES

Confidence Level

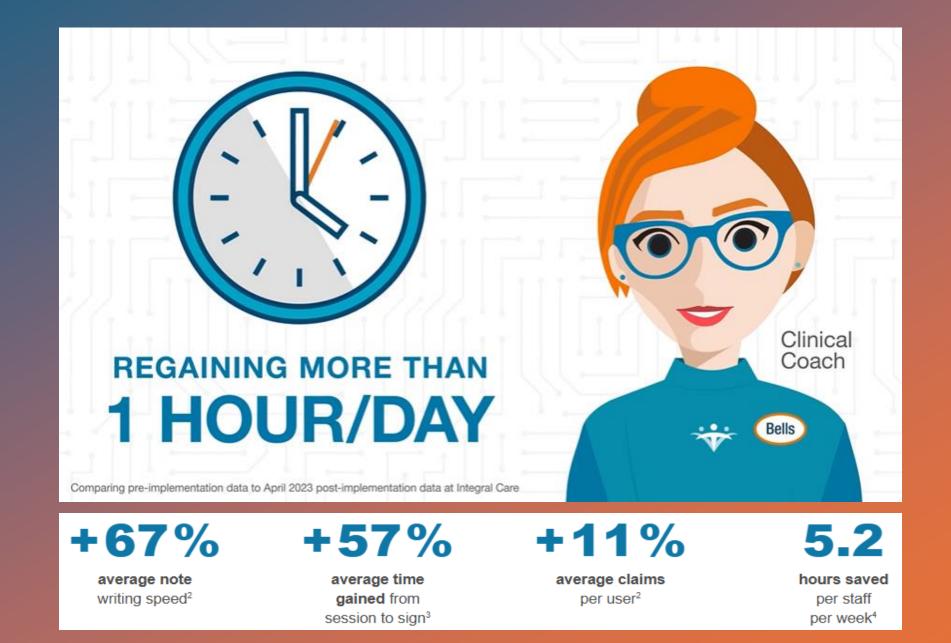
100%

Evidence

Note states 'The 24/7 National Suicide Prevention Lifeline and local crisis services were reviewed with the client, and printed materials with contact numbers were provided'

Was a follow-up appointment scheduled? Change answer to NO

Crisis Indicator: routing



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How It's Going: Real-World Impact and Lessons Learned

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Texana's Story: Empowering **Clinicians with** Eleos

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- "Eleos has helped me focus my attention on the interaction with my client."
- "It has allowed me to keep up with my notes and not fall behind."
- "I really appreciate how much faster I can get my documentation done. I also really like that I don't have to spend as much time creating the sentence structure, I can just plug in the important details and Eleos will do the rest of the 'thinkin' for me, which saves a lot of time. The altogether time saving is so priceless, to me!"
- "Eleos has helped me to write more professional progress notes"

° Texana's Story: Empowering **Clinicians with**

Eleos

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 97% of staff surveyed feel that Eleos is helpful

- 94% of staff feel their note quality is better
- 85% feel Eleos is helping them complete their notes more quickly (we have a lot of checkboxes)

Texana's Story Gains in Productivity

Therapy/Skills/Psychosocial Rehab/Case Management Snapshot Jan-May of each year



Integral Care's Journey: What do the clinician's think?

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- "It makes the documentation experience much more enjoyable and expeditious as it is a lot more user friendly in comparison to documenting in Avatar."
- "BELLS Ai has been such a time saver for writing notes."
- "I know that I can write a great quality note in a matter of minutes with BELLS Ai."
- "Some of my favorite tools to use are the drop-ins and the expansions; both are extremely helpful and so easy to setup."

Integral Care's Journey: Enhancing Clinical **Experience** with **Bells** AI

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2025 Stats

- Active Users: • 288
- Recommendations Accepted:
 90k
- Session to Sign: • 4.46 hours
- Create to Sign: • 5.4 minutes
- Notes finalized: • 46k

What's on the horizon?

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- Eleos
 - Embedded functionality for E&M Visits
 - Compliance Audit Tool
 - Transition to Web Side Bar
- Bells
 - Medical Note Integration for E&M Note
 - Telehealth Integration
 - Clinical Chart Summary
 - Bells Quality Coach



Questions?

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Contact Info

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- <u>Tera.Stallard@IntegralCare.org</u>
- Damien.Speaker@IntegralCare.org