

Modernizing IDD Services: A Data-Driven Model for Tomorrow's LIDDAs

Gulf Coast Center

Felicia Jeffery, LPC

Chief Executive Officer

Deanna David, QIDP

Director of IDD Services

Brooke Camarata, MA

Supervisor of IDD Authority Services



Room Code: 1006



June 2026

The Big Opportunity



Felicia Jeffery, LPC

Chief Executive Officer





A Future Focused on Access, Care, and Community Well-being



Mission

To provide accessible, efficient and quality services to support the independent and healthy living of those we serve



Vision

Better community healthcare promoting healthy living



Focus

A Focus on Access, Provision, and Expansion of Services



Excellence



Improving Population Health

- Risk management pooling
- Preventive Care
- Socio-economically impactful

Reducing Cost of Care

- Productivity
- Sustainability
- Cost effective
- Comparatively effective

Quadruple Aim

Patient Experience

- Patient Satisfaction
- Outcomes
- Quality
- Safety

Provider Experience

- Provider Satisfaction
- Work/Life Balance
- Workflow optimization

What is a CEO responsible for?

Culture, People and Numbers



Culture

Strengthening values, collaboration, and innovation

People

Enhancing staff efficiency, reducing burnout, and improving care

Numbers

Increasing productivity, optimizing financial outcomes, and ensuring compliance



The Reality Across LIDDAs

Increasing Complexity

IDD services are growing more complex with expanding needs and expectations

Compliance Demands

Growing documentation and regulatory requirements strain capacity

Workforce Challenges

Staffing shortages and turnover undermine service consistency

Scaling Limitations

Current systems were not designed to scale or adapt to modern demands



Recommendation: Conduct a system audit to identify where complexity has outgrown your current infrastructure.

The System Is the Barrier



Staff Are Capable



Expectations Are Clear



Systems Block Consistency

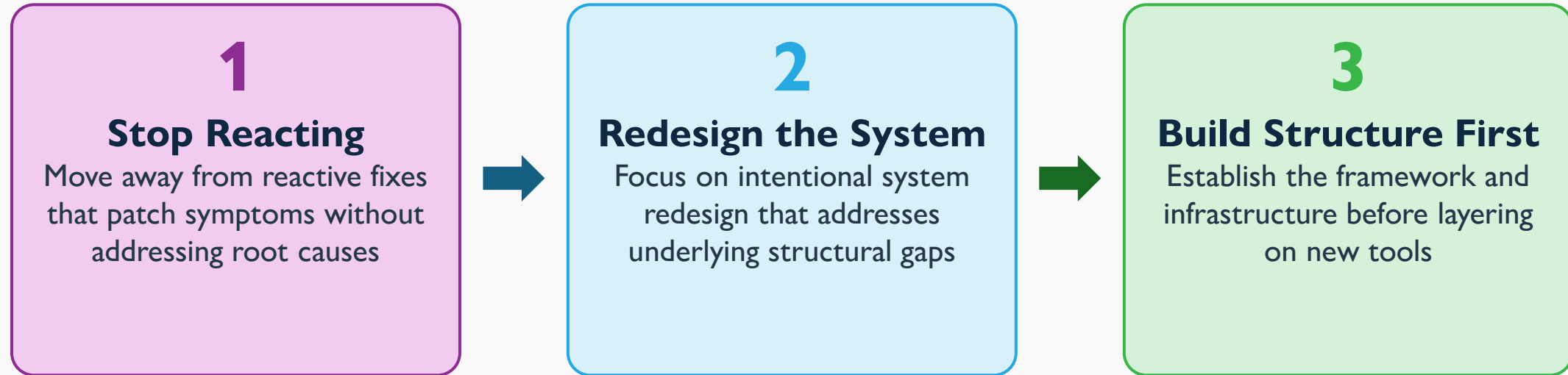
BOTTOM LINE

We are asking people to succeed in systems that are not built to support them.

Recommendation: Map every point where staff work around the system rather than through it.



From Layering Fixes to Rebuilding Systems



Recommendation: Prioritize one foundational system change before adding any new tools.

What We Saw Operationally



Deanna David,
Director of IDD Services



What We Saw Operationally

Fragmented Systems

Disconnected tools and platforms creating data silos across departments

Reactive Workflows

Staff responding to crises rather than following proactive, structured processes

Limited Visibility

Leadership lacks real-time insight into service delivery and outcomes

Documentation Burden

Excessive paperwork pulling staff away from direct service delivery



Recommendation: Conduct a workflow assessment across all operational areas to quantify inefficiencies.

Fragmented Systems

Multiple Disconnected Platforms

EHR, CARE, TMHP, LIDDA Connect, and spreadsheets all operating independently

No Single Source of Truth

Data scattered across systems with no unified view for decision-making

Manual Workarounds

Staff bridging gaps with paper processes and ad-hoc solutions



Recommendation: Designate a single source of truth and build integrations around it.

Reactive Workflows

TODAY

- ✗ Staff chasing tasks instead of following structured workflows
- ✗ Inconsistent processes across teams and locations
- ✗ No standardized flow for service delivery



TOMORROW

- ✓ Proactive task management driven by data
- ✓ Standardized processes with built-in accountability
- ✓ Clear workflow sequences from intake to outcome

Recommendation: Implement standardized task sequences to shift from reactive to proactive service delivery.

Documentation Burden



Time-Consuming

Staff spend hours on documentation that could be streamlined with better tools and templates



Inconsistent Quality

Variable note quality across staff creates gaps in service records and care continuity



Compliance Risk

Incomplete or inconsistent records increase audit exposure and regulatory risk

Recommendation: Adopt AI-assisted documentation tools to reduce time spent on notes by 30% or more.

Lack of Visibility

THE VISIBILITY GAP

- **No Real-Time Tracking**

Performance data is outdated before it reaches leadership

- **Delayed Decision-Making**

Without timely data, leaders act on assumptions not evidence

- **Limited Accountability**

No way to track who does what, when, or how well



Recommendation: Deploy real-time dashboards to enable data-driven decisions at every level.

A glowing lightbulb is centered in the frame. Inside the bulb, a small, detailed model of a sailing ship is visible, illuminated by a warm, golden light. The background is a deep blue, speckled with numerous small, out-of-focus golden lights, creating a bokeh effect. The word "Solutions" is written in a large, white, sans-serif font across the middle of the image, partially overlapping the lightbulb.

Solutions

SOLUTION 1: AI-Supported Documentation (Eleos)

PROBLEM

Inefficient and inconsistent documentation across service teams

SOLUTION

AI-assisted collaborative documentation via Eleos integrated with SmartCare

IMPACT

Increased efficiency • Improved consistency • Reduced staff burden



Recommendation: Start with a documentation pilot in one team to measure time savings before full rollout.

Time Savings

11.2 Min

Saved
(Avg)

75%

Decrease
(Avg)

(11.2 minutes saved
x 78.1K notes)
/ 60 minutes

= 14,579 hours

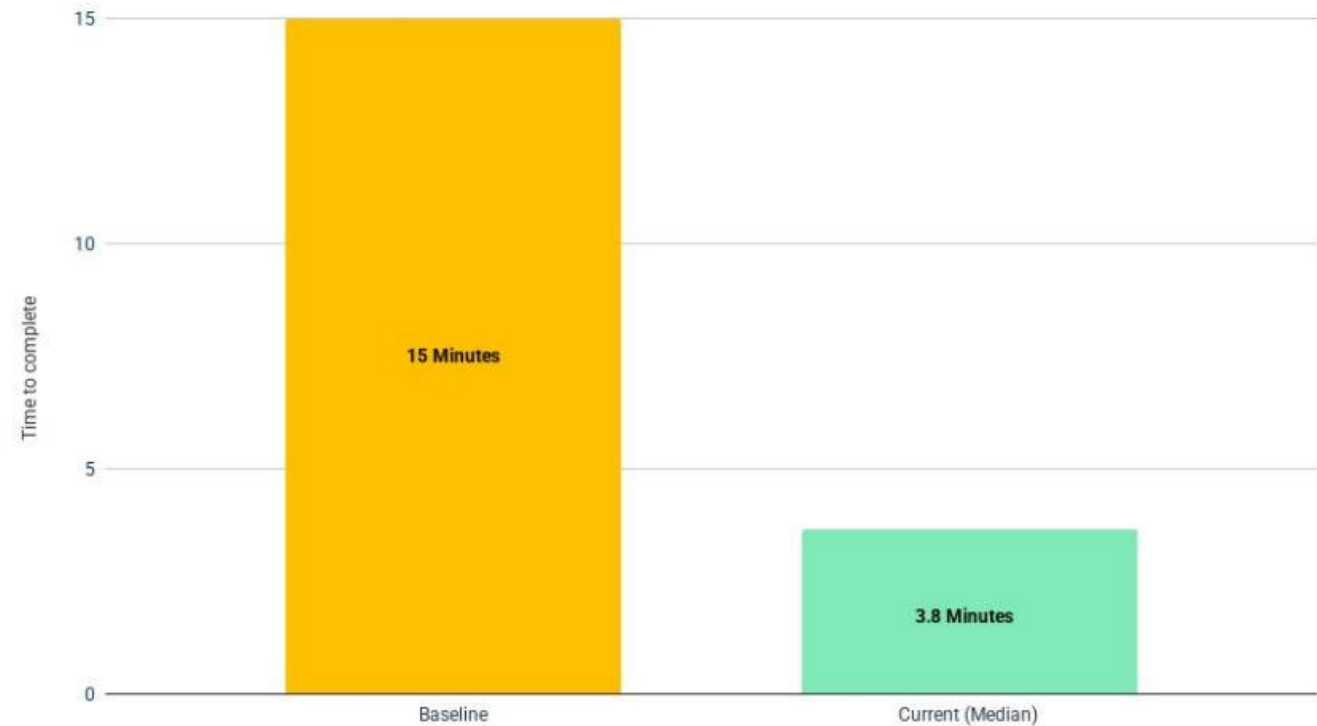
What does that translate to?

= ~2 hours/active user/week

**For super-users maximizing their Eleos usage
(20-25 notes per week), this can equate up to 3-5
hours of weekly documentation time saved.**



Time to Complete per Note (minutes)



*Calculated using 82 active providers

*Assuming a caseload of 20-25 notes per week

AI-Powered IDD Service Delivery

Streamlining IDD documentation. Enhancing person-centered care. Driving better outcomes.

Purpose-built AI is transforming how IDD service coordinators and direct support professionals document, plan, and deliver services, creating more time for the individuals they serve.

Understands IDD Context

Trained on IDD-specific terminology, person-centered planning language, annual/revision documentation, and LIDDA service workflows

Streamlines IDD Documentation

Auto-generates service notes, updates, and progress documentation so staff can spend more time supporting individuals in their communities

Strengthens Person-Centered Outcomes

Enables more meaningful engagement during service delivery, improving individual goal achievement and community integration

Integrates With IDD Systems

Works alongside SmartCare, with minimal disruption to existing IDD service delivery processes

More time with individuals. Less time on paperwork. Better outcomes across IDD service delivery.

Eleos AI Documentation: Our Results

Gulf Coast Center implemented Eleos Documentation for field-based and onsite providers August 2024

30

Providers Enables

12,100+

**Notes Completed
Using Eleos since
12/22/25**

11.2

**Minutes Saved per
Note**

3.8 minutes to complete a
note

2,220

**Hours Saved Using
Eleos**

Bottom Line: Eleos drives timely note submission, decreases staff stress, burnout, and turnover, and produces more consistent, compliant documentation across teams.



SOLUTION 2: Real-Time Data Visibility (Power BI / iCentrix)

PROBLEM

No real-time insight into team performance, service delivery metrics, or compliance status

SOLUTION

Interactive dashboards via Power BI and iCentrix providing live operational data across all service areas

IMPACT

Immediate visibility into key metrics
Data-driven decision making at every level
Increased accountability across teams

Recommendation: Identify your top three KPIs and build initial dashboards around those metrics first.

Staff	Goal A	Goal B	Total A	Total B	Total Expected A+B	Total UB	Total Travel Hours	Goal A	Goal B	Total A	Total B	Total Expected A+B	T
Abigail Rizzo	52.25	156.75	53	162	\$9,778.40	8	27.78	52.25	156.75	53	162	\$9,778.40	
Alexandra Gaudio-Thorpe	52.25	156.75	43	114	\$7,410.40	8	5.00	52.25	156.75	43	114	\$7,410.40	
Angelica Alaniz	52.25	156.75	42	93	\$6,687.60	33	-3.65	52.25	156.75	42	93	\$6,687.60	
Brandi Neese		156.75		4	\$120.00	30			156.75		4	\$120.00	
Brianna Campanale	52.25	156.75	1	1	\$122.80	1		52.25	156.75	1	1	\$122.80	
Cecilia Prince	52.25	156.75	55	166	\$10,084.00		25.42	52.25	156.75	55	166	\$10,084.00	
Christine Shelton	52.25	156.75	6	13	\$946.80	24	10.22	52.25	156.75	6	13	\$946.80	
Cynthia Brooks	52.25	156.75	57	160	\$10,089.60		2.28	52.25	156.75	57	160	\$10,089.60	
Debra Lee	52.25	156.75	15	73	\$3,582.00	10	7.12	52.25	156.75	15	73	\$3,582.00	
Fernanda Bustar	52.25	156.75	9	17	\$1,345.20	4		52.25	156.75	9	17	\$1,345.20	
Jamie Rodriguez	52.25	156.75	3	1	\$308.40	1	3.98	52.25	156.75	3	1	\$308.40	
Jesse Goodman	52.25	156.75	54	164	\$9,931.20	2	10.13	52.25	156.75	54	164	\$9,931.20	
Kimberly Grover	52.25	156.75	37	87	\$6,043.60	22	9.48	52.25	156.75	37	87	\$6,043.60	
Kjersti Hansen	52.25	156.75	60	169	\$10,638.00		22.08	52.25	156.75	60	169	\$10,638.00	
Kristen Beahm	52.25	156.75	65	161	\$10,862.00	15	46.25	52.25	156.75	65	161	\$10,862.00	
Kristina Gobles	52.25	156.75	1	16	\$572.80	19	2.50	52.25	156.75	1	16	\$572.80	
Lashonda Reddick						1							
Marilyn Flores		156.75		9	\$270.00	35	1.78		156.75		9	\$270.00	
Mikela Johnson	52.25	156.75	6	15	\$1,006.80	7	4.43	52.25	156.75	6	15	\$1,006.80	
Paralela Cordero	52.25	156.75	26	73	\$4,602.80	17	26.17	52.25	156.75	26	73	\$4,602.80	
Rachel Goley	52.25	156.75	53	183	\$10,408.40	10	16.63	52.25	156.75	53	183	\$10,408.40	
Rodrigo Rodriguez	52.25	156.75	56	175	\$10,446.80	4	21.45	52.25	156.75	56	175	\$10,446.80	
Rephana Velez	52.25	156.75	49	174	\$9,767.20	13	1.92	52.25	156.75	49	174	\$9,767.20	
Rene Saenz	52.25	156.75	59	161	\$10,305.20	1	1.73	52.25	156.75	59	161	\$10,305.20	
Ty Esnard	52.25	156.75	54	169	\$10,081.20	3	-13.57	52.25	156.75	54	169	\$10,081.20	
Valerie Steier	52.25	156.75	49	121	\$8,177.20	9	-4.43	52.25	156.75	49	121	\$8,177.20	
Vedania Villarreal						2	0.98						
Yolanda Serrano	52.25	156.75	62	169	\$10,823.60		30.43	52.25	156.75	62	169	\$10,823.60	
Total	1,254.00	4,075.50	915	2650	\$164,412.00	279	256.13	1,254.00	4,075.50	915	2650	\$164,412.00	



Tools Alone Are Not Enough



Brooke Camarata, MA
Supervisor of IDD Authority Services



Tools Alone Are Not Enough

⚠ Without Structure

Tools without structure create more complexity

Tools support work — but they don't define how work gets done

Inconsistent adoption across teams without clear frameworks

✓ With Structure

Systems define how work happens consistently

Structure creates consistency across every team and service area

Sustainable behavior change through clear frameworks

The Missing Piece: System Structure

Systems must support consistent behavior — not just provide tools

Recommendation: Audit current tools for structural alignment before investing in new technology.

SOLUTION 3: Building a Scalable Model

1

Standardized Workflows

Define repeatable processes that every team follows, ensuring quality and efficiency regardless of staffing changes

2

Clear Role Expectations

Establish specific responsibilities for each position so every team member knows exactly what is expected

3

Consistent Processes

Apply the same standards across all teams and service areas to create a unified, scalable operating model

Recommendation: Document every workflow before scaling; undocumented processes cannot be replicated.

COMPANY SCORECARD



	Week 1 [05/04-05/08]	Week 2 [05/11-05/15]	Week 3 [05/18-05/22]	Week 4 [05/25-05/29]	Remainder [NONE]	Monthly Actual	Monthly Target	Status	Metric Owner	Metric Source	Notes
EVERGREEN METRICS											
90% Authority forms active in SmartCare by June 2026	88%	88%	88%		N/A		100%	Yellow	Deanna		5/4/2026 - HAB Co
Total staff with no late note requests	52%	81%	78%		N/A		80%	Green	Yesenia		5/11/2026 - 5 SCs r
NORTH STAR METRICS - Change every 90 days (Quarterly after QSP)											
Supervisor Chart Review deficiencies corrected within 30 days	40%	50%	50%		N/A		100%	Light Red	Yesenia		5/4/2026: SCs still e
Increase to 4000 services across IDD Department by August 2026	72%	54%	63%		N/A		100%	Red	LaShonda		5/11/2026: Lowest s
All current processes/value engines reviewed and improved upon.	75%	75%	75%		N/A		90%	Light Green	Jana		Starting on Crisis pr
GATES											
Complete all enrollments within 90 days	Light Green	Light Green	Light Green		N/A		95%	Light Green	Brooke		5/18/2026 - 34 of 6
Greater than 90% will receive their initial IDD Intake from the designated tir	100%	100%	100%		N/A		90%	Green	Brooke		5/18/2026 - refinem
Permenancy Plan Completion Rate	95%	95%	100%		N/A		95%	Green	Brooke		5/18/2026 - PP rep
Complete extension on time with 100% accuracy	95%	100%	100%		N/A		95%	Green	Brooke		5/18/2026 - all exte
PASRR/PROVIDER SERVICES											
95% of the PASRR caseload with be provided with a face to face contact m	Green	Green	Yellow		N/A		95%	Yellow	Irene		SPQM will be used
Hab Coordinators provide 50% direct services	Green	Green	Yellow		N/A		50%	Yellow	Irene		Direct services hav
Care Providers provide 90% maximum hours of services in the plan of care	90%	90%	90%		N/A		90%	Green	Jana		3/16/26 CM Positio
PE completion within time limits	Green	Green	Green		N/A		90%	Green	Irene		3/6 fr period 3/1-3/
Provide GR Services to 145 individuals each month	Green	Green	Green		N/A		145	Green	Irene		3/6 pulled data from
PASRR Roll-Up billing will be completed and forward to billing department b	Yellow	Yellow	Yellow		N/A		100%	Yellow	Irene		3/26/26 February ro
SERVICE COORDINATION											
Maintain minimum 3000 services monthly.	2944	554	1274		N/A		3000	Red	LaShonda		Averaged 3326.5 m
SCs provide 1500 services by 15th of each month.	N/A	N/A	1274		N/A		1500	Red	LaShonda		2/9: Need to educat
100% Home Visits a minimum of 2x annually	40%	40%	32%		N/A		100%	Light Red	Yesenia		5/4: LaShonda requ
PDPs must be completed 60- 90 days prior to end date	70%	70%	70%		N/A		95%	Yellow	Jana		2/2: More staff are e
TRAINING, QM/QA, AI, BT&T, PROCESS AUTOMATION											
Ticket Claims	TBD	TBD	TBD	TBD	TBD		100%	Light Green	Devon/Robert		2/9: Ticket submitte
Forms Project Completion	TBD	TBD	TBD	TBD	TBD			Yellow	Devon/Robert		
HelloSign Utilization	TBD	TBD	TBD	TBD	TBD			Light Red	Devon/Robert		Can tell through cha
SUCCESS/SUPPORT/CRISIS											
Interest List Calls	38%	38%	38%		N/A		50%	Light Green	Jana		Estimated completi
Transfers entered and accepted within 10 days from Transfer meeting	85%	85%	85%		N/A		100%	Light Green	Jana		2/9: Still receiving t
95% Entry into TMHP completed within timelines each month	85%	85%	85%		N/A		100%	Light Green	Jana		2/9: Possibly yellow
OPERATIONAL EXCELLENCE - TRAININGS COMPLETED WITHIN REQUIRED TRAINING DATES (?)											
IDD service provision greater than 50% of individuals achieving 100% of the	32%	32%	32%		N/A			Red	Deanna/LaShonda		2/9: Yese no, Brooke
New Staff Competency verified at 100% within 60-90 days of hire date	Under Review	Under Review	Under Review		N/A		100%	Green	Deanna		2/9: Deanna will sco
ELIGIBILITY ADVISEMENT, BUDGET, FINANCIAL EXCELLENCE											
All Benefit Referrals processed and/or scheduled within 48 business hours.	Red	Red	Light Red		N/A		100%	Red	Mary		2/9: One referral be
Financials implementation	Yellow	Yellow	Yellow		N/A		100%	Yellow	Mary		ETA 2/1, Brooke and



Impact of Structure

Faster Onboarding

New staff reach full productivity sooner with clear, documented workflows and role expectations

Improved Consistency

Every team delivers services the same way, reducing variation and improving quality across the board

Increased Compliance

Standardized processes ensure accurate documentation and audit-ready records at all times

Higher Service Provision

Structured operations free up capacity, enabling teams to serve more individuals effectively

Recommendation: Set baseline metrics now so you can measure the impact of structural changes over time.

From People-Dependent to System-Driven

“We stopped relying on people to remember processes and built a system that carries them.”

Recommendation: Identify your most knowledge-dependent processes and systematize them first.

A modern office hallway with glass walls and a potted plant. The hallway is long and bright, with a polished floor reflecting the light. On the left, there is a desk with a computer monitor and a white office chair. A large potted plant is in the foreground. The text "How to Start" is overlaid in the center.

How to Start

Your Roadmap to Getting Started

- 1 **Identify One Key Breakdown** — Find your biggest pain point and start there
- 2 **Build Visibility First** — Create dashboards so you can see what's happening
- 3 **Standardize Workflows** — Document and align processes across teams
- 4 **Layer in Tools** — Add technology that supports the new structure
- 5 **Reinforce Through Leadership** — Sustain change with accountability and coaching

Recommendation: Assign an owner and a timeline to each step to ensure accountability.

What We Learned

Technology Amplifies Systems

The right tools supercharge well-designed processes, but without structure they add noise instead of value

Structure Must Come First

Build the foundation of standardized workflows and clear expectations before layering in technology

Leadership Reinforcement Is Essential

Sustained change requires visible leadership commitment, coaching, and ongoing accountability



Recommendation: Invest in leadership alignment before rolling out any system-wide change.

Kotter's Change Model



Survive

Reacting • Overwhelmed • Maintaining the status quo



Thrive

Purpose-driven • Innovative • Confident • Future-focused

GCC chooses to THRIVE — together.





GCC LEADS develops the *shared* practical skills and habits leaders use to drive everyday work and relationships.

Connection &
Presence

Strategic
Thinking

Getting Work
Done Through
Others

Coaching &
Feedback

Agility, Flexibility,
& Resilience

Building Inclusive Teams

Hungry

Humble

Smart

MISSION MINDSET

Apply This to Your Organization (Breakouts)

1 What is your biggest system breakdown?

2 Where are staff relying on memory instead of structure?

3 What could be standardized first?

4 What tools are available for your specific EHR?

Recommendation: Use these breakout questions as a structured assessment tool back at your organization.

Key Takeaways



Felicia Jeffery, LPC
Chief Executive Officer



Key Takeaways



Systems Drive Consistency

Standardized workflows reduce variation and errors across teams.

Visibility Drives Accountability

Real-time dashboards keep everyone aligned on goals and progress.

Structure Enables Success

Clear roles and processes empower staff to deliver quality services.

Change Is Possible

Transformation can happen within existing constraints and budgets.

Recommendation: Choose one takeaway to act on within 30 days of returning to your organization.

Moving Forward

Adapt, Don't Duplicate

This is not about copying a process, it's about evolving your current systems to meet tomorrow's demands.

Start Small, Build Smart

Begin with one program area, prove the model works, and expand based on real results.

Scale with Intention

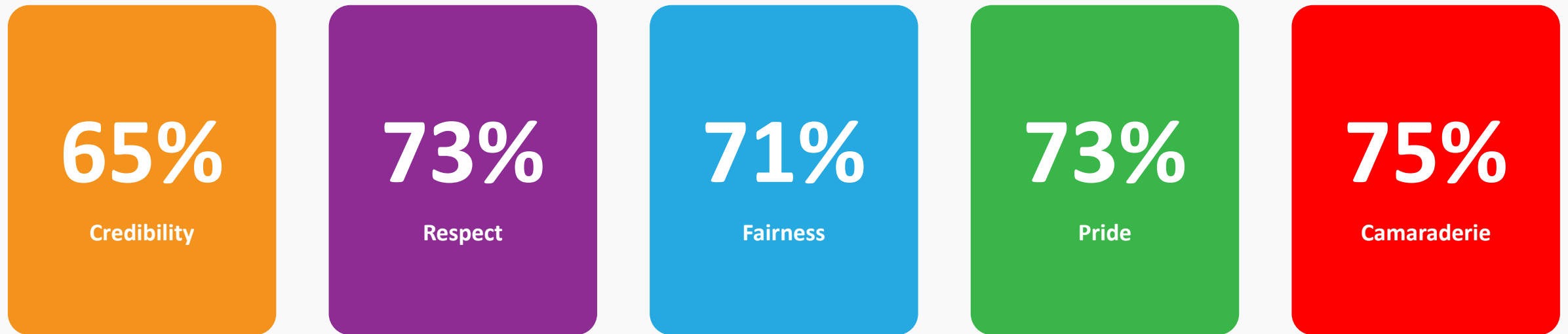
Structure your growth so every expansion strengthens the system rather than stretching it thin.

Recommendation: Start with a 90-day pilot in one program area and expand based on results.

"The best time to build the right system was years ago. The second-best time is now."

2025 Great Place To Work® Trust Index© Survey - IDD Results

Our 2025 survey results reflect the culture we're building; strong in pride and camaraderie, with clear opportunities to strengthen credibility and fairness as we continue to grow.



GPTW TRUST MODEL DIMENSIONS



Living Out Our Values

Our values are part of our DNA, intricately woven into who we are & how we serve

H

Humanity

Creates more time for
person-centered care

E

Excellence

Boosts operational
efficiency and
innovation

A

Accountability

Ensures compliance
and quality assurance

L

Loyalty

Supports family
involvement through
accurate records

T

Teamwork

Enhances
collaboration and
documentation
transparency

H

Honor

Promotes self-
direction and
continuous learning

Y

You

Strengthens
community
partnerships with
data-driven insights





Thank You!

We don't come to work
We Come to Care

