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Margins Matter, AI-Driven Solutions for Therapy's Toughest Business Challenges

Speakers

- Amy McDermott, EmpowerMe
- Jordan Bowman, Athelas
- Kathleen Dwyer, Legacy Healthcare Services

Moderator

- Linda Riccio, TCM Consulting & Management



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Housekeeping Reminders

- All attendees are on mute
- **Handouts** are available on the NARA website: Resources>Quick Links Page
- **Questions for Speakers:** submit them using the Q&A button on the attendee control panel
- **Technical Questions:** submit them using the Chat button on the attendee control panel
- **Recording:** will be available on the NARA website: Resources>Quick Links Page



NARA
The National Association of
Rehabilitation Providers and Agencies

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Disclaimer

The information shared in today’s presentation is shared in good faith and for general information purposes only. It is accurate as of the date and time of this presentation. Providers should seek further guidance and assistance from CMS and their Medicare Administrative Contractor (MAC), commercial payers, state and national associations, and continue to watch for new developments and information regarding the topics discussed today.

Humans, AI and the Future of Appeals Work



Reducing Friction Without Losing the Human Thread

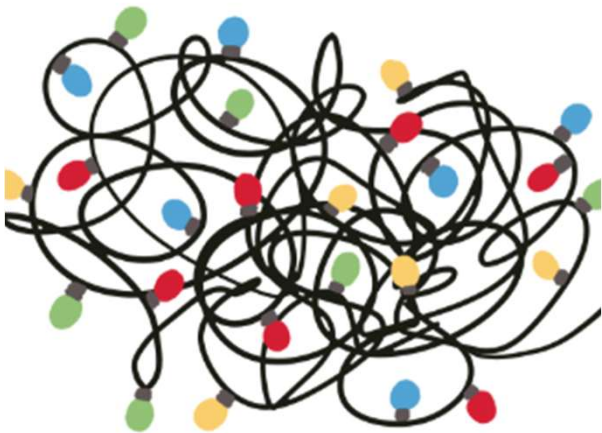
Presented by:
Amy McDermott, M.S., CCC-SLP, CHC
Senior Vice President of Compliance, EmpowerMe Wellness
November 2025 | NARA AI Webinar

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The Reality of Appeals Work

Manual, Messy, Expensive.
Multi-system data scavenger hunt
Complex medical language
Varying payer rules across MACs
Time-consuming document assembly



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The Complex Landscape

Appeals Span Multiple Systems
EMR, payer portals, quality systems,
internal trackers
Multiple episodes of care per appeal
Differing MAC rules and language
Dense, technical terminology that
challenges NLP accuracy



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Early Experimentation

Where We Started
Partnered with an AI start-up focused on denials and appeals
Trained model on real EmpowerMe examples: denials, appeals, MAC responses
AI produced high-quality position papers and prefilled review packets
Human reviewers adjusted, refined, and taught the model in real time



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Productive Skepticism

Healthy Caution Became a Strength
Skepticism kept the process ethical and evidence-based
Human guardrails from day one (review before submission)
AI excelled at formatting, summarizing, and form population
Human expertise remained essential



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When It Broke



The EMR Transition Changed Everything
New EMR disrupted AI data access and field mapping
Lesson: AI is only as strong as its data ecosystem
Success depends on structured, interoperable information



Lessons and Next Steps



Design for interoperability from day one

Human context still makes or breaks the output

Progress looks more like iteration than innovation



Closing Thought



AI Won't Replace Humans – It Reduces Friction

AI can streamline our work, but only humans can give it purpose.

The goal isn't to replace ourselves — it's to remove what slows us down, so we can focus on what truly matters.



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Thank you!

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AI Solutions for Revenue Cycle Management (RCM)

Jordan Bowman, M.A. CCC-SLP

NARA 2025



What is YOUR why?



"My why is simple: to help older adults stay connected to their loved ones, their communities, and themselves. Communication is more than words; it's belonging." - Kendra SLP



KPIs (Key Performance Indicators)		
Therapist, Operator, Patient		
Financial	Operational	Outcomes
- Profit per visit - Net revenue per month - Payer revenue per patient - Average reimbursement per patient visit - Billing units per visit Revenue leakage	- Number of referrals - Evaluations performed - Completed visits per episode of care - Percent of time billed - Units per hour - Therapist productivity - Session attendance - Cross-discipline referrals	- Overall OT/PT/SLP outcomes - Patient function at time of d/c - Patient satisfaction - Net promoter score
 Athelas Powered by Commure		

Key Causes of Therapy Revenue Leakage



- Billing and Coding Errors
- Claim Denials and Underpayments
- Contract Mismanagement
- Declining Reimbursement Rates
- Payor Policy Shifts
- Lack of transparency in revenue cycle process

 Athelas
Powered by Commure

It's Harder than ever to get Paid in Healthcare

“ Reimbursements are [trending down](#), and Insurance Payers are making it increasingly [more difficult to get paid](#).

“ 65% of denied claims are never reworked. - [MGMA](#)



How Cigna Saves Millions by Having Its Doctors Reject Claims Without Reading Them

by Patrick Rucker, Maya Miller and David Armstrong
March 25, 5 a.m. EDT



Reduce Healthcare Burnout Through Data-Driven Automation

While clinicians are facing high levels of stress, health systems can implement data-driven automation to provide insights that enable streamlined workflows and revitalize care teams.

by Nathan Eddy

Nathan Eddy works as an independent filmmaker and journalist based in Berlin, specializing in architecture, business technology and healthcare IT. He is a graduate of Northwestern University's Medill School of Journalism.

AI Solution Examples for RCM

- Automated claim scrubbing
- Eligibility verification
- Smart coding assistance
- Denial prediction and prevention
- Automated payment posting
- Patient billing communication
- Predictive AR management
- Revenue insights dashboards
- *MORE TO COME!!!!*

Key Questions to Ask RCM Vendors During Your Search		
Technology & Automation	Transparency & Reporting	Revenue & Outcomes
What aspects of your RCM process are powered by AI or automation? How does your system handle claim scrubbing and error detection before submission? Do you integrate with my EHR, scheduling, or billing system natively—or via API? How frequently is your technology updated, and what's your process for continuous improvement?	What level of visibility do I have into my claims, denials, and collections? Can I access real-time dashboards for AR aging, payer trends, and collection rates? Do you provide custom reporting by payer, location, or provider? How do you measure and communicate performance metrics to clients?	What is your average improvement in AR days, denial rates, and collections across clients like ours? How long does it take to see measurable ROI? Do you have client case studies or references? How are incentives aligned—do you charge a flat rate, percentage of collections, or hybrid model?
 Athelas Powered by Commure		

Key Questions to Ask RCM Vendors During Your Search		
Compliance & Data Security	Team & Support	Implementation & Scalability
How do you ensure HIPAA compliance and patient data protection? Where is your data stored, and what encryption protocols do you use? How do you manage compliance with CMS, Medicare, and payer-specific regulations? Are there audit trails for all transactions and claim modifications?	What does your client support structure look like (dedicated rep, ticket system, chat)? How quickly do you respond to issues or claims inquiries? What level of training do you provide to our internal team? Do you partner with us strategically to identify revenue opportunities, or only manage billing tasks?	What is the average implementation timeline? How do you manage data migration and ensure no disruption to cash flow? How do you scale as our organization grows or adds service lines/sites? What does your onboarding and change management process look like?
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Before AI Solutions for RCM

- Limited visibility with no access to exact numbers
- No choice but to rely on estimations of revenue
- Uncertainty and doubt around billing execution
- No in-house solutions or support
- Lack of strategy and control



Case Study:

This Physical Therapy organization is both a teaching and learning physical therapy clinic. All of their physical therapists are dual-credentialed, and many teach both domestically and internationally about their innovative approach to rehabilitation and recovery. Their physical therapist-led aftercare initiative is designed to promote lifelong healthy habits and prevent future injuries.

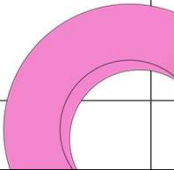
With AI Solutions for RCM

- 115% increased reimbursement rate per visit
- 15% decrease in denial rates
- Dedicated handling of denials daily
- Financial communication confidence with patients
- Visibility into exact figures

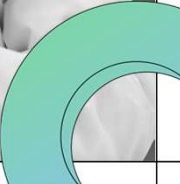


Lessons Learned from Clients Using new AI Solutions

- ☐ Prepare key questions when evaluating an AI provider
- ☐ Consider change management for each team member
- ☐ Start with one measurable workflow
- ☐ Align AI with KPIs
- ☐ Keep human oversight on your end and your AI provider's end



How do you hope to use AI to enhance efficiency and boost revenue in your practice?



Thank You

 Jordan Bowman, M.A. CCC-SLP
jordan.bowman@getathelas.com



Legacy
HEALTHCARE
SERVICES

*Kathleen Dwyer, OTR/L, RAC-CT, CHC, CHPC
Senior Vice President of Compliance
Kdwyer@legacyinc.com
November 13, 2025*



How I found a reason to look into AI

- **Idea** → *Heard about AI but unsure where to start*
- **Risk aversion** → *Waited until others tried it*
- **Trigger event** → *Large chart audit received*
- **Challenge** → *98 beneficiaries – Record needed fast*
- **Action** → *Pulled 10-person team; 7 days to complete*
- **Reflection** → *There must be a better way...*



When It Dawned on Me “There Has to Be a Better Way”



To meet one large audit, we had to pause other work and dedicate *everyone* for over a week.

I remembered sitting on my sofa late at night, repeating the same task over and over — pulling records, doing the same steps endlessly.



That’s when it hit me:
“I bet a robot could be trained to do this.”

I started exploring companies using machine learning and having conversations with colleagues about how AI might help.



Turning Motivation into Innovation



 Exploration Phase – Researched AI companies

 Connection – NetHealth recommended Innobot

 Collaboration Begins – Met with Innobot, mapped our process

Before 📁	After 📁
Orders in Case Manager	All orders & referrals uploaded to Alinea
Consents in Alinea	Single, centralized location for audit documents
Multiple systems to pull from	One automated workflow
Manual packet creation	Innobot builds complete audit packets

 From chaos to clarity — one SOP and one smart bot at a time.



New Process for Record Requests

Medical Records Packet

- Evals, recertifications, progress notes, daily notes and discharge summaries
 - Batch print from NetHealth
- Billing logs
 - Report NetHealth– downloads by month by patient
- Medical and financial consents
 - Download from Alinea
- Orders
 - Download from Alinea

New Staff Workflow for Records Requests

- Microsoft Form completed by staff
 - Patient name
 - Dates of service
 - Disciplines of audit
 - Facility name
- Form completion creates excel of information
- Excel is in a shared secure folder
- Bot has access to excel
- Reads record request and processes
- Files PDF packet in shared secure folder by patient



 *Impact and Overflow*

 **95% Accuracy**
Bot-generated charts matched perfectly

 **1,558 Packets Completed**
Since launch last fall

 **~1 Day Turnaround**
Average request-to-fulfillment time



The overflow effect

- Target Probe and Educate record requests
- All ADR (Additional Documentation Requests)
- Life Insurance record requests
- POA/Patient record requests
- Attorney/ Law office requests
- Auto Insurance Requests
- Internal audits- compliance and quality

- Doctor office requests
- Customer requests
- Law enforcement/ agency requests
- Risk Adjustment requests
- Managed care claim review requests

AI-driven automation that transformed manual work into precision efficiency.

Human Element & Feedback



Spot
check
the
records

Especially for the
ARDs, TPEs
Ensuring accuracy
to the patient,
dates of services,
etc.



Bot has “saved us”
“I love it!”

Exploring AI in Rehab: Where to Begin and What to Know Before You Dive In

Complimentary Webinar

 January 22, 2026



3:00pm EST/ 12:00pm PST

Register at: www.naranet.org/education/webinars

Attendees will learn:

- What AI is—and isn't—and how it applies to physical, occupational, and speech therapy settings
- Common use cases for AI in rehab, including documentation support, billing, and patient engagement
- How to identify operational pain points that could benefit from automation
- What to consider in terms of cost, integration, compliance, and staff training
- Questions to ask AI vendors to ensure transparency, effectiveness, and ethical use
- Policies to protect your organization





Thank you for listening!

What questions do you have?