Case Study:
Three Years, Countless Efficiencies: How FellowshipLIFE Modernized Care with AI

FELLOWSHIPLIFE
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NuAIg

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Organization Name:
FellowshipLIFE

Main Contributor:
Brian Lawrence, President and CEO; Chris Black, Vice President, Building Projects; Kim Sheppel, Director of Team Engagement and Development: Luisa Mota, Senior Director of HR; Patty Marrone, Director of Business Management; Mark Aguilar, Executive Director; Marcy Burrach, Vice President of Sales and Marketing

Organization Type:
Senior Living and Healthcare Services

Organization Description:
FellowshipLIFE is a New Jersey–based, not-for-profit aging services organization committed to enriching the lives of older adults through innovative, hospitality-centered programs. Across its Life Plan Communities and public-facing services, FellowshipLIFE creates opportunities for purposeful living, lifelong learning, wellness, and high-quality care that go far beyond traditional senior living.

Driven by a vision to transform the aging experience, FellowshipLIFE designs person-centered offerings that meet the evolving expectations of today's older adults while strengthening connections with the broader community. The organization also integrates advanced technologies including Artificial Intelligence (AI), data strategy and analytics, and intelligent automation to enhance efficiency, support compliance, and elevate overall service delivery.

Through FellowshipLIFE Management Services, this expertise is extended to mission-aligned organizations, providing hands-on leadership in operations, clinical care, hospitality, finance, technology, marketing, human resources (HR), and strategic planning. This partnership approach delivers stronger performance, sustainable growth, and enhanced outcomes for residents and organizations alike, grounded in the philosophy of *Partners. Performance. Purpose.*

Testimonial

"Partnering with NuAIg has accelerated FellowshipLIFE's transformation in ways that are both measurable and mission-advancing. Their team took the time to understand our organization, our operations, and the complexity of serving older adults across multiple Life Plan Communities. Together, we built an automation and data framework that not only streamlines workflows but also strengthens our ability to deliver exceptional care and service.

The impact has been substantial. Processes that once required hours of manual effort are now consistent, accurate, and completed in minutes. This work has elevated how we lead, giving us timely, reliable information that supports stronger decision-making for our residents and team members.

Most importantly, it allows our teams to spend less time on administrative burden and more time focused on enriching the lives of the people we serve. NuAIg has been a true partner in our journey, and their expertise has positioned FellowshipLIFE for long-term operational strength, innovation, and growth."

- Brian G. Lawrence, President and CEO
FellowshipLIFE

Project Description

NuAIg & FellowshipLIFE: Building a Scalable, Insight-Driven Operations Model
FellowshipLIFE partnered with NuAIg to solve a fundamental challenge: too many critical processes depended on manual effort, siloed data, and inconsistent workflows. Together, they established a long-term transformation framework through the creation of **Center of Excellence (CoE)**, a capability hub designed to standardize automation, data practices, and continuous improvement across the organization.

Within this model, NuAIg re-engineered high-impact processes across compliance, intake, property management, financial reporting, payroll, and clinical documentation, streamlining work that once consumed hours of staff time. This case study highlights a curated selection of these initiatives, each representing a measurable leap forward in efficiency, accuracy, and operational transparency.

As solutions matured, the CoE became the engine for scaling insights. Automations began producing structured, reliable data, which NuAIg transformed into **Power BI dashboards** and **centralized visualization tools** that give leadership real-time visibility into operational performance, revenue trends, workflow bottlenecks, and compliance adherence.

The result is a modern operational infrastructure, one in which automation reduces friction, data drives action, and FellowshipLIFE's teams can stay focused on delivering exceptional resident care.

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System Type

- **EMR: MatrixCare, NetHealth**
- **Data Sources:** ADP, Rexpert, Sherpa
- **Software and Automation Tools:** Power Automate, Microsoft Forms, Power Apps
- **Communication Tools:** Microsoft Outlook, DocuSign
- **Document Management:** OneDrive, SharePoint

System Embodiment

- **Automation:** Power Automate manages the automation bots. They automate data extraction from multiple healthcare systems, create reports, and share with stakeholders.
- **Data Security:** All development and processing are conducted on servers hosted within FellowshipLIFE's environment. This ensures secure and controlled access.
- **Alerts and Notifications:** Automated alerts and notifications are managed through Microsoft Outlook. This helps in timely and effective communication among team members and stakeholders.
- **HIPAA Compliance:** Built to meet Health Insurance Portability and Accountability Act (HIPAA) standards, the automated system safeguards Protected Health Information (PHI) with unwavering confidentiality, integrity, and accessibility.

Implementation Approach

The implementation began with a thorough analysis of existing processes at FellowshipLIFE. NuAIg identified the problems and challenges in compliance tracking, billing procedures, and administrative workflows.

- Collaborated closely with FellowshipLIFE stakeholders to understand their key pain points, requirements, and the structure of their data sources.
- Identified critical areas that were particularly labor-intensive: Office of Inspector General (OIG) compliance monitoring, Medicare Part B metrics calculation, resident intake processing, and payroll management.
- Detailed discovery and stakeholder engagement to identify the gap areas.
- Developed a data analytics and automation plan tailored to address these challenges. The solutions were designed to streamline tracking and management of these key areas.
- Continuous collaboration with FellowshipLIFE stakeholders was maintained throughout the implementation to ensure the solutions met their specific needs and regulatory expectations.

Data Analytics + Process Automation Integrated Solutions

Property Management Solution
The manual property management process required facility managers to fill out multiple forms. This included tracking the vacant units, managing renovations, creating milestones, and resident readiness checklists.

FellowshipLIFE used paper-based workflows and manual data consolidation. However, they had limited visibility into project timelines and completion status across multiple communities.

NuAIg developed a comprehensive automated solution using Power Apps forms and Power Automate workflows to streamline property management operations.

The system includes multiple integrated modules:
- Create the **Milestones Form** for defining milestones, subtasks, and timelines.
- Update the **Milestones Form** by modifying existing milestone dates and statuses.
- Design a **Property Management Form** to update details related to the property.
- A **Project Milestone Checklist** for creating detailed task checklists. These were organized by days or weeks.
- A **Final Countdown Checklist** for managing pre-completion tasks.
- A **Resident Readiness Checklist** for tasks related to move-in.

The NuAIg solution consolidates these disparate and numerous forms into a centralized database using Power Automate. They also incorporated visualization through Power Apps.

Solution Highlights:
- The facility managers were now able to access weekly summaries, filter data by various criteria, and monitor deadlines and delays in real-time.
- Automated alerts and notifications ensure timely data submission and highlight critical issues for immediate resolution.

This comprehensive **automation and data visualization solution** eliminates paper-based workflows, provides centralized visibility across all properties, and enables proactive management of property-related projects and timelines.

Resident Intake Process Automation

The resident intake process involved multiple manual steps such as client information entry, insurance verification, profile creation in MatrixCare and NetHealth, and DocuSign agreement processing. Each step required separate handling, which made the workflow slower, increased the effort for staff, and created inconsistencies across communities.
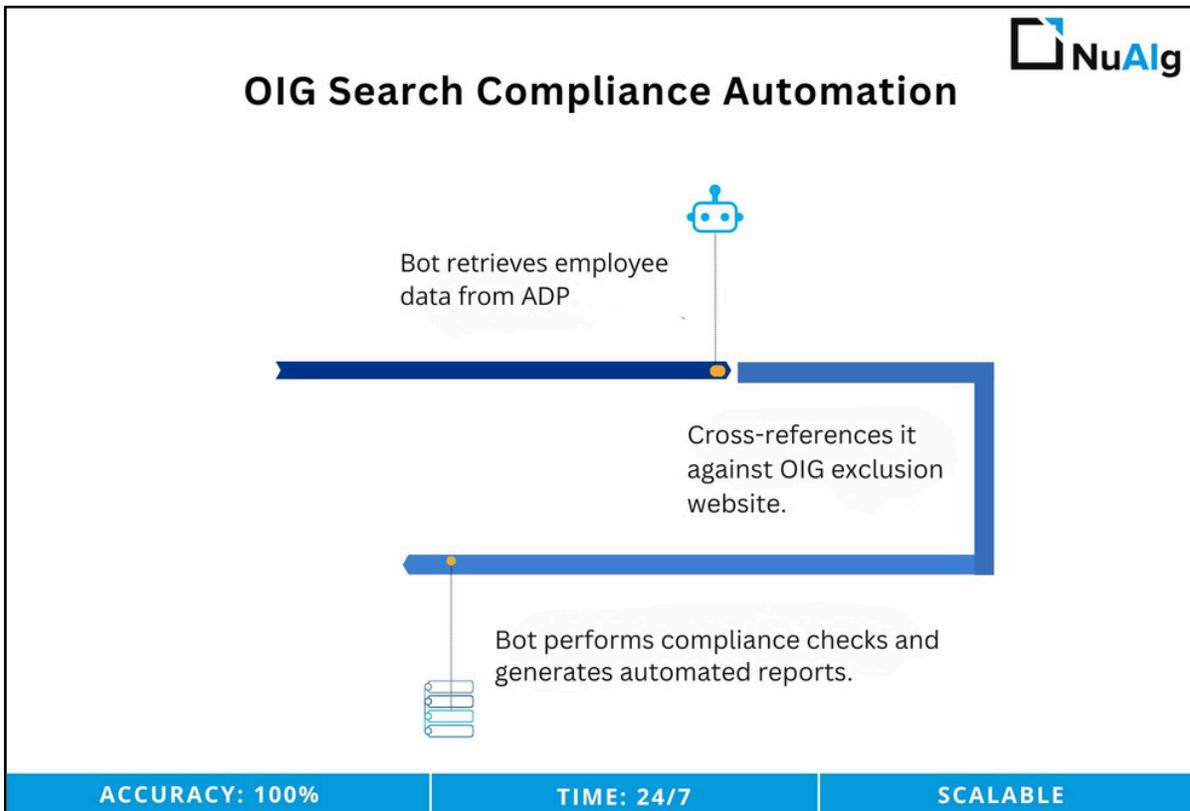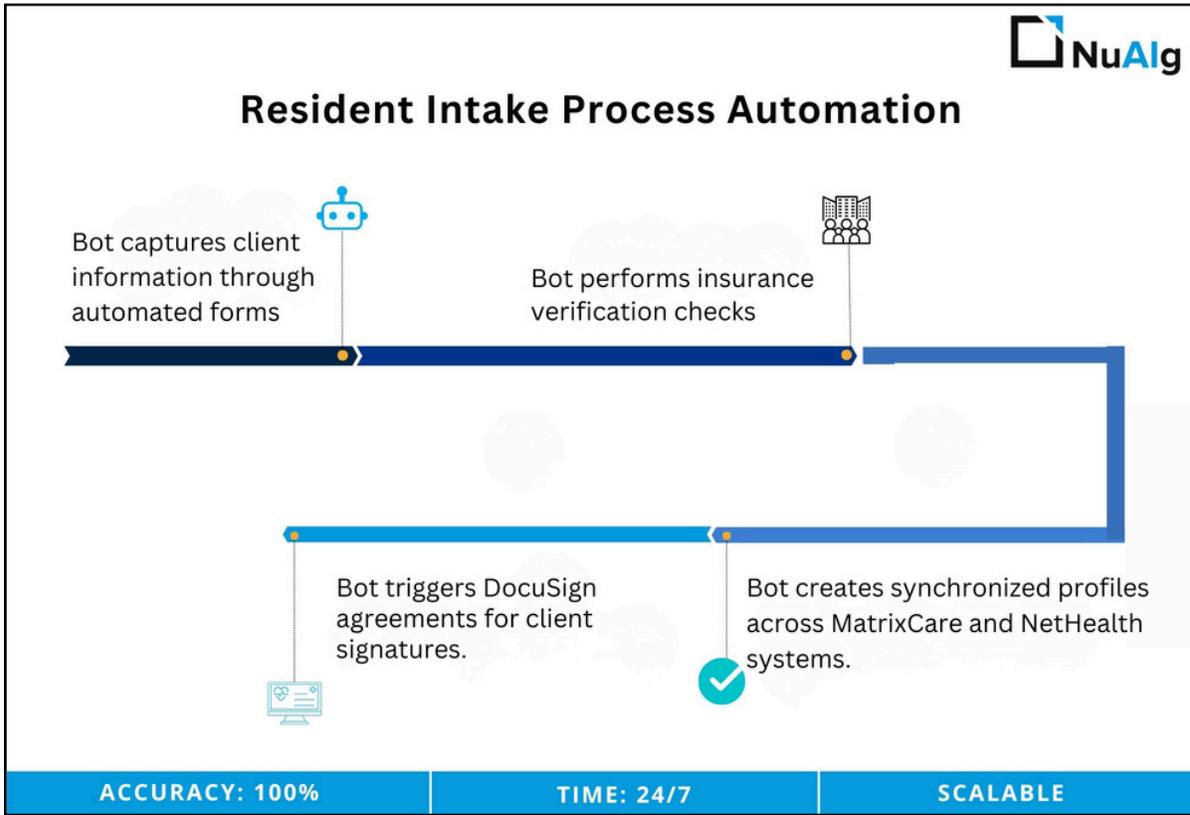
Solution highlights:
- NuAIg created a unified intake workflow and interface that connects every step from information entry to agreement completion.
- Client information flows automatically into MatrixCare and NetHealth without duplicate data entry.
- Insurance verification and agreement processing now follow a single streamlined path that removes manual delays.
- Real time tracking provides full visibility into intake status across communities.
- Staff receive alerts for pending tasks, so no part of the process is overlooked.
- FellowshipLIFE now has a standardized, reliable intake system that delivers faster onboarding, fewer errors, and a consistent resident experience.

OIG Search Compliance Automation

The NuAIg team developed a sophisticated solution using Power Automate. It retrieves employee data from ADP and cross-references against the OIG exclusion website. The system processes employee information in batches, performs compliance checks, and generates automated reports.

Solution highlights:
- The solution eliminates the need for manual OIG searches for each employee. This significantly reduced the time required for compliance verification.
- Results are automatically saved back into ADP with a detailed compliance status.
- Generates comprehensive reports for management review.
- Ensure continuous compliance monitoring and reduce the risk of employing individuals who are excluded.

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Resident Intake Process Automation

Bot captures client information through automated forms

Bot performs insurance verification checks

Bot triggers DocuSign agreements for client signatures.

Bot creates synchronized profiles across MatrixCare and NetHealth systems.

ACCURACY: 100%	TIME: 24/7	SCALABLE

NuAlg

OIG Search Compliance Automation

Bot retrieves employee data from ADP

Cross-references it against OIG exclusion website.

Bot performs compliance checks and generates automated reports.

| ACCURACY: 100%	TIME: 24/7	SCALABLE

Medicare Part B Metrics Automation
FellowshipLIFE required a monthly Medicare Part B metrics reporting based on UB-04 reports from NetHealth. The manual process involved complex calculations of net revenue by client category (PT, ST, OT), with various insurance-based discounts and territory-wise reporting.

NuAIg developed an automated solution for FellowshipLIFE that retrieves UB-04 reports from NetHealth. The bot applies predefined discount structures based on insurance types and codes, as well as compiled comprehensive revenue reports. The system calculates net revenue for each client across therapy categories and produces territory-wise summaries.

Solution highlights:
- This automation saves significant time in monthly reporting cycles.
- Ensures accuracy in financial calculations, providing management with timely insights into revenue performance across different service lines and territories.
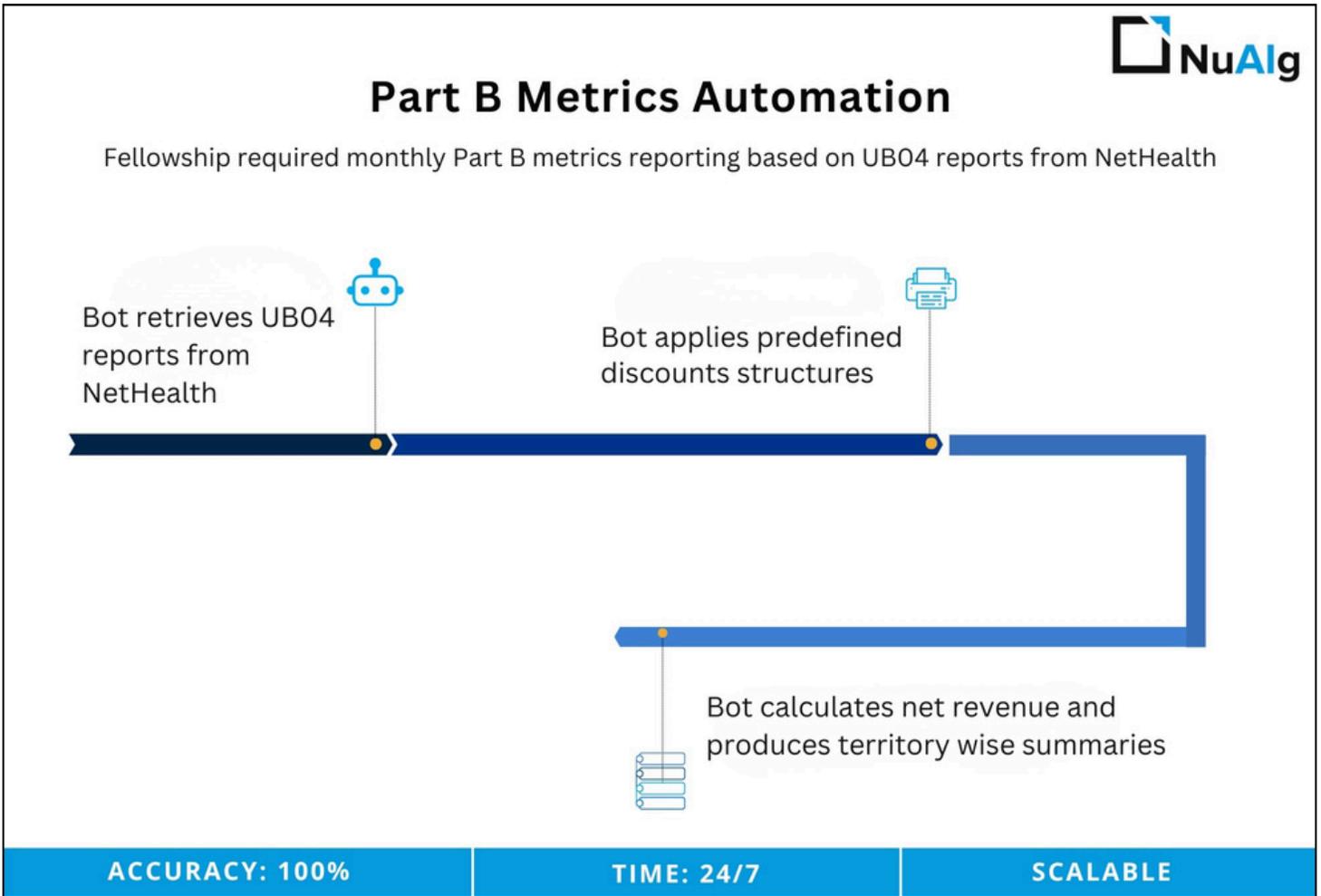
Automating the Balance Transfer of 'Paid Time Off'
The year-end paid time off (PTO) balance transfer process required manual intervention due to the limitations of the ADP system.

NuAIg designed an automated solution that interfaces with ADP and identifies employees with accrued PTO balances. The solution then calculates the amount based on company policy and executes the transfer to APTO Bank accounts. The system generates detailed reports of all transfers and maintains audit trails for compliance purposes.

Solution highlights:
- This automation ensures accurate and timely PTO transfers
- Reduces payroll processing time
- Eliminates the risk of employees losing earned benefits.

PTO Balance Transfer Automation

NuAIg

Bot identifies employess with accrued PTO balances

Bot calculates transfer amounts based on company policies

Bot generates detailed reports of all transfers and maintains audit trails

Bot executes the transfer to APTO bank accounts.

| ACCURACY: 100% | TIME: 24/7 | SCALABLE |
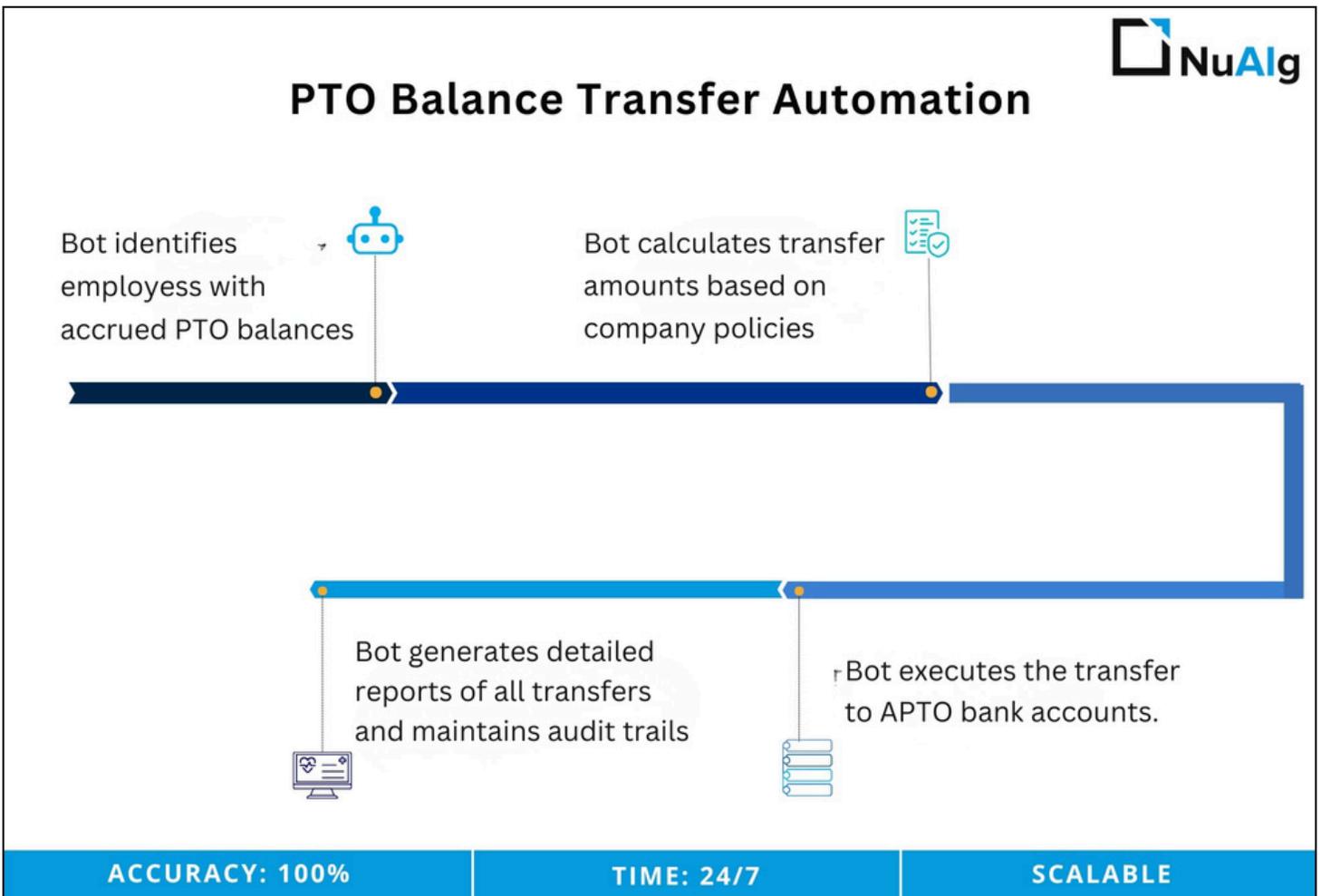
Payroll Status Change Automation
The manual payroll status change process involved paper forms, email submissions, multiple approval stages, and manual ADP updates, leading to delays and potential errors.

NuAIg developed a comprehensive automated workflow using Power Apps Forms for request initiation, automated approval routing based on organizational hierarchy, and an email notification will be sent. The system includes tracking capabilities, automated notifications, and audit trails for all changes.

Solution highlights:
- This solution significantly reduces processing time.
- Improves accuracy, eliminates paper-based workflows.
- Provides complete visibility into all payroll changes.
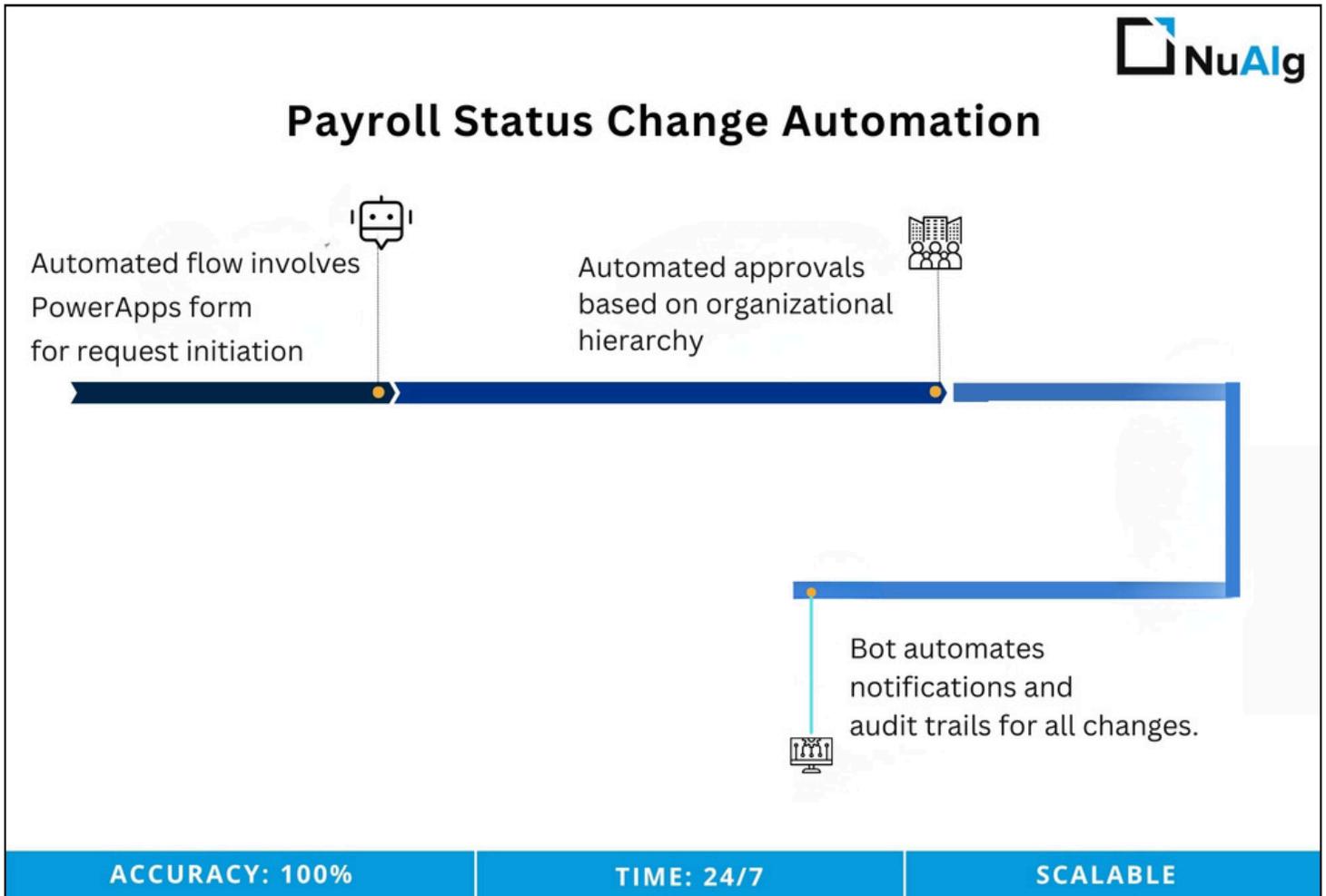
Resident Tracking Logs Automation

The manual process of tracking resident evaluations and re-certifications relied on large Excel logs, manual data entry, repeated NetHealth report checks, and eFax workflows for physician signatures. This made the process time-consuming, error-prone, and vulnerable to compliance risks under Medicare's strict 30-day signature requirements.

NuAIg implemented an automated solution that extracts resident details directly from NetHealth, retrieves finalized evaluation and re-certification documents, validates physician information through NPI lookups, and stores standardized document packages in SharePoint while updating a centralized database, eliminating the need for Excel-based tracking entirely.

Solution highlights:
- Automates retrieval of resident evaluations, re-certifications, and due-date information.
- Eliminates manual Excel logs by capturing all data in a secure database.
- Ensures accurate physician details through automated NPI validation.
- Improves Medicare compliance by monitoring deadlines and document status.
- Streamlines eFax preparation with standardized, automation-ready document packages.
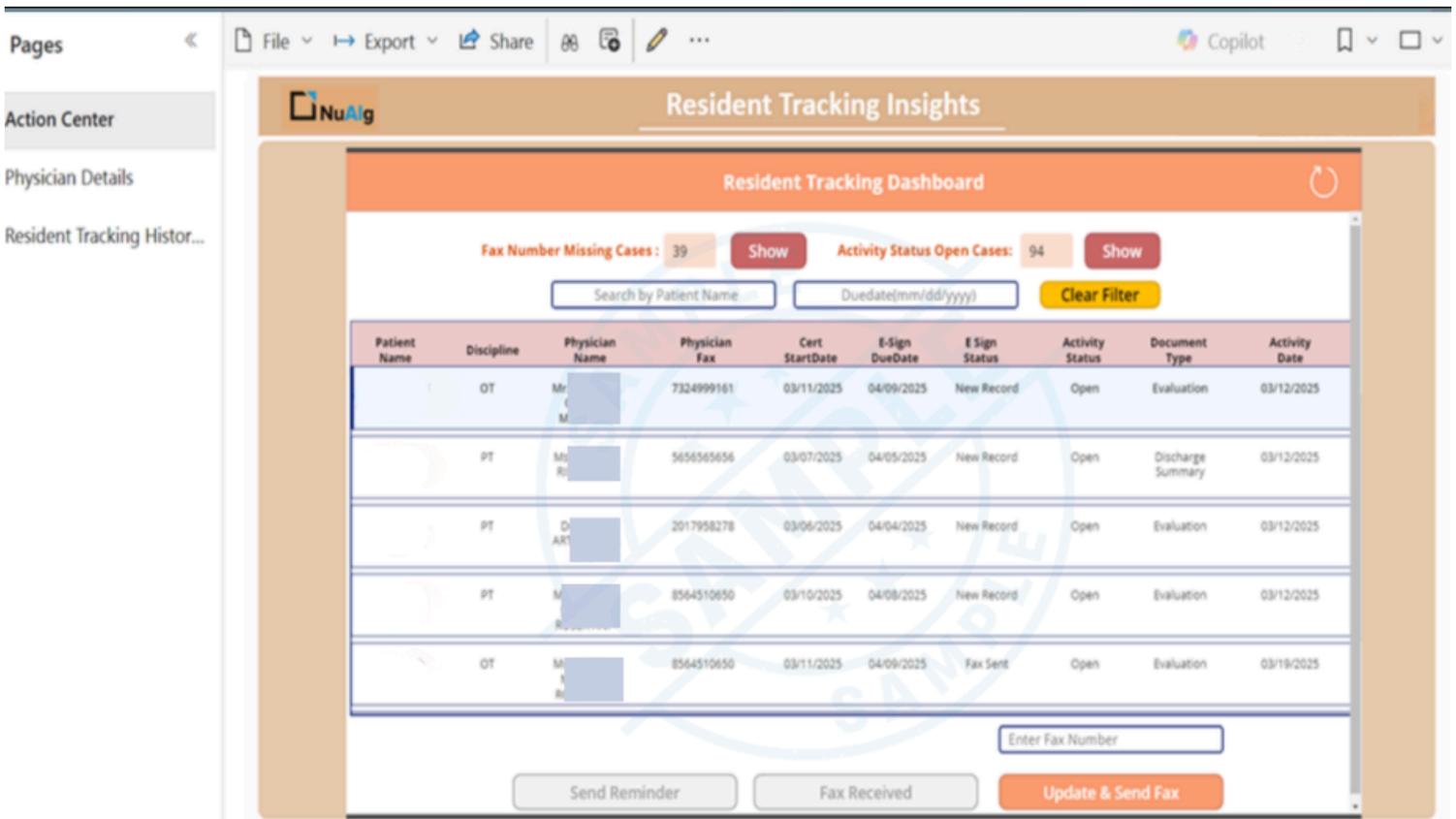
Purchase Order Automation
Communities created Purchase Orders (POs) by scanning manual forms and emails, routed approvals manually, and re-entered details in MatrixCare. This slowed monthly cycles, created inconsistencies, and made it hard to maintain clear financial visibility.

NuAIg built a unified Power Apps workspace with structured approval flows, automatic PDF archiving in SharePoint, and an Invoice Submission form that feeds a scheduled AP bot to post invoices into MatrixCare with complete traceability.

Solution highlights:
- This automation helps FellowshipLIFE gain a faster, fully traceable, and significantly less manual PO process that strengthens financial controls and reduces effort across teams.

Purchase Orders

Search By PO No :   Search By Status :   Clear Filter   Past Approvals

PO No	Requestor	VendorName	Amount	Status	Approver	PO Type	PO Date
PO·			3,711.14	Saved		Non-Capital	12/11/2025 02:17
PO·			1,122.88	Approved	-	Non-Capital	12/11/2025 00:43
PO·			692.68	Saved		Non-Capital	11/11/2025 08:45
PO·			14,359.33	Approved	-	Capital	11/11/2025 02:24
PO·			15.98	Approved	-	Non-Capital	11/11/2025 01:04

New Purchase Order   Edit Purchase Order   Change Purchase Order   Approvals

Advantages to the Approach

- **Enhanced Productivity:** Automating repetitive tasks allows the FellowshipLIFE team to focus on direct patient care and high-value activities.
- **Improved Efficiency:** Automation ensures accurate, timely, and comprehensive processing, significantly reducing the risk of errors and compliance violations.
- **Transparency and Decision-Making:** Automated reporting provides real-time insights into various processes, improving decision-making capabilities.
- **Customizable and Scalable Solutions:** Solutions are easily customizable and scalable, allowing FellowshipLIFE to adapt to future needs and regulatory changes.

Cost of Care and Return on Investment (ROI)

Providers:
- **Automated Compliance Monitoring:** The providers receive automated compliance reports, enabling them to maintain regulatory standards without the risk of manual oversight.
- **Streamlined Operations:** Reduced administrative overheads allow providers to allocate more resources to patient care and service improvement.

Residents:
- **Faster Processing Times:** The residents benefit from quicker intake processes, faster claims processing, and improved service delivery.
- **Enhanced Care Coordination:** Automated systems ensure better coordination between healthcare systems and providers.

Challenges and Pitfalls to Avoid

Change Management
- Effective strategies were required to transition smoothly from manual to automated processes, minimizing resistance and ensuring adoption across all departments.

Ongoing Maintenance
- Regular updates and maintenance of automated systems were necessary for optimal functionality, requiring proper planning and resources allocation.

Scalability Issues
- The system is scalable to accommodate an increasing volume of data and the number of users. Without this provision, the system can become sluggish and lead to performance bottlenecks and reduced efficiency.

Integration Complexity
- Managing integrations across multiple healthcare systems (MatrixCare, NetHealth, ADP, Rexpert) necessitated careful planning and robust error handling.

Lessons Learned

- **Stakeholder Engagement:** Early and continuous engagement is essential for insights, support, and alignment with organizational goals across all departments.
- **Importance of Thorough Assessments:** Thorough assessments of existing processes lead to building more effective solutions and better user adoption.
- **Flexibility and Scalability:** Developing adaptable solutions ensures the organization can meet future changes and regulatory requirements.
- **Data Security Priority:** Healthcare data requires the highest security standards, necessitating robust protocols throughout the automation lifecycle.

Advice to Share with Others

- **Commit to Ongoing Enhancement:** Consistently evaluate and refine systems to adapt to evolving healthcare requirements and integrate user feedback.
- **Prioritize Data Security:** Establish robust security protocols to safeguard sensitive health information and ensure regulatory compliance.
- **Plan for Integration:** Healthcare environments involve multiple systems; plan for comprehensive integration strategies from the beginning.
- **Focus on User Training:** Ensure comprehensive training programs for staff transitioning from manual to automated processes.