



Artificial Intelligence Roadmap

NewOrg leverages artificial intelligence in a **safe, responsible, and practical way** to improve efficiency, reduce administrative burden, and enhance service outcomes.

Our AI strategy focuses on three key areas:



Internal Efficiency

Accelerating system development, partner implementations, testing, and support through AI.



User Productivity

Enabling organizations with AI-driven tools to simplify workflows, improve usability, and reduce administrative effort.



Case Insights

Delivering governed AI tools to generate documentation, summarize case activity, and provide actionable insights.

Responsible AI Framework

 Data Privacy & Security

 HIPAA-Compliance

 Human-In-The-Loop Validation

 Full Transparency and Audibility

AI designed to enhance outcomes while protecting sensitive client data

Internal Productivity and Developmental Efficiency

The first focus area of NewOrg's AI roadmap enhances internal team productivity by using AI to accelerate system development, streamline customization and client onboarding, improve testing and workflow documentation, and strengthen support.

Key Objectives:

- ✓ Reduce development and testing time
- ✓ Accelerate onboarding and customization
- ✓ Improve internal knowledge management
- ✓ Enable faster support responses

AI-Assisted Development

AI tools assist developers with:

- ✓ Code generation and refactoring
- ✓ Automated testing and debugging
- ✓ Documentation and schema analysis

Outcomes:

Faster releases and improved code quality

Implementation Assistant

Supports client onboarding and system configuration by:

- ✓ Summarizing meetings and extracting requirements
- ✓ Generating system configuration
- ✓ Assisting with system components: forms, workflows, reports, automations

Outcomes:

Faster onboarding and setup

Meeting & Documentation Intelligence

Captures and structures implementation knowledge

- ✓ Records and summarizes meetings
- ✓ Tracks decisions and action items
- ✓ Generates documentation and system summaries

Outcomes:

Reduces manual documentation effort

Partner User Productivity Tools

This focus area empowers partner staff with AI-driven tools that streamline workflows, enhance usability, enable report and form customization, and reduce administrative effort.

Key Objectives:

- ✓ Reduce administrative workload
- ✓ Simplify configuration
- ✓ Improve support communication
- ✓ Enhance documentation

AI Data Protection

- ✓ No client data exposure
- ✓ Works on configuration and documentation only

Support Assistant

Capabilities:

- ✓ Answers questions about system functionality
- ✓ Searches and explains documentation
- ✓ Guides users through workflows and processes
- ✓ Identifies and generates reports

How it Works:

Users can interact with the system using natural language, reducing the need to navigate complex menus or workflows

Example: *"How do I create a report for rental assistance clients?"*

Reporting & Workflow Assistance

- ✓ Create custom reports
- ✓ Modify fields and values
- ✓ Build queries and workflows

Example: *"Show all clients receiving rental assistance in the past 6 months"*

Communication & Templates

- ✓ Email and SMS Templates
- ✓ Mail merge letters
- ✓ Outreach messages

Example: *"Create an appointment reminder for housing counseling clients."*

AI-Assisted Case Insights and Documentation

The final focus area delivers governed AI tools that support documentation and case note generation, summarize case activity, and provide actionable insights for service delivery. **Partners will have control over which tools are available to which staff, and whether PII is included in AI processes.**



Custom Prompt Management

- ✓ Define standardized documentation prompts
- ✓ Control output format and where data is stored
- ✓ Align AI outputs with internal documentation standards

Meeting Transcription & Documentation

Converts meeting recordings into structured documentation

- ✓ Transcribes meetings (Teams, Zoom)
- ✓ Generates structured documentation
- ✓ Case notes and summaries
- ✓ Progress notes and follow-ups
- ✓ Treatment plans and SOAP notes



Responsible AI Commitment

NewOrg's AI strategy is built to assist staff, not replace professional judgment, while upholding strong privacy, compliance, and transparency standards.



Human-in-the-Loop Architecture

- ✓ All AI outputs require staff review
- ✓ No automated changes without approval
- ✓ All actions remain transparent and auditable

Document Processing & Case Insights

Extracts data from documents and analyzes case history

- ✓ Case notes and summaries
- ✓ Progress notes and follow-ups
- ✓ Populates system fields and triggers workflows
- ✓ Summarizes case history and service progress
- ✓ Highlights risk patterns and areas of focus



Privacy & Compliance Safeguards

- ✓ Controlled processing environments
- ✓ HIPAA-compliant AI providers and BAAs
- ✓ Minimal data exposure with optional anonymization
- ✓ Full audit logging of AI activity