

Kipu

A woman with long brown hair, wearing a blue denim jacket and black leggings, is sitting on a grey couch in a bright, modern living room. She is smiling and looking towards the right while holding a smartphone in her hands. The background shows a bookshelf, a potted plant, and a window with natural light.

ATAC 2026 Annual Meeting

Carina Edwards, CEO, Kipu

Agenda

1 Introduction, Carina Edwards, CEO, Kipu Health

2 Newest Industry & Market Trends

3 AI Case Study: Banyan Treatment Centers

4 AI Maturity Model & Best Practices

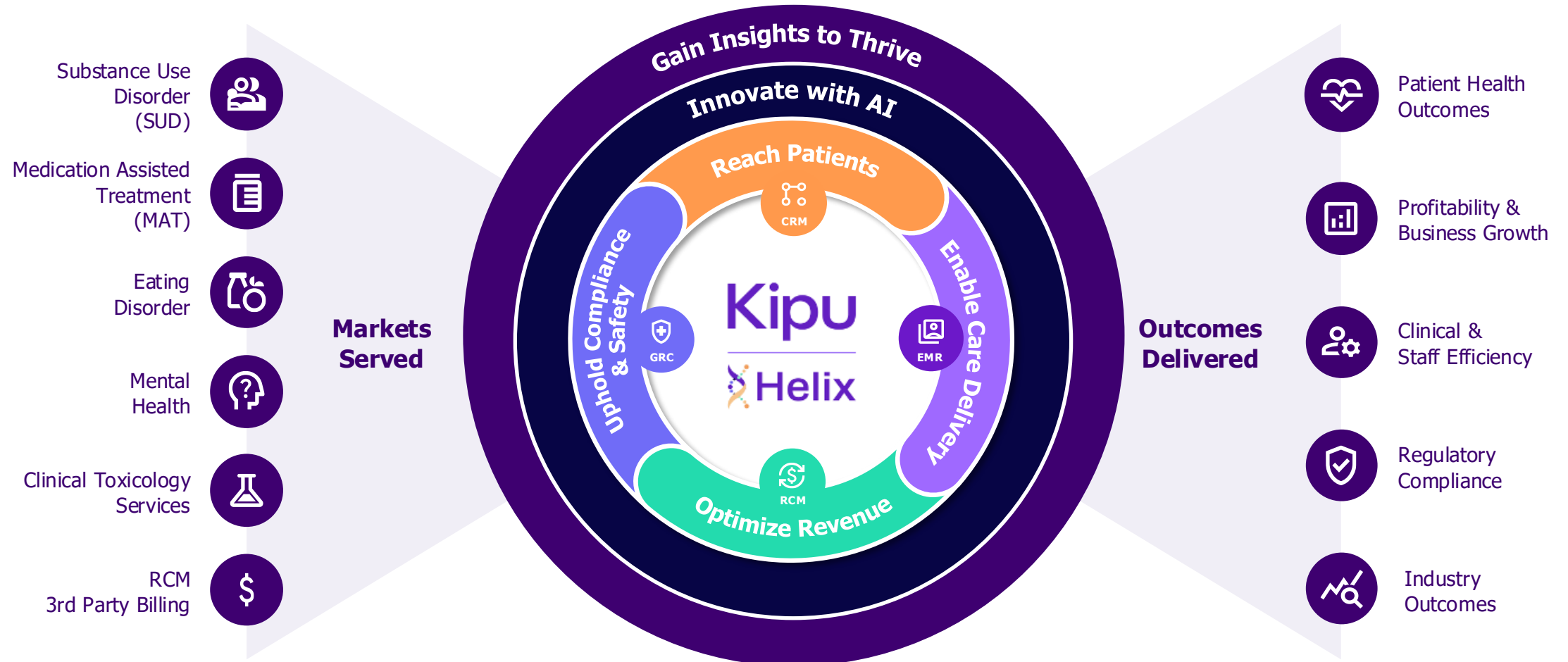


Our Mission

We provide behavioral health technology that empowers organizations, their teams, and their patients to thrive.

The Leading Behavioral Health Technology Company

The First Intelligent Operating System for Behavioral Health – Used by more than 6,000 facilities nationwide



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New Market Trends

**Kipu 2026 State of
Behavioral Health Report**



2026 Study: State of Behavioral Healthcare

1 How are organizations growing?

2 What are leaders and clinicians excited about?

3 What are they worried about?



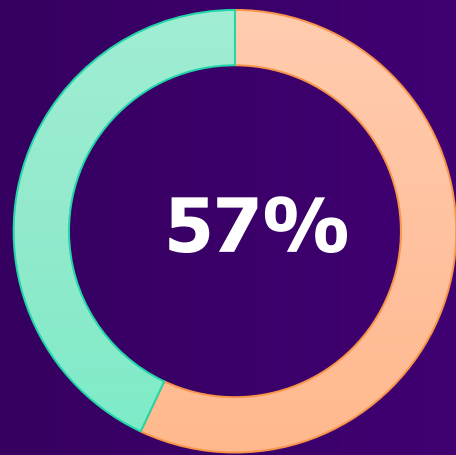
State of
Behavioral Healthcare
2026 Outlook

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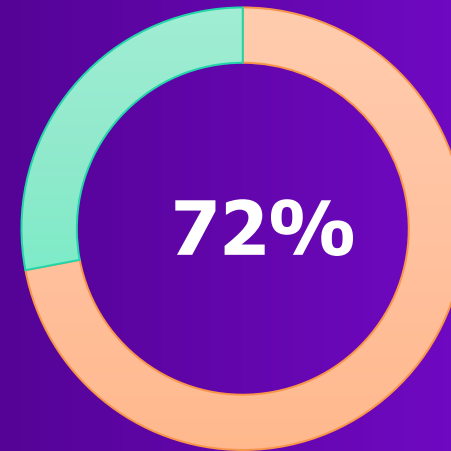
*~1000 Behavioral Health
Respondents*

1 Organizational Growth Strategies

Growth in 2026 Tied to Service Line/Level of Care Expansion Vs. Acquisition



Enhancing or diversifying
service lines

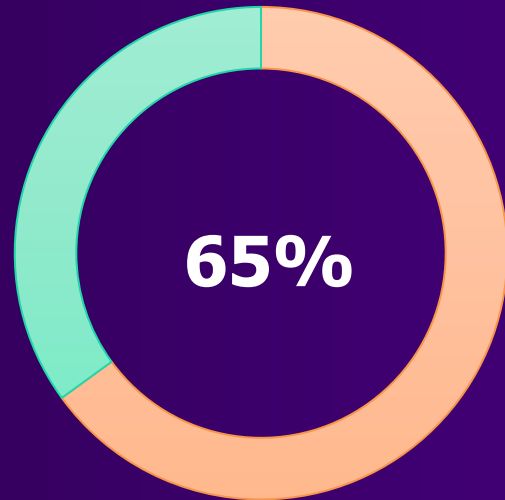


Lack exit strategy– signaling energy is
going into operations, not transactions

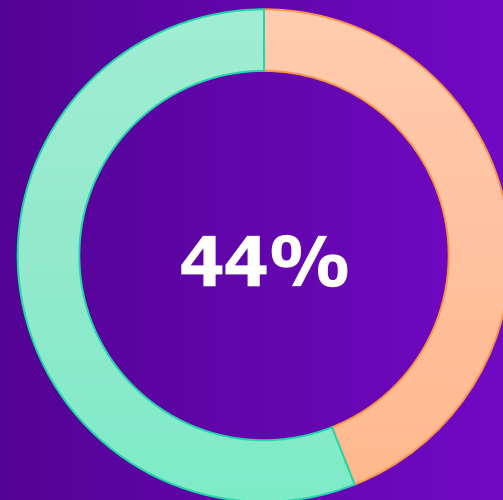
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What are leaders & clinicians excited about?

AI is a Clinical + Organizational Force Multiplier



Report more time for direct patient care



Say AI-generated notes are more accurate!

3 What are leaders worried about?

Regulatory Landscape

Funding tied to regulations now ranks as the



business threat

Payer Relationships & Value-Based Care

Fewer leaders feel confident in payer negotiations:

22% ↓ 16%



Data Capabilities Supporting Payer Engagement

Infrastructure readiness is improving:

Outcome tracking:
81% ↑ 87%



3


What are leaders worried about? Learn more!

- Workforce Pressures
- Policy Anxiety
- Compliance Pressure
- Payer Negotiations


WEBINAR
Wednesday, January 28, 2026
8:30 AM PT | 11:30 AM ET

**Under Pressure:
A 2026 Leadership
Guide to Workforce
Stability, AI, and
Regulatory Change**


REGISTER NOW




Carina Edwards
CEO
Kipu



Justyna Evlogiadis
Chief Marketing Officer
Kipu



Travis Moon
Content Strategist
Kipu



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AI Strategies for Clinical
Productivity, Staff
Retention &
Operational Efficiency



AI Case Study: Banyan Treatment Centers



Key Challenges Driving AI Need



Documentation Headaches

Clinicians frustrated and spending long hours entering data, writing detailed notes, and trying to ensure compliance is met



Staff Burnout

Staff burnout had an impact on retention, clinicians reported feeling burned out by constant tug of war between paperwork and presence with patients.



Revenue Gaps

Incomplete documentation often led to downstream financial consequences



42% Time Savings 100% Note Compliance

- Biopsychosocial Assessments: 45–90 min → 15–30 mi
- New Client Notes: 20–30 min → 10–12 min
- Existing Client Notes: 15–18 min → 5–8 min
- AMA/AD Notes: 30 min → 2–3 min
- Note compliance increased from 93% to 100% for AI-supported users, eliminating the need for corrections or follow-up from supervisor and hidden costs.



Cultural Benefits

- Clinicians more energized, reclaim time and focus for care
- Documentation quality and consistency improved
- Leadership embracing concerns as learning
- AI framed as support, not replacement – even with skepticism around privacy, patient connection, and job security

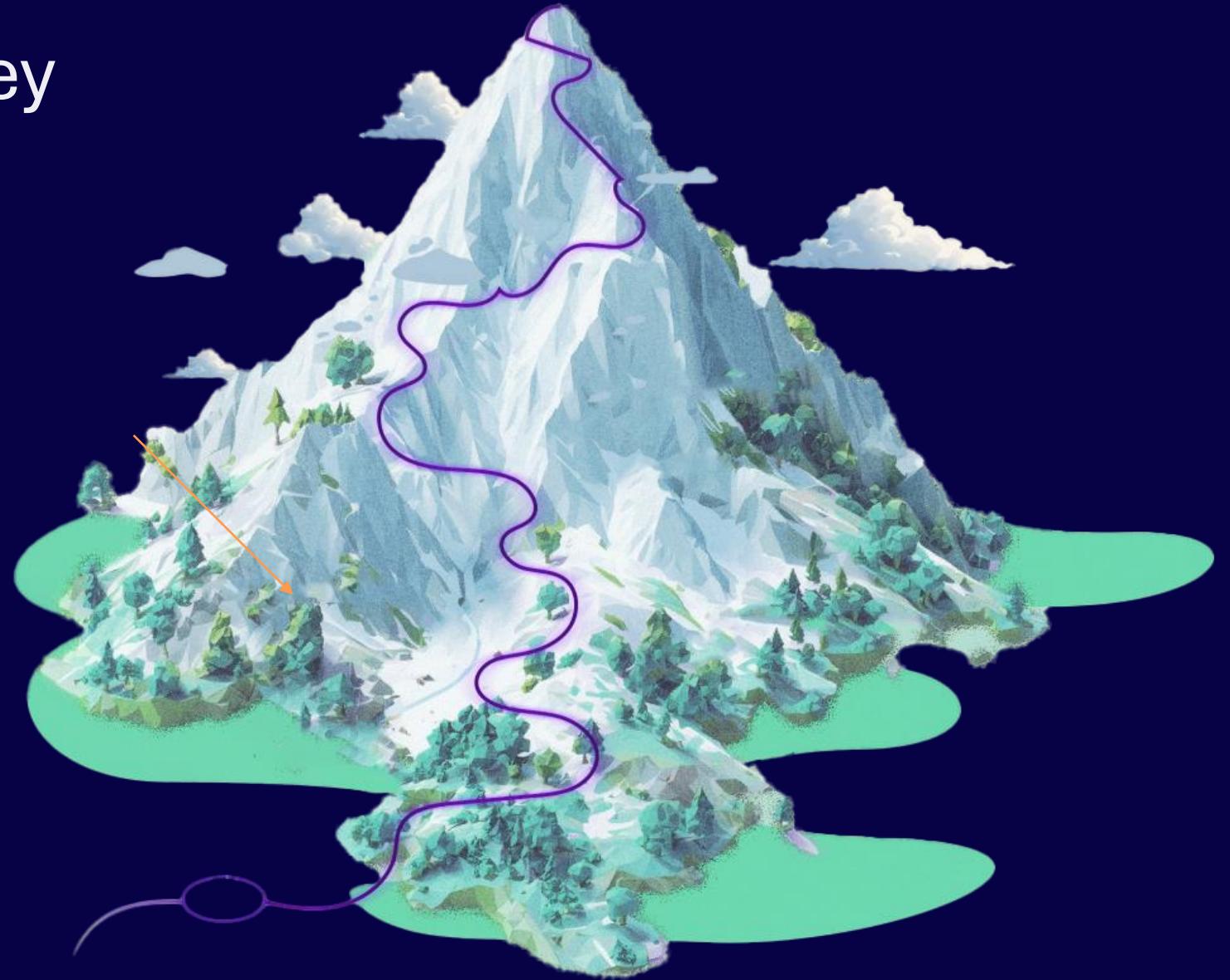
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AI Maturity Model Framework

Charting Your AI Journey

- 1 Basecamp
- 2 Trailblazing
- 3 The Climb
- 4 The Final Approach
- 5 The Peak



Stage 1

Basecamp



Organizations at Basecamp are shifting to digital systems and establishing the infrastructure for future AI capabilities.

Though AI use is minimal, this stage is critical for building data quality, digital literacy, and early cultural readiness

Stage 2

Trailblazing



Organizations begin testing AI through small-scale pilots like predictive models or automation tools.

Modest success sparks momentum.

Stage 3

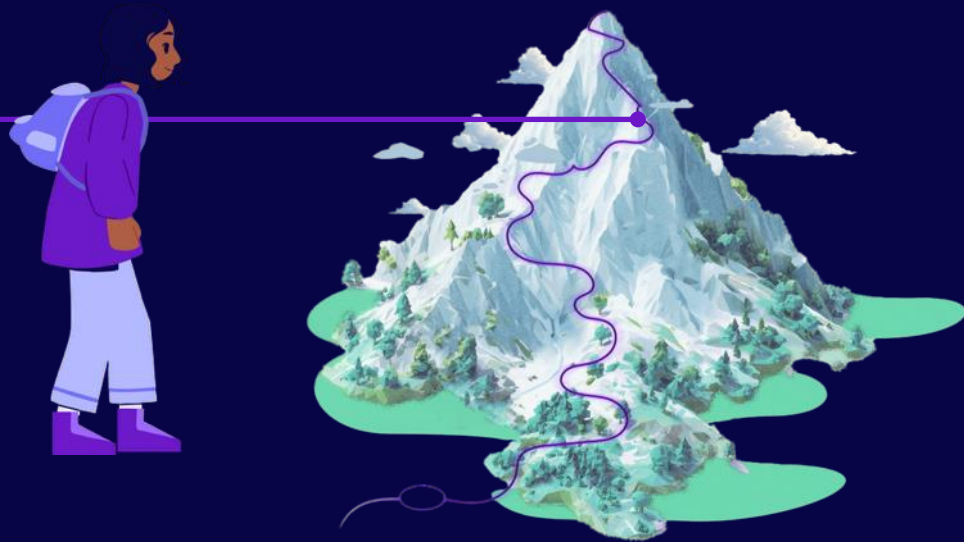
The Climb



AI becomes embedded in everyday workflows, supporting documentation, decision-making, and care coordination.

Stage 4

The Final Approach



AI scales across departments, informing strategy and operations.

A strong data culture drives agility and innovation.

Stage 5

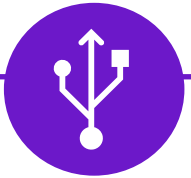
The Peak



AI drives innovation and strategy at every level.

Your organization leads in outcomes, efficiency, and influence.

Key Challenges Facilities Face Today



**Tech-First
Mistakes**



**Integration
Challenges**



**Under
Emphasizing
Compliance**



**Lacking a
Champion**

Key Learnings from Customers Adopting AI

- **Integration matters**—adoption relies on embedding AI into existing workflows.
- **Engage a Champion** – success starts with a respected leader guiding the rollout and defining success, then expanding.
- **Time savings fuel retention**—freeing clinicians from administrative work also reduces burnout and allows for improved patient interactions.
- **Compliance is non-negotiable**—compliance and quality go hand-in-hand to improve clinical experience and meet regulatory demands.

Top AI Use Cases for Success

Kipu Intelligence



Enhances clinical care

Gives clinicians real-time decision support so they can focus on patients instead of paperwork.



Standardizes documentation and compliance

Enforces regulatory, payer, and organizational standards directly inside everyday workflows.



Drives measurable productivity gains

Reduces documentation effort by 42%+ across key clinical workflows.



Purpose-built for behavioral health

Designed specifically for substance use, mental health, and eating disorder care — not adapted from general healthcare AI.



Trustworthy, responsible, and secure by design

Built on ethical AI principles and secure, scalable AWS infrastructure.

Use Case: Clinical Note

Better documentation, less burden

Value Delivered:

- Reduces documentation time by 50%
- Improves note consistency and clinical quality
- Preserves clinician control and patient consent
- Fits seamlessly into existing Kipu forms and workflows
- Built with privacy-first, compliant handling of clinical recordings

The screenshot displays the Kipu Intelligence interface. At the top, there is a purple header with a search bar labeled 'Search Patient', notification and message icons, and the text 'Kipu Recovery Center'. Below the header, the main content area is titled 'Kipu Intelligence' and 'Transcript Details - 09/26/2024, 8:44 AM'. A section titled 'Provide feedback on this transcript' includes thumbs up and thumbs down icons. The client name 'Client: Rhea Willams' is shown with a 'DELETE' button. A dropdown menu is open, showing 'Transcript' selected. Below the dropdown, a list of note types is visible: 'Transcript' (checked), 'SOAP', 'DAP', 'PROGRESS', and 'CURRENT FORM' (highlighted in blue). The transcript text is partially visible, showing a conversation between Person 0 and Person 1.

Use Case: Group Notes

Standards, consistency, and compliance at scale

Value Delivered:

- Reduces documentation time by 42%+
- Simplifies group documentation with individualized, accurate notes
- Automatically enhances notes with group session context
- Maintains alignment with each patient's treatment plan ("Golden Thread")
- Creates robust, payer-ready documentation to support UR and audits

Kipu

The screenshot displays the Kipu EMR interface for a "Demo Behavioral Health Center". The top navigation bar includes "Dashboard", "Patients", "Occupancy", "Schedules", "Rounds", "Contacts", "Labs", "Reports", "Templates", "Queues", and "Help". The main content area shows two patient entries:

- Anthony Itachi** (DD2022-43): The note includes a "GOLDEN THREAD" section with AI-generated text: "(1) (Clinical) Anger / Learn the assertive skills that are necessary to reduce angry feelings and solve problems in a less aggressive and more constructive manner. / Learn and implement relapse prevention strategies. / Discuss with the client the distinction between a lapse and relapse, associating a lapse with an initial and reversible angry outburst and relapse with the choice to return routinely to his/her old pattern of anger." Below this is an "Individual Assessment/Intervention" section with a detailed clinical note.
- Sarah Merrick** (DBH2025-2): The note includes a "GOLDEN THREAD" section with AI-generated text: "(1) (Clinical) Substance Use Disorders / Utilize behavioral and cognitive coping skills to help maintain sobriety. / Implement relapse prevention strategies for managing possible future situations with high risk for relapse." Below this is an "Individual Assessment/Intervention" section.

On the right side, the "Kipu Intelligence Group Note Assistant" panel shows a "Generation complete. Make edits to regenerate." message and a preview of the generated text: "Well groomed. On time. Oriented 4x. Engaged. Shared 2 trigger...". A "Suggested Individual Assessment/Intervention" section also shows a preview of the generated text.

Use Case: Chart Summaries

Context without clicking

Value Delivered:

- Reduces time spent reviewing patient records by up to 50%
- Accelerates utilization review by surfacing payer-ready clinical context
- Surfaces key clinical insights in seconds
- Supports real-time level of care decisions using ASAM, LOCUS and CALOCUS criteria.
- Improves communication and care coordination across multi-disciplinary teams.

The screenshot displays the 'Kipu Intelligence' interface. At the top, it shows 'Snapshot Details - 08/28/2025, 12:29 PM'. Below this, there is a feedback section with 'Provide feedback on this snapshot', a thumbs-up icon with '1', a thumbs-down icon with '0', and a 'TELL US MORE' link. The main content area is titled 'Client: Rhea Willams' and includes a disclaimer: 'Snapshots represent a summary of information available at the date and time shown. Please review the patient's chart for more recent updates.' There are two summary sections: 'Demographics Summary' and 'Medications Summary', both with copy icons. The 'Demographics Summary' states: 'The Patient is a 54-year-old female from South Carolina, United States. The Patient has the following diagnosis codes: F11.20 (Opioid use disorder, severe) and F12.20 (Cannabis use disorder, severe).' Below this is a feedback section with thumbs-up and thumbs-down icons, both with '0'. The 'Medications Summary' states: 'The Patient's current active medications include:' followed by a list of medications and their purposes.

Kipu Intelligence
Snapshot Details - 08/28/2025, 12:29 PM

Provide feedback on this snapshot 👍 1 👎 0 [TELL US MORE](#)

Client: Rhea Willams

Snapshots represent a summary of information available at the date and time shown. Please review the patient's chart for more recent updates.

Demographics Summary

The Patient is a 54-year-old female from South Carolina, United States. The Patient has the following diagnosis codes: F11.20 (Opioid use disorder, severe) and F12.20 (Cannabis use disorder, severe).

👍 0 👎 0

Medications Summary

The Patient's current active medications include:

- Vitamin B1 (50 mg) - helps with energy production and nerve function
- Folic Acid (1 mg) - helps with red blood cell formation and cell growth
- Multivitamin - provides essential vitamins and minerals
- Clonidine (0.1 mg) - helps with opioid and alcohol withdrawal symptoms
- Hydroxyzine Pamoate (50 mg) - helps with anxiety and insomnia
- Methocarbamol (750 mg) - helps with muscle spasms and pain
- Ondansetron (4 mg) - helps with nausea and vomiting
- Bupropion HCL (150 mg) - helps with depression and smoking cessation
- Gabapentin (600 mg) - helps with neuropathic pain and alcohol withdrawal

Use Case: Chart Chat

Real questions, real answers

Value Delivered:

- Provides chart-grounded answers with transparent source citations
- Reduces time spent searching across charts and documents
- Enables faster, more confident clinical and operational decisions
- Fits seamlessly into existing Kipu workflows without leaving the EMR

The screenshot displays the Kipu Intelligence Chart Assistant interface. At the top, there is a search bar labeled "Search Patient" and several notification icons. The main content area shows a question in a blue box: "Are all of this patient's goals measurable? If not can you provide suggestions for improvement?". Below the question, the system provides an "Analysis of Current Goals and Objectives - Measurability Assessment". This analysis identifies three current goals that are "NOT MEASURABLE" and lists specific issues for each. Goal 1 is "End addiction as a means of escaping anxiety and practice constructive coping behaviors," with issues including no specific timeframe, vagueness of "End addiction," and lack of frequency or specific behaviors for coping. Goal 2 is "Acquire the necessary 12-step skills to maintain long-term sobriety from all mood-altering substances, and live a life free of substance abuse," with issues including undefined skills, no timeframe for sobriety, and no measurable skill acquisition criteria. Goal 3 is "Utilize behavioral and cognitive coping skills to help maintain sobriety," with the issue of lacking measurable parameters.

Search Patient

Kipu Intelligence
Chart Assistant

Are all of this patient's goals measurable? If not can you provide suggestions for improvement?

Analysis of Current Goals and Objectives - Measurability Assessment

Current Goals - NOT MEASURABLE

Sarah's current goals lack specific, measurable criteria:

Goal 1: "End addiction as a means of escaping anxiety and practice constructive coping behaviors."

Issues:

- No specific timeframe
- "End addiction" is vague - no measurable sobriety criteria
- "Practice constructive coping behaviors" lacks frequency or specific behaviors
- No quantifiable success metrics

Goal 2: "Acquire the necessary 12-step skills to maintain long-term sobriety from all mood-altering substances, and live a life free of substance abuse."

Issues:

- "Necessary 12-step skills" not defined or quantified
- "Long-term sobriety" has no specific timeframe
- No measurable skill acquisition criteria
- "Live a life free of substance abuse" lacks measurable parameters

Goal 3: "Utilize behavioral and cognitive coping skills to help maintain sobriety."

Use Case: Note Auditing

Compliance + Revenue Protection

Value Delivered:

- Reduces denial risk with documentation aligned to payer, accreditation, and state standards
- Identifies documentation gaps early—before audits occur
- Streamlines supervision by reducing manual review and intervention
- Improves training and accountability with clear, objective feedback on note quality

The screenshot displays the Kipu Intelligence Note Audit interface. At the top, there is a search bar labeled 'Search Patient' and several notification icons. The main content area features a large circular gauge showing a score of 88. Below the gauge is a blue button labeled 'EVALUATE'. A progress bar at the bottom indicates 'To Do' (1) and 'Completed' (21). The list of audit questions includes:

- Does the Document include cultural preferences or sensitivities?
 - Documented in Do you identify with any cultural or sub cultural group?
 - Documented in Were you raised in any specific religion?
 - Documented in Do you currently practice any specific religion?
- Does the Document include client's response(s) to previous treatment and individual care?
 - Documented in What is your perception of previous treatment?
 - Documented in Other Recovery History:
- Does the Document include a history of abuse, neglect, trauma, exploitation, and trafficking?
 - Documented in Have you ever been sexually abused?

A man with a beard, glasses, and tattoos is sitting at a desk with a laptop, smiling warmly. He is wearing a dark green button-down shirt. The background is a blurred office environment with computer monitors and a plant.

Questions?