



THE LOOKBOOK

Collabrios Health is redefining the future of aging by unifying workflows for people, processes, and technology into one connected and intelligent platform.

Seamless
Care
Delivery

Exceptional
Patient
Outcomes

Scalable
Operational
Performance

Intelligent
Analytics

We deliver the only end-to-end workflow platform built specifically for aging organizations. Our advanced technology empowers teams to efficiently manage daily operations, coordinate meaningful care, and make smarter decisions with confidence.

Over **Three** Decades Strong

Longevity is our strength.

Our stability, continuity, and deep institutional knowledge give partners lasting confidence. We understand this space at a regulatory level, have supported organizations like yours for decades, and we're not going anywhere.





THE LOOKBOOK

TABLE OF CONTENTS

Unifying The Care Journey Overview of who we serve	3
Collabrios Intelligence AI analytics driving your organization	4-5
State Units on Aging Interoperable. modernization without disruption	6-7
Adult Day Services Manage daily operations efficiently	8-9
Ombudsman Protecting and enhancing community care	10
Ambient Scribe Built for the realities of aging care	11



Unifying the Care Journey

CBO **Community-Based** **Organization**

Our stability, continuity, and deep institutional knowledge give partners lasting confidence. We understand this space at a regulatory level, have supported organizations like yours for decades, and we're not going anywhere.

AAA **Areas Agencies** **on Aging**

Bringing unmatched experience to solving the most complex challenges in home and community-based care.

ADS **Adult Day Center** **Management**

Bringing together attendance, authorizations, billing, and private-pay collections in one connected workflow—eliminating the need for spreadsheets and manual re-entry.

SUAs **State Units on** **Aging**

Delivering connected systems that strengthen accountability, empower oversight, and unify the aging network by linking state systems with community-based aging networks.

Ombudsman

Intentionally designed around resident rights, confidentiality, and federal LTCOP standards, it streamlines complaint management, investigations, facility visits, and reporting.





Collabrios Intelligence

Governance-grade analytics on your aging-services data.

Live in production | Deployed at a State Unit on Aging

Gov Aging Workbooks turns your agency's operational data into executive dashboards, federal reporting, self-service reports, and board-ready AI briefings, all from your governed data environment with no separate analytics warehouse to build or maintain.

Why Agencies Choose It

8 Executive workbooks

Access, enrollment, outcomes, ROI, fiscal, equity, a North Star, and AI Insights.

1 Platform: EMulti-tenant, 1 codebase

Platform-routed with no hardcoded names; add tenants without forking.

SPR Federal-report fidelity

Numbers reconcile to the authoritative OAAPS State Program Report.

0 copies: No data movement

Analytics run where your data already lives — nothing is copied out.

The Eight Workbook Dashboards

#	Workbook	What it Shows
1	Executive North Star	Program-wide KPIs, top services & regions, statewide coverage map
2	Access & Referral	I&R call-contact volume, completion, and call-outcome mix
3	Enrollment & Activation	Enrollment volume, conversion, authorization, by-program
4	Outcomes & Impact	ASCAP ADL functional outcomes and longitudinal trajectory
5	Service ROI & Value	Cost-per-client, outcome-per-dollar, dose-response, by-geography
6	Payer & Provider	Fiscal by payer and provider, contract burn, by-service spend
7	Geographic Equity	Regional distribution and demographic equity (HIPAA-suppressed)
8	AI Insights	Collabrios Intelligence narrative briefs from live data

Ombudsman

Long-Term Care
Ombudsman — Case
Management
& Complaints.

OAAPS Reporting

Federal SPR reconciliation
plus a live data-validation
& flags view.

Report Builder

Self-service catalog →
builder → output, with
saveable configurations.

AI Insights

Structured, board-ready
analyst briefs with
confidence & risk flags.





How it Works

Architecture & Trust

Governed-Data By Design

Reads from your governed data

A three-layer pipeline (raw → conformed → analytics-ready) with no separate analytics database and no external transformation runtime.

Runs next to your data

The application is hosted inside your governed cloud environment, so query traffic never leaves it.

Federal fiscal-year aware

One toggle switches every view between Federal (Oct–Sep) and State (Jul–Jun) basis.

Graceful data handling

Missing source tables degrade to “No data” instead of errors; authorized quantities and pro-rated spend are modeled transparently.

Privacy & Security

Small-cell suppression

Demographic cells with fewer than 10 people are nulled server-side.

Non-causal language

Outcomes are framed as “associated with,” never as proof of cause.

Layered sign-in

Secure platform sign-in, then application MFA — password with TOTP authenticator, email one-time code, or WebAuthn passkey; SAML single sign-on for internal reviewers.

Tenant isolation

Every query is scoped to the signed-in user’s tenant; demo accounts are clamped to demo data.

100%

OAAPS SPR Reconciliation

Home-Delivered Meals and expenditures reconcile to the authoritative OAAPS State Program Report used by federal reviewers.

At a Glance

Source system	Your operational data
Delivery model	In-place analytics · no data movement
Hosting	Secure managed cloud · single-tenant isolation
Access	Any modern web browser — no install
AI Engine	Collabrios Intelligence (structured briefs)
Accessibility	WCAG 2.2 AA remediated
Deployment	Production · State Unit on Aging

Part of the Collabrios Intelligence Platform

One platform, two products

LGovernment Aging Workbooks is one of two products on the Collabrios Intelligence platform. Users see only the products their tenant is entitled to, selected from a single portal — the same shell, sign-in, and design system across both.

Sibling Product — Ani

Aging Network Intelligence serves the Aging, Ombudsman, OAAPS, and Caregiver domains for network agencies. Shared platform, product-specific data models — so investment in the platform compounds across both.



State Units on Aging

Collabrios Health is the trusted technology partner for State Units on Aging, delivering connected systems that strengthen accountability, empower oversight, and unify the aging network by linking state systems with community-based aging networks.



Proven at Scale

Trusted by 14 states and over 50% of the nation's AAAs, demonstrating broad adoption and reliability.

Designed with Intention

Not a retrofitted CRM, we support intake, referrals, service delivery, and reporting.

Configurable without Custom Code

Rapidly adapts to new programs and mandates, reducing costs and burden.

Secure Network- Scale Governance

Role-based access across agencies with seamless interoperability across state, payer, and communities

Interoperable **Modernization** without Disruption

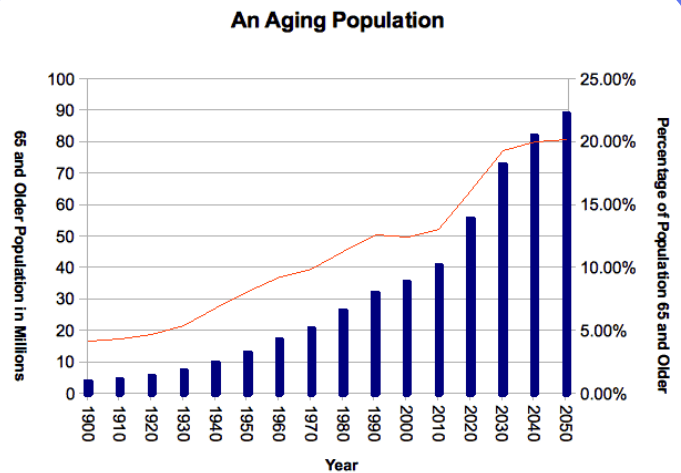




State Units on Aging

Bridging **Critical** Gaps

- Complex coordination
- Administrative burden
- Disconnected systems
- Evolving needs
- Regulatory complexity



Born from the merger of industry pioneers RTZ Systems, PeerPlace Networks, and Tabula Rasa, we have unmatched experience.



- **20+** years serving the HCBS market across 22 states
- **20,000+** users
- **1,500+** CBOs
- **3,000,000+** clients served

For Care Recipients

For Organizations





Adult Day Services

Collabrios Adult Day Services (ADS) is designed specifically for Adult Day centers to manage daily operations efficiently and accurately.

The platform brings together attendance, authorizations, billing, and private-pay collections in one connected workflow—eliminating the need for spreadsheets and manual re-entry.



20 Years of CADCare

Proven expertise, modernized for today's HCBS and Medicaid environments

Intentionally Designed

Created specifically for Adult Day Services, not adapted from general EHR or billing tools.

End-to-End Workflow

Connects attendance, authorizations, billing, and collections in one system.

Accuracy & Compliance

Automated claim validation, payer rule packs, and EDI integration.

Interoperable **Modernization** without Disruption





Adult Day Services



Revenue & Cash Tracking

Transforms daily ADS operations into submission-ready claims and imports remittance files. With dependable private pay invoicing and AR tracking across all payers, the platform gives clear proof that your program delivers results.



Network Effect for Community Care

ADS connects families, providers, payers, and state reporting, turning local activity into credible, system-level outcomes.



Scale Without Rip & Replace

Start in Adult Day and extend to transportation, meals, and in-home support on the same rail as you grow.

Collabrios is the common rail of community care.

With a modern HCBS backbone, and the capital to scale and innovate, we elevate Adult Day centers today while preparing the entire ecosystem for tomorrow.





Ombudsman

Collabrios Ombudsman empowers State and Local Long-Term Care Ombudsman Programs to protect residents and strengthen advocacy with a unified, compliant, and transparent system of record.



Intentionally designed around resident rights, confidentiality, and federal LTCOP standards, it streamlines complaint management, investigations, facility visits, and reporting.

Real-Time
Data Access

Comprehensive
Reporting Tools

Increased
Transparency

Faster Case
Resolution

Improved
Accountability

Enhanced
Resident
Advocacy

Collabrios empowers Ombudsman programs with the tools to **protect vulnerable individuals and enhance community care**. Our goal is to strengthen advocacy and improve outcomes in long-term care through transparency and accountability.



Ambient Scribe

**REDUCE DOCUMENTATION BURDEN.
RECLAIM PROVIDER TIME.**

Built for the Realities of Aging Care

Documentation is Slowing Care Delivery.

Providers are forced to divide attention between participants and documentation—impacting both care quality and efficiency.

-  Slower visit flow
-  Increased administrative burden
-  Reduced face-to-face engagement
-  More after-hour charting
-  Provider fatigue and burnout risk

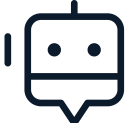
Meet Ambient Scribe.

Transform conversations into draft notes for provider review and approval—reducing documentation burden without disrupting workflows.

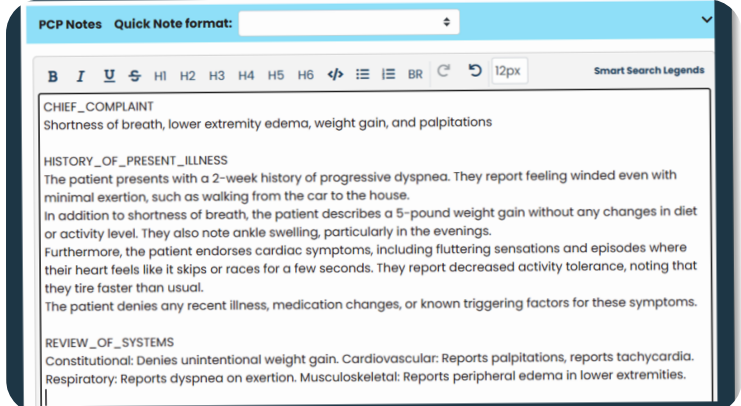
-  Faster visit flow
-  Lower administrative burden
-  More focused patient engagement
-  Less after-hours charting
-  Improved provider experience

HOW IT WORKS

 Record directly in the platform or upload audio files.

 Structured notes are generated from the conversation.

 Edit, approve, save, and sign within your workflow.



PCP Notes Quick Note format: [dropdown]

CHIEF_COMPLAINT
Shortness of breath, lower extremity edema, weight gain, and palpitations

HISTORY_OF_PRESENT_ILLNESS
The patient presents with a 2-week history of progressive dyspnea. They report feeling winded even with minimal exertion, such as walking from the car to the house. In addition to shortness of breath, the patient describes a 5-pound weight gain without any changes in diet or activity level. They also note ankle swelling, particularly in the evenings. Furthermore, the patient endorses cardiac symptoms, including fluttering sensations and episodes where their heart feels like it skips or races for a few seconds. They report decreased activity tolerance, noting that they tire faster than usual. The patient denies any recent illness, medication changes, or known triggering factors for these symptoms.

REVIEW_OF_SYSTEMS
Constitutional: Denies unintentional weight gain. Cardiovascular: Reports palpitations, reports tachycardia. Respiratory: Reports dyspnea on exertion. Musculoskeletal: Reports peripheral edema in lower extremities.





THANK YOU



LET'S BUILD THE FUTURE OF AGING TOGETHER