

# Elion

## Buyer Review Transcript

Product Reviewed	Wheel
Reviewer Tech Stack	DoseSpot
Other Products Considered	SteadyMD
Date	August 17, 2023
Expert Role	Product Manager
Specialty	Clinical Staffing
Payment Model	Cash Pay

**We're chatting about Wheel and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?**

I'm the head of product at an at-home lab testing company, and our main focus is women's health. After taking our at-home lab test, individuals can access telemedicine through our platform and receive a comprehensive treatment program.

**How long have you been using Wheel?**

Since May 2022.

**What caused you to look into using Wheel?**

We had a strong hypothesis that people were interested in telemedicine services through our company. Initially, we directed people to their own doctors and the traditional healthcare system, but it seemed they were unable to find what they needed or their doctors were not adequately addressing the core problem. As a result, we decided to take matters into our own hands and provide the services ourselves. However, building everything in-house seemed like an arduous task just to test the hypothesis. That's when we discovered Wheel, which allowed us to quickly establish a telemedicine offering. While seven months may not be considered fast by some, it is relatively quick compared to building it entirely in-house. Additionally, Wheel also provides the option to set up a professional corporation (PC) with them.

**What problems is Wheel solving for you?**

At its core, Wheel enables us to seamlessly connect our patients to providers whom we can also help train. Setting up the necessary legal structures, hiring, sourcing, and training in-house would have been a complex process. Wheel simplifies it by eliminating many of these steps.

Additionally, Wheel allows us to go through the lab approval process with them. A clinician must approve the lab order before we can offer telehealth services using them. Wheel provides APIs that expedite the lab approval process, which we would otherwise have had to develop in-house.

Moreover, Wheel offers a wealth of guidelines that facilitate the implementation process. We had to consider various aspects, such as linking each consult to the appropriate ICD-10 codes and displaying the required treatment information to the patient. While we could have figured it out ourselves, having pre-existing documentation with clear requirements was immensely helpful.

**Who do you feel is the ideal user for Wheel? Does it tend to be an early-stage company without a chief clinical officer?**

Even if you have a chief clinical officer, they are typically not permitted to practice medicine. This arrangement is primarily for teams that do not have their own primary care physicians or medical practice associated with their company. If they want to offer telehealth services quickly, it saves them the trouble of hiring and training a large number of providers. It also offers the flexibility of utilizing providers on a part-time basis, rather than full time. This approach is valuable even for mature companies. A company I previously worked for developed all their systems in-house, and it turned out to be very expensive. We even had multiple product teams solely dedicated to maintaining the electronic medical records (EMR) system we had built. If you want a more cost-effective and streamlined solution, this is the way to go.

**What requirements did you use to evaluate Wheel and some of the other competitors in this category?**

Because we developed everything in-house at my previous company, I understood the different components required in the system. I became familiar with the flexibility of Wheel's APIs and realized the vast potential they offered to accomplish our goals. Additionally, I was impressed by the quality of their clinicians and their openness to receiving training. They also had a well-established set of Service Level Agreements (SLAs) in place, which they held themselves accountable to. This was crucial for us, as it ensured the standards we expected were met.

Another important aspect we focused on was the enthusiasm of the providers toward the specific project we were working on. We didn't want them to view it as just another contract. Instead, we sought providers who were genuinely interested in the problem space and who were excited about our mission, as they are acting as an extension of our company.

**During the procurement process, Wheel met a lot of your qualifications. Since you've been using them, how would you characterize relative strengths and weaknesses with the product and the service?**

I believe the team's strengths lie in their willingness to tackle any problem alongside you. When we found unexpected issues, they were always ready to address them and find solutions. Individuals at the company possess a deep understanding of the company's operations due to their extensive tenure and experience working with various other organizations, so they can help accelerate our progress and tackle problems more efficiently. Additionally, their sales team stood out as the best. They directly addressed our questions and demonstrated expertise, and their pace of innovation surpassed that of their competitors, such as SteadyMD, whom we also considered.

As far as weaknesses, their implementation times can be quite long due to the large number of clients they have. We often have to wait in a queue just to make minor changes. Additionally, there are times when the providers are not as careful as they should be. While there is a QA process in place, mistakes still happen. Unfortunately, there isn't a great proactive way to control this, other than educating the clinicians, which isn't always 100% effective. Another weakness is their EMR, which lacks flexibility. It's difficult to personalize it to our specific needs. For instance, if we wanted to flag certain patient responses or make sure a particular thing is checked, there is no way to do that. This lack of customizability limits its usefulness for our particular use case.

**If you requested that they use a specific EHR, could they accommodate you?**

That's something we asked about. Since clinicians are handling cases for multiple companies, all the cases are stored in the Wheel EHR.

**Is there anything else that helped convince you to go with Wheel?**

Another thing that sets Wheel apart is that the providers have to choose to be part of the project. Wheel will propose various accounts to the providers, and the providers on our account are the ones who were genuinely enthusiastic about working with us. Additionally, Wheel constantly seeks feedback from patients. We've shared a lot of patient quotes with the providers to help them grasp the true impact of this treatment.

**In terms of the competition, it sounds like you were considering SteadyMD. Were there other products on the shortlist for you?**

We were considering using a headless EMR on our own, hiring a full-time provider, and setting up our own PC. Although it would have provided more flexibility in patient care, it didn't make sense for our current size and the volume of tests we were selling. The do-it-yourself option was

labor-intensive and time-consuming, and it might not have ended up being much cheaper, since we would still have to pay for the headless EMR.

As far as SteadyMD, their sales team was nowhere near the team we interacted with from Wheel. They didn't answer many of our questions with the rigor we were looking for.

### **How would you compare SteadyMD to Wheel?**

We were primarily concerned with the quality of healthcare providers rather than the specific technology used by these companies. I can't say for certain how good SteadyMD's technology is, but since the technology mainly served as a means to facilitate consultations, our main focus was on what came after. Specifically, we wanted to know what kind of information was being presented to patients and how quickly it was being delivered.

In terms of provider quality, we heard that the providers at Wheel were happier. They seemed to be more motivated in their work, and the SLAs were clearer. One impressive aspect was that it only took four hours to open an initial consultation. I don't recall the exact numbers for SteadyMD, but they didn't meet the same standards. It felt like, even during the sales process, they didn't emphasize the providers as much. Instead, they focused more on the overall service they offer and their previous customers.

### **So there was a chance that SteadyMD might have a more up-to-date EMR, but you felt that the operational and services components of Wheel were better?**

Absolutely, 100%. When we were having calls with Wheel, we were talking directly to their medical director. We were interacting with the individuals who were actively carrying out the implementation process. However, with SteadyMD, we were only in contact with a sales account manager. We received much faster responses from the individuals actually involved in the work at Wheel compared to SteadyMD.

### **Can you discuss the pricing model?**

There's a cost for each action, consultation, or lab review, and we pay either that, or a monthly minimum that we have set in place in our contract. Additionally, there is an implementation cost, but I believe there are opportunities to negotiate that.

### **Can you walk through the sales process and Wheel's willingness to understand your concerns?**

The sales process was really impressive. They really stood out in that aspect. We explained our use case and what was important to us, including feedback from our patients, which ultimately led us to consider offering telehealth services. We created a 15-page document with questions, and they took the time to answer each and every one in great detail. It was really reassuring to

see that they had thought about everything. They also actively listened to our discussions and used that information to create an implementation diagram tailored to our specific use case. It felt like they were doing a lot of customized work for our team, rather than just providing generic materials.

Moreover, they were willing to do a lot of customization for us. We had a major concern about providers not contacting patients after a lab test. We thought perhaps the providers didn't have enough information to discuss a test they had never encountered before. Wheel was open to customizing the normal clinical process, as long as it still met their standard of care.

**You've been working with Wheel for some time, but you mentioned that you're still getting things set up. Can you discuss the onboarding process and timelines?**

Just to clarify, we were successfully onboarded for our main telehealth offering, but now we're launching new types of tests and care that need additional integration. Overall, the onboarding process went well. The main challenge was making sure that we and Wheel aligned on our clinical protocols. The most time-consuming part of the setup was agreeing on a set of questions to ask patients. Wheel tends to collect more information for clinical decision-making, whereas we want to balance that with keeping it concise for patients. Reaching a consensus on what the intake process should look like took over a month.

In terms of the actual tech onboarding and integration, it was quite smooth. Wheel's API documentation is excellent, and their implementation engineers are highly skilled. Our implementation team, in particular, did an outstanding job. Overall, the onboarding and setup process went smoothly, with the majority of the work focused on ironing out the clinical details.

**How would you characterize the way you're using Wheel's offerings?**

Their main service involves reviewing a specific set of patient information, making a diagnosis, and providing a list of prescriptions. This can be sent to either your pharmacy or the patient's local pharmacy. They call this service an asynchronous consultation review. We haven't started using their synchronous consultations yet, so I can't comment on that. Another service we utilize is lab orders, which was relatively new when we first started using it. They have made significant improvements to this service and its functionality. They also offer automatic lab reviews, where, if certain criteria are met, the sample can be automatically reviewed and sent to the lab for processing.

Those are the two features we utilize, and they both work quite well. They also use DoseSpot for e-prescribing, which works well too. It seems like everyone uses DoseSpot or Surescripts. However, we have noticed some bugs with these services.

**On the provider side, are they reliable? Do they do what they need to do? Do they ever miss SLAs?**

Overall, they've been pretty reliable. We've had to set up a lot of alerts to ensure patient safety. Missing even one prescription is a big problem, so we've made sure to implement measures to prevent any "never" events from occurring. Occasionally, there have been incidents where the wrong prescription was provided or SLAs were missed. There was also a bug where consults weren't getting closed, but it only happened sporadically. I would say 98% of the time everything goes smoothly, but there have been about 2% of cases where consults weren't reviewed on time or prescriptions were incorrect. We have our own alerting system to catch these issues.

**Have you talked to them about setting up that alerting in a standardized way?**

The alerting process is not available in their EMR, so we handle it internally. This makes it much easier for us to initiate the necessary actions and involve their support team, which is always on call and very responsive. They even have a secondary RN team that can resolve most issues. If the RN team is unable to resolve a problem, they will escalate it to the prescribing provider.

**On that note, how do you feel about the account management and support teams?**

I'm really happy with our current situation. It took us a while to find the right people to work with, but our account management team is top-notch now. The person who handled our implementation is now our account manager, and they're fantastic. Plus, the support team is incredibly responsive – you'll always get a same-day response from them.

**Did you build on top of the platform or integrate with any of their APIs?**

Yes, a lot of them.

**How would you characterize the developer experience, the documentation, the whole process?**

I didn't personally handle any of the building, but I believe everything has been pretty seamless so far. Whenever we had questions or needed assistance with specific use cases, we were able to get quick answers because we always had an implementation engineer on our implementation calls.

**Do you have any advice for other organizations that want to build with the Wheel API?**

I think it's pretty straightforward. One thing to consider is, if you want to customize the EMR, you could explore using the existing APIs. For example, to flag allergies, we simply show it as the

first field in the EMR through our API, rather than using a visual treatment. We have some flexibility in the information we exchange.

Additionally, we have to meet minimum security requirements, and I believe they are HIPAA compliant, so a lot of the security aspects are taken care of.

**Did you integrate Wheel with other products in your tech stack?**

The information we receive from Wheel feeds into every aspect of our system. We have a constant exchange of information, which is then integrated into Django. Our entire front end is constructed based on the data we obtain from Wheel. We select what information to present to the user.

**Do they have any integrations with other third-party products, like a marketplace or ecosystem style integration, with other products that you're using?**

The only one we use is DoseSpot. It's likely that for their synchronous consultations they have scheduling products, perhaps Doximity for calling, among other things.

**Looking back, do you think choosing Wheel was the right decision?**

Yes, definitely. When I first joined this company, I was anxious about setting up a telehealth offering from scratch, since that's the primary focus of many companies. However, working with Wheel made it possible to achieve that in less than a year. And given the quality of the providers, we're seeing really good patient experiences too. I was particularly worried about not having in-house providers and how that would reflect on our company, but it has actually turned out quite well. I firmly believe we made the right choice.

**Are there any areas for growth that you would like to see Wheel move into?**

I think it would be great if we could expand our team by adding more specialists, especially OB/GYNs, since we focus on women's health. However, developing contracts with multiple OB/GYNs might be challenging. Another important aspect is the customization of their EMR. It would be really helpful if we could customize it to highlight what's important, like marking which labs require follow-up and which ones don't. As the business grows and expands to different types of practices, there will likely be a need for increased customization to meet specific needs.

**Do you have any advice for buyers selecting this type of product right now?**

At first, I believed that building the project internally was the better option. This was probably influenced by my previous experience working in a company where everything was built

in-house. I also had reservations about purchasing such a critical component from an external source.

I now realize that partnering with Wheel has turned out to be the best-case scenario. They have been incredibly flexible and collaborative, allowing us to have control over various aspects of the experience. This collaboration has allowed us to benefit from their expertise while still maintaining our unique touch throughout the entire experience.