

Elion

Buyer Review Transcript

Product Reviewed	Wellsky Personal Care
Integrations Reviewed	CareAcademy
Other Products Mentioned	AlayaCare, MatrixCare
Date	July 7, 2023
Expert Role	CEO
Specialty	Homecare Agency
Payment Model	Per Patient Per Month

So today, we're talking about Wellsky's Personal Care product, and how it was used at your former company. Before we jump into that, could you give a brief overview of that organization and your role there?

I was the founder and CEO of a homecare agency in South Florida. We provided non-skilled care to seniors and disabled adults. So we sent in caregivers to wherever the senior lived, whether that was the home or a facility. Our caregivers tended to all of a patient's nonmedical daily needs, including personal care like toileting, bathing, and dressing, as well as daily care needs like meal prep, transportation, and light housekeeping.

When did you purchase Wellsky and how long were you using it?

I used it throughout my time owning that company, so purchased it before we opened doors and had it all the way through the day I sold the company.

Which types of users interacted with the product, and what were their workflows?

We used the Wellsky Personal Care product, which was called Clarecare at the time. It was really the operating backbone, how we ran the agency. So from a business development perspective, we could manage referral sources, and our sales folks interacted with the platform in terms of referral sources, visits, follow-ups, and so forth.

We could also track the CRM for our client pipeline as well, so potential clients would get added to a referral source, and we could track that potential client until they became an actual client. It allowed us to follow up with potential clients, track engagements, and then when the potential client became an actual client or patient, it then became the record of care.

Everything that that patient needed from a care perspective was there, in terms of their daily needs, their preferences, their requirements, their schedule, what they wanted to eat, did they have a walker or wheelchair, did they have a car and so forth. So anything that went into their care plan and care management was in there. We also managed the client's schedule, so that was a huge use of the tool for us. We would be able to put in their daily and weekly schedules on a recurring basis. We would also use it to set up shifts for our caregivers.

So it was our client CRM, but it was also our employee CRM from a caregiver side. We had a funnel of potential caregivers, who all applied through a link in Wellsky, and whose records were added into the Wellsky platform if we ended up hiring them. They would convert into caregivers on our roster, and we could use them to help fill open shifts. With a caregiver profile, there are a lot of documents to store, there are skills and competencies, like what type of weight they can handle, do they have dementia experience, so all of the different elements we needed to help match them on the right shift for the right patient.

From an operator perspective, we had a dashboard where we could assign tasks to each other in the office, like "Hey, you need to call this patient on this day to follow up", or when caregivers have expiring certifications, we would get a notification on our dashboard. There's a reporting element as well, so we could track a lot of KPIs and we had off-the-shelf reports that I could run to understand how the business was performing on a day-to-day basis.

What features worked well for you, and were there any features that didn't seem to work?

It was simple to navigate their UI. You have your client section, your caregiver section, and there are a couple of other features, but the whole thing was pretty intuitive. The main thing we were using it for was scheduling, especially in terms of being able to set up recurring shifts, being able to assign caregivers to clients.

On features that didn't work well, the search functionality seemed to be hit or miss. As you can imagine, we'd have certain patients or caregivers that we'd have with us for a while, so there would be a lot of notes in their profile, and those logs would grow over time. That made it a little cumbersome to find what we were looking for, for example, when a caregiver had a particular issue, you had to do some digging.

Also, the matching capabilities, i.e., finding the right caregivers for the right patients: they did have a Carefinder element, but a lot of the data wasn't structured in the UI, so we would have to put it in the notes. Their matching feature wouldn't work as well as we needed. Having better tools to structure data, or at least to allow us to customize structured data, would have been nice.

Were there any features that you ended up not using or supplementing because they didn't perform well or they just didn't quite match your workflows?

Yeah, so Carefinder, which was meant to find the best caregivers for a patient, but that we found didn't work very well. So, we ended up doing a lot of that ourselves, kind of offline. That was disappointing. While there was a lot of robust reporting, some of it wasn't as user-friendly. Luckily, I was the main user, but if other folks needed to use it, it wasn't super intuitive with respect to how to run different reports. I wanted to build some custom reporting, and they started adding in some features to enable custom reporting, but again, it was unintuitive and a little clunky. Beyond that, some of the structured data elements needed to be more customizable. As COVID hit, the ability to track vaccines systematically, track who requires a vaccinated caregiver, and some of these other COVID-related things, would have been helpful to have.

That makes sense. Did you build on top of the product or extend the platform?

No. They had some partnerships and integrations. For instance, we used CareAcademy, which is a great online platform for caregiver education and resources. So we would have our caregivers take certain classes that were required by the state, but then they also had the option to take classes that may benefit them in their day-to-day activities. We linked the two services, which let us track and assign courses in a seamless way. Our payroll was integrated. Actually, let me just say that it wasn't a full integration, it spit out a CSV file that can then easily integrate into Paychex, but wasn't like, "Click a button and it automatically exports to Paychex". That would have been nice because there was some cleanup required before I could actually upload it somewhere else. So again, we didn't build anything on top, but they had different integrations for some third-party applications.

It sounds like this part-CRM, part-EHR for you, but because of the nature of unskilled workers, you didn't necessarily need more advanced clinical notes or more advanced charting or any of the other things that many EHRs provide. I'm curious if you partnered with any data providers or imported data from other clinical data sources, or if it was just really standalone?

Yeah, so they had some home health capabilities, but we weren't a home health business – clinical and reimbursable and so forth – so I can't speak to those features as much. It's possible that they had some of the more robust EHR and clinical capabilities which we didn't utilize. I know they had built in EVV, which is critical in a lot of sites, especially for home health. We did use a telephony system for timekeeping with our caregivers. But in terms of clinical integrations, no, unfortunately, and it would have been nice in a couple of areas. For instance, medication schedules are something that we were constantly updating. Granted, we were in the home all day every day, so we had access to that information, but it wasn't an integration with the patient's PCP or their pharmacy to help make that seamless. It would have been a godsend, instead of having to manually do that, and it would help with compliance. I think it would have been good for everybody across the board. So because there wasn't a way to import that data in a structured way, we would put it in ourselves and if there were any documents or PDFs, we would save them in the patient's profile to their physical therapy regimen, or save their discharge paperwork after they left the hospital.

That makes sense. And you had the ability to build the care plan for a particular patient within Wellsky and have that be easily visible and available for your clinicians.

Yeah. 100%. And so like, when we've started a new patient, their profile is blank, and then you add in as much as you need. Some of our patients had simpler care plans, you know, go Monday through Friday, all they need help with is transportation and cooking, and that's pretty easy to write out. On the other hand, some clients had full-blown dementia, and they needed help with literally everything, so we'd have details on their meal plan, medical conditions, their interests, triggers, and as much as we could gather from them and their families. So, we were constantly updating that care plan over time as well. Obviously, we wanted to get as much information as possible upfront, but as we got to know our patients over time, we would constantly update that and what we found worked well or not.

In terms of the procurement decision itself, how did you find the sales process overall?

So, I had bought into a franchise, and Wellsky was strongly recommended. It was, by far, the largest homecare platform out there at the time. I looked at a few others just to compare functionality, but they all seemed pretty comparable. So, I went ahead and spoke with them and it was a pretty seamless and easy process given that they work with so many homecare providers. Onboarding is pretty quick and the training is pretty straightforward. And like I said, the product is pretty intuitive, so it's a matter of playing with it for a week or two before you get used to it.

Did you consider other products to fit your needs? Or was it just like, "Hey, I'm joining the franchise, this is the recommended product, let's go with that"?

I looked at a couple of the other competitors out there, AlayaCare and MatrixCare, I believe, off the top of my head. But again, nothing really looked radically different in terms of quality, features, or capabilities, so I decided to go with the recommended vendor.

That makes sense. Do you recall how the different products or different vendors might have compared on price or pricing structure?

Yeah, I can't tell you which one but there were a couple others that were at a much higher price point. I think for the most part, it was PMPM-type pricing. I think one of them did have more of a subscription, based on the number of clients. But given Wellsky's size and scope, they were super competitive on pricing.

Do you feel like you made the correct assessment in going with Wellsky?

I think the platform did everything we needed to on a day-to-day basis. Of course, no platform has 100% of the features that you'd ever want. My biggest gripe with it is that it would often go down. There was a stretch of six to nine months where Wellsky went down way more than it

should have. And it was crippling because our whole business was run through the platform, and we literally couldn't do anything without it. There were times where it was down from 9 AM to 1 PM, and that's really significant because our caregivers couldn't clock in and out of shifts, so we didn't even know if our caregivers were there on time, so we were constantly calling and texting. It was pretty chaotic. Those system outages were pretty bad, and I was kind of disappointed with that.

Once you had made the purchase decision, what was the onboarding and implementation process like?

Once I signed the purchasing agreement, they set up my user account, and we went from there. One thing I noticed is that there were a lot of admin settings that needed to be set up. It would have been nice to have somebody walk through the key settings and their implications for the business, instead of having to think through the implications myself. So somebody who could say, "Hey, like, you should do this, or this is what it means if you do that" would have been really helpful.

How did you feel about customer support and account management on the whole? Were they responsive and helpful?

Yeah, they were. Typically, we would email them with a customer support issue and, depending on the urgency, they would gauge how quickly they would respond. If it wasn't something mission critical, you'd get a response within one business day, and there was a 1-800 number for anything that needed to be addressed immediately. Their customer support team was actually good and generally knowledgeable, so they could usually solve the issue.

What I liked the most about them is, sometimes there was something they didn't have yet, featurewise, and there were a couple of instances where we would ask them about it. Then, maybe six months later, they would reach out to me and say, "Hey, remember this thing you flagged six months ago, it's now there." So I thought that was actually pretty impressive, I'd never seen that before.

What do you like most about the product?

I think the UI and ease-of-use were very clean and straightforward. Dashboard, a few tabs, and they kind of get you to where you need to go. The scheduling element, how easy it was to schedule, and especially recurring events were also really great. For new employees, the ramp-up time was pretty low.

What did you dislike most about the product?

I think in terms of the basic stuff that we just talked through – the CRM, EHR, scheduling – it did great. Some of the tier two things, not so great. For instance, integrations with medical records or medications should be pretty straightforward, but that wasn't there. The reporting, especially

customizable reporting, should have been a bit more intuitive and easy to use, so that we wouldn't have to build spreadsheets outside of the platform. The Carefinding and Care Matcher element, being able to store unstructured data in a better way, those are the things that I think they could do a better job with.

Do you have any advice for folks out there making a decision in this space?

Yeah, definitely get demos from a few different products that are out there. Ask if you can download the caregiver app. I really like to touch and feel the product, and my sense is a lot of the features and capabilities will be pretty standard, so a lot of it comes down to UI, and that can be a personal preference.