

Elion

Buyer Review Transcript

Product Reviewed	Healthie
Integrations Reviewed	Tellescope, Zoom, Office Ally
Other Products Mentioned	Canvas, Epic, Practice Mate, Athenahealth
Date	August 10, 2023
Expert Role	Co-founder, CEO
Specialty	Dementia-focused Healthcare Provider
Payment Model	Fee-for-Service, Case Rates

Today we're talking about Healthie and how it's used at your company. Could you give us a brief overview of the company and your role there?

I'm the co-founder and CEO of a platform for brain health and dementia care. We work with health systems and payers to manage dementia care for their populations, from screening through diagnosis, treatment, and care management.

When did you purchase Healthie and how long have you been using the product?

We started using it in the middle of 2022, so it's been over a year now.

How is it used within your organization?

We use it mainly as our EMR and also our practice management solution. It starts from scheduling – and I think this is one of its strong points – to making sure the right patient sees the right doctor with the right licensure in the right state. For the actual visit, we use it as an EMR. We mostly don't use the video conference function, although sometimes we will use the built-in Zoom function. We also use it for ordering prescriptions, but not labs yet because I think that's still being built out. We have also used it for billing but we've actually just moved away from using it for that.

What works well in Healthie and what are some areas for improvement?

The strong points are that it's built for a virtual health offering. For example, you can embed items like your price list, your product list, and your booking tool into the website very easily. Another strong point is the scheduling function. I think it's very hard to find a tool that works

across different time zones and allows you to give people from different states the option to only book with providers that are licensed in that state. This is the type of solution that I think is otherwise very hard to find in the market.

The actual EMR functionality, I think, is on the simpler side. It's not as complex as Epic. This can be an advantage in many cases because it's just simple to use. I think providers can get onboarded onto Healthie within perhaps 15 minutes, and then it's very intuitive to use. On the flip side, it's harder to automate certain things – it does have smart phrases, but you can't auto-populate templates easily, for example. I know it's possible in theory, but it's not as easy as maybe Epic.

I think the billing functionality works quite decently. There were some hiccups with the CMS 1500 submissions wherein certain fields would get changed during submission. That's why we recently changed our billing software. But otherwise, the platform is useful in providing a general overview of billing, how much you filled in, etc. And finally, ordering is something that they are actively working on. It is still fairly manual.

Their API functionality is built out really well. We've only recently started making use of that but I think it's well-documented. It's ideal for the scenario we are in where you want to start with a complete out-of-the-box product that works on day one but that you can then build more and more functionality on top of, using that API layer. We want to gradually move functionality out of the original platform but use Healthie as a database and infrastructure product.

I'm curious to hear what you're starting to use the APIs for. Where have you decided to augment or build on top of Healthie and move away from their native UI?

It's primarily for the physician experience, just because we want to automate more of the care flows. I think that feature set has worked as well for us. The other issue that we've always had is that because our patient population is on the senior end, and generally not very technology-savvy, the Healthie video chat doesn't work for us because the patient has to log into the app. So, we've never been able to use that. We've always had to use Zoom instead. And then you have the problem that it's hard to arrange that you can both see the patient and have Healthie on at the same time, in which case you have to work with split or two screens.

It sounds like you don't use Healthie's patient-facing application or web portal, given the nature of your population. Is that right?

We do both. For our patients who want to use the Healthie app, they're free to do so. But, I would say that 90% of our patient population prefers text messages, and phone calls.

So, with those other video solutions, you can just text them a link and they can click on it and essentially be in the video chat?

Zoom is embedded in Healthie so it works that way. But the patient obviously has to have and be able to use Zoom.

What features do you not use on Healthie, either because they are not applicable to your model or because they don't work the way you would want them to?

The last part I haven't yet talked about is task management, where we've just moved away from Healthie. Healthie is now starting to build out their smart tasks, which could be great, but their current version is very simple. You can't prioritize tasks. You can't rank them. There are just certain limits in terms of what you can do on their task management tool, compared to a more sophisticated one. That's also why we use Telescope with Healthie.

What drove you to layer Telescope on top of Healthie? How do you see the relationship between those two solutions?

I think they're really complementary. Telescope helps in automating our care management flows. It also handles task management for us because it's much more sophisticated for that. Finally, it's our communication tool with patients because Healthie supports messaging with patients only through email or through the Healthie app. With Telescope, you can use emails, text messages, phone calls, and it logs everything. You have access to the full history of your engagement with that patient, merged across communication channels. If another care coordinator comes on shift, they can see exactly what happened to that patient. And again, you can automate some of these functions as well.

Do the same people within your organization use both platforms, or are they different?

The same people use both.

Do you anticipate using both platforms together for the foreseeable future?

Yes, I do.

Going back to your experience with Healthie's billing, what drove you to move off the platform and what do you use now?

Billing worked relatively well on Healthie, actually. It links to Office Ally as the main clearinghouse for claims. However, our billing lead noticed that there were certain restrictions and some location codes got changed while submitting claims. We also just didn't have enough transparency or feedback about where the claims were at any given time. That's why we've moved to Practice Mate. We already had Office Ally as our clearinghouse and Practice Mate integrated with it. I don't think either is the best solution, but they work for us for now.

How was the migration off Healthie and onto Practice Mate?

I think it was really easy because Healthie already integrates with Office Ally.

I'd like to learn more about your procurement process. How did you choose to go with Healthie?

We went through two phases. First, we evaluated lots of solutions, especially more traditional EMRs. We weren't even aware of Healthie at the time (this was late 2021 – early 2022). At that time, we actually chose Canvas as our EMR because we really liked the idea of being able to build around it and sort of integrate it with our own patient experience app. But Canvas was quite cumbersome in terms of using it as an EMR. It's a bit clunky and hard to use. It's not always easy to use it for documentation (for example, you can't really format things). That's why we decided to move to Healthie. We looked at Capable, which I'm now glad we didn't go with. I think we also looked into using Telescope in combination with Canvas at the time.

Our options varied in terms of the different levels of coding needed – some required more, others were more out-of-the-box. What we liked about Healthie specifically was that it worked fully on day one, coming out of the box, without any development work. But even with that, we could add components later on. It also seemed to check many of the functionalities we wanted from an EMR – for example, building out the patient experience later on with journeys. It's a little focused on the nutrition side of things, but it's definitely got features like patient journaling that make it a great solution if you want to focus on prevention.

So, it had a better charting experience that worked out-of-the-box and the flexibility that you needed if you wanted to build on it later on.

Also, it's super easy to deploy. With Healthie, you open it and it works. There's very little setup needed. With Canvas, we went through months of setting things up, with processes and integrations. The experience with Healthie was much better.

Did you have to do a migration from Canvas to Healthie or was it too early for that?

I think we were early enough that it wasn't much of an issue.

How did they stack up from a pricing perspective?

The pricing structure is quite different. Canvas is billed on a per-patient basis. It's also integrated with another clearinghouse, so there was also an element of proportion of billing. Essentially, it has a low per-patient fee plus a proportion of the billed revenue, which is great. If you initially have low volume, it's really cheap. Healthie has a more standard per-physician or provider cost. We've got several part time providers and allied health professionals (speech language pathologists, therapists etc), so it ends up being not that low-cost for us.

Presumably, that'll scale better so it might be a little bit more expensive in the shorter term but won't scale as much as a percentage of revenue would. How did you find the sales process with Healthie?

It was a really good experience. They did a demo. We could set up a trial version, and that pretty much has all the functionality. We had lots of questions about different functions and they were all answered very promptly. So it was a really good experience.

What steps did your team take to evaluate each of the options you were considering?

We didn't have a head of operations at the time, so it was mostly me and another person who was dealing with development at the time and looked at our options from a more technical perspective. Our Chief Medical Officer was involved in the later stages. We had a long list of different functions that we wanted to make sure we had covered. So, we sat through all the demonstrations and checked boxes to see which solution covered as many of those features as possible.

You mentioned earlier that tools like Healthie sometimes fall short in comparison to traditional EMRs like Epic.

Epic was definitely the benchmark for our Chief Medical Officer who had mainly worked in hospitals before. But obviously, Epic is not a solution for a telehealth physician group. I was looking more at whether a given solution covered the different functions we needed, but the Chief Medical Officer was looking at the platform from a physician experience perspective. So, Epic was his benchmark.

What was it like to get clinicians used to how Healthie works, compared to the legacy tools they might have been more familiar with?

That's an easy process with Healthie because I think it's very intuitive and easy to use. We have had physicians who take paper notes and then copy them over into the EMR, even if live charting is better. But even so, adoption has generally been easy for physicians.

Was there any kind of documentation or resources that Healthie provided to help you onboard your clinicians to the platform?

They have a very comprehensive "Help" section on the internet. I think there are some videos as well. So give a 15-minute introduction to using the platform and its main functionalities. Physicians get onboarded in less than half an hour, so it's quite time-effective.

Do you use integrations between Healthie and other solutions?

The integration with Telescope works very well. There are also integrations we use with the clearinghouse and with the labs and e-prescribing solutions. The integration with communication

tools like Zoom is built in, so it doesn't really feel like integration. It's their own Zoom essentially, which is very convenient because that's already HIPAA-compliant, and it automatically generates different links for the patient and the provider. That also works pretty well.

For most of those integrations, were they out of the box, or was work required on your side to set them up?

They were all out of the box. We have now built integrations ourselves for our physician experience that we're building out separately. But that seems to work relatively well. They're quite responsive and make changes or accommodations and give advice pretty quickly.

More broadly, how would you characterize their support?

I think the support is great. They generally respond at least within a day. And unless you're asking for some complex feature, they're very prompt. If it's complex, you can put it on the roadmap and they allow different users to vote for the roadmap features they would prioritize, which is cool.

To wrap up, what do you like most about the product?

The scheduling functionality is really well built-out and very easy to use.

What do you dislike most about the product?

I think what needs to be built out most is probably task management. And maybe some small fixes on the billing side.

Looking back, do you feel like you made the correct assessment in terms of going with Healthie?

I think so. We've been happy with the decision. We might reevaluate in the future, but for now it's the right decision for us.

Do you anticipate continuing to use the product for the next 18 to 24 months?

I think so. There may be a point when we need to change to a more sophisticated system, like Athena, but that comes with its own drawbacks.

What would indicate you're at that point?

I think it's if Healthie doesn't work with our workflows anymore and there are too many functions that we need to do outside the platform. We currently use Telescope for care management and patient communication. We're also bringing the physician experience outside Healthie because that's more proprietary to us and we need to build more automation there. I guess if we had

more such feature groups or functions that we took outside. For example, we might need to move data management off the platform at some point. I think the most likely scenario is that we'll just build out more and more functionality ourselves rather than switch to another product.

What has your experience been with Healthie's reporting and analytical capabilities?

I think it's decent. All the standard fields are easy to put into reports. There are standard reports like the appointments report that you can pull very easily and generate at any time. You can also ask them to build up to three custom reports. It becomes a bit more challenging when you have custom fields in forms and try to do any reporting on those.

Do you have any advice for anyone going through the process of selecting an EHR?

Have a good list of features that you're looking for and think about where you want to be in two years time. Make sure to go through the most relevant demos.