

Heidi Health








by Director of Medical Excellence and Innovation, Physician

AI Ambient Scribes

Details

Review Date	10/28/2024
Purchase Date	N/A
Implementation Time	Immediate
Product Still in Use	Yes
Purchase Amount	Enterprise (per provider [including assistant], per month)
Intent to Renew	100%
Review Source	Vendor

Product Rating

Product Overall	 5.0
Use Case Fit	 5.0
Ease of Use	 4.5
API	 N/A
Integrations	 N/A
Support	 5.0
Value	 5.0

About the Reviewer

N/A

Reviewer Organization

N/A

Reviewer Tech Stack

Elation

Other Products Considered

N/A

Summary

- **Product Usage:** Heidi Health is used to record patient consultations along with creating summary emails detailing treatment plans; the software is employed during acute care visits, yearly physicals, mental health assessments, and phone consultations.
- **Strengths:** Heidi Health demonstrates a high degree of accuracy in capturing medical details, ability to differentiate between medical and casual conversation, personalizes to individual’s writing style, and includes features like AI bar for quick searches and document creation.
- **Weaknesses:** The software lacks direct integration with EHR systems, spells certain medications incorrectly, and occasionally experiences system glitches during the transcription process.
- **Overall Judgment:** Despite some minor weaknesses, the tool is considered a valuable asset to the practice, given its primary strength of significantly reducing the administrative burden, thereby effectively giving back time to the physicians.

Review

Today, we're chatting about Heidi and how it's used at your company. Before we begin, could you give a brief overview of the company and your role there?

I'm an internal medicine physician with over 20 years of experience and a member of a large direct primary care concierge practice, soon comprising 14 physicians across three locations in our city. My role also includes being the director of medical excellence and innovation. Our practice, which is evenly split between internal medicine and family practice doctors, operates entirely outside the insurance system. We don't process insurance claims. Instead, we offer a membership model where patients pay an annual fee for comprehensive care.

We provide a mix of in-person and remote services. Patients have unlimited office access without additional costs, yet we frequently engage in phone and video consultations, especially since many of our patients travel or live part of the year in other states. Our telehealth capabilities are well utilized, given our flexibility to manage patient care without requiring office visits for billing purposes. This alignment of objectives with our patients allows us to prioritize their convenience and needs, conducting consultations over phone calls when appropriate.

What was the business need that drove you to look for a product like Heidi?

We wanted to address the high administrative burden of writing detailed patient notes, which contributes significantly to physician burnout. As physicians in a practice with a high volume of detailed documentation, extensive patient communication, and round-the-clock on-call responsibilities, the task of creating high-quality notes became overwhelming. Failing to maintain comprehensive records could compromise patient care continuity, so we wanted to improve the charting process and reduce the time spent on it.

As chief medical officer at a health technology startup, I had gained insights into AI and machine learning's potential to aid medical documentation. This sparked my interest in finding a solution that would alleviate the burden without compromising the quality of our documentation. I independently tested various scribe tools, eventually engaging my colleagues in the discussion after identifying promising options.

Another crucial consideration was enhancing patient interaction. Not having to focus on typing or writing notes allows for better engagement with patients, which is especially important in our practice model where patients expect a high level of active participation during consultations. This became a key factor in our decision-making process, as we value the longstanding relationships we have with our patients and their families.

What criteria did you use to evaluate the different tools?

Accuracy was key. Also being able to capture the essence of the patient visit, and the ability to employ templates for structured notes. We needed it to accurately insert specific data points, such as vital signs and lab results, into the correct sections of the templates. Another important feature was the ability to distinguish between medical and casual conversation, so only relevant clinical information was recorded. Additionally, the ability to differentiate between the provider's voice and the patient's comments was also valuable, particularly in terms of medical history relevance.

What were the other vendors you evaluated, and how did they stack up against Heidi?

I tried Freed and Nabla. Freed didn't allow for creation of templates, and it didn't have a function like the "Tell Heidi AI Anything" feature, which allows on-the-fly creation of to-do lists and emails. Nabla has integration with our EHR, Elation,

but its use within Elation is limited to certain note forms, making it less versatile than Heidi. Nabla's Note Assist can't be used for phone notes or common SOAP notes and is limited to two-column notes. Additionally, Nabla's assessment and plan sections lack narrative explanations for diagnoses, which is less helpful for historical documentation. Heidi allows for a more detailed and explanatory approach in note-taking, which aids in our medical decision-making process and provides a clearer picture for anyone reviewing the patient's history.

Do you know how they compared in pricing?

Before we made a decision, I tested the free versions of Freed, Nabla, and Heidi. I also tried the paid subscriptions on a month-to-month basis to compare the premium features. Freed was about \$69 per month, whereas Heidi was approximately \$89 per month. The price difference wasn't significant enough to be a concern for us.

How was the sales and onboarding process and their customer service?

Two weeks before our demo with Heidi, they experienced a surge in usage in the United States, causing server issues and glitches. Despite this, their customer support was incredibly responsive, especially through their chat function. They seemed eager to expand their user base in the US.

When we expressed our interest in Heidi, their sales team happened to be touring the United States and gave us a demo. Initially skeptical, my partners were quickly convinced of its value after using it for just a day. Given that we're a sizeable direct primary care practice, Heidi may have been particularly attentive to us, but it was my sense that they really do have great customer service. Heidi assigned us a customer service representative (CSR) who offered excellent support, including training sessions and assistance for our less tech-savvy doctors, helping them understand and utilize the software correctly.

There are challenges, however, such as learning to create and instruct AI to use templates effectively. Based on my previous experience, I could create some templates, but achieving the desired result wasn't always straightforward. Thankfully, Heidi's template builder feature allows uploading an example note to extrapolate instructions, which is useful, although it often requires further tweaking. Our CSR has been invaluable in this process, customizing templates to fit our needs and offering continuous support.

What are the specific use cases and workflows you use Heidi for in your practice?

I regularly use Heidi for several key functions in my practice. During annual physicals, which take about three hours, Heidi records the entire session as I conduct tests, examine the patient, and discuss treatment plans. It then inputs that information directly into a pre-set template, making sure that each piece of information is documented in the correct sections of the template.

Post visit, I generate summary emails with Heidi to quickly communicate our discussed treatment plan to patients. This tool proves especially beneficial not only for yearly physicals but also for acute care visits, like someone with strep throat, making sure they have written instructions conveniently emailed to them almost instantly.

Heidi is essential for all my acute care visits, including consultations for things like high blood pressure, diabetes management, or mental health follow-ups. The software offers varying levels of detail in note-taking, from basic to super detailed, which is incredibly useful depending on the condition addressed. For instance, during mental health assessments, capturing direct patient quotations can offer important context, and Heidi allows for that level of detailed documentation.

During consultations, I typically run Heidi as an open tab on my laptop in Chrome. Although there isn't a dedicated app for laptops, the browser-based system is accessible and straightforward to use. I start recording sessions with a simple button click and can save past sessions for specific amounts of time or set them to auto-delete as needed.

Heidi has also streamlined my phone consultations. I place my phone on speaker next to my laptop and record the conversation. Heidi efficiently creates a summary that I can then incorporate into the patient's EHR through copy and paste, since there isn't direct integration with Elation. I find this process helps ensure accuracy and adds a safety measure to my workflow.

For house calls, I use Heidi on my mobile browser currently, though they're working on developing a dedicated app. Finally, Heidi has significantly improved my on-call experience, enabling me to handle and document multiple calls efficiently. On Saturdays, in particular, when the call volume is high, Heidi helps make sure I capture and document all the important information.

What would you consider some of the strengths and weaknesses of Heidi?

Strengths include high accuracy in capturing medical details and the ability to differentiate between medical and non-medical terminology consistently. The AI bar is particularly beneficial, since it allows quick searches and creates various documents efficiently. Additionally, Heidi personalizes itself to the individual's writing style over time, learning from corrections and adapting to preferences, such as using patients' first names instead of formal titles.

A notable weakness is the absence of direct integration with EHR systems like Elation. This adds an extra step in the documentation process. Additionally, Heidi sometimes spells medications incorrectly. An example is Mounjaro, which is surprising given the popularity and significance of those types of drugs. There are also minor issues with default settings, such as date formats not aligning with the US format, and occasional glitches where the system gets hung up when stopping the transcription, which can be concerning, though notes are usually not lost entirely.

The overall value of Heidi is unmeasurable, because it's the closest you can get to buying time. Heidi is giving you back your time.

How is the overall reliability of the platform? Do those hang-ups occur frequently, and is there a workaround?

The reliability has improved since their initial period of rapid user growth, and the hang-ups are not as frequent as they once were. When issues occur, there are two effective workarounds. The first is to refresh the page by clicking on the address bar, highlighting it, and pressing enter. The second is using the transcription feature: if the system gets hung up after stopping a transcription, you can resume it, speak a few words, then stop it again, and it usually resolves the issue.

Looking back, do you think you made the right decision to move forward with Heidi?

Definitely. I love the product, and their team is great to work with.

Can you think of any areas of potential growth for Heidi?

The main one that would be most beneficial is expanding its integration capabilities, particularly with EHR systems like Elation. They're exploring options such as a Chrome extension that could allow their solution to work within the EHR interface. Another key ability would be enabling Heidi to query medical records and incorporate patient history into the visit notes, enriching the context of the conversation summaries.

Can you talk about the collaboration feature for editing notes?

We haven't fully used that yet, but we're hoping to start using it soon. It would allow my assistant to contextualize a note and streamline tasks like filling out prior authorization documents for procedures or medications, saving my assistant time and improving efficiency. For example, if a patient requires an MRI and a standard prior authorization needs completing, the assistant could use the collaboration feature to quickly handle that process.

Do you have any general advice for others who might be evaluating tools like Heidi?

Start with the free version to get a feel for the software, but it's important to also test the paid version, as it usually offers significantly more functionality. A limited trial involving one or two doctors can give you a good idea of what it can offer to your practice. And use it in various circumstances to get an idea of its versatility and effectiveness in different clinical settings.