

Dock Health








by Product Manager

Care Team Coordination

Details

Review Date	11/17/2023
Purchase Date	Q2'23
Implementation Time	< 1 week
Product Still in Use	Yes
Purchase Amount	Per user with volume discounts (publicly available)
Intent to Renew	75%
Review Source	Elion

Product Rating

Product Overall		3.5
Use Case Fit		4.0
Ease of Use		3.5
API		N/A
Integrations		4.5
Support		4.0
Value		4.0

About the Reviewer

Purchasing Team Implementation Team
Product Oversight

Reviewer Organization

Primary Care Clinic

Reviewer Tech Stack

athenahealth Monday CRM

Other Products Considered

Awell

Summary

- **Product Usage:** Dock Health is used to manage workflows and tasks in a healthcare setting, enabling proactive patient care.
- **Strengths:** The platform's strong workflow engine, excellent task management capabilities and patient-centered approach are its core strengths.
- **Weaknesses:** A major weakness is the outdated user interface and user experience design, which makes the platform less engaging.
- **Overall Judgment:** Despite some difficulties with adoption among providers and the need for a more modern interface, Dock Health appears to be a cost-effective task management tool for healthcare.

Review

So today, we're chatting about Dock Health and how it's used at your company. Before we get started, could you give a brief overview of your company and your role there?

I'm the Head of Product for a concierge primary care practice that offers all-inclusive primary care and some specialty care services. Our members pay an annual fee that covers everything within our primary care umbrella. We have our own on-site labs, imaging, and pharmacy. We offer services for both adult and pediatric patients, including cardiology and neurology consultations, all of which are done in-house. We also provide in-home services. Our membership base consists primarily of couples and families.

What prompted you to look for a solution like Dock Health?

Our clinic offers a wide range of services, including primary care, neurology, cardiology, performance and movement, gynecology, geriatrics, and pediatrics. With such diverse services, managing workflows and cross-department visibility into these workflows is a continuous challenge.

A common question is why the EHR doesn't solve this problem. To the extent that you can click into individual patient charts and review information, the EHR can solve this problem, but EHRs in general don't handle the concept of tasks well, especially proactive tasks. This applies not only to Athenahealth, our current EHR, but also to other EHR systems I've worked with.

Most EHRs are designed with the assumption that patients come to you- and you respond (reactively) accordingly. However, modern digital health companies want to be proactive and to keep patients on track towards achieving their health goals - we don't want to just passively wait for patients to reach out to us. Dock Health filled that gap by enabling us to manage forward-looking tasks and outreach.

Did you look at any other vendors, and what were your requirements?

Evaluating this product and its competitors was challenging, as there weren't (and still aren't) many options in this space. We didn't really feel able to set many requirements because we were just picking from what was available in the market.

Our main requirement was finding a solution that would sign a business associate agreement (BAA), and Dock Health was willing to do that for all their plan tiers, which makes it extremely cost-effective compared to other task management tools like Monday or Asana. Typically, task management tools, if they offer a BAA at all, will do so only on their enterprise tiers, which is prohibitively expensive for smaller companies. Dock Health will allow you to use their platform with a BAA in place with a very low number of seats, which is extremely valuable.

Other requirements included the ability to integrate the system with our EHR, the ability to create, assign, and update tasks, and the flexibility to define workflows with rules and triggers. While the latter was not an absolute necessity, it is definitely a valuable feature to evaluate when considering task management platforms.

Did you consider more traditional task management vendors?

I've been through this process a few times now, so I'm familiar with standard platforms like Monday, Asana, and Smartsheet. Those were my backup options if I couldn't find something else. In the healthcare space, the available

options were Dock Health and Awell. I had extensive discussions with the Awell team, and while they have a great product and team, Awell functions more as an orchestration layer on top of the EHR that adds task management functionality to the EHR.

Awell runs in the background and isn't meant to be directly interacted with by users, which makes it more suitable for teams who want to set up workflows for providers without exposing them to a separate tool. If you want to keep all of your providers in the EHR, Awell is definitely worth considering, but because it's an orchestration layer that sits on top of the EHR, your workflows have to be very well defined. We needed the ability to add tasks ad hoc via a graphical user interface (GUI), and Awell couldn't fulfill that requirement; their product is just not really designed for that.

In contrast, Dock Health is more like a fancy spreadsheet, which made it a better fit for our providers. In terms of technology, Awell may be more robust, but Dock Health better suited the needs of our providers.

How did Awell and Dock Health compare in terms of pricing?

I don't believe Awell uses a per-seat model; instead, I think they use a per-patient model. Pricing-wise, Awell had a significant upfront cost, making it harder for us to invest without extensively testing the product beforehand. We did some napkin math when considering Awell and it was around ¼ to 1/3 the cost per year of our EHR. In contrast, we were able to get started with Dock Health at \$50/month for a few seats to test the product, which made it a much more appealing option to start with

What was the sales process with Dock Health like?

Very simple – when you sign up for their product, they walk you through an onboarding flow and offer the option to set up a Zoom call, which we did. They get you up and running quickly, and I don't believe it's actually necessary to talk to them directly. Having the ability to access the tool without a lengthy sales process is always a positive from my perspective.

What was the onboarding and setup process like?

The onboarding and setup process is relatively straightforward, especially if you have someone who is reasonably technically savvy leading the implementation. If that's the case, you can get up and running fairly quickly.

We've maintained a strong connection with the Dock Health team since we started. Once we signed up for their Enterprise tier, we were able to set up a Slack channel with them and they've been very responsive. Having the channel allows us to easily reach out to them with questions and they're always willing to schedule Zoom calls to address our questions.

How did you intend for Dock Health to fit into your organization? What were the intended use cases and workflows?

When we implemented Dock Health, the main goal was to define clear workflows and ensure that our teams used them so that we could keep track of their activities and ensure standardization and visibility across teams.

To provide some context, we have several pods consisting of physicians, nurse practitioners (NPs), physician assistants (PAs), and care coordinators. Each pod operates as an individual clinical unit. Over time, we noticed that these pods operated quite differently, with loosely defined workflows, which resulted in confusion among patients who happened to interact with multiple pods.

We incorporated Dock Health into our system to address this issue. In Dock Health, there are different tabs on the left-hand side of the user interface. One of these is a task list, which can be specific to either the user or the team in which they work. The team can also have workflows, which are essentially a series of tasks, as well as lists of patients associated with each team.

As part of the rollout, I defined workflows for various processes, including onboarding new patients, scheduling visits, conducting standard visits, and managing referrals. Each of these workflows consists of between eight and 25 steps, depending on its complexity. That was the intended use case for Dock Health—to streamline and standardize our clinical operations.

Has that implementation been successful?

We've successfully implemented Dock Health in some teams. These teams are using Dock Health as I previously described—managing workflows, maintaining patient lists, and effectively monitoring and completing tasks. For them, the system is working as intended.

Other teams, however, have had concerns about the amount of clicking Dock Health involves. They understand the importance of task completion but feel that confirming each task is too onerous. We've had ongoing discussions with the clinical teams about whether we really need this degree of tracking and oversight. There's a bit of an ideological divide. Some of us who are more focused on product and operations think that it's necessary, which is why we introduced Dock Health in the first place, so there's been a significant amount of conversation aimed at reconciling these different opinions.

One aspect that influences the perception of task tracking within Dock Health is the degree of specificity at which the workflows are defined. You have the freedom to determine the granularity of the workflows. For instance, if you're trying to contact a patient, the workflow could be as simple as one step—getting in touch with the patient. Alternatively, it could involve 20 steps, such as making an attempt, sending a text, trying again the next day, and so on. You have the flexibility to define how you'd like to track that workflow based on your needs.

However, increased granularity results in additional clicks for providers, which they find cumbersome. It's essential to find the right balance; simplifying the workflow could reduce the number of clicks but might compromise the desired level of detail and granularity. It's a delicate trade-off we're trying to manage. Ultimately, it probably depends on how metrics-driven your organization is.

What do you think the main challenge has been in having providers adopt Dock Health as their new task management tool?

I've come to realize that clinical teams typically don't think of their work in terms of tasks but rather in terms of patients. Previously, many of our providers used spreadsheets where each row represented a patient and contained all the relevant information and tasks related to that patient. A single cell would include all of the tasks needed for the patient. When the provider wanted to know the status of a particular patient, they would refer to that specific row or cell. Though the approach seemed efficient to them, it limited the granularity of workflow tracking, making it harder to monitor the progress of each individual task and prevent any potential lapses.

When I discussed this with the Product and Engineering teams, they agreed that overwriting a single cell and representing multiple tasks in that cell just didn't make sense, but the clinical team was reluctant to change because they found it easier to manage a single row per patient.

What initially seemed like a straightforward implementation of a task management tool actually raised much bigger ideological questions regarding how we operate and the extent to which we should track tasks. It turned out to be more complicated than anticipated, and it really depends on your stakeholders' willingness to adopt a tool like this and use it as intended.

Which of Dock Health's features do you use? What works well or poorly?

When used as intended, the workflows and tasks in Dock Health work exceptionally well. The platform offers a robust workflow engine that allows you to define intricate workflows, including time delays, branching logic, and triggering of other workflows. Its backend capabilities are very impressive, particularly with the convenience of a front-end UI editor for defining and implementing these workflows. It's straightforward and intuitive to define and build workflows and to assign tasks and teams within the system.

One aspect that doesn't work as well as desired in Dock Health is its handling of a panel of patients with a dense information view. The platform focuses primarily on tasks and workflows rather than providing a comprehensive view of all patient-related information in a condensed manner. This differs from the approach that some providers are accustomed to, where they prefer to view the complete information about a particular patient in a single row of a spreadsheet or a single page of a website.

I've had numerous conversations with providers where I've tried to convey that they don't need to review every row on their patient tracker because tasks will appear at the right time for them to address specific patient needs. Some providers struggle to adapt to this different way of working; they find it difficult to have faith in the fact that the system will deliver the right task to them at the right time, even though tools like Dock Health are designed to do exactly that.

Dock Health offers various task views including views of individual patients, but when it comes to viewing the entire patient panel in a dense, comprehensive view, Dock Health falls short. This limitation can be frustrating for providers who prefer a more holistic, condensed overview of their patient panel.

What are Dock Health's strengths and weaknesses?

In terms of strengths, Dock Health's workflow engine is impressive, and its task management capabilities for healthcare purposes are excellent. One unique aspect is that each task is linked to both a specific patient and an assigned individual responsible for the task. This aspect makes Dock Health well-suited for healthcare in a way that a more general task management platform like Monday or Asana wouldn't be—Dock Health addresses the specific needs and dynamics of patient-centered workflows, which sets it apart.

One major weakness is the user interface (UI), which feels like it's perhaps 5-10 years out of date. The UI and UX are both weak – if they were better, I think it would be much easier to get our providers on board with using this tool. Right now, it's just not responsive enough. A lot of the conventions feel very outdated. Our EHR's UI is even more outdated though, so I don't believe this is necessarily something that should prevent our providers from using Dock Health, but it certainly doesn't help.

How does the workflow creation and management function in Dock Health?

In Dock Health, there is a dedicated page where users can create workflows, which are called SmartFlows. When creating a workflow, you are presented with an infinite canvas where tasks are represented by boxes. These boxes can be connected with arrows to define relationships. For example, in a new patient onboarding workflow, Step 1 could be checking whether all the required forms are collected. You can add a dropdown with options like “yes” or “no.” If “yes” is selected, the workflow moves to the next step of creating the patient in the EHR. If “no” is selected, the workflow moves to reaching out to the patient. Due dates can be assigned to each task within the workflow.

Workflows are deployed within the context of specific patients. Each task can be assigned to either an individual or a team who can work on tasks from a shared list. The workflows can have multiple steps, and they can trigger other workflows on completion. For example, completing the new member workflow can automatically trigger the scheduling workflow for another team.

Is the Dock Health platform reliable and relatively bug-free?

I haven't experienced any outages or downtime with Dock Health, except for one incident that was due to an external service experiencing an outage. There are some issues with the system, but I'd probably call them UI quirks rather than major bugs—some things just don't work as expected. Occasionally, you may also need to refresh the platform to pull in updated data or resolve issues, which can be annoying for me and my providers.

If I were to compare Dock Health to a platform like Monday, Monday is definitely more bug-free and reliable. However, I feel a fairer comparison would be to Athena (our EHR), which has similar levels of bugs and UX quirks. It's a challenge when conducting evaluations of tools like these because while some of my providers may find Dock Health to be buggy, it's no more so than Athena, which my providers use every day.

Why do you consider Athena to be the more appropriate comparison for Dock Health?

If we're considering the concept of a clinical operational hub and using both tools together, it's fair to hold them to the same standard. The alternative to using a platform like Dock Health would be to manage everything within the EHR. In Athena, for example, patient cases can be used as tasks by assigning them to specific individuals to complete. For a while, we were using patient cases for task management, but this is not what they were designed for, and the UI is not user-friendly. Patient cases lack features like workflow management, due dates, and the ability to relate to each other effectively. Given that patient cases in Athena would be the next best option for our providers, it makes sense to compare that functionality to Dock Health's functionality, and Dock Health offers a more robust solution for workflow management. Ultimately, the comparison is about finding the best option for task management, and in our case, the EHR alone doesn't fulfill that need.

Have you used the Dock Health APIs to build any custom integrations?

Not yet. Although we pay for API access, we've decided not to invest in building on top of Dock Health right now because of some of the cultural challenges I've mentioned—right now, the bigger priority is to secure buy-in from our providers.

However, we do plan to integrate Dock Health with our EHR in the future. For example, we want to set up workflows that trigger follow-ups in Dock Health at set time intervals when a medication is prescribed in the EHR. We have built the prescription follow-up workflow; we just haven't built the trigger that links that workflow to an initial action in the EHR.

To what extent have you integrated Dock Health with Athena or other tools in your tech stack?

Dock Health offers some basic integrations that are quite useful. For instance, when searching for patients in Dock Health, it can directly search against Athena and pull basic demographic information from the EHR. This means we don't have to create patients in two separate places, which saves time.

Additionally, we can access a patient's Dock Health profile directly from their chart in Athena, which is also quite valuable. Athena has also been working on enhancing integrations by enabling the embedding of applications within the EHR. If that works well, it would allow us to have both the Athena patient chart and the Dock Health profile in a single view, which would be incredibly useful.

Do you know whether Dock Health integrates with other EHRs and what that integration looks like, or whether you need an API to integrate with others?

Dock Health does integrate with other EHRs. However, it's not as simple as just clicking a button and entering your password for integration. It requires some custom setup, which the Dock Health team can assist you with. They also offer professional services if you need further assistance.

What other integrations does Dock Health offer?

They actually offer a fair number of integration options with surveys, messaging, email, and telemedicine platforms. For example, you can send emails or initiate telemedicine calls with patients directly from the Dock Health platform.

What are your thoughts on Dock Health's account management and support?

I feel pretty good about it. Dock Health's team is very responsive. We have a weekly call set up, and we maintain a Slack group with them. They seem eager to collaborate with us because our cross-disciplinary use case aligns well with their product's capabilities, especially where workflow on one team triggers actions in another.

Their support team is very adept at offering workarounds for the occasional bugginess in their product. They offer alternative ways to achieve the desired results when certain features don't work as expected. While I appreciate their knowledge of these workarounds, I do think it would be better if the issues were resolved directly. Still, considering the nature of this sector, these kinds of issues aren't uncommon, and I don't hold it against them; I appreciate the support regardless.

Do you believe you made the right decision to proceed with Dock Health?

I believe we made the right choice given our options at the time; we didn't have the engineering resources to build something similar ourselves. With Dock Health, you can set up workflows and task management in a day, which is quite

significant. While it might be possible to use a general-purpose platform like Monday or Smartsheet, those platforms may not cater as effectively to a healthcare context, and obtaining a BAA requires an enterprise-tier subscription, which is a considerable financial commitment.

I do think we made the right decision; I just didn't fully anticipate the cultural shift required. Moving from an informal approach, where we might remind ourselves to follow up on a task, to a structured system with assigned tasks, due dates, and clear oversight required more of a shift in mindset than I anticipated. While it's the right direction, it's been an adjustment for our providers and clinical teams.

What are the growth areas that you'd highlight for Dock Health?

I'd recommend they focus on enhancing their UI/UX over the next six months instead of adding more features. They're constantly rolling out new integrations and functionalities, which can feel like bloat when a sharper focus on polishing their already excellent workflow engine would be a wiser investment in my opinion. Users want a seamless experience with their tasks and workflows. If Dock Health can make those look good and function well, it will likely satisfy many users.

Do you have any advice for buyers currently considering products like Dock Health?

My advice would be not to rush into building your own solution just because you think your business logic or context is too unique for a tool like Dock Health. You may end up actually needing a custom tool for your specific use case, but I recommend starting with something like Dock Health to build out the workflows needed to run your clinic or care pathways. Using Dock Health can clarify whether or not you need to invest in custom development, and you can do that very inexpensively and quickly with Dock Health. Test it out first, and then decide whether you need to build a bespoke solution.