

# Healthie

by Co-Founder

Electronic Health Record








Headless EHR

Patient Scheduling

## Details

Review Date	06/27/2023
Purchase Date	Q1'23
Implementation Time	2-3 weeks
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	N/A
Review Source	Elion

## Product Rating

Product Overall		4.0
Use Case Fit		4.0
Ease of Use		3.0
API		4.0
Integrations		3.0
Support		5.0
Value		4.0

## About the Reviewer

Purchasing Team

Implementation Team

Product Oversight

## Reviewer Organization

Virtual-First Provider

Chronic Care

Behavioral Health

## Reviewer Tech Stack

Candid Health

Typeform

## Other Products Considered

Canvas

SimplePractice

## Summary

- **Product Usage:** Healthie is used by providers for patient treatment and charting, by patient coordinators for scheduling and following up with patients, and by the tech team for developing a client-facing app.
- **Strengths:** Healthie enables seamless communication between providers and patients, facilitates group-based experiences, and is described as stable and reliable.
- **Weaknesses:** Healthie lacks CRM functionality and has shortcomings in client-facing functionality and form-building.
- **Overall Judgment:** Though there is room for improvement, particularly in client reporting, Healthie is deemed a solid solution that effectively unifies a variety of functions that the organization will continue to use.

## Review

**We're talking about Healthie and how it's being used at your company. Before we jump into that, could you give me just a brief overview of your company and your role there?**

Yeah, I'm the co-founder of a virtual care platform for chronic pain patients. We take a behavioral approach to treating patients with chronic pain, both in individual sessions as well as group sessions.

**When did you purchase Healthie and how long have you been using it in production?**

We purchased it in either January or February of this year and started using it in production within a few weeks.

**How do you use Healthie at your organization? So one way to go about this is what types of users interact with the product and what are their workflows?**

Pretty much everyone on our team. I'd say there are three different types of people that are using it. One, are our providers, of course. They're using it to see patients, chart for patients, review intake forms, et cetera. Pretty much their entire clinical workflow happens in Healthie. Second is patient coordinators, so people who are working to book consults for our providers, working to follow up with patients, to make sure they've gotten the forms that they need, etc. And then third is our people on our tech team. So myself and our software engineer who are engaging with Healthie to build our app that sits across iOS, Android, and web. That's really the client-facing interaction for the majority of clinical stuff for patients. So we're engaging with Healthie's API outside of that.

### **Healthie Response** 10/25/2023

Healthie is an API-first company and our API product is the same that our own front-end developers use to build our web and mobile apps. Learn more about our API & SDKs [here](#).

**Maybe going through those different steps or users from a chronological or patient perspective, the onboarding staff, the patient coordination staff; how do they feel about the product from their perspective when they're doing scheduling, eligibility checking, patient intake? How do you think Healthie performs on the front office side of things?**

It performs well. Healthie is checking a lot of boxes. In some ways, it really checks most of our boxes and in other ways, the client facing pieces are a challenge for any company where the exact needs don't match the tools and features and the workflows that Healthie's built out. So there is kind of a mismatch in probably all three of those. Primarily the provider and coordinator ones. For example, it lacks CRM functionality, which means that it can be tricky for our coordinators upfront to track where clients are in their journey up till booking a consult. So a client comes into our platform once they're booking a consult, but anything upfront of that, any engagement or even a conversation that may happen with that client, is not being tracked in Healthie. So it's not really serving the purpose of what a CRM would be doing.

The other place where I'd say it is challenging with Healthie is the form-building functionality, both building out the forms as well as how easy it is for patients to fill out intake forms. It's left us in our own app continuing to use Typeform or intake forms in a variety of things because it's just such a night-and-day difference in terms of patient experience.

That said, the forms get to the client, they fill them out, and they get to our providers, and it's very much getting the job done well enough for us.

**When we talk about a difference in patient experience between Typeform and Healthie forms, is there anything in particular? Is it just the design of the UI or are there differences in functionality?**

So first from the building side, obviously, with Typeform, forms is all they do. So it's just very easy to build forms with conditional logic. Early in the flow for a patient, depending on what state they're in, depending on what insurance they have, asking different questions or routing them to different paths enables us to build a more of a dynamic experience for them. Healthie can't do that.

**Healthie Response 10/25/2023**

Forms Logic is a capability within Healthie, with plans to continue to improve on conditional functionality. See how to apply Forms Logic [here](#).

On the client side of things, a variety of user experience things, like having really large text, the ability to have pictures, the ability to navigate more easily between questions, like those kinds of simple user experience pieces.

**How do you feel about Healthie's integration with Typeform?**

That part of it works well for us. So I think being able to take data from Typeform and post to Healthie, no issues really so far.

**Gotcha. But that does require (you mentioned posting) you to write code. There's no out of the box workflow?**

Correct.

**Are there any features that you aren't using?**

We're not using the Programs functionality, which is content and curriculum management, CMS basically. A large reason for that is because we've built out our CMS ourselves and we have a very deep content experience for patients. I haven't spent a lot of time in the Programs tool or the content side of Healthie, but Healthie started off as a nutritionist and dietician platform and it kind of grew from there and now they've made a switch. They're doing a great job of it honestly, I'd say overall, but just in terms of a really rich content experience, I would look at a separate CMS, whether it's yourself or another tool that integrates with Healthie, if that's a really big part of your patient experience.

**How do you find the interlinking of Healthie workflows and your own CMS that you're managing content out of?**

They're basically two distinct experiences and that's where we are with it today. For example, chat is the only way in which patients and providers can communicate and exchange content, but there is no way today for providers to personalize the content experience within our app because those two experiences are sitting completely separately.

**Did you build on top of Healthie or extend the platform in any way?**

Yeah, definitely the patient-facing application. I think I underestimated how much time this would take when we first signed up for Healthie. We had a patchwork of six or seven different vendors like Acuity for appointments and someone

else for chat and someone else for something else for each of these pieces, and we've been porting them over to Healthie. A lot of the work of extending Healthie has been bringing our existing functionality into the Healthie platform: the patient-facing app, appointments, chat, and user management.

In addition, we're doing a lot of work with the Groups feature. We implemented patient management and groups within Healthie. Groups and Tags have been amazing. It's been really, really helpful for us to switch from having a separate system that our providers could access and where they would have to contact the tech folks on our side to update a patient or move them, versus the providers being able to do that themselves, with our app then updating automatically. I'd say, A lot of the work has been to get what we're doing in Healthie today - what providers and patients are experiencing in Healthie - to get that stuff into our app, get the appointments into our app from Healthie, get them the notifications, etc.

#### **Healthie Response** 10/25/2023

Healthie makes it easy to create Client Groups in order to organize your clients and to tailor their experience. Moreover, Client Tags offer an additional way (beyond Client Groups) to assign particular attributes to clients and automate specific actions based on Tags that have been established. While clients can only be assigned to one group, clients can have an unlimited number of tags.

Learn more on managing clients in Healthie [here](#) and [here](#).

#### **So you talk about how patient groups are an important first class concept in your practice. I'd be curious to understand what are the primitives within Healthie that allow you to perform clinical workflows more easily?**

Yeah, this was one of the reasons we went with Healthie. I think with their origins in the nutritionist/dietician and wellness world, they have a lot of Group-type of stuff. For us, a patient has some number of individual encounters and we also put them into structured groups. Based on how Healthie is set up, that's actually relatively easy.

So a few tangible things that they do really well there. One is the fact that they have Groups, patient groups, to begin with. This wasn't something that some of the other platforms we were looking at had. And when you add a patient to a group, that can set off a variety of workflows for adding them to a group appointment and adding them to a group chat. The group charting functionality is pretty decent, much better than what I saw elsewhere. So after a group appointment, (these can have 10 patients, which is kind of common for us) 10 patients charting not one by one for patients, but charting overall as a group. Being able to add individual notes and have that output an individual note for each patient. There's a lot for them to improve on that side, and I'm always working with their customer success team to do a bunch of those things, but I think that in itself saves providers something like 45 minutes in terms of charting for a group.

#### **I'd be curious to chat about your integration stack. You mentioned Typeform earlier?**

I'm not sure if Healthie has a no-code integration with Typeform. They might. Given how we are processing our forms and surveys within the app, it makes sense for us to send form responses through the API because we have engineering resources, and we're also posting it to our own backend.

We also have Candid, which is in the works for us. I'm trying to talk in terms of other tools or products we have: Office Ally, which is within Healthie also. We experimented around with it a little bit, but given that we were integrating with Candid, I don't think we're using that anymore. One place where we are actively looking for the right integration is intake flows. Eligibility checks right now are not built out within Healthie. You can track eligibility status, but their integration

with, I think Change Healthcare, isn't complete. So we today cannot run an eligibility check within Healthie, which is definitely a downside. And as we look at integrating with Candid, having eligibility checks complete before we start billing is required.

**Healthie Response** 10/25/2023

Healthie has integrated with Optum (formerly Change Healthcare) for E-Labs, Claims Management, and Eligibility Checks.

Our Eligibility Checks integration enables providers to check the insurance benefit status for each client within Healthie, to support more efficient and accurate reimbursement. More functionality is planned for this integration, as part of our Product Roadmap.

Learn more about our [Optum integration offering](#).

**I'd be curious to dig into the Candid integration.**

It's so far been pretty good in that it is specifically no-code from our side. The process looks like us emailing the Candid support team and asking them to transfer our Candid AI keys over to Healthie's support team and copying both of them, and then they basically get it done. We're not using the Candid integration in production quite yet. Candid and Healthie both are very upfront about some of the limitations. At least the Candid team was very clear on that. Today for us, we can take any CMS-1500s that we generate, send them over to Candid, and then do all of our RCM work in Candid.

What's not possible is having a two-way street of communication. So you can post everything to Candid, but that data can't be brought back into Healthie for visualization. The other place where I think it's still early in the works is some of the payment models between patient copays and self-pay patients versus the amounts that you're getting paid out from the commercial payers generally. That I think is a place (we haven't gotten through it yet) where Candid itself mentioned that we may want to be bringing in some of our own engineering resources to look at if there are ways that we could simplify that.

**Healthie Response** 10/25/2023

We appreciate this feedback and have shared it with our partner, Candid. Our teams are in communication on how we can continue to develop this integration to support a seamless billing experience.

**Healthie Response** 10/25/2023

Healthie supports multiple payment models, including cash-pay and insurance-pay. We currently have solutions in development that will bring intuitive automation to the creation and submission of insurance claims, which would include automatically submitting claims to Candid for those who have enable the integration.

Visit our [Product Roadmap](#) to review what functionality is in development, and what's planned next.

**That makes sense. Payment reconciliation and multiple forms of payment are going to be complex when you have a payment model that includes fee-for-service, cash-pay, and direct contracts. How did you find the sales process with Healthie?**

It was very straightforward. I got connected with the sales team through a friend, and we had a few meetings with them, and did a few demos. They were pretty upfront about pricing, which was a pro for us. It really annoyed me during EHR procurement how hard it was to find pricing with a lot of folks, how you need to book demos and do all that. So we had a couple demos. They were obviously happy to move very quickly, which was important to us at that time. And they were responsive.

**Did you evaluate or consider other products to try to fit your needs?**

Yeah. We did go through a full EHR evaluation process maybe six to nine months ago. We came out of that deciding that none of them fit our needs properly and we were just going to hold out and keep using SimplePractice for a little while, using a patchwork of products a little bit more and then ultimately build one out ourselves. And that was after meeting companies like Capable. We looked at them pretty closely and decided against it and then tried just a variety of others. Canvas, we were speaking with them and basically decided that they don't have, for a variety of reasons, the group workflow that was important to us. It wasn't exactly clear how they would address that for us. And the second piece was that I wasn't clear on how much of a value-add this was for us over SimplePractice and just doing it ourselves. And so ultimately we decided to just say that we would kick this can down the road. Then fast-forward two or three months and it was such a nightmare trying to patchwork stuff. I was chatting with a friend at Healthie and felt maybe this was the right time for us to actually make a switch.

**So Healthie came around; they had group scheduling and you felt that maybe from a value perspective they made more sense. Is that correct?**

I think it came down honestly to a few things. One was that I chatted with a couple co-founder friends of mine who were using Healthie, who had been in a similar stage and had first tried out a variety of other ones, and then ultimately used them. They gave similar responses to what I'm saying now: they're not flashy, but they get the job done. It's stable and that's important. And then second, yes, I'd say some of the group-based experience mattered. I basically looked through our clinical workflows and investigated how we'd do that on Healthie, and gave my team two weeks to play around with it. They all came back and our providers were really excited about it, so it made sense.

**Do you feel like you made the correct assessment at the time?**

I think we made the right decision. Around the time we bought Healthie, we were able to raise some funds, but one thing we could have done if we were a cash-strapped startup is start with a few providers and do that on a few hundred-per-month type of thing and then later upgrade to API access, which I think costs on the order of \$25,000. So you can pay by month, but it's a very high fee for a start-up that's genuinely just starting right off the ground.

**Healthie Response 10/25/2023**

Healthie supports organizations that range in size from 1 - 5000 providers, in over 25 specialties of care, across >4M patient lives. It's critically important for us to be able to support organizations at all stages of company-building, and thousands of businesses use our out-of-the-box plans to deliver care and build long-term relationships with clients.

There is an API add-on fee to our Enterprise plan, which allows builders to purchase our API product (and / or fully brandable interfaces) to extend the functionalities of Healthie.

If you're interested in learning more about our plans and pricing, [connect with our team](#).

### **Taking it back to the high level, what do you like most about Healthie?**

What I like most about Healthie is that it's a solution that has gotten the job done and I've probably said that 10 times already, but that truly is what it does for us. It's such a relief to not use the five to seven different tools that we were before, trying to manage all of them. It's a solution that connects our providers and patients. And when I say patients, I mean our patient-facing app. The fact that our providers can easily see the patient data that they need to see, and how patients are being moved around by coordinators, or how they're using the patient-facing app. That's awesome for us to have.

### **What do you dislike about the product?**

Yeah, I've mentioned forms and the client-facing functionality need improvement. I am not very familiar with their mobile app, as in their white-labeled mobile app and what it would be like, but I wouldn't let my client experience depend on Healthie's patient-facing apps. I think I could have some qualms with any platform, around say, this one feature that we really need or something like that. That's true for any of them. Their customer success and support teams have been pretty great at responding and keeping us in the loop with stuff.

### **What's the likelihood of you continuing to use the product in 18 to 24 months?**

Good question. A lot is riding on the Candid integration and some of the group charting. Depending on how much friction there is in that process and how quickly we're growing as a team, I could see a world where it's very cumbersome for providers to complete their workflows in Healthie and that means that we need to build something ourselves or with a headless EHR or something else. That said, I think it's more likely than not that I'm kind of banking on those things to go well, so it's more likely than not that we will continue with them.

### **Is there anything that we didn't cover that could be worth mentioning? Anything you wish you had known while making the decision?**

There's room for improvement on the reporting side of things. We haven't used any integrations yet on the reporting side. You were mentioning a couple of them, but haven't integrated with something else. And the client reporting and metric reporting, is basically non-existent. You can output a CSV of client data, which is not ideal for a variety of reasons, but being able to see things like the metrics that people are tracking within our app and are posting to Healthie for our providers to be able to see in a consumable way was something I expected, but not something that exists today.

#### **Healthie Response** 10/25/2023

Healthie offers a robust Client Portal on both web and mobile that facilitates provider-client async care. Clients can log food & lifestyle entries, track their activity, sync their wearable devices, log metrics, and much more.

Providers are able to personalize the Client Portal and ways that client's can engage with them – with adjustable settings available even on a per-client basis.

Moreover, providers are able to provide feedback directly on journal or metric entries for more engagement care.

Learn more about our [Client Engagement](#) functionality