Welkin Health

by Product & Data Analytics Manager

`Care Management` `Electronic Health Record` `Headless EHR` `Patient CRM`

Details

Review Date	09/22/2023
Purchase Date	Q4'22
Implementation Time	3 months
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	90%
Review Source	Vendor

Product Rating

Product Overall	▬▬▬▬▬	4.5
Use Case Fit	▬▬▬▬▬	4.5
Ease of Use	▬▬▬▬▬	4.0
API	▬▬▬▬▬	4.0
Integrations	▬▬▬▬▬	N/A
Support	▬▬▬▬▬	5.0
Value	▬▬▬▬▬	4.5

About the Reviewer

`Product Oversight`

Reviewer Organization

`Virtual-First Provider` `Primary Care`

Reviewer Tech Stack

`RubiconMD` `Sisense` `Elation` `Snowflake`

Other Products Considered

`N/A`

Summary

- **Product Usage: Welkin is used primarily for communication between the clinical team and patients, with custom-built features and functionality present to facilitate seamless transitions.**

- **Strengths: The platform's strengths include its trackability for patients, customizability, robust API, and security permissions which provide a level of control for sensitive data.**

- **Weaknesses: Welkin lacks a functionality to easily switch coverage for users when providers are unavailable and a feature that correctly links conversations to the involved parties' account in the case of child-parent relationships.**

- **Overall Judgment: Despite a few lacking functionalities, Welkin has been a good fit for the company due to its strengths and the company has appreciated the support and responsiveness to their requests.**

So today we're chatting about Welkin and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?

Yeah, so we're a virtual health system that provides clinical care to employers and their employees and dependents who are on a medical benefits insurance plan. We have a lot of specialties, but primary care is our main focus. Our goal is to keep all of the patient's care in one record, one system. Recently, we acquired an in-clinic sister company. In total, we have around 300 employees, and we have around 10 combined clients with approximately 5,000 members.

The main company is using Welkin, but our sister company is not currently using it. Right now, we do use Sisense through Welkin, and our sister company also uses Sisense, so there's some integration between the two companies in certain areas, but Welkin as a platform is only used by our main company, with about 30-50 users. As a product manager, my role involves dealing with the data and integrating all of our external vendors and partnerships into our system so that everything works synergistically.

What was it that drove you to look for a product like Welkin?

So we were using a custom-built communications platform that was very similar to Welkin. It's a crucial need for our model to have seamless communication between patients and our clinical team. Welkin had similar structures to the system we were using, and there were more features and functionality that we could take advantage of. Our leadership prefers to keep communications in a text conversation format because it's easier to communicate with clinical providers. That's why we chose to go with Welkin instead of searching for other tools that would have required a bigger transition from our current platform.

What particular requirements were you looking at in your search for vendors?

Essentially, we were looking for a tool to manage patient journeys and facilitate clinician-to-patient communication to supplement our core EHR, which is Elation.

Were there any other vendors that you considered when looking at Welkin?

Yes, but I wasn't directly involved in the process, so I don't have any specific names to share. From what I understand, the focus was mainly on communication vendors, since we knew we needed to replace our previous platform, which primarily served as a means of communication between patients and clinicians, providing an interface for them to interact. However, there was some uncertainty regarding whether we needed an EHR or if we could solely rely on Welkin for that. Ultimately, it was decided that some of our clinicians required an EHR to document patient visits, so we ended up going with both. But it was a bonus that Welkin had the potential to function as an EHR as well.

Why was it that you ended up going with Welkin? And why did you choose not to use their EHR functionality?

I think there were several factors. First, the platform had all the features and functionality we were looking for, making it a seamless transition from what we were already using. Additionally, the pricing was reasonable, and Welkin was open to working with us on a gradual transition plan to implement it across different parts of our business.

Another important consideration was compliance with regulations. We needed an EHR that met certain standards, particularly for RFPs and prospective clients. Unfortunately, Welkin didn't meet all those standards. But the fact that we

could integrate Sisense with Welkin was a significant benefit. This allowed us to start utilizing a business intelligence (BI) platform, which was an added bonus for us.

> **Welkin Health Response** 11/15/2023
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> Welkin is a Care Management / Healthcare CRM, providing a robust infrastructure along with an open API. While it can function as a light-EHR, it's important to note that Welkin is not a certified EHR. Recognizing the significance of EHR features to our customers, the Welkin team is continually enhancing our platform by adding features typically found in EHR systems.
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> Many customers use Welkin as their system of record, but others layer on a certified EHR to meet compliance requirements or leverage meaningful use programs. There are fundamental differences between the software types, and we talk prospects through them during the evaluation process to ensure this is understood.

One of the things we really liked was that Welkin did have some clients who use their platform as an EHR. Even though we didn't proceed with the EHR use-case, seeing Welkin's model helped us explore and better define the philosophy of how we wanted to go about clinical care, rather than simply fitting around an Elation-type EHR. So it gave us more options, including forms, programs, message templates, and communications.

How was the onboarding and setup process with Welkin?

I was only involved in some aspects of the original onboarding and setup, but I've actually become more involved now than I was when we first implemented the platform. From my perspective, transitioning onto Welkin went smoothly. The Welkin team has been incredibly helpful throughout the process, not just initially but even now. They've been great at helping us with any features that we might not find on the platform or if we're unsure about how to do something. They educate us on available options to get as close as possible to our needs within Welkin. Overall, I believe the initial implementation process went smoothly, and we didn't encounter many issues.

> **Welkin Health Response** 11/15/2023
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> Thank you for this positive feedback! We are dedicated to the customer experience. The success of our clients is of the utmost importance, and we are constantly taking feedback seriously and implementing changes so that we can adapt and grow our product offerings.

How does Welkin fit into your workflow currently?

Once we know we're going to be working with a client, we gather eligibility files to identify the patients or employees and their dependents that we can provide clinical treatment for. We import this data into our system, which then integrates with Elation and Welkin. We create a unique patient profile in both systems to ensure consistency.

Our clinical team, composed of physicians and specialists, primarily uses Elation for providing clinical care. However, they also utilize Welkin for communication with patients. We make use of web hooks to enable certain features in both Elation and Welkin to be accessible for specific care team members. For example, if a physician posts an office message in Elation, it will also be visible in Welkin.

The other part of our care team, our care concierges, are the front line. They guide the patient through their experience, handle scheduling, and facilitate their transition into clinical care with the physicians. Welkin serves as their main platform for communication. The concierges have visibility into the physicians' activities, and vice versa.

We utilize Snowflake to pull in data from Elation into Sisense, and the Welkin team pulls all of the data from Welkin into Sisense. This way, we have all the necessary information in one centralized location. We can leverage this data for internal and external reporting, as well as for monitoring metrics and key performance indicators (KPIs).

Which of Welkin's features are you currently using?

We rely heavily on Welkin's automations. Specifically, we've built five main programs for our specialties, and we use programs to track active conversations and patients requiring follow-up. Another feature we love is the ability to customize the user interface for our clinical team. We can tailor it to fit our specific model and how information flows through our system. This includes custom data views, sorting and filtering options, and customizable navigation layouts.

> **Welkin Health Response** 11/15/2023
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> We're so happy to hear this! At Welkin, our commitment to automation is one of our key focuses. Technology can be the backbone for great organizations when it comes to their ability to scale quality care, holding resources steady. This is why we've invested so heavily in building out robust automation functionality for customers, always listening to customer needs and evolving.

In terms of patient interaction, we use the forms feature within Welkin. It allows our patients to fill out forms through SMS conversations with our care team. We can track the results from these forms through charts, graphs, and different data views.

We also use the regions and territories to label and tag our patients based on the employer or client. Additionally, the security policies offered by Welkin allow us to set access limitations for certain parts of our care team. This level of control ensures that sensitive data is only accessed by the appropriate personnel.

We currently use Elation for appointment scheduling. However, we have had recent conversations with Welkin about potential integration with Elation. This could open up more functionality and enhance the functionality between the two systems. We're looking forward to seeing where that leads.

What do you see as some of Welkin's strengths and weaknesses?

There are several strengths that stand out. One is the ability to track patients using the available programs. This feature is unique and makes sense in our workflow. Additionally, the customization options are great, and the API is very robust. We've been able to do a lot on the development side with web hooks utilizing the API on the back end.

Another significant strength for us is the security permissions. As we have different types of users, having the freedom to allow specific users access to certain areas has been crucial for our business.

Welkin has been responsive to our requests. They listen to us and help us figure out if a requested feature can be implemented or not. Recently, we've been looking at ways to manage our clinic more efficiently, especially when care concierges are unavailable due to lunch breaks, illness, or vacations. Ensuring that patients receive timely responses and nothing falls through the cracks is a challenge for us. We've been talking to Welkin about an "out-to-lunch" feature

that can easily turn coverage on and off for specific users. The current functionality doesn't meet our needs in this area.

Another issue we've encountered is related to households where a parent with one phone number wants to communicate about their child's clinical care. We want those conversations to be linked to the child's account, not the parent's. We'll be working with Welkin in the coming months to see if we can address this.

How is the platform from a reliability and stability standpoint?

It's been great. In the beginning, we encountered some challenges with pulling in eligibility data and having to go through updates for a large number of patients. This was causing delays in clinical care because there were too many updates happening simultaneously on the back end, but Welkin worked with us and we've resolved the issue. Stability and reliability are not something we've had to worry about, but there has sometimes been a lack of capacity.

How are the APIs, the documentation, and the developer experience?

We primarily use APIs for our eligibility data. Our team uses a custom tool to retrieve this data, which keeps us informed about a patient's demographics and whether they qualify for care. If they are eligible, we can access the medical benefit details necessary for claims submission or effective care coordination. The data comes in as a raw file from the client, goes through our system, and then we are working on some processing steps for validation. For this particular aspect, we haven't found any tools yet that fulfill our requirements.

Overall, the API experience has been positive. The only complaint we received was when there were delays due to conducting bulk updates through the API affecting the clinical care process. However, we have addressed this issue and now understand the criteria and requirements to prevent such delays. Now that we are aware of these, everything is running smoothly.

Do you use any integrations with Welkin?

We utilize other tech platforms, but they're not directly integrated with Welkin. However, we do have a PostgreSQL database that we use for health scans on members. They can perform a scan from their phone, and that data will be pulled into the back end using the API. It's not technically an integration, but the data does show up in Welkin as a link so you can view a patient's profile and see their scan data and how they're doing.

How is the integration with Elation?

Currently, we're utilizing a number of web hooks to synchronize Elation and Welkin. However, customizing it and ensuring visibility on both platforms has been quite labor intensive. It hasn't been the best experience. I believe there's room for improvement, and Welkin recently approached us about exploring an actual integration with Elation. They're currently investigating the best approach to implement this across multiple clients, should they decide to proceed. This integration would likely benefit us, so we'll see where it goes. We have been able to accomplish what we needed so far, but we put in a lot of effort to make it look and function the way we want it to.

How do you feel about the account management and support?

It's been great. They're very quick to respond and extremely willing to meet with us on custom requests or work that we're looking into. So I would say definitely top tier.

Do you think that you made the correct decision in going with Welkin?

I do. The way I approach things might be different from others. Ideally, I wouldn't have rushed into it. The transition was a bit hurried because we had to sunset the previous platform we were using. I believe if we had taken the time to plan how we were going to use Welkin and what that plan would have looked like, it might have helped speed up the implementation. Despite everything going smoothly, I think it could have been quicker if we had done more upfront planning. But it's not really Welkin's fault, it's more on us.

Do you have any advice for buyers who are searching for a product like this?

Planning is important. In the cost analysis document for Welkin, we initially considered several features like DrFirst and Health Gorilla. However, we ultimately decided to go with Elation and didn't end up using those options. So I think planning is important, because there are so many options. You'll want to know exactly how you can use them to meet your specific business needs and model.