Canvas
by Revenue Cycle Manager

Claims Management **Electronic Health Record** **Headless EHR**

Details

Review Date	09/20/2023
Purchase Date	Q1'23
Implementation Time	6 months (and ongoing)
Product Still in Use	Yes
Purchase Amount	N/A
Intent to Renew	100%
Review Source	Vendor

Product Rating

Product Overall		3.0
Use Case Fit		5.0
Ease of Use		5.0
API		N/A
Integrations		5.0
Support		5.0
Value		5.0

About the Reviewer

User

Reviewer Organization

Virtual-First Provider   Cardiology

Reviewer Tech Stack

Candid Health   ClaimMD

Other Products Considered

Athenahealth

Summary

- **Product Usage: Canvas is primarily used for managing patients' clinical charts, creating claims, and dealing with patients' claims and profiles.**

- **Strengths: Canvas offers more visibility and a clearer workflow when dealing with patients' claims and profiles compared to previous product.**

- **Weaknesses: Canvas has some issues with system setup, such as wrong population of multiple locations in script ordering and missing data fields when using the claim edit feature. However, these issues are believed to be due to user error and not Canvas itself.**

- **Overall Judgment: Overall, the product is praised for its ease of use and customization options, with a recommendation from the review to take full advantage of its capabilities.**

So today we're chatting about Canvas 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?

I'm the revenue cycle manager, and I've been working here for about a year and a half. Our company primarily focuses on cardiology. Currently, our main billing activities revolve around physicals and EKGs. We generally work with Medicare patients. Our main objective is to keep patients out of the hospital, and my responsibility is to oversee all the insurance billing and manage the revenue.

How long has your company been using Canvas?

About six months. We're still implementing Canvas at this time.

What was it that drove you to start looking into Canvas in the first place?

We were using Athena, and the account managers at Athena kept quitting or switching, so in one year, we had eight different account managers. This meant they weren't really staying on top of our work. Our enrollments weren't done in the system, and we had issues with payment verification and posting. We couldn't navigate the system properly, get accurate reports, or know what issues were happening with the claims. We needed a simpler system for our providers and teams.

Another problem we faced was contract issues when trying to add multiple tax IDs with Athena. It caused confusion in our billing process, and we couldn't verify our payments or get claim numbers. Our notes didn't show the time spent with patients either. When it came to insurance, Athena had an error where the insurance verification would show the correct address but a different insurance name for Medicare. For example, patients in New York had Empire Medicare, but Athena would show it as Medicare from a different state. This resulted in billing errors and underpayments.

Aside from that, Athena couldn't even verify our payments, which affected our accounts receivable. Posting took months, and there were issues with claims and reporting. Overall, everything in the system was just done incorrectly. The main reasons for searching for a new product were driven by the shortcomings of Athena. And compared to Athena, Canvas is easier to use.

Were you using Athena for both your EHR and your revenue cycle solutions?

Yes. And we've decided to switch from using Athena for both of these solutions to using Canvas as our EHR and Candid as our revenue cycle solution. Previously, we were using Athena for their technology and services, including their billers and coders on the RCM side. Now, we're leveraging Candid's teams for tasks such as enrollment, payment posting, and claim verification. They also review and verify the claims from Canvas to ensure correct billing. So my perspective on Canvas is focused on the RCM side, not so much clinical documentation and scheduling processes.

Why was Canvas chosen over other options?

I think cost was a consideration. And Canvas is more customizable compared to other EHRs. When providers use the system, they're forced to follow all the necessary steps to build out claims. In Athena, providers could input any information and simply click to build out the claim. Unfortunately, there was no way to audit the actual claim in Athena. However, with Canvas, we could ensure that providers followed the correct steps and entered all the necessary

information. One major issue we faced in Athena was with self-pay claims, where diagnosis codes and other important information weren't populating correctly. It was difficult to audit these issues within the system, whereas we can in Canvas.

How has the implementation been going?

Canvas has been great. They're really organized. We've been having issues with other vendors in our tech stack, so we're having to do a lot of manual work, but the Canvas implementation has been good.

How does Canvas fit into your workflow?

Canvas is the platform where claims are generated and verified. It's where we handle insurance verifications, send scripts, and create the claims before they are filtered to Candid for billing purposes. Ideally, we wanted to use just one system, but we're currently working with three. One of them is an internally developed system that is used for scheduling.

Our registration team receives a referral and enters the information into our internal system. They then schedule the patient in our system, which sends a link to the patient for payment or to set up a video call or follow-up. Then we manually create the patient's profile in Canvas. Within our scheduling system, providers can see the list of patients they will be seeing. The provider then accesses the patient's profile in Canvas to create a claim. They can then enter all their clinical notes and relevant information into Canvas.

Afterward, the claim moves from the clinical queue to the coding queue. I or someone from my billing team will review the claims in the coding queue and transfer them to the submission work queue. Once in the submission work queue, an API file is sent to Candid to create the claims in their system. The claims also undergo scrubbing for eligibility before being built out in Candid. Candid manages the posting of the claims, and from there, our team handles any enrollment tasks or denials that arise.

What strengths and weaknesses have you noticed in Canvas?

One strength of Canvas is its increased visibility. Compared to Athena, Canvas provides a clearer workflow when dealing with patients' claims and profiles.

With respect to weaknesses, we're still in the early stages of establishing workflows, so I think we're just not utilizing the system to its full potential (currently, we primarily use Canvas for managing patients' clinical charts and creating claims). Instead of filtering information from other programs into Canvas, everything should be done within Canvas, and any relevant information should be sent to our internal scheduling system, rather than the other way around.

We are experiencing a couple of issues with Canvas in our billing workflow. That said, these seem to be primarily due to system setup errors on our end, and we are actively working with the Canvas support team to resolve them. A few specific examples of these issues are: (1) multiple locations aren't populating correctly in script ordering, (2) data fields are missing when using the claim edit feature, (3) some irrelevant fields are populating in the claims labeling workflow, and (4) manual entry is needed for us to capture each insurance company's contact information in Canvas.

How are the integrations and APIs?

We're still working on the integrations for all our systems. Specifically, we're actively working on integrating our internal scheduling system with Canvas and Canvas with Candid. Additionally, we're also focusing on generating reports that allow us to retrieve all the necessary claims information.

How is Canvas's account management?

They've been fantastic at managing and keeping us updated. Their account management team is really on top of things and responds quickly.

Do you feel like you made the right assessment going with Canvas, for where it sits in your workflow today?

Yes. I think we just need to take advantage of more of Canvas's capabilities.

What key areas of growth do you see that Canvas can work on?

I'd like to be able to upload a CSV file with information, similar to how we upload files for patients or charts. This way, we could easily upload all the insurance addresses we have in the system in one go, instead of manually inputting each one. Additionally, I think it would be helpful to have more options for claims reporting, especially for larger volumes.

Any general advice for other folks who are also looking to use Canvas?

Take advantage of what Canvas has to offer. The system is pretty straightforward.