

# CharmHealth








by CEO and Founder

Electronic Health Record

## Details

Review Date	11/29/2023
Purchase Date	Q4'20
Implementation Time	<1 week
Product Still in Use	No
Purchase Amount	\$0.50 per encounter
Intent to Renew	0%
Review Source	Elion

## Product Rating

Product Overall		4.5
Use Case Fit		4.5
Ease of Use		4.0
API		3.0
Integrations		2.0
Support		4.5
Value		5.0

## About the Reviewer

Purchasing Team User  
Implementation Team Product Oversight

## Reviewer Organization

Virtual-First Provider Behavioral Health

## Reviewer Tech Stack

Surescripts

## Other Products Considered

eClinicalWorks Epic Kareo Valant  
Veradigm EHR

## Summary

- **Product Usage:** CharmHealth is used as an EHR system, for notes and calendar features, a telehealth platform, a patient portal, and a revenue cycle management tool.
- **Strengths:** CharmHealth is cost-effective, user-friendly, intuitive, and does not overwhelm users with an array of unnecessary features.
- **Weaknesses:** CharmHealth struggles with scalability and extensive integrations, especially as the business is growing; minor issues were also found in the scheduling feature and fax system.
- **Overall Judgment:** CharmHealth was the right tool for the initial growth stage of the company, with affordable rates and a simple interface that allowed for significant expansion but struggles with scalability pushed the company to explore other options.

## Review

**So today we're chatting about CharmHealth 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?**

We're a virtual psychiatry and addiction care practice. Currently, we're dedicated to serving our home state, with a specific mission of being the go-to telehealth option for mental health and addiction support in rural and frontier communities within this region. However, we're eager to broaden our reach to other states within the next few months. I'm the cofounder and CEO of the company, as well as a part-time clinician.

**What business problem were you looking to solve with CharmHealth?**

Good EHRs are very expensive, especially the bigger ones like Epic and Cerner. We were a startup with limited funds, and we were looking for a cost-effective solution that would allow us to start from scratch. A friend recommended CharmHealth, and it seemed promising. Then we heard about a company called Valant that specialized in mental health EHR and decided to try them. It was a disaster: the technology was incredibly outdated, so we quickly returned to CharmHealth. We also wanted an EHR that was user-friendly for providers—given how central the EHR is to a provider's daily experience, we wanted our physicians' interactions with the system to be positive. The deciding factors for us were physician experience, patient experience, cost, and the ability to efficiently bill for the work we do.

**Besides Valant, did you look at any other vendors?**

We reached out to Epic, but their pricing was astronomical, so that was a nonstarter for us. The only other vendor we took seriously was Valant, as they focused on mental health. However, their pricing ended up being more expensive than CharmHealth, and their technology was not up to par. In the end, we chose CharmHealth because their pricing was very reasonable. In the beginning, Charmhealth charged us around 50 cents per encounter. There were no implementation or fixed base costs—it was purely per encounter. This was great for us, as we had providers who worked part-time, and a flexible fee structure made more sense for us. Most of the other vendors had provider-based fixed fees, which didn't work well for our situation. Charmhealth's per-encounter pricing was exactly what we needed at the time.

**Were there any other EHRs that were priced similarly to CharmHealth?**

Not that I can remember, no. All the other EHRs we looked at had significant upfront fixed fees. There were a couple of other interesting things about CharmHealth. We actually became one of their biggest customers during our trial period. My partner developed a strong relationship with their development team, which I think was unique.

Initially, to be honest, CharmHealth's customer service was a bit inconsistent. It would take a while for them to get back to us. However, my partner, who is quite tenacious and knowledgeable about technology, pushed hard and developed a strong relationship with CharmHealth. They started becoming much more responsive to our feature requests, which ultimately helped them create a better product overall. It became a very good relationship.

While CharmHealth wasn't specifically designed for psychiatry or mental health, it is user-friendly and flexible enough to be used in any specialty. The other interesting thing about the product is that its backend is built on top of Zoho. The companies are somehow related, so the backend of Charmhealth is very robust.

### **Was there anything else that affected your decision-making process?**

Not really; pricing and user-friendliness were the main factors in our decision-making process.

### **What was the sales and implementation process like with CharmHealth?**

It was average. They were responsive enough and nice enough, but they didn't really go above and beyond. Initially, they weren't terribly responsive, probably because CharmHealth was already well established and we were just another small practice joining their platform. I didn't come away thinking they were amazing. The product sold itself more than the service.

### **What specific use cases did you use CharmHealth for?**

Initially, we used it as a straightforward EHR system, particularly for its notes and calendar features. During this time, the demand for telehealth services started to grow rapidly. At the time, CharmHealth didn't have a built-in telehealth solution, so we had to use Zoom alongside CharmHealth for telehealth visits. Over time, CharmHealth developed two versions of a video telehealth product within their platform. We had the opportunity to provide some input during this process, and eventually, the telehealth feature ended up being quite robust. It was seamlessly embedded, eliminating the need for an extra download, and it performed very well. While we were customers, text messaging between patients and the practice also became available, which was a great convenience.

CharmHealth had a patient portal from the outset, but it was initially a simple email-type system with some additional features. However, over time, the portal improved, allowing patients to access videos and even receive text messages from our practice. They also had a fax feature, which was initially challenging to set up—sometimes the fax system didn't work, possibly due to the underlying vendor's performance—but they eventually resolved those complications, after which it worked well.

CharmHealth also offers full revenue cycle management (RCM) capability. That comes at an additional cost—I think it was a percentage of billing—but it was actually quite reasonable. Because we're a telehealth company, we have over 20 providers, each of which has a different patient schedule. Given the complexity of billing in the US healthcare system, as well as our various relationships with vendors and healthcare organizations, we had to find creative solutions. Although no EHR is built perfectly for this, CharmHealth's billing backend worked well for us.

Our back-office team initially outsourced billing to a specialized billing group. This team had experience with various EHRs, and they actually preferred CharmHealth to other EHRs they'd worked with. They found the billing backend user-friendly and appreciated its ability to support analytics.

Billing is complex—you have to ensure that you have the right insurance, generate and send out invoices to a clearinghouse, and receive feedback on approvals or denials. CharmHealth excelled in these backend processes and reporting. It allowed us to generate reports on denials and payments, which provided valuable insights.

### **How well did different elements or features of CharmHealth's EHR work for your users?**

When it comes to this EHR, there are different stakeholders to consider. You have the billing people, the providers, the patients, and the administrators who handle scheduling. You also have support staff who are responsible for managing the inbox and coordinating tasks like contacting patients for refill requests. They communicate internally to ensure everything runs smoothly, so there are different pieces involved in the process.

It took some time to figure out the scheduling aspect. There's a great scheduling tool called Acuity. We kept requesting that CharmHealth integrate Acuity into their platform because their scheduling feature could be a bit clunky. But to be fair, scheduling in any EHR can be challenging. For instance, we would see patients in prison, and those patients weren't billed through Medicaid or Medicare but on a separate contract basis. That required us to engineer a solution; there was a manual component involved. We had to set the bill to zero, and then the billing team had to be aware that this was a contract service, and so on. We had to find workarounds in the EHR, but that's just the way healthcare is. It wasn't overly complicated to figure it out—CharmHealth was helpful in this regard, and their features were user-friendly enough that we could customize things without requiring a lot of external support.

I can't say the same for many other EHRs, but CharmHealth's interface is actually pretty straightforward and intuitive; it doesn't feel overcrowded. It's not perfect or super polished, but it's okay.

One function we used frequently was the chat function, both for individual communication with other providers and with different user groups. It's like a rudimentary version of Slack within CharmHealth. We used to rely on Google Chat, but we weren't comfortable discussing patient information there, even though we had a Business Associate Agreement (BAA). We started using CharmHealth's chat feature, and it worked really well for us. We found it very useful, and it significantly improved communication.

We had various channels on this platform, like a general announcements channel where we can share non-clinical updates, such as someone's birthday. We also had a channel specifically for clinical questions, where providers could ask each other for advice, and a channel for leadership discussions.

### **What would you say are Charmhealth's key strengths and weaknesses?**

CharmHealth really shines when it comes to cost, ease of use, and intuitiveness. They keep things simple and don't burden users with an overwhelming array of features. Unlike some other EHR systems that bombard you with countless functionalities that you'll never use, CharmHealth is purpose-built and straightforward to navigate.

### **What were the specific weaknesses that eventually led you to decide to explore other alternatives?**

In the main, the decision to switch to Athenahealth was driven by the desire for greater extensibility and integration with other tools. We're expanding our telehealth services to several new states, which means scaling up our patient encounters. As we continued to grow, we realized that we needed a more scalable solution over the next few years.

Our partnership with CharmHealth was great in terms of collaboration, and we had a significant impact on their development, but we now need a system that can handle different markets and insurers, as well as accommodate larger volumes of patients in each state. That led us to start exploring more scalable options like Athenahealth, which offers a marketplace for customizable apps to enhance their platform. Athenahealth's API infrastructure is also more user-friendly and robust than CharmHealth's. We'd been increasing the number of integrations, and we were starting to face challenges with integrating additional tools and applications into our EHR system. For instance, we encountered issues when trying to connect our health information exchange (HIE) in Montana with CharmHealth. In comparison, connecting with Athenahealth was smoother as they had more experience in this area.

We're also exploring other apps like Droxi, developed by an Israeli company, which helps streamline processes and reduce clicks for our doctors.

In addition, we're looking to develop some proprietary clinical pathways that would require robust API integrations with the EHR, and Athena offers more robust capabilities for that. The patient and provider experiences were both fine;

it was rather the ability to scale and integrate other technologies on top of the EHR that led us to seek a different platform.

**Did you consider any other platforms during your assessment, or how did you decide on Athenahealth?**

We considered a variety of EHR platforms; we looked at Allscripts, Kareo, Epic, eClinicalWorks, and Athenahealth. Cost was often the dealbreaker; many of these platforms were just too expensive for us. Very few EHRs are designed for small practices; they seem to be tailored for larger enterprises that are willing to pay a lot of money, and that really excludes independent and smaller practices. My partner examined everything from API integration to cost. It wasn't about personal relationships or fancy dinners; we really dove into the technical aspects, and in the end, Athena emerged as the clear winner.

**How extensively had you integrated CharmHealth with the rest of your tech stack?**

We integrated the HIE (Health Information Exchange) successfully, and we were able to integrate the Montana PDMP (Prescription Drug Monitoring Program) for controlled substances. We also integrated Surescripts, which allowed us to access medication histories.

**How would you describe the quality of the account management and support at CharmHealth?**

Initially, when we started with CharmHealth, we were just one of many practices with only one or two doctors, so we received limited attention. Interestingly, I discovered a Facebook group specifically for psychiatrists using CharmHealth. It's called "Charm for Psychiatrists" or something along those lines. There are hundreds of psychiatrists in the group who share tips and experiences with one another. It's quite interesting; these are likely smaller practices that just don't receive that much attention from CharmHealth due to the sheer number of similar practices they serve. However, it's fair to say that as your practice grows larger, you will receive more attention, which is probably true for most companies.

**Looking back, do you think you made the right decision by choosing CharmHealth when you first set out?**

Honestly, I believe CharmHealth was the perfect fit for our stage of growth. I will credit CharmHealth with playing a significant role in getting us where we are today. We started with hardly any patients and are now handling a workload of 800 patients per week using CharmHealth. That allowed us to generate revenue and attract investors. We've just closed a Series A funding round, which is an incredible achievement, and we were able to do that with CharmHealth. I am truly grateful for CharmHealth; it was the right tool at the right time for us. They eventually gave us the attention we needed, and that enabled us to accomplish a lot. We went from using Zoom on the side to having CharmHealth's telehealth product integrated into the system. We even developed a telehealth waiting room feature where multiple patients could wait in line. That's still a CharmHealth product that others can now benefit from. Looking back, I wouldn't have wanted any other product during the first three years of our practice; CharmHealth was perfect for us.

**In terms of product development, what are the key growth areas you believe CharmHealth should focus on?**

I would suggest they focus on making the calendar feature more robust. It's overly complicated, especially as practices grow larger. If they have ambitions to target enterprise-level organizations, improving the calendar experience and investing in API technology integration will be essential. However, it's important to be mindful of not adding too many unnecessary features that can make the platform less elegant and more cumbersome to use.

**What advice would you give to organizations going through the process of selecting an EHR?**

My advice would be to do your homework. Reach out to current users and former users of the EHR you are considering. Carefully evaluate the cost of the system, and don't be afraid to make a change if necessary. Sticking with a specific technology simply because it's familiar is dangerous and doesn't serve patients well.