

# Healthie

by Head of Product

Electronic Health Record

Headless EHR

Patient Scheduling

## Details

Review Date	06/22/2023
Purchase Date	Q3'22
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		4.5
Use Case Fit		4.0
Ease of Use		N/A
API		4.0
Integrations		5.0
Support		4.5
Value		N/A

## About the Reviewer

Purchasing Team Product Oversight

## Reviewer Organization

Virtual-First Provider Chronic Care

## Reviewer Tech Stack

Zus Candid Health

## Other Products Considered

Avon Elation

## Summary

- **Product Usage:** Both patients and providers use Healthie, with patients handling messaging, care plans, and scheduling and providers dealing with scheduling, billing, and setting up care plans and programs.
- **Strengths:** Healthie’s interface is intuitive for both patients and providers, allowing easy navigation and seamless scheduling, and the personalization feature enables the creation of specific educational programs, care plans, and goals for patients.
- **Weaknesses:** The customization of preset default settings in Healthie is somewhat limited, sometimes requiring requests for adjustments, and flexible reporting options are restricted.
- **Overall Judgment:** Despite limitations in customization and reporting, Healthie is favored for its intuitive navigation, seamless scheduling, and capability for care plan customization. It has proven to be a reliable infrastructure for clinical operations and the likelihood of continuing to use it remains high.

## Review

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

We do collaborative specialty care for patients, really focusing on providers across specialties or health and wellness coaches, and I'm the Head of Product.

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

Coming up on a year, so we purchased around July or August of 2022.

**How do you use Healthie in your organizations? For instance, which types of users are interacting with this product, and what are their workflows?**

Historically, both our patients and our providers have been using Healthie as their main interface. So patients will go in, deal with messaging care plans, scheduling with our providers, really basic EHR features for the patients. On the provider side, we're doing everything from scheduling, billing, setting up care plans and programs, and setting goals for the patients to specific integrations like Zus Health to find past data or health records. Nothing too out of the ordinary. I will say that we're also building our own patient portal off of Healthie's API, which is allowing us to do a little bit more, including creating daily care agendas for the patient, more in-depth and specific health tracking, as well as an education curriculum that can be tied to the patient's schedule.

**What are the sets of features that really stand out to you with Healthie - what works well, what maybe doesn't work as well?**

I'm just looking at the overall interface. One thing is that it's very intuitive both for patients and providers. That's something we've been really happy with. So it's not a difficult platform to navigate. Going through the basic functionality like scheduling, syncing with calendars, finding appointments, canceling, rescheduling, etc, has always been very seamless for our patients and providers. So that basic functionality was something that we were looking at and it has worked well across different specialties and across different patient demographics. That's been really, really strong for us. We also liked the feature set of being able to personalize care plans for patients a little bit better - everything for setting up specific educational programs or specific care plans or even setting goals for patients based on their personal preferences, needs or lifestyles. That's been really, really helpful for us. The other two things I would call out that were critical for us choosing Healthie that have proven to have exceeded our expectations have been the API which again, we're using to build our own patient-facing portal, building a mobile application that connects seamlessly to Healthie and all of its features, as well as the integration. So I mentioned Zus health earlier for data interoperability, being able to check past patient health information or past prescriptions, which is really important for our use cases, especially for patients that might want to wean off of opioids.

**Another thing I think you mentioned earlier is that you have been using the Healthie cash pay features. How do you think about the quality of that particular feature set?**

Yeah, there are a couple different ways I could take this one - for example, in terms of integrating with Stripe to make a really seamless setup process for patients and providers to take self-pay payment models. That's been really, really easy. So we've been happy with that. Something we've really liked about Healthie is we've had a lot of different

instances where we wanted to change the payment model for patients. So for example, we can set up packages that have a specific number of appointment credits, be it one physical therapy appointment and maybe a couple of coaching appointments per month on a recurring basis. We can kind of custom create those packages to be sent to the patient and really work with this credit system to make sure that patients aren't booking for more than they've been allotted or more than they paid for. And as an early stage startup without a big operations team, that's been really helpful.

**Got it and that kind of provisioning of credits aligns with self-service scheduling so that patients are able to understand what services are available, what credits they have left, and choose their own schedule based off of that?**

Exactly. So typically in our workflow, we will have an initial assessment with a patient to come up with a care plan for them. And then we'll say, these are the appointments we'll want you to have on a recurring basis. So we can put those in a package or give them a specific number of credits, so that they can always book what they have paid for or what is presented in their care plan on a recurring basis without any extra hassle or any oversight needed on our part to make sure that patients aren't over-booking or under-booking.

**Are you working across multiple states and different time zones?**

Yes, we are currently working in eight states across central and eastern time, but quickly expanding to at least the mountain timezone soon.

**There can be some credentialing and licensing concerns that can arise when you're working across different regions. How do you feel that's been handled by Healthie with their scheduling features?**

Yeah, it's a good question. Something that Healthie does well is you can make sure that patients can only book with providers in specific states based on their licenses. That's been really helpful for us in terms of actually managing which providers have which credentials. It's pretty much as simple as just saying which providers can work in which state and that's worked for us for now. I wouldn't say it's too advanced or flexible, but for our use case, that's been fine.

**Is it integrated into any third-party credentialing and license management software?**

Not in our use case.

**Are there other features that are worth calling out from your perspective as being particularly interesting or relevant for your use case?**

In terms of features, I will say that forms have been helpful, they have a pretty flexible form setup. I wouldn't say it's always as flexible as we need. So you can create intake forms, charting forms that work very seamlessly for bare minimum functionality and you can customize them, but not as easy to customize for each patient. So there's a little bit of limited flexibility there. But forms and document sharing and messaging communication with the patient have all been pretty seamless. The other thing I'll call out is the Healthie support team has been very solid, typically having a good response time. But a lot of the time we do hear that that product feature request, which they're always receptive to hearing, will be pushed pretty far out on the roadmap.

**How do your providers feel about the charting and clinical notes in Healthie?**

Everything's been great from that standpoint, including with the API. So in our mobile app, we're capturing additional information, we're able to push that information directly into the charting section for patients. So we've been happy with that feature. Definitely.

**Maybe moving into a slightly different section. Are there any features that you don't use that are worth calling out? It could be because you just don't need to use that feature, or because the feature doesn't work the way that you need it to.**

Yeah, that's a good question. I guess there are two sides to this coin. The reports feature is very helpful. We can pull reports for appointments, see which providers are holding which appointments, and capture the amount of time that providers have put into specific appointments. Their reports for payments, billing bank transfers, and client activity are pretty well-covered, but they're not super flexible. We do have the option with our enterprise plan to customize up to five reports and they will for us, but beyond those five custom reports, there is limited flexibility in terms of the reporting you can gather, and they typically come out in Excel spreadsheets, so they're not going to be super useful if you're trying to work with massive bits of data.

**Are you exporting that into a data lake now?**

As of now, we're keeping it in sheets. As we move towards more use of our mobile app, which is going to be having much larger datasets, we're going to be using our own database.

**Any other features you would want to talk about or should we move on to chat about APIs?**

Maybe not feature-specific but some things that do come to mind with Healthie are some of the default settings that can be hard to manipulate or customize for our own needs. So for example, there are specific automated patient emails that are sent out and oftentimes there's very limited flexibility into how you can change those to better meet your workflow needs or your branding. So that's one thing.

Some things have limited scheduling for events. So for example, with goals you can have them recurring, I believe, on a daily, weekly, or monthly basis, but not anything more custom than that. So those smaller things where you do have fewer customization abilities are some things that we've certainly made note of. And then clinical automation tools, in terms of patient engagement, I certainly think integration with other tools that make that a little bit easier are pretty much essential if you want to have deep and effective patient engagement processes.

**Switching gears a little bit. Did you extend the platform in any way?**

As of now, only so far. We've built our own patient-facing portal, which is in the form of a mobile app, which is supposed to make it a little bit more specific to our care needs. Again, we work in a field of healthcare where our patients have very specific needs that aren't always fulfilled by Healthie's patient interface. So we've connected our app to Healthie through an API, which has worked very well so far. And it has also been huge in making sure we have that level of HIPAA compliance and security built in while we're building our app. So that's been great.

**How easy was it to build what you needed? Did you find the APIs robust and comprehensive?**

Yeah. I would say the API has met our needs and certainly has been flexible. And if there's anything ever not found in the documentation, the support team has been quick to work with us for workarounds in most cases where they are

feasible. It hasn't been perfect in all instances for us. Sometimes we've had to build guardrails around our own code, but for the most part, it's been what we're looking for.

**Do you have any advice for other organizations that might want to build on Healthie?**

Don't hesitate to reach out to their support team even before making the decision. Because understanding what is and isn't customizable, what's feasible beyond what's listed in their documentation can make a big difference. We've found that their support team has been very helpful in ways that we didn't expect given what's listed on their documentation site today.

**I'd be curious to chat about integrations. Did you supplement any product functionality or integrate it with other parts of your stack?**

Yeah, so we're currently integrating with Candid Health for billing to make moving in-network with insurance easier, and we have used Zus for data interoperability for getting past patient history information for prescriptions or other appointments, seeing what they've seen before, what types of treatments they've had, etc. Being able to cut down some of that intake flow and get that done automatically has been really great for both our providers and our patients.

**What has the integration process been like?**

More or less out-of-the-box. Both integrations have been very seamless and both integrations have been very intuitively placed within Healthie's user interface, which has been great, especially with Zus being able to capture all this information without moving into a separate platform (without having separate logins). That was outstanding for us. So we've been really happy about it.

**Are there any other notes you make on the quality of the integrations?**

For these two integrations, they're constantly being developed. So we've seen a few iterations with positive changes over time. For the most part, I think the quality has been great. It's been what we expected it to be - relatively bug-free. In terms of capturing data from Zus, for example, in some cases, we don't get as much data as possible. But that's not a Healthie concern. That's more just limited access to data from Zus' side, which, again, has a broad range of output for patients so we certainly haven't been disappointed with the output but it does vary greatly.

**Did you choose Candid and Zus because they were already integrated with Healthie or did you go through a separate procurement process and then decide based off of that?**

Good question. Being pre-integrated with Healthie is a big part of our decision making. One of the reasons we chose Healthie upfront was actually their broad marketplace and their broad range of integrations that make our lives as an early-stage startup a lot easier. So we never rule out potential integrations that aren't pre-integrated with Healthie, but given how vast the list of pre-integrations with Healthie are, it's been great for us and certainly moves the needle considerably.

**With Healthie, how did you find the sales and procurement process overall?**

We looked at a few different products. Ultimately, it came down to pricing. One great thing about Healthie is they do have a pretty broad range of pricing options so you can find one that suits your needs. So we went with a semi-white-label enterprise plan. But again, it ultimately came down to how intuitive it was - how flexible it was for

different types of providers - because again, we work with at least four different types of specialists who sometimes have different needs. The level of integrations with tools like the ones we've covered, and the flexibility of the API to build our own platforms off of it were absolutely critical for us. We also went through and spoke to a few companies that had used Healthie prior and the level of confidence that companies have had with their support team in terms of getting responses and getting flexible care has been massive.

**How did you feel the competition stacked up? Are you able to talk about the different folks that you were considering at the time and kind of how you thought about their trade offs?**

A couple of other ones that we looked at and were honestly very impressed with were Elation and Avon. I think in Avon's case, they were relatively new to the competitive space and we were pretty eager to go with someone that had a little bit more of a history and we could go to past customers to get some sort of reliability check. So that was a big part of our decision-making. With Elation, they were just a little bit less out-of-the-box versus Healthie, so we felt with Healthie we could hit the ground running a little bit faster, get our providers comfortable with the use cases, and move quickly. That was ultimately the trio that we came down to for our final decision, and that level of how intuitive it was. And that sense of reliability we had from past customers kind of moved the needle for us.

**Looking back, do you feel like you made the correct assessment at the time?**

Yeah, I think it's hard to say there's a correct choice in all cases, but we've certainly been happy with our choice with Healthie. We really haven't hit any major roadblocks. And, again, we have a pretty complicated, sometimes convoluted workflow given our different care plans that are personalized for every patient and across different specialists. We do have a collaborative care model where we also want our providers to be able to work together. It's probably something I didn't mention earlier but the ability for our providers to share documents, message each other, and view each other's calendars very easily mattered. That was big for us and that's proven to be very accessible and consistently workable with Healthie so we've been happy.

**I'd love to learn more about collaborative care and how it impacts workflows that you might have.**

Yeah, so for us, we really want every patient to have a care team that works together, so our physical therapists may work with our coaches and our physicians. They'll share notes they have about the patient, making sure there's alignment and the patient doesn't have to constantly retell their story. We don't want a physician and the physical therapist to be giving either conflicting or overlapping exercises. For example, our care teams have what we call interdisciplinary team meetings, where they kind of cover these needs and bases and preferences information about each patient, making sure care plans really are cohesive across specialties.

**Healthie allows you to quickly summarize the latest state of a patient so that they can move seamlessly between different types of providers?**

Yeah, I think so. Again, I would go to the fact that having more automated automation tools for operations, like say, you've had your initial assessment, send a message to the patient to automatically enable scheduling for your next specialist visits - things like that would make it a little bit easier in terms of charting and note-sharing. There's been absolutely no problem there. I will say again, though, for bigger reports, if we want to have a summary that we share with a patient or a dashboard of health progress, that's something we're doing on our own through really just basic tools, but it's totally external to Healthie. Unless we're exporting a spreadsheet of health results or health information over time through surveys,

**Switching gears, once you'd made the purchase decision, what was the onboarding and implementation process like and how long did it take before the product was ultimately deployed?**

Getting the product in our hands only took a little over a week. Actually getting it fully set up for our needs (which of course, in Healthie's defense, our needs were evolving over time) - it took a few weeks to really finalize our processes and figure out which automations we wanted, what settings we wanted for all of our different appointment types and different provider guardrails. To make sure that patients were only scheduling with providers based in their states, things like that took a few weeks, but again, some of that was probably extended given our evolving needs as well.

**How do you feel about customer support and account management now that you are in production?**

I asked a lot of questions, both from an API standpoint with our engineers and from the standpoint of basic needs to help our providers work a little bit more seamlessly. If I reach out by email with a question, I'll typically hear back within the next 24 hours and I've never had a question go unanswered. So I've been satisfied with the support. Again, there have been a lot of instances where I've asked for a lot but at the very least, they're always responsive and do their best to make sure some solution is found. I will also say that I have a weekly standing meeting with our team. I don't always hold it but if I do, I can get on the phone with either someone from their product team or someone from their sales team to get quicker support that way.

**Let's do a lightning around. What do you like most about the product?**

I like that it's intuitive. So it's easy for someone to hop onto, whether it's a patient or a provider, and figure out how to make it work. And then really just the flexibility with the API and integrations being able to expand on top of it in a range of different directions and to do so quickly has been massive for us.

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

Maybe the lack of flexibility with some of their preset default settings. Sometimes we can reach out and request to have those adjusted but having some more prebuilt flexibility to move things a little bit more quickly would be great.

**What is the likelihood of you continuing to use the product in 18-24 months?**

On the provider side, high. But again, we are building our own patient-facing portal that's more specific to our needs. So having that as our default patient experience is incredibly likely. But keeping Healthie in some form, just to make sure it's the infrastructure for our clinical operations, I'd say very high.

**Is there anything that we haven't talked about so far that you would want to share or any advice that you have for someone who is in the process of making their EHR decision?**

I will say that the number of companies that seem to be choosing Healthie, from my perspective, is growing quickly. So there has been a great kind of community of people to reach out to to better understand the use cases with Healthie, understand best practices or get support or even think of different ways to build off of it. So if you do decide to go with Healthie, understanding who those other companies are, who to reach out to and discuss best practices can help get up to speed much more quickly. But in terms of product experience, and satisfaction, we've been very happy and certainly expect to continue using it moving forward.