

# Welkin Health








by Operations Lead

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

### Details

Review Date	10/04/2023
Purchase Date	Q1'22
Implementation Time	6 weeks
Product Still in Use	Yes
Purchase Amount	per provider per month
Intent to Renew	100%
Review Source	Vendor

### Product Rating

Product Overall	 5.0
Use Case Fit	 3.5
Ease of Use	 5.0
API	 N/A
Integrations	 3.0
Support	 5.0
Value	 5.0

### About the Reviewer

Product Oversight

### Reviewer Organization

Specialty Practice

### Reviewer Tech Stack

- Sisense
- DocuSign
- Twilio

### Other Products Considered

N/A

### Summary

- Product Usage:** Welkin is primarily used for communication between nurses, facilitating referrals, telehealth sessions, and documentation.
- Strengths:** Welkin is praised for its flexibility and customizability that allows in-house feature development.
- Weaknesses:** Users are suggesting improvements in the assessment templates' interactivity and the functionality of the calendar feature.
- Overall Judgment:** Despite its minor weaknesses, Welkin is greatly appreciated for its effective overall product and features.

## Review

**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?**

We offer high quality, cost effective wound and ostomy care to patients in partnership with health plans and risk-bearing providers. I manage operations and I oversee a bunch of different areas. We partner with the healthcare settings to either give direct patient care or to educate their staff on how to give specialty wound and ostomy care.

**What initially drove the need for a product like Welkin at your company?**

In order to meet the requirements of providing virtual care, we needed software that would ensure secure end-to-end communication, whether directly with patients or with external clinical staff.

**What specific requirements did you have in mind? Did you look at other vendors?**

We wanted flexibility, especially in terms of integrating with other facility software. We wanted multi-channel communication — email, SMS, or phone — to all come in and be documented securely in the patient's record. We looked at a few other vendors, I don't know which ones specifically, but the decision to go with Welkin was quick and easy. It met our requirements, was extremely cost effective, and didn't have the bells and whistles the other tools had that we knew we wouldn't use.

**How did you find the sales process?**

I wasn't directly involved but I heard it was organized and straightforward. We didn't have to jump through a bunch of hoops just to get an agreement signed and get it implemented.

**How was the onboarding and setup process?**

We had a really great group from Welkin to help ensure a smooth implementation. They looked at the end-to-end project plan and got us up and running fairly quickly; I think it was about six weeks.

**How does Welkin integrate into your current workflow and tech stack? Who are the stakeholders across your team that interact with it?**

Our main use case is to support communications between nurses: we have certified wound and ostomy nurses on staff and they're our primary users. We receive a secure referral within the system with patient information, and our nurses can then act on that referral, either by sending a text, sending an email, or, setting up a Zoom meeting. Following that, they can document the encounter or assessment within Welkin and make recommendations that can be relayed back to the patient and the facility, who then can carry out the recommended action.

**What specific features do you use within Welkin?**

The most important feature is the communications center, as described above; we also make use of assessments and encounters. We've built assessments to record the patient location, such as telehealth or in person. We've also

included documentation logic based on the number of wounds the patient has or the type of ostomy they have. The documentation changes in each case.

**How do you facilitate communication and data flow between the referring provider, the nurse, the facility, and the patient?**

That's part of our workflow within Welkin: once an assessment is completed, it's sent back along with recommendations to either the patient or the facility, based on what's listed in their profile.

**Do you use any other features in Welkin?**

We use automations to streamline navigation for our virtual nurses and reduce time spent clicking through tasks. We also use programs, which can automatically generate the required tasks for a nurse to complete, and which also helps us with reporting.

**What are some of Welkin's strengths and weaknesses?**

Welkin's customizability is one of the top features we love about it. We can build our own assessments, create our own programs or tasks, and add automation, without having to call their development or support team to get it implemented. The programs' feature is also a highlight: it enables us to bucket our patients into different programs that get billed or invoiced differently, and it streamlines our billing process.

We have put in a bunch of enhancement requests that would be helpful for us. We'd like the assessment templates to be a bit more interactive: right now, they can only be built from a PDF. We'd like it to have a feature where, if a field doesn't have any data, it doesn't show up on the template, but that's not possible yet. In addition, the calendar feature isn't as functional as we'd like: when we schedule an appointment, the text gets cut off so it's hard to see which patient the appointment is with.

**Are there any upcoming features you're planning to incorporate into your workflow?**

Currently, we use scoring groups within the assessments feature. This lets us score individual options within a drop-down data field to produce an overall score. We use it to track the progress of wounds so that we and our customers can see whether a wound is healing, stalled, or perhaps declining. It's been a game-changer for us. Welkin is improving their scoring capabilities so that it's easier to add to assessments and so that it connects to one of their integration licenses, which will help us with our business intelligence reporting and analytics.

**Have there been any bugs or stability issues?**

It's been pretty bug free. We've had some issues with the A2P [application-to-person] compliance, which is not specifically related to Welkin but carrier requirements and their communications provider, Twilio, but Welkin has been addressing the issue and it's starting to clear up.

**Have you built on top of Welkin's API or integrations?**

Yes, we have connected our proprietary web and mobile applications with Welkin's API. We have integrations with DocuSign and Sisense; those are both out-of-the-box integrations with Welkin.

The integration and setup experience has been great. With DocuSign, it's been really useful to have something like a Patient Service Agreement flow directly into a patient's record. All of their information is in one place and we don't have to use a separate application. It's fantastic. Sisense has been a game changer for us too. We were looking at several other BI and reporting tools which would have cost us a lot more money because they're completely separate, when we found out Welkin had an integration with Sisense.

**How has account management support been?**

It's been A+. I get an immediate response any time I reach out, and they're always happy to jump on a call and help. It's one of the best I've encountered.

**Do you think your organization made the right call going with Welkin?**

Absolutely.

**Any other areas of growth you'd like to highlight?**

There are some nice-to-have features we want to see. I'd like to be able to copy a data field instead of having to create it again from scratch. I'd also like it if, when a patient record contains multiple assessments, those assessments could talk to one another instead of standing alone.

**Do you have any advice for someone who's going through the process of selecting this type of product?**

Welkin can be a great route if you need to integrate with customer applications. It's great because it's so customizable and lets you develop features in-house, instead of always having to work with engineers or developers.