

# Elation

by Director of Clinical Programs

Electronic Health Record

Headless EHR

## Details

Review Date	11/13/2023
Purchase Date	Q2'23
Implementation Time	Instantaneous, but 6 weeks of follow-up and integration
Product Still in Use	Yes
Purchase Amount	\$289 / provider / month, no implementation fee
Intent to Renew	100%
Review Source	Elion

## Product Rating

Product Overall	<div><div></div></div> 4.5
Use Case Fit	<div><div></div></div> 4.5
Ease of Use	<div><div></div></div> 5.0
API	<div><div></div></div> 5.0
Integrations	<div><div></div></div> 5.0
Support	<div><div></div></div> 4.5
Value	<div><div></div></div> 5.0

## About the Reviewer

Purchasing Team

Implementation Team

Product Oversight

## Reviewer Organization

Specialty Practice

Orthopedics

## Reviewer Tech Stack

Tellescope

CertifyOS

Hubspot

Medmo

## Other Products Considered

Canvas

DrChrono

## Summary

- **Product Usage:** Elation is used primarily for charting, clinical orders, and billing, with patient self-scheduling and registration handled through an integrated platform, Telescope.
- **Strengths:** Elation's strengths include easy integration, fluid navigation through patient charts, robust provider database, efficient lab ordering functionality, and a responsive support team.
- **Weaknesses:** The scheduling interface needs improvement, there's limited recognition of providers in various geographic locations, and the clinical visit templates, although customizable, feel rigid and overly strict.
- **Overall Judgment:** Elation has proved to be a reliable and fitting solution for the organization, with its ease of integrations and flexible charting capabilities standing out, albeit improvements could be made.

## Review

**Today, we're talking about Elation and how it's used in your organization. But first, can you give a brief overview of your company and your role there?**

We are a value-based tech company in the orthopedic space. Founded about three years ago, we initially focused on building our tech stack and product while targeting self-funded employers. However, we realized that wasn't the right fit for us. We now exclusively work with health plans, particularly ACOs and Medicare Advantage plans. Our role is to take on full risk in relation to their orthopedic patient population. We needed a platform that could function as a fully certified EHR but also provide patient engagement, care management, and ongoing patient navigation. I am the director of clinical programs and the only clinician on the team. I have been an orthopedic PA for about 22 years and lead the orthopedic team.

**What drove you to look for an EHR like Elation?**

We started with IntakeQ before we realized that we would need to transition to a different model, so we didn't need a certified EHR at first. However, when we pivoted to a new model, we evaluated the field again to find a certified EHR. The big names like Athena, Epic, and Meditech weren't suitable for us as a small company. We eventually chose DrChrono, but after a year, we realized it didn't meet our needs and had to start over.

We were looking for a certified EHR with an open API or headless component that would allow us to integrate our care management and population health platforms. The only two vendors that met those criteria were Elation and Canvas, and Elation's pricing was significantly more competitive, which counted in their favor.

**What were your requirements, and how did you ultimately decide between Elation and Canvas?**

In terms of the API, we wanted to be able to manage integration ourselves rather than relying on the vendor to do it for us. We've been iterating very quickly, and we didn't want added complications on that front.

On the clinical side, we needed note and templating functionality, as well as the ability to easily connect with other providers at different practices. We needed the ability to view an embedded eFax, for instance. Elation already had many integrations in place with imaging facilities, lab facilities, and other services like AI scribes. They also had lightweight billing functionality at the time, which we thought would be sufficient. It wasn't adequate for our needs, but they've since improved it and now offer a robust integrated billing platform.

The decision between Elation and Canvas was primarily based on the price difference. Canvas has a slightly more user-friendly UI that is easier to navigate; it's designed to be tech-forward and accessible to anyone without feeling overly clinical. If price hadn't been a factor, we would have chosen Canvas because both platforms offer similar functionality.

**What was your experience with the sales process at Elation like? How would you rate the quality of interactions with their team?**

The sales process with Elation was fantastic. We had gone through about 87 demos for different components of our tech stack, so we were adept at asking the right questions to quickly get the answers we needed. If the demos were too rigid or lacked robust knowledge, we would end the call and move on.

Although it spanned a few months, the sales process with Elation felt casual, which suited us well—we wanted specific questions answered in specific ways, and Elation’s team was accommodating in addressing our needs through email or a quick chat. That flexibility was very helpful.

The onboarding process after our purchase was similarly seamless, with a product manager scheduling regular meetings and being highly responsive via email. Overall, the experience was great.

### **Can you discuss the setup process in more detail?**

After we decided to proceed with Elation, we were able to start using the platform immediately, even while going through weekly training sessions. Our tech team was granted immediate access to the development site, which allowed them to integrate our systems and conduct tests.

The person handling our onboarding was also available to address any integration-related questions, ensuring a cohesive experience without being passed around to multiple people. As part of the sales process, Elation offered to handle two integrations, such as labs or imaging, at no additional cost. Any integrations beyond the initial two would incur charges unless we opted for open API access to handle them ourselves.

### **How do clinicians and front office staff interact with the Elation platform? What are the main workflows that users go through?**

We’ve integrated Telescope, our patient communication platform, with Elation. This means that patient self-scheduling and registration happen through Telescope and are then pushed through to Elation, where a patient chart is created. Appointments are also pushed to Elation for scheduling.

Clinicians are strictly using Elation for documenting office visits, creating progress notes, and communicating with external providers. After completing an appointment, the notes are shared with the primary care doctor or another specialist that we’re referring the patient to. From a clinical perspective, our use case is somewhat limited.

Additionally, all billing is done in Elation. We submit bills and they are scrubbed in Elation before being sent out. Our administrative staff members don’t interact with Elation frequently; if a patient phones in with a question, they can look that up in Elation, but they primarily use Telescope.

### **Why did you choose Telescope over Elation for scheduling and patient intake?**

Elation’s scheduling feature, as with many other EHRs, lacks the ability to populate a list of the next available appointments based on patient geography. This is crucial for companies that operate in multiple states and rely on telehealth services. We wanted patients to be able to easily find available providers in their state and book appointments accordingly, which Elation couldn’t provide.

Another factor is that patient intake and registration in Elation, as in many EHRs, often require patients to create an account in a portal. However, we wanted to make the process frictionless for patients and avoid the need for a patient portal, which also influenced our decision to use Telescope for these functionalities.

### **How do you perceive Elation’s strengths in terms of data interoperability workflows? For instance, do you receive clinical data or share clinical data with other providers using Elation?**

That happens through Elation, yes. Elation has a robust provider database, unlike many other EHR systems. You can easily search for any provider nationally. I’ve only encountered one or two instances out of hundreds where a provider

didn't populate. In those cases, we would send them an eFax as well as a private portal message that they can access to read the notes. While we use Elation for communication with external providers—and I find that Elation's system is actually better than most—our inter-team task management is done in Telescope.

### **What led to the decision to use Telescope for task management in addition to other functions?**

I worked in private practice for 20 years, and one thing that is really lacking in most EHRs is a cohesive and robust way to track everything that happens to patients between visits. A visit is just one moment in time, but there are many other interactions and communications that occur outside of those visits. Unfortunately, most EHRs don't capture these interactions well, and it can be difficult to find and organize them chronologically. This is also the case with Elation. Patient communication platforms like Telescope, on the other hand, do a much better job of tracking all of these crucial components of a patient's journey.

### **Do you use Elation for any clinical orders, such as labs, imaging scripts, or referrals?**

We use Elation for referrals; these are sent in a similar way to how you can send notes, which provides a cohesive way to manage them. We also use Elation for e-prescribing and ordering labs. We haven't set up any integrations with lab facilities since we don't have a high volume of lab orders; we can simply receive the results via fax. As for imaging, we use Medmo for that.

### **Is the lab ordering functionality within Elation efficient and user-friendly?**

The lab ordering functionality in Elation is fantastic. Unlike large EHRs like Epic and Athena, where you have to enter things in a very specific manner, Elation is more flexible. For example, when ordering an erythrocyte sedimentation rate, some providers may refer to it as an "ESR," while others may use the term "sed rate." If you don't enter the term exactly as they expect in those EHRs, you'll get stuck and won't be able to proceed. But with Elation, as long as you're within the realm of what they expect to see, it will populate your options, which is nice.

Elation has also just updated its e-prescribing system to make it easier to enter free text instructions, and it seems like its database of pharmacies has improved significantly with this update. Overall, I find it incredibly user-friendly.

Finally, Elation has a great provider directory. It's really robust, and the providers on the receiving end can access the referrals through both eFax and a portal, which they can access through their email. Ensuring that referrals reach the intended recipients is half the battle, and Elation has improved this process by using multiple ways to distribute them.

### **What are your thoughts about the telehealth component of Elation?**

We don't use any of the patient workflow categories in Elation. We use Elation purely on the provider side, specifically for charting, clinical orders, and billing.

### **How have you found Elation's overall performance in relation to fee-for-service and value-based care?**

The value-based care aspect is really more of a charting responsibility. On the fee-for-service side, revenue cycle management has been excellent so far. Elation has a robust system that performs an initial scrub of submitted bills. If there's a reason a claim might be denied, they provide guidance on necessary documentation changes or additional diagnosis codes. With our low patient count, we've had a 100% first-time payment success rate. However, we'll see how we fare next year as our volume increases. Their UI is fantastic; they've made it foolproof for clinicians who are new to billing. For small practices, their billing software alone is sufficient, which means you don't need billing staff.

### **How would you characterize the overall strengths and weaknesses of Elation's product?**

The ease of integration is definitely a strength; our IT team has successfully integrated Telescope and HubSpot.

Clinicians also appreciate the fluidity and flexibility it offers when you're navigating through a patient's chart; there's no rigid structure forcing specific answers in order to access the next screen.

As for weaknesses, the scheduling interface needs improvement, and there is currently limited recognition of providers in different geographic locations. Their templates for clinical visits also need some improvement. While they claim to be customizable, they are still within a set of predefined templates and feel overly strict. We're working with Elation to address this limitation since it hinders their ability to cater to a broader range of providers, such as those in wellness or physical therapy.

### **Have you found the Elation platform to be reliable and bug-free?**

We haven't experienced any downtime or issues since May; we've been really pleased with the reliability of the platform.

### **From your team's perspective, how would you characterize the overall experience on the developer side?**

They've mentioned that the experience has been seamless. They had access to the Elation platform from the first day, which allowed them to perform integrations while we were still onboarding and raise any questions that they had. Overall, they have been pleased with it.

### **Could you share your experience with the out-of-the-box integrations Elation offers?**

Their list of out-of-the-box integrations is extensive, with around 30 to 40 options that provide a wide range of functionalities. In our case, we integrated Telescope in a relatively light manner, initially exchanging patient demographics. Our next step is to exchange intake form responses. Eventually, we plan to include clinical data, such as clinical notes. Overall, the integration process has been pretty straightforward.

The ability to e-prescribe is built into the system. Lab ordering is also built in; it's just a matter of determining how you'll receive those results, whether through eFax or direct integration.

### **How would you describe the quality and depth of Elation's integrations? Has there been significant improvement on the scripting and lab ordering side?**

Definitely. Elation's transcription offering and external billing platform integration options offer all of the prominent players in the industry. The majority of their out-of-the-box integrations are with providers located in specific geographic regions, which can be beneficial for organizations operating in those markets. Hopefully, over time, Elation will expand its national integration offerings.

### **How would you rate Elation's support and account management?**

Elation has been excellent in terms of support and responsiveness. They even have a product team with whom you can book time on Calendly to discuss any upgrades you'd like to see or suggestions you may have. They're a young and responsive company, and they really value customer feedback and input. We've been pleased with that aspect of our experience as well.

**Do you believe that choosing Elation was the right decision for your organization?**

Without a doubt. When compared to our experience with DrChrono, the difference is like night and day; we definitely made the right decision in choosing Elation.

**Are there any specific areas for growth or improvements that you would like to highlight?**

One area for growth is scheduling. It's not just about scheduling appointments but also the capability to set up multiple practices separately. We want to have distinct schedules for our practices in various states, with providers associated with each location and their availability reflected in the schedules. Additionally, we'd love to see more flexibility in template creation.

**Do you have any advice for individuals who are currently looking for an EHR?**

I would advise considering options outside of the traditional players. EHRs like Elation and Canvas may appear very different from larger providers like Athena, Epic, and Meditech. There is also a subset of EHRs like DrChrono that may seem more flexible than they actually are. It's crucial to do thorough research on these newer, younger EHRs because there is a clear divide between platforms like Elation and Canvas, which offer true flexibility and open APIs, versus the others. Take the time to dig a little deeper before making a purchase.