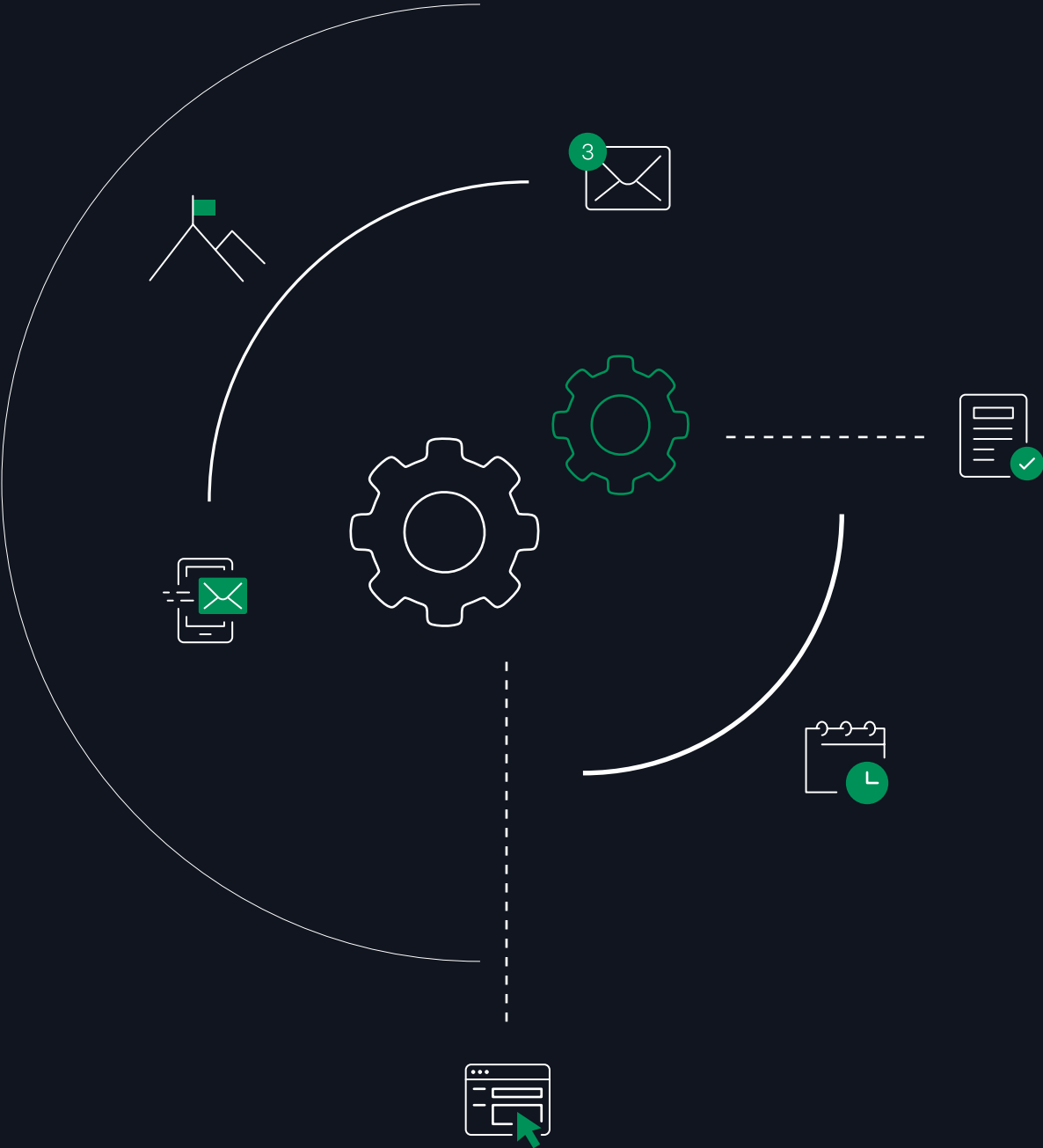


# Automation Capabilities and Workflows



# The way to better patient engagement

Build unique processes and escalations based on outcomes or conditions. Welkin supports efficiency by intelligently helping you move patients through their care plan. Lessen task burden and allow your team to do what they do best – care.

## What can Welkin automate?

### Triggers

Each automation trigger can be a single event, scheduled, or recurring.

<b>Data Type</b> Created Updated Deleted	<b>Assessment</b> Completed	<b>Calendar Event</b> Created Updated Deleted	<b>Goal</b> Created Updated Deleted	<b>Task</b> Created Cancelled Completed
<b>Encounter</b> Created Opened Finalized Disposition Updated Disposition Finalized	<b>Program</b> Created Updated Deleted Started Ended	<b>Patient</b> Created Updated Care Team Updated Care Team Updated	<b>User</b> Details Updated Invited Permission Created Permission Updated Territory Created Territory Updated	<b>User App Access</b> Access Created Access Updated
<b>Communication</b> Email Received SMS Received	<b>DocuSign</b> Signed			

## Conditions

Conditions check whether specific criteria is met before triggering an action and can be checked immediately or on a delay.

<b>Data Type</b> Equal Not Equal Less than Less or Equal Greater than Greater or Equal Contains, Contains All	<b>Program</b> Program Exists Program Status Equals Program Phase Equals	<b>Patient</b> Equal Not Equal Contains Null Not Null	<b>Assessment</b> In Progress Not in Progress	<b>Communications</b> Contains Contains (Ignore Case)
<b>Time Delay</b> Minutes Hours Days Weeks Months				

## Actions

Action define what happens after your trigger and conditions are executed. Multiple actions can take place off of the same trigger.

<b>Patient</b> Encounter Assign Program Email Patient Text Patient	<b>User</b> Task Notification Email User Text User	<b>System</b> Webhook
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## Automation examples and use cases:



### Escalations & triage

Create escalation pathways for events that need monitoring including adverse events, out of range results, specific patient responses, or lack of engagement.

#### Example A

- 1 Trigger:** Patient responds in assessment: "I have little or no interest or pleasure in doing things"
- 2 Action:** Text triggered to entire care team
- 3 Action:** Urgent task generated to check in with patient

#### Example B

- 1 Trigger:** patient submits high blood pressure in daily log
- 2 Action:** Email sent to patient to schedule check-in video call linked to calendar availability
- 3 Action:** Patient assigned to new phase in program



### Assessment workflows

Schedule or trigger intake forms, periodic check-ins, and patient feedback forms.

#### Example A

- 1 Trigger:** Assessment completed
- 2 Condition:** Score outside of expected threshold
- 3 Action:** Task created to schedule follow-up appointment

#### Example B

- 1 Trigger:** New patient sent baseline questionnaire
- 2 Condition:** Patient completes assessment
- 3 Action:** Patient queued to receive 30, 60, & 90 day follow up questionnaires



## Programs & phases

Graduate patients from one phase of their care journey to the next by defining specific patient criteria.

### Example A

- 1 Trigger:** Patient completes 10 workouts in low back MSK program
- 2 Action:** Patient graduates to next treatment phase
- 3 Action:** Patient receives email with next steps in program

### Example B

- 1 Trigger:** Patient reports milestone: sobriety for 90 days
- 2 Condition:** Most recent assessment score above defined threshold
- 3 Action:** Patient moves to next program phase



## Patient communications

Automate an email or SMS to your patient based off of an action or inaction, upcoming or missed appointments.

### Example A

- 1 Trigger:** Text sent to ask if patient interested in enrolling in new program
- 2 Condition:** Patient texts back “yes”
- 3 Action:** Email sent with onboarding materials: assessment, education, next steps

### Example B

- 1 Trigger:** Patient reports low A1C reading
- 2 Condition:** Program phase equals “maintenance”
- 3 Action:** Motivational text sent to keep up the good work



## Team alerts

Automate internal alerts, or trigger email or SMS to care team members based off of an action or inaction, upcoming or missed appointments.

### Example A

- 1 Trigger:** Point of contact changed by care team member
- 2 Action:** new care team member notified they have a new patient in their care
- 3 Action:** introduction text sent to new patient from care team member

### Example B

- 1 Trigger:** Patient doesn't check in for appointment
- 2 Action:** Alert sent to care team via SMS
- 3 Action:** Task created to schedule new appointment



## Calendar events

Automate regularly scheduled check-ins, appointments, and reminders.

### Example A

- 1 **Trigger:** Calendar event created: first check-in with patient
- 2 **Action:** Email reminder sent one week before appointment
- 3 **Action:** Email reminder sent two days before appointment

### Example B

- 1 **Trigger:** Calendar event update: change recurring meeting time
- 2 **Condition:** Meeting reminder texted, patient texts back "attending"
- 3 **Action:** Encounter event is created for scheduled meeting



## Email sequences

Create email campaigns to nurture patients or pre-patients by building lists within Welkin.

### Example A

- 1 **Trigger:** Pre-patient population loaded in Welkin via API
- 2 **Condition:** Patient in southwest region
- 3 **Action:** Entered into 3 series educational email campaign

### Example B

- 1 **Trigger:** Assessment response indicates high risk person
- 2 **Action:** Patient entered into motivational email campaign
- 3 **Action:** Person receives email every 3 days with reminders



## Tasks

Build automations around created, completed, or canceled tasks.

### Example A

- 1 **Trigger:** Task completed
- 2 **Condition:** Add two week delay
- 3 **Action:** Follow up task created

### Example B

- 1 **Trigger:** Task completed
- 2 **Action:** Notify administrator
- 3 **Action:** Notify billing department to record billable event

**Note:** All examples are just that – examples! Your Welkin configuration is entirely customizable and uniquely tailored with automations you require for your program.

# Let's Create Amazing Patient Experiences Together

## Why Welkin?



### Automated Care Delivery

Automate your care program from end-to-end



### Care Coordination

Supporting a true care team model



### Codeless and API First Program Design

Freedom to create and customize care plans



### Multi-Channel Communication

Harness the power of personalization



### Integrations

Create a unique environment



### Patient Encounters

Log every visit detail in one place



### Security & Permissions

Security and compliance policies and permissions

Learn more about us at [welkinhealth.com](https://welkinhealth.com)