Carebot delivers **60,000 COVID-19 vaccines** in four months

Uses low-code automation to rapidly stand up HIPAA-compliant healthcare appointment system nationwide

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The Tray Platform gives you superpowers. You can come up with an idea, rapidly build and deploy, get it up and running and make an impact quickly.

Jonathan Baran, CEO and co-founder

Carebot

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Highlights

�○ Delivers 60,000 vaccination appointments in four months

�○ Securely connects nationwide healthcare database to manage electronic health records in full compliance with HIPAA

�○ Enables lean startup team to quickly launch product and go to market in 12 months
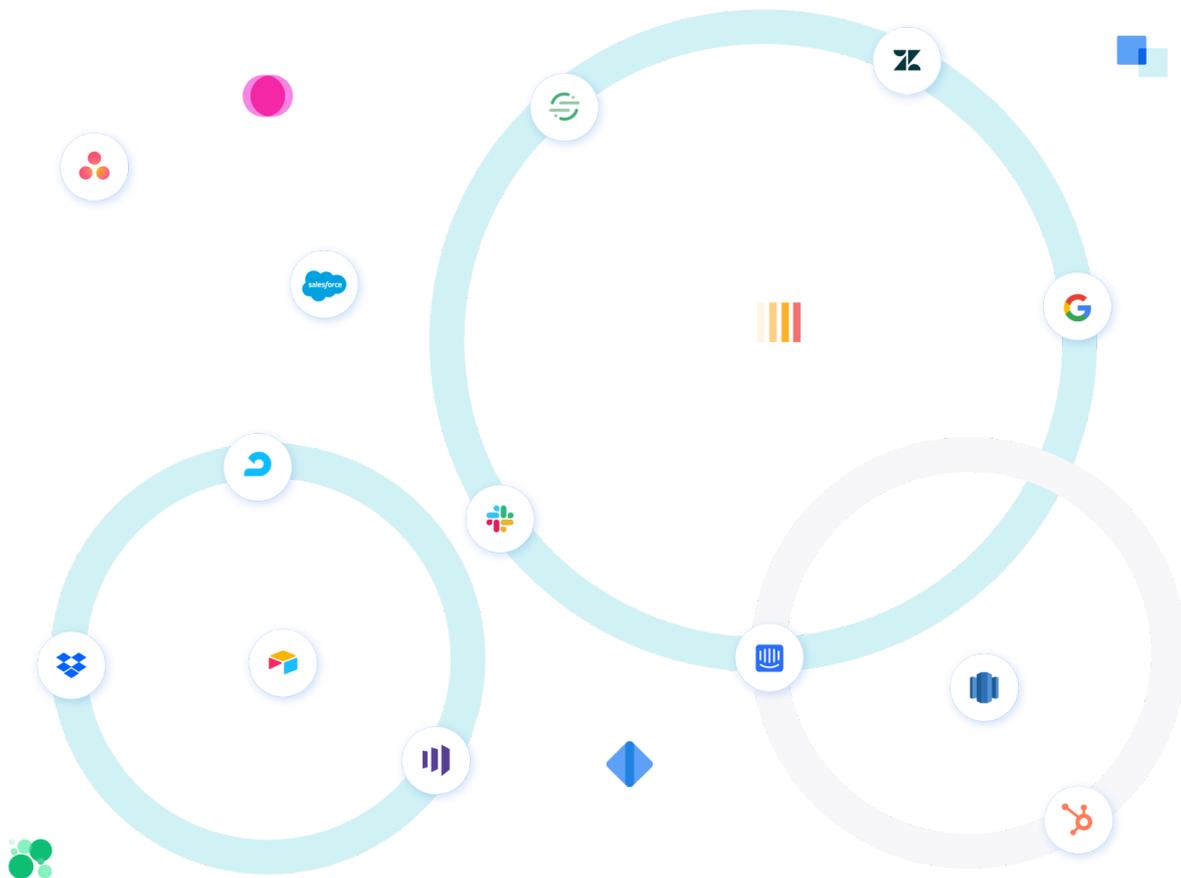
Industry   Healthcare

Location	Madison, Wisconsin
Employees	2
Solution	Tray Platform

Carebot is an all-in-one solution for connecting healthcare providers with patients. Carebot manages scheduling and appointment reminders for a variety of healthcare use cases, including annual wellness visits, lab appointments, and cancer screenings. However, as the company was launching in 2020, it found significant demand for its services with the COVID-19 pandemic, even before the development of vaccines.

"I've been working in healthtech for some time, working with healthcare organizations to automate clinical care," explains Carebot CEO and co-founder Jonathan Baran. "We realized that our key challenge after the start of the pandemic - and this was a major logistical undertaking - was going to be getting people vaccinated."

Carebot case study

Preparing for high-demand vaccine appointments

Baran explains that Carebot set about laying the groundwork to support large-scale COVID-19 treatment before scientists had even released the vaccine, given there would be demand for screenings and other related appointments. "We knew there would be high demand and major challenges, including understaffed physicians' offices tracking lengthy waitlists."

The Carebot team quickly realized that the pandemic would introduce numerous logistical challenges to doctor visits, screenings, and vaccination appointments, including managing patient data. Unfortunately, American healthcare doesn't operate on a single system that stores patient details in a uniform, easy-to-transfer format. Instead, different healthcare providers tend to store patient data within multiple, heterogeneous systems, all of which must remain secure due to HIPAA regulations.

Because the Carebot app excels at connecting the dots between physicians' records and providing custom alerts for patients, the team knew it could make a substantial difference in the war against the pandemic. To mitigate the issue of heterogeneity of electronic health records (EHR) across different systems, the team began its search for health data by intentionally limiting its initial launch to focus on a single, relatively mature healthcare database which offered a robust set of APIs to which the app could connect. However, the team still needed a fast, reliable, and secure way to connect and flow patient data across its patient database, its own app's infrastructure, and the records kept at physicians' offices across the nation.

Securely integrating EHR with a nationwide appointment system

"We knew there were a fair number of low-code tools out there, and we were very familiar with downmarket, consumer-like point solutions," Baran states. "However, we also knew that most of those tools weren't robust enough and couldn't handle some of the interactions we needed to manage."

The Carebot team also understood it needed to securely manage patient health information (PHI) in compliance with HIPAA. As a result, its search for a fast, low-code data integration solution came down to finding a partner willing to sign a business associate agreement (BAA) - an agreement that would formally designate Carebot's partner as being qualified to confidentially handle PHI.

Low-code automation to instantly manage waitlists and scheduling

"We ended up building out a product that leveraged the Tray Platform to automate all the processes involved in getting patients queued and scheduled for vaccinations," says Baran. Carebot worked with healthcare organizations throughout 2020 to establish waitlists for vaccine signups. The team also made sure to identify priority criteria for specific patients - specifically, bringing patients older than the age of 65 to the front of the queue in accordance with American healthcare policy.

The Carebot app not only let users reserve a spot on the vaccine waitlist, but also sent alerts directly to waitlisted patients once vaccine appointments began to open up. "We set up our automation so that as vaccines became available, the Carebot app would send mobile text alerts to patients to let them know vaccines were available, and that they could reply 'schedule' to book an appointment. We built a text messaging workflow for the entire process of booking dates and times, including for first and second

appointments," Baran explains. "We used the Tray Platform to directly integrate tools such as **Twilio** for our mobile messaging and **Knack** to manage waitlist data."

Results

Carebot facilitates 60,000 COVID-19 vaccinations in four months

Using the platform, the Carebot team got its vaccine scheduling workflows up and running towards the end of December 2020. By early to mid-April, within the span of about four months, the Carebot team had already gotten 60,000 patients vaccinated.

"Carebot is currently a two-person team, and while we're somewhat technical, neither of us is an engineer," Baran points out. "I myself am more of a product person. My process tends to start with ideas that we eventually have to figure out how to get to market. Now, I feel very comfortable using the platform."

Baran adds, "What's really compelling about the Tray Platform is that, if a customer had an idea for something to add, we could build it in an afternoon, test it, and deploy it the next day. The platform brings this ability to develop to people who aren't seen as developers. Honestly, the Tray Platform gives you superpowers. You can come up with an idea, rapidly build and deploy, get it up and running and make an impact quickly."
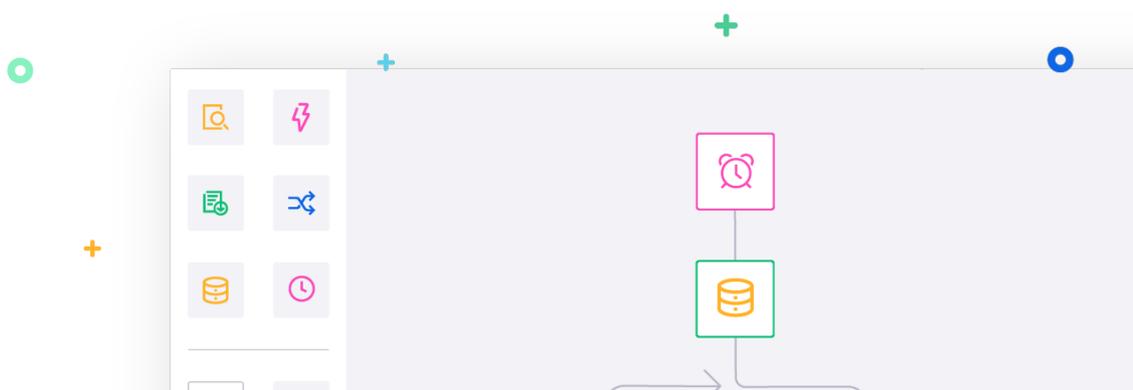
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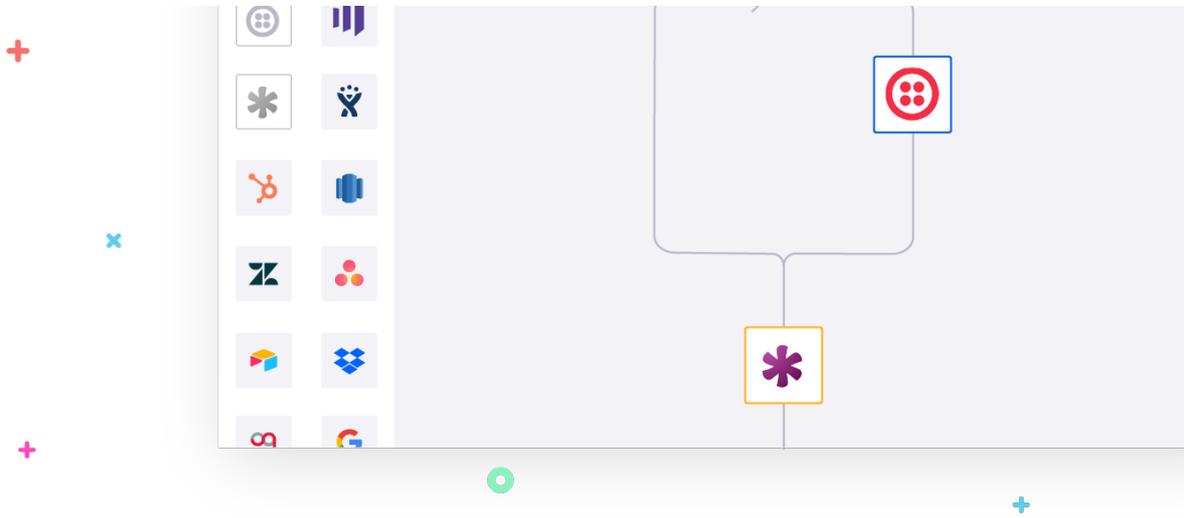## Expanding automation to cover additional healthcare use cases

"We're now in the process of transitioning beyond COVID-19 vaccines into other areas," explains Baran. "Our goal is to apply the same approach of connecting patients to physicians for important healthcare services while the Carebot app handles scheduling, booking, and alerting via text message."

"In the future, we're looking into expanding the services we manage to include scheduling annual physicals, preventative care, and cancer screenings, among others. Our goal is to build out a platform and toolset for engaging with patients with physicians for a variety of use cases."

"We're thinking about a lot of different options right now, including healthcare visits of all types, dental, and veterinary, among others. We're mainly looking at different areas and trying to ascertain whether they're technically possible and offer a good opportunity. Wherever we end up, I'm confident we can use low-code automation to figure out a solution."

Learn more about how businesses use low-code automation to scale out their processes by reading about how **FICO**, **Udemy**, **Mixpanel**, **Getronics**, *and* **New Relic** *improve essential processes for marketing, sales, finance, and customer experience.*

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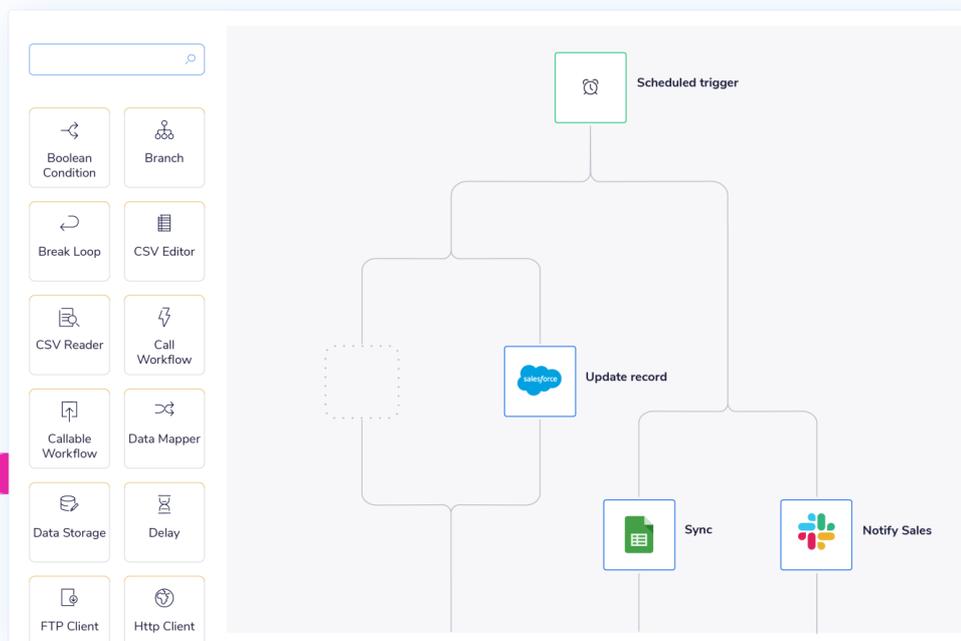Select the type of demo you'd like

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