Emerging Insights Case Study

Wellsheet 2025

Ascension Utilizing AI to Improve Workflows,
Make Informed Decisions & Organize Data

Emerging Insights Report | **July 2025**

KLAS RESEARCH
Emerging Insights Case Study

Note: Emerging Insights Case Study reports share initial feedback from one or two early adopters of newly emerging companies or solutions. Note that the feedback represents early findings.

Wellsheet

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Wellsheet is a clinical workflow platform designed to streamline EHR workflows and provide clinicians with decision-making support directly within their workflow. As part of the platform, Wellsheet offers add-on AI capabilities that are intended to improve care delivery and enhance provider efficiency. This case study draws from interviews with three respondents from Ascension and shares their experiences with using Wellsheet's AI capabilities.

About Wellsheet

Wellsheet explains: Wellsheet is a care team copilot that enables chart summarization, multidisciplinary rounding and discharge planning, and AI-generated documentation. Unlike AI scribes that listen to patient conversations, Wellsheet's AI reads the entire patient chart and generates documentation based on that data—a more natural workflow for inpatient settings. Embedded within major EHRs, Wellsheet is seamlessly accessible within existing EHR workflows and complements native EHR functionality. Providers describe it as life-changing, and health systems report that it generates millions in ROI per hospital annually.

Ascension explains: *"Wellsheet is an overlay on the existing EMR and is primarily designed to enhance the user experience. It adds value to things such as list creation and the clinical workflow, and it aims to minimize clicks per use and ultimately facilitate a more efficient clinical workflow so that physicians have a better user experience. On the delivery-of-care side, users are able to find the information much more readily and navigate information in the EMR more quickly; users can pull relevant data in a meaningful way, so they have high visibility as they scan information in preparation for rounding or a new visit."* —CMO

Customers Interviewed by KLAS

1 KLAS interviewed 3 individuals from 1 unique organization live with Wellsheet's AI capabilities enterprise-wide

Academic health system	Clinic	Large-hospital health system	Payer	Small-hospital health system	Standalone hospital
●	●	✓	●	●	●

Note: Ascension is the only customer who is fully utilizing Wellsheet's AI capabilities; however, more than 100 hospitals are currently deploying or utilizing Wellsheet's broader solution in some capacity.
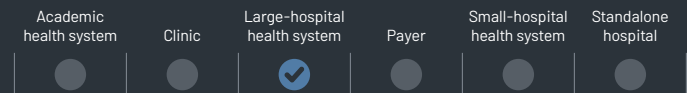
Wellsheet Customer Experience: An Initial Look

Ascension respondent report a fast implementation with minimal training needs and high physician adoption. The solution is described as intuitive, portable, and flexible for accommodating user preferences. Users across different specialties have quickly embraced Wellsheet as a time-saving and patient-safety-enhancing tool. Additionally, respondents say Wellsheet supports provider efficiency through configurable templates and a modern data-presentation layer.

Key Insights

Challenges that Ascension wanted to solve
- Physicians needed to access relevant information quickly within the EHR without unnecessary information overload or repetitive clicks.
- Existing workflows were fragmented and inefficient, affecting clinicians' experiences and efficiency as well as patient safety.

How Wellsheet worked with Ascension to reduce friction
- **Low resource utilization:** Wellsheet did not require many internal resources for the implementation.
- **Ease of use and intuitive training:** The ease of use and design reduced the need for formal training; clinicians learned by interacting with the tool. An easy-to-use tool is critical for reducing friction when navigating complicated EHRs.
- **Configurable provider views:** The solution's structure allows each provider to configure their view, which has encouraged widespread adoption, made the system easier to navigate, and improved individuals' efficiency.

Outcomes achieved through collaboration
- **Savings from retiring legacy applications:** Ascension has seen a net annual savings of over $65 million by retiring 760 legacy applications (thereby reducing maintenance expenses) and is on track to reach their target net annual savings goal of at least $100 million by retiring another 250+ applications.
- **Return on investment:** Ascension realized ROI within the first quarter after going live, covering capital investment and sustaining positive returns.
- **Quick scaling and sustained savings:** Executive backing enabled quick scaling and ongoing savings. Progress is regularly reported on to executive stakeholders within the organization.

Ascension's best practices that other organizations can apply
- **Practice, explore, and develop familiarity with the solution in a low-stakes environment**: *"Play with the Wellsheet product by using a fake patient. Everybody has a workflow, so users should drive their own workflow or have a mental map of their workflow and start playing with the application. I can guarantee that after practicing with one or two patients, users will know what to do. They need time to learn Wellsheet, but they can learn it quickly, and the more they use it, the easier it becomes. It is simple and very intuitive."* —CMO

Where the customer sees Wellsheet's greatest value
- **Solution is designed to improve workflow efficiency:** Data is displayed and accessible in line with how physicians think and work, thus helping them avoid extra clicks, unnecessary searching, and frustration.
- **Improved patient safety:** The solution contributes to improved patient safety, particularly around patient medication notes and concerns.
- **Seamless integration with Epic and Oracle Health:** Wellsheet provides excellent EHR integration with EHR vendors, and the implementation is relatively smooth and painless.

Vendor strengths and opportunities
- **Strength:** *"One strength is the way the system presents the data; it allows the workflow to be very efficient. The portability is also great. Another benefit is the alerts for the presentation of critical results. Those alerts can be customized by the user. There is at least one area where the user can customize, and the clinical tabs allow multiple specialties to look for information specific to their specialty. The information is presented very quickly. Additionally, the integration of AI and the synthesis of data is really helpful for me as a hospitalist."* —Physician
- **Opportunity:** *"Wellsheet should continue expanding the capabilities of AI to be more specific to areas like discharge summary, transfers, and data monitoring, like for clinical documentation improvement."* —CMIO

Other Relevant Commentary

"The system is very intuitive. Every doctor has their own workflow. I tell doctors to map the workflow and then go through the motions of the EMR. Wellsheet doesn't require hours and hours of training. It takes a little longer to download the application on a phone than it does to understand the workflow; the system is that simple. I have been using some electronic records where there is a lot of data, and it gets confusing. Sometimes I have to click through multiple screens to get to the right information. With Wellsheet, I can get the information I need to make a clinical decision. Whoever designed it probably has a lot of clinical experience because the system is presented from that point of view. It makes sense to us, and it is easy to adapt." —Physician

Wellsheet: Company Profile at a Glance Information provided by Wellsheet

Top competitors
Google Care Studio, Qventus, Regard, TransformativeMed, Xsolis

EHR integrations
Epic, Oracle Health, and athenahealth; also, Wellsheet can integrate into any EHR with FHIR APIs enabled

Number of employees
10–50

Estimated revenue
$5M–$25M

Current funding history
Series A, $12M raised; now profitable and expecting Series B this year

Target customers
Midsize to large health systems on Epic or Oracle Health

Revenue model
We charge a SaaS subscription fee based on the number of hospitals and the size of each; this single, all-inclusive fee includes all maintenance, feature enhancements, and customer support

Features and offerings

- **Chart summarization:** Contextual clinical views that account for a user's specialty, role, and usage patterns; brings together relevant chart data and AI-generated narrative summaries for hospital course, assessment and plan, and other documentation needs
- **AI-generated inpatient documentation:** AI reads entire patient chart and generates documentation (e.g., hospital course, assessment and plan, discharge summaries)—a more natural workflow for inpatient settings
- **Embedded decision support (e.g., UpToDate):** Surfaces relevant content from UpToDate using prefilled patient data from the chart
- **AI-assisted multidisciplinary rounding and handoff:** Enables case management team to view entire hospital census, view LOS to predicted GMLOS, and manage barriers to discharge (supported by AI suggestions); also enables clinicians of all specialties to hand off effectively during shift changes, as AI generates handoff notes, past medical history, and active issues and helps with I-PASS status flagging
- **AI-assisted discharge planning:** AI helps with discharge, anticipated discharge, discharge disposition, and LOS/GMLOS flagging

What do future customers need to do to be successful with Wellsheet?

- Identify clinical champions
- Have a technology team that is familiar with FHIR APIs for integration
- Establish leadership for transitioning case management workflows

What are Wellsheet's biggest differentiators?

Wellsheet is deeply embedded in clinical workflows and is integrated into the full patient chart and external data sources (e.g., UpToDate for decision support). Unlike scribes that listen to the patient conversation, Wellsheet reads the patient chart to generate documentation for the entire multidisciplinary care team, including physicians of all specialties, nursing, and case management; this process is more aligned with inpatient workflows. Wellsheet has been deployed to hundreds of hospitals across some of the largest health systems in the country and delivered vast improvements in clinician productivity and experience at enterprise scale.

Solution Technical Specifications Information provided by Wellsheet

Cloud environment
AWS

Development platform
React.js for front end; Ruby on Rails for back end

Database environment
PostgreSQL

Mobile application environment
Browser based; true mobile applications in Apple and Google stores

Security platform
SOC 2 Type 2 certified

Confidentiality
HIPAA compliant; have BAAs with all customers and all relevant service providers

Data encryption
AES 256 encrypted at rest and in transit

Integration approach
SMART on FHIR

HITRUST certification
SOC 2 Type 2

AI
Yes; we integrate with EHR and usage data to create our test models. Data is sourced both from customers and from proprietary data and is accessible to customers. Our AI summarizes patient charts, generates documentation, and suggests barriers to discharge. The models are trained weekly.

Report Information

Reader Responsibility

KLAS data and reports are a compilation of research gathered from websites, healthcare industry reports, interviews with healthcare, payer, and employer organization executives and managers, and interviews with vendor and consultant organizations. Data gathered from these sources includes strong opinions (which should not be interpreted as actual facts) reflecting the emotion of exceptional success and, at times, failure. The information is intended solely as a catalyst for a more meaningful and effective investigation on your organization's part and is not intended, nor should it be used, to replace your organization's due diligence.

KLAS data and reports represent the combined candid opinions of actual people from healthcare, payer, and employer organizations regarding how their vendors, products, and/or services perform against their organization's objectives and expectations. The findings presented are not meant to be conclusive data for an entire client base. Significant variables—including a respondent's role within their organization as well as the organization's type (rural, teaching, specialty, etc.), size, objectives, depth/breadth of software use, software version, and system infrastructure/network—impact opinions and preclude an exact apples-to-apples comparison or a finely tuned statistical analysis.

KLAS makes significant effort to identify all organizations within a vendor's customer base so that KLAS scores are based on a representative random sample. However, since not all vendors share complete customer lists and some customers decline to participate, KLAS cannot claim a random representative sample for each solution. Therefore, while KLAS scores should be interpreted as KLAS' best effort to quantify the customer experience for each solution measured, they may contain both quantifiable and unidentifiable variation.

We encourage our clients, friends, and partners using KLAS research data to take into account these variables as they include KLAS data with their own due diligence. For frequently asked questions about KLAS methodology, please refer to engage.klasresearch.com/why-klas.

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LEAD AUTHOR
Jackson Tate
jackson.tate@KLASresearch.com

CO-AUTHOR
Drew Partridge
drew.partridge@KLASresearch.com

KLAS
RESEARCH

Our Mission
Improving the world's healthcare through collaboration, insights, and transparency.

365 S. Garden Grove Lane, Suite 300
Pleasant Grove, UT 84062

Ph: (800) 920-4109

For more information about KLAS, please visit our website:
engage.KLASresearch.com

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