CAPABILITIES STATEMENT

Community-Integrated Care Coordination

WellCheck builds the tools that connect screening, referral, coordination, and reporting across the organizations that serve a community. Some partners run our full platform. Others start with one piece: a screening workflow, a service directory, outreach to a specific population, or a custom build. Whether you already run a referral system or closed-loop referral is not a priority right now, there is a place to start.

THE CORE PLATFORM

EquiLoop™

Our closed-loop referral and care coordination platform. EquiLoop tracks every referral from the moment it is made to a recorded outcome, coordinates the follow-up in between, and produces the reports funders ask for. It works alongside the EHR a program already runs. Where an organization already runs a referral system, EquiLoop can be scoped to a single program or population.

WAYS TO WORK WITH US

Screening

Configured to your program. Standard instruments including SBIRT, PHQ-2, and PHQ-9 run alongside SDOH, eligibility, and communicable disease screening, including COVID, in the same workflow. We also build custom screeners, intake forms, and consent forms. Results land in one record whether collected in person or by link.

Broadcast

Outbound SMS and email to the groups you define. Send a screener as a link that opens in any browser on a phone or computer, with no app to download, and results return to EquiLoop the same way an in-person screening does. Use it for health fairs, vaccine clinics, community events, and program openings. Segmentation, scheduling, delivery reporting, and SMS opt-out handling are built in.

Curated Network and Service Directories

We help identify, recruit, and onboard the partner and service provider organizations your referrals depend on, and keep the network current as programs change. We also build client-branded public directory sites, organized by category and kept up to date, so residents and advocates can find local services without a login.

Community Front Door

One entry point for every partner: public directory, self-referral, pre-screening, document upload, and routing to the right program. Program matching surfaces the programs that address each need identified at intake.

Grant and Program Management

Award budgets, line items, and burn rates held alongside the work they fund. Deliverable deadlines tracked with reminders. Each service is recorded once and feeds the referral, the follow-up, and the funder report.

Reporting and Dashboards

Role-based dashboards for advocates, leadership, and funders. Outcomes broken out by geography, demographics, service type, and referral source. Quarterly and annual reports generated from the platform, with participant stories that have identifying details removed.

Custom Builds

Client-branded websites, records applications, and data tools, built and maintained by the same team that runs the platform. If it helps your team connect people to services or document the work, ask us.

ALONGSIDE YOUR EHR

Your EHR records what happened in the clinic. EquiLoop records what happened next.

EquiLoop sits above the record system rather than inside it. The community programs it covers were never in the clinical record to begin with. Tribes run a mix of record systems, from RPMS to commercial EHRs, and IHS is moving to PATH EHR. Migrations are periods when integrations are in flux. A coordination platform that sits above the record keeps intake, routing, and follow-up continuous while that work happens underneath.

	Your EHR	EquiLoop
Primary job	Clinical documentation, orders, prescribing, billing, and clinical quality reporting	Intake, screening, routing, and documented follow-up across programs and partner organizations
Who works in it	Providers, clinical teams, front desk, and billing	Care coordinators, community health workers, navigators, advocates, program teams, and partner organizations
Who it covers	Patients of the clinic	Community members, whether or not they are patients of the clinic
Where the work ends	When the clinical encounter and its orders are complete	When the receiving program or partner documents that the service was delivered
Reporting focus	Clinical quality and billing measures	Program, grant, and funder reporting across clinical and non-clinical services

How it connects

Built to integrate with the record system a program already runs. Integration scope is defined at deployment, together with your IT team. EquiLoop is FHIR-ready. Scoping settles the following before any data moves between systems:

- Which data elements are exchanged, and which stay in one system only
- The direction, frequency, and method of each exchange
- Who authorizes each data flow, under Tribal direction
- How behavioral health and substance use records are segmented

What stays the same

- Your EHR remains the system of record for clinical care and billing.
- Advocates and community members use EquiLoop in a web browser, with no app to download.
- Getting started takes less than two weeks.

WHO WE SERVE

Tribal health programs · Local health departments · FQHCs · Community-based organizations · Rural health programs · Health hubs and community centers · Mobile health units · AHECs · School-based health centers

A focus: Tribal health programs. EquiLoop meets programs where they are. Where a Tribe already runs RPMS with RCIS and Purchased/Referred Care (PRC), EquiLoop works as the community front door, the access layer that sits ahead of the formal referral process without changing it. Where the referral process is manual or varies by program, EquiLoop adds referral tracking and PRC documentation that stays with the case. In both cases, the constant is coordination across programs that share clients but not a shared intake path.

Data belongs to the Tribe. WellCheck operates as a processor under Tribal direction, with no external sharing without written Tribal authorization.

WORKFORCE TRAINING

Training CHWs, Care Navigators, and Advocates to coordinate care on EquiLoop

We train your community health workers, care navigators, and advocates on EquiLoop so they coordinate care efficiently: screening, referral, follow-up, and documentation, practiced on the workflows they will run in the field. Training is part of every deployment.

HOW WE WORK

- Same team from scoping through every quarter after go-live.
- Training for your advocates included in every deployment.
- When grant numbers drift, we flag what to adjust and how to recover.
- Flat pricing, shared up front: a setup fee, a subscription billed monthly or annually, and any custom work. No per-seat or usage charges.

SECURITY AND COMPLIANCE

- HIPAA-compliant and BAA-capable
- Operates within a SOC 2 compliance framework
- FHIR-ready
- 42 CFR Part 2 data segmentation for SUD and behavioral health records
- AES-256 encryption at rest, TLS 1.3 in transit
- Role-based access controls and audit logging
- U.S.-based data residency
- Full data portability and deletion rights
- Tribal data sovereignty agreements executed as required
- EHR integration, with scope defined at deployment
- Mobile-first and offline-capable for low-connectivity field work

IN PRODUCTION · EQUILOOP™ IN DEPLOYMENT

93.9%	22,682	45,458	32
CLOSED-LOOP COMPLETION RATE	INDIVIDUALS SCREENED	SERVICES DELIVERED	PARTNER ORGANIZATIONS ENGAGED

Rural health hub deployment with a multi-partner ecosystem. Includes both clinical and social services referrals.

COMPANY DATA

Legal name	WellCheck LLC
Founded	2019
UEI	GW6YW75X9NC9
CAGE	228Y0
NAICS	621999 (primary) · 621498 · 541611 · 541512
EIN	92-1733314

CONTACTS

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See EquiLoop alongside your programs and your EHR.

A 30-minute conversation with the team that scopes, deploys, and supports it.

Book a 30-Minute Conversation

calendly.com/wellcheck/demo-discuss