Patient Intake Buyer's Guide

How to find the right patient intake solution for your organization

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Introduction

You and your team are overworked and understaffed, and you need a way to work more efficiently. But finding the right patient intake solution takes precious time and energy.

Instead of trying to figure it out on your own, this Buyer's Guide walks you through exactly how to spot the right tool for you. We explore the three key stages in finding and buying the right patient intake solution:

> *Mobile [patient intake] gives our patients a more private and convenient check-in option that has helped increase self-service utilization and boost overall patient engagement. It's also helped streamline operations and drive efficiency at our practice because patients can check in ahead of time on their own devices, and staff can focus on more urgent needs."*
>
> **- Karen Reyer, Director, CBO,**
> **Phoebe Putney Physician Group**

What is a patient intake solution?

Patient intake solutions eliminate redundant processes, improve data capture, provide an individualized, patient-centric experience and boost profitability. These solutions can vary widely, including tools for mobile check-in, flexible patient payment options, consent management, appointment scheduling and patient-reported outcomes.

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Identifying your needs

Step 1: Identifying your needs

Business goals

The first step toward identifying your needs is determining your business goals. Take five minutes and write out a list of the main reasons you need a patient intake solution—these may look like pain points and/or aspirations for your practice—and the corresponding practice goals and end business impacts you want to attain.

Example business-goals statements for a patient intake solution

Reason: Our providers' schedules are backed up because patients have to fill out so much paperwork.

End business goal: Providers' schedules run on time. Patients can easily complete their appointment paperwork at home before they arrive.

End business impact: Staff time saved, greater employee satisfaction and happier patients

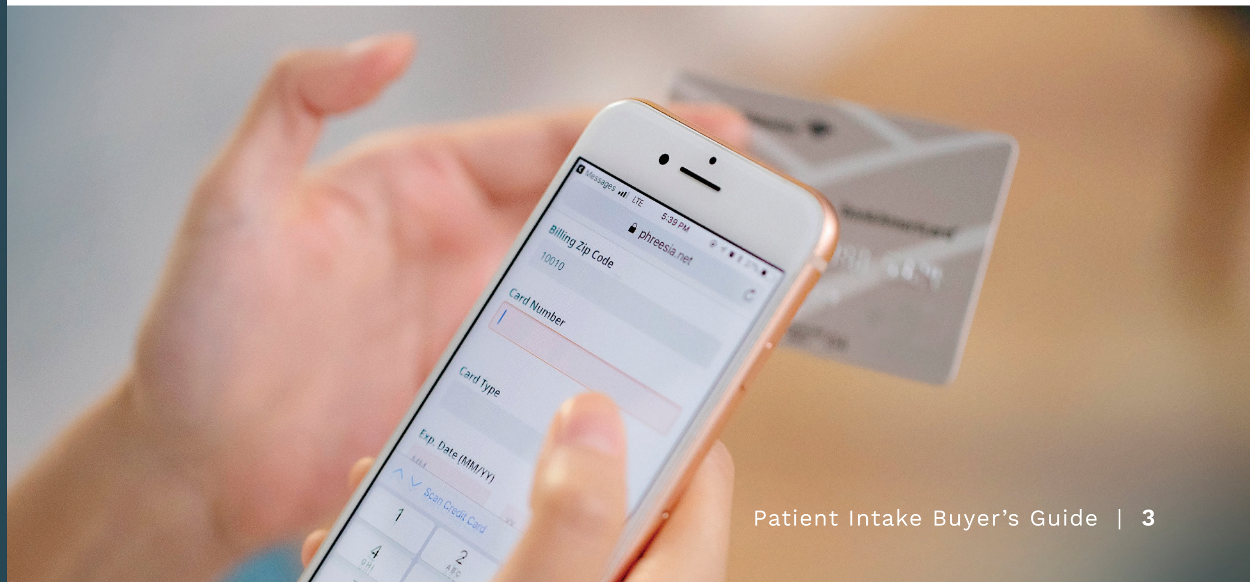
OR

Reason: We want to do a better job of collecting patients' financial responsibility.

Practice goal: Collect at least 85% of copays and outstanding balances due via self-service payments.

End business impact: More revenue, lower cost to collect, fewer surprise bills and a better patient financial experience

> *Our staff really didn't like having to talk about financial matters with patients. Now they're not having those discussions at the counter where everyone can hear them."*
>
> \- David Duma, CFO
> Urology of Virginia



1
Identifying your needs

Measuring success

As you think about your goals, it also can be helpful to consider how you'll ultimately measure the success of your patient intake solution. How will you ensure that the software is truly helping you to meet your goals and what matters most to you? Measurements of success could include time saved on checking patients in for appointments, or increased collections. Write down these metrics as part of your requirements list as well.

TO GET STARTED, ASK YOURSELF THESE QUESTIONS:

If you could eliminate one time-consuming manual task in your practice, what would it be? How would that impact your organization?

If select patient demographic and clinical information automatically flowed back into medical charts, what would be the impact?

If your practice could collect more of what patients owed before their visit, what would be the impact?

Possible answers might be:

"My staff could have time for lunch, and leave on time at the end of the day."

"I wouldn't have to try to hire another staff member, which is hard right now, given staff shortages."

"We would be more profitable and could hire an extra nurse."

TIP: When the time is right to discuss your organization's requirements for a patient intake solution, be sure to consider the needs of all stakeholders, including end users like front-desk staff, practice managers, executives, and finance and IT personnel.

It's easy to think that wait times are just 'business as usual' in healthcare, but they're not— they impact everything from staff efficiency to patient satisfaction and retention. The truth is that patients don't need to be in the waiting room for very long. If you give them a way to complete their check in electronically, either ahead of time or quickly when they arrive at the office, then you can effectively reduce patient wait times."

**- Shari Crooker, Practice Administrator,
Gwinnett Center Medical Associates**

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Evaluating a partner

Step 2: Evaluating a partner

Ability to meet your primary goals should be top-of-mind as you assess vendors, but don't stop there. Find a company that will be your true partner in transformation, complete with a dedicated customer service team, after-hours and weekend support, and in-house subject matter expertise. This checklist guides you through important questions to ask as you evaluate vendors' products and partnership potential:

Customer Solutions

- [ ] **CONTINUOUS OPTIMIZATION:** Is the customer solutions team dedicated to customizing and optimizing your set-up based on your practice's current and future needs?
- [ ] **AUTOMATIC IMPROVEMENTS:** How often does the vendor release product enhancements, including those specific to how you use the solution?

General Intake

- [ ] **PATIENT-SPECIFIC WORKFLOWS:** Can you customize workflows and is bidirectional integration available with your PM/EMR or host system?
- [ ] **INTAKE FOR SPECIFIC APPOINTMENT TYPES:** Does the software vendor support intake for a variety of appointment types?
- [ ] **PRACTICE CUSTOMIZATION:** Can patient intake questions be customized to meet the unique needs of your organization?
- [ ] **DEVICE OPTIONS:** Are there mobile, tablet and/or kiosk options available? Do they have high adoption rates?
- [ ] **CONTACTLESS INTAKE:** Can patients complete the digital check-in process on their own device?
- [ ] **PATIENT EXPERIENCE:** Is the patient's entire intake experience simple and contained in a single, easily accessible place, no apps or logins required?

Revenue Cycle

- [ ] **ELIGIBILITY & BENEFITS:** Does the solution automatically verify patients' insurance before the visit and calculate financial responsibility?
- [ ] **PATIENT PAYMENT CONVENIENCE:** Is it easy and convenient to pay through multiple options, including card-on-file, payment plans, mobile and/or online payments?
- [ ] **CARD PROCESSING:** Are payment processing rates competitive? Is there in-house support and PCI-compliance assistance?
- [ ] **SINGLE PLATFORM:** Can the vendor provide end-to-end payment capabilities across different practice locations from a single platform?

Clinical Content and Patient Outreach

- [ ] **CLINICAL SCREENING TOOLS AND PATIENT REPORTED OUTCOMES (PROS):** Which screening tools or PRO assessments can be included in patient-intake workflows?
- [ ] **SOCIAL DETERMINANTS OF HEALTH (SDOH):** Does the vendor support screening patients for unmet social needs using validated measures?
- [ ] **SATISFACTION SURVEYS:** Does the solution include automated post-visit patient satisfaction surveys?
- [ ] **TARGETED DIGITAL PATIENT OUTREACH:** Can the platform send targeted, customizable messaging between visits to engage patients? Are templated messages available?
- [ ] **QUALITY IMPROVEMENT:** Does the platform help your organization capture patient-reported data for value-based care programs like MIPS?

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Evaluating a partner

Patient Access and Schedule Management

- [ ] **ONLINE APPOINTMENT REQUESTS:** Does the intake platform allow patients to request appointments from your website?
- [ ] **SELF-SCHEDULING:** Can patients schedule their own appointments from your website with real-time updates to your scheduling system?
- [ ] **AUTOMATED SCHEDULE MANAGEMENT:** Are there automated tools to fill unexpected cancellations with clinically relevant patients?
- [ ] **REFERRALS:** Can all referral appointment requests be managed from one central hub? Can faxed referrals be digitized and tracked?

Integration

- [ ] **AUTOMATION:** Is bidirectional integration available for your PM/EHR or host system? Do updates and new data automatically flow back into your systems?
- [ ] **PM/EHR UPDATES:** How is data added: discrete integration, note field updates, and/or PDF attachments? Are consents attached as documents or flagged in systems?
- [ ] **PAYMENT POSTING:** Do payments post automatically to your PM system?
- [ ] **APPOINTMENTS:** Can appointments be scheduled directly from the vendor solution with real-time updates to your PM system?

Reporting and Analytics

- [ ] **PRODUCT USAGE** Does the vendor see high adoption rates across locations, staff members and modalities, and can you monitor usage?
- [ ] **FINANCIAL PERFORMANCE:** Can you track patient payments across your organization, reconcile them at the end of the day, and can you track each batch posted to your bank account?
- [ ] **CLINICAL RESULTS:** Is reporting or data available to help meet quality measures?
- [ ] **PATIENT EXPERIENCE:** Can you track patient satisfaction by location and/or provider to identify areas for improvement?

Security

- [ ] **PRIVACY AND SECURITY CERTIFICATION:** Is the vendor certified with industry-leading security organizations (e.g., HITRUST CSF, SOC 2 Type 2)?
- [ ] **PAYMENTS SECURITY:** Is the vendor Level 1 PCI-compliant? Are all payments hardware encrypted and does the vendor provide point-to-point encryption (P2PE)?
- [ ] **SINGLE SIGN-ON:** Can the patient intake solution be integrated into your single sign-on platform?
- [ ] **DEVICE AND USER MANAGEMENT:** Does the solution support local device and user management?
- [ ] **REPORTING:** Is reporting available by location and/or department, and are permissions role-based?
- [ ] **CONNECTIVITY:** Can the vendor support secure and automated data exchange among your key systems (e.g., PM, EHR, HIE, data warehouse, data lake)?
- [ ] **DEPLOYMENT:** Does the vendor have the resources and capabilities to deploy the solution across multiple locations? Does the vendor offer train-the-trainer programs?

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Buying the solution that fits

Step 3: The buying process

At this point, you have hopefully pulled together a short list of possible patient intake solutions that could generally fit with your needs. Now it's time to pressure-test those solutions to make sure you find the one that's exactly right for your practice.

Review product demos

A demonstration of the vendor's software and integration is critical for deciding which solution will best meet your practice's needs. To get the most out of these demos, follow these quick tips:

1. Make sure you have already shared your key goals and desired outcomes with the vendor
2. Decide what you want the vendor to cover before the demo starts and share those details with them
3. Consider the needs of key stakeholders as you evaluate each demo, including a representative from your front-desk and clinical teams
4. Create a scorecard for yourself! This will allow you to evaluate how the vendor performs against your main goals
5. Make sure the vendor walks you through the experience for all patients, not just returning patients, so you know whether the process seems easy and intuitive for first-time new users
6. After the demo, debrief with your team, and take notes on what worked for them (and what didn't) so you can reference those details later

Talk to references

Your peers are your most trustworthy source for determining what types of intake solutions will work best to meet your needs. Ask each patient intake vendor to share the names of one or two reference practices they work with that are similar to your organization. Try to speak with other practices that are similar in specialty, size, PM/EHR system, business challenges and goals, or who've been using the solution for at least six months.

TOP QUESTIONS TO ASK YOUR REFERENCES:

- ? What was the true cost of the patient intake solution, including upkeep and maintenance?
- ? What quality of support do you receive from the vendor?
- ? What did solution training look like for your staff?
- ? What was the implementation process like?
- ? What metrics did you look at to evaluate whether the software was truly helpful?
- ? How has the solution improved efficiency, saved staff time or increased your collections? (Ask references to be specific!)
- ? What does your practice receive from the vendor in return for being a reference (i.e., what is your relationship to the vendor)?
- ? What might you have done differently in selecting/implementing this software?
- ? What sort of promotional or trial period did you receive?

Conclusion

Your needs will be unique to your organization, and the search for any patient intake software solution for your practice will require time and resources. Be patient—finding the software that meets all of your stakeholders' needs can take time. But the right partner with the right tools can transform your organization and help you create the modern, convenience experience that staff want and patients expect.

Feel free to share this free Patient Intake Buyer's Guide with your colleagues or other practices facing similar decisions. You can post the Guide on your website or blog, or tweet or email it to anyone you feel might benefit from reading it.

This Guide is appropriate for a wide range of healthcare organizations, including small to mid-size medical groups, large multi-specialty organizations and even one-provider practices.

> *Things just seem so archaic when you look back at how we used to do things. With phone calls and paper, there was no way for patients to get through to the office quicker, or to make a payment or schedule an appointment. It's so important to see what we're doing and what we've done and how far we've come, and to how easy it is, how efficient is."*
>
> **- Rose Hudepohl, Practice Administrator, Northeast Cincinnati Pediatric Associates**

PATIENT INTAKE SOLUTION BUYING, SIMPLIFIED

- [ ] Write out your business goals
- [ ] Articulate what you need your patient intake software to do
- [ ] Make sure those needs are aligned with your business goals
- [ ] Determine and prioritize your software requirements
- [ ] Eliminate any patient intake management solution from consideration that does not match your requirements list
- [ ] Narrow the list of vendor solutions to a short list of possible choices
- [ ] Contact each vendor
- [ ] Speak with their references
- [ ] View solution demonstrations/trials with input from end users
- [ ] Review terms of the proposed contract
- [ ] Make your final purchase decision

About Phreesia

Phreesia gives healthcare organizations a suite of robust applications to manage the patient intake process. Our innovative SaaS platform engages patients in their healthcare and provides a modern, consistent experience, while enabling healthcare organizations to enhance clinical care and drive efficiency.

To learn more, visit **phreesia.com**.

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