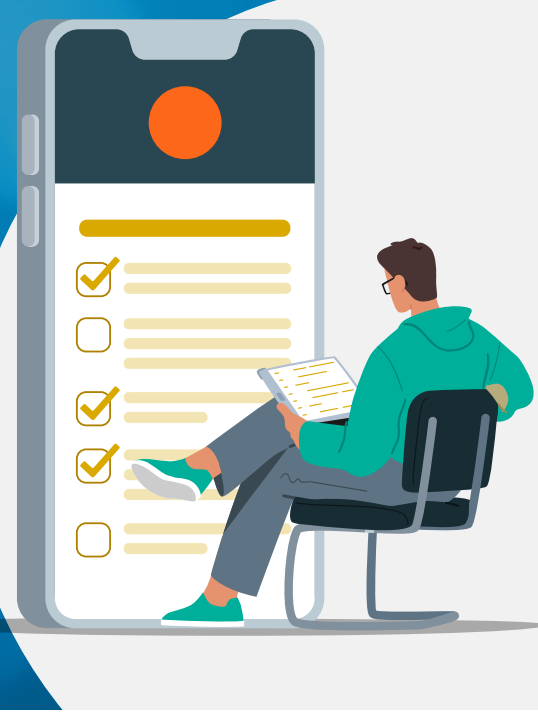


# Five ways digital patient intake drives success across your organization



## What is patient intake?

**Patient intake** is the process through which healthcare organizations collect new and returning patients' demographic, social and clinical data, consent forms, insurance details, payments and other key information before they see their provider.

Unfortunately, many organizations' intake processes rely on time-consuming data entry, long phone calls and outdated paper forms, frustrating patients and staff alike.

### The solution?

Implement a **digital patient intake solution** to save time, minimize manual work and give staff the information they need before patients arrive.

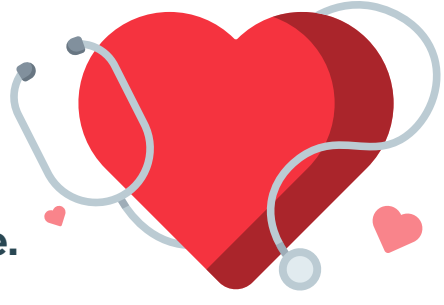


## A modern patient intake solution lets technology do the heavy lifting by:

-  **Streamlining** patient check-in with mobile, in-office and virtual-visit intake workflows
-  **Capturing** a complete patient record, including self-reported demographic and clinical data
-  **Verifying** patients' insurance coverage before they arrive for their visit
-  **Collecting** copays and balances before, during and after the time of service
-  **Automating** consents and group policies so patients receive the right forms
-  **Administering and scoring** patient-reported outcomes (PROs) and screening tools
-  **Closing** gaps in care and **measuring** patient activation
-  **Educating** patients about preventive care, seasonal health topics and ancillary services
-  **Tracking** intake trends and patterns to inform strategic decision-making

Digital patient intake gives patients the convenient experience they expect and reduces administrative workloads, giving you time to focus on what you do best:

**delivering high-quality, compassionate care.**



## Five improvements you can make with digital patient intake

Every healthcare organization is unique, but there are common challenges that all provider groups face—regardless of size, specialty or location. The right patient intake solution will address those potential pitfalls head-on so you can:

### 1 Increase preventive-care uptake

**Problem:** Only 8% of Americans age 35+ receive all clinically appropriate preventive-care screenings.<sup>1</sup>



#### ✓ Solution:

Digital tools can offer automated clinical screenings that allow patients to fill out questionnaires on their own time from their own device, which can boost completion rates.

Digital patient intake also lets you automatically remind patients about preventive care—even during registration. In fact, engaging patients during intake makes them **2x more likely to express interest in scheduling an in-office screening.**

### 2 Save staff time and avoid burnout

**Problem:** The healthcare staffing crisis, coupled with high rates of manual work, is exacerbating front-office burnout.



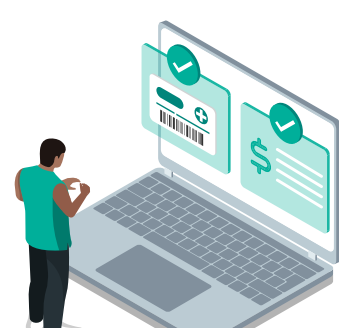
#### ✓ Solution:

Automating check-in and data-entry tasks can **save 5+ minutes of staff time** for every patient who checks themselves in. Digital intake solutions also automate payment collections, appointment scheduling and more, giving staff more control over their time.

That support can help reduce burnout, which is one of the top reasons that medical staff leave their jobs, according to the Medical Group Management Association.<sup>2</sup>

### 3 Strengthen your financial health

**Problem:** Relying on staff to collect payments at the time of service is inefficient and leads to awkward conversations at the front desk.



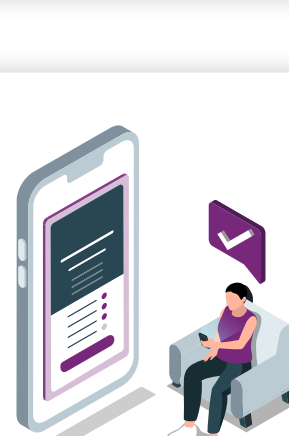
#### ✓ Solution:

Digital intake tools automatically verify patients' insurance coverage before their visit, give them immediate visibility into what they owe and offer them flexible, convenient ways to pay—including payment plans, card on file and mobile wallets like Apple Pay® and Google Pay™.

Simplifying the payment process boosts collections: Among organizations that use Phreesia, patients pay **67%** of their balances and **88%** of their copays at the time of service.

### 4 Improve the patient experience

**Problem:** When patients' needs are unmet, they're liable to look elsewhere for care: Nearly 80% of people who switched providers in 2021 did so due to a poor patient experience.<sup>3</sup>



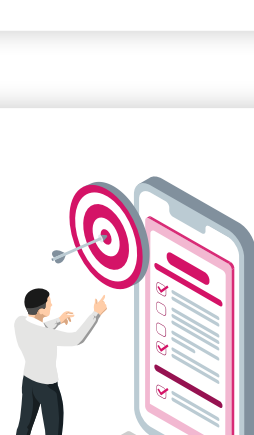
#### ✓ Solution:

Streamlining patient intake can help prevent negative patient experiences, such as long wait times, scheduling difficulties, cumbersome paperwork and poor communication between appointments.

Additionally, patient satisfaction surveys can alert you to organizational problems in real time so your staff can proactively address them. Across Phreesia's network, **1 in 5 patients** share their post-visit feedback via satisfaction surveys.

### 5 Deliver more tailored support

**Problem:** Many patients need help, but they don't know what barriers they're facing—and that makes it hard for providers to deliver the personalized support they need.



#### ✓ Solution:

Administering the Patient Activation Measure® (PAM®) during intake can help assess patients' ability to self-manage their health and **tell providers how to tailor their support to each person.** Knowing a patient's PAM score can help you boost their preventive health and improve their chronic-condition management, post-surgery outcomes and other essential aspects of their health.

Collecting population- and individual-level PAM data enables you to meet patients where they are and partner with them to improve their health outcomes—and their confidence.

Phreesia's patient intake platform can help your organization thrive

[LEARN HOW](#)

#### References

1. Borsky A, Zhan C, Miller T, Ngo-Metzger Q, Bierman A, Meyers D. Few Americans receive all high-priority, appropriate clinical preventive services. *Health Affairs*. 2018;27(6). <https://doi.org/10.1377/hlthaff.2017.1248>

2. "As compensation competition continues, medical group leaders say staff turnover not easing up yet," *Medical Group Management Association*, February 3, 2022.

3. "Healthcare experience: The difference between loyalty and leaving," *Accenture*, October 14, 2022.