Patient intake buyer’s guide

What to consider when choosing a patient intake solution

Phreesia

Introduction

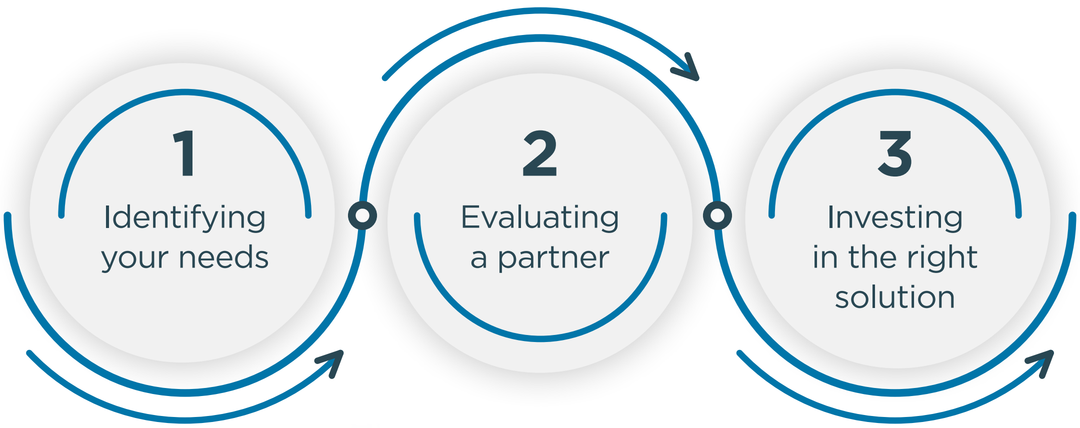
Picture this: You and your team are overworked and understaffed, and you need a way to work more efficiently. If that sounds familiar, it's time to consider a patient intake solution.

What is a patient intake solution?

Patient intake is the process through which healthcare organizations collect demographic, social and clinical data, consent forms, insurance details, payments and other key information from new and returning patients.

Healthcare organizations have long used paper forms and manual data entry to collect and measure that information, but **a patient intake solution streamlines the process.** The right solution can help you minimize manual work, improve data capture, boost profitability and deliver a more individualized, patient-centric healthcare experience—all through just one vendor.

This buyer's guide walks you through exactly what to consider as you compare patient intake solutions for your organization. We'll explore three stages:



> Digital patient intake delivers tremendous value to our organization by automatically capturing and integrating important clinical, demographic and social data from patients, consistently and at scale. Our staff no longer has to worry about manual input of lengthy paper interviews and can spend more time addressing patients' needs."
>
> – **Robin Scott**, Business Office Manager, Virginia Cardiovascular Specialists

Step one: Identifying your needs

Determine business goals

The first step toward identifying your needs is determining your business goals. Consider the **specific challenges your organization needs to address** and **what you hope to achieve** in doing so. For example:

Are you receiving **negative online reviews** about long wait times?	You might need a patient intake solution that supports **scheduling automation and pre-visit check-in** to accelerate throughput in the waiting room.
Does your organization have a tough time **collecting patients' financial responsibility?**	Consider using a **self-service payment option** to boost collection of copays and outstanding balances.

Be sure to consider the needs of all stakeholders, including end users like front-desk staff, practice managers, executives, and finance and IT personnel.

Considering the goals you need to achieve, the needs across your organization and the types of tools you'll need to get there can help you determine which vendor you'll work with—one whose products address all your pain points.

*"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 wait times."*

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

Decide how you'll measure success

An important part of choosing a patient intake solution is **determining how you'll measure whether the solution drives results.** Are you looking for improved staff experience and retention? Increased collections? Something else?

Once you've established business goals, you should visualize how a successful patient intake software will help you meet them, which can help you evaluate potential vendors.

Ask yourself:		Possible answers might be:
If you could eliminate one time-consuming manual task from your day, what would it be? How would that impact your organization?	→	"Staff could leave on time at the end of the day and have time for longer lunch breaks, which would make them happier at work."
If select patient demographic and clinical information automatically flowed back into medical charts, how would that affect your workflows?	→	"I wouldn't have to try to hire another staff member, which is hard right now due to industry-wide staff shortages."
If your organization could collect more of what patients owed before their visit, how could that affect your progress towards business goals?	→	"We would be more profitable, so we could afford to hire the additional nurse we need to be fully staffed."

Step two: Evaluating a partner

The ability to meet your primary goals should be top of mind as you assess vendors. But it's equally important—if not more so—to find a company that will be your **partner in transformation,** complete with a dedicated customer service team, after-hours support and in-house subject matter expertise.

When evaluating vendors' products and partnership potential, be sure to ask about:

Customer solutions

- ☐ **Continuous optimization:** Does the vendor have a customer solutions team dedicated to optimizing your setup based on your organization's needs? Will they help you adapt as your needs evolve?
- ☐ **Automatic improvements:** How often does the vendor release product enhancements, including those specific to how you use the solution?
- ☐ **Deployment:** Does the vendor have the resources and capabilities to deploy the solution across multiple locations?
- ☐ **Training:** What training resources does the vendor offer? These might include workshops, digital training programs, "train-the-trainer" programs and more.

General intake

- ☐ **Intake for specific appointment types:** Does the vendor support intake for a variety of appointment types, including telehealth visits?
- ☐ **Logic-driven workflows:** Does the software let you tailor intake to specific patients, care settings and appointment types?
- ☐ **Device options:** Are there mobile, tablet and/or kiosk options available? Do they have high adoption rates?
- ☐ **Self-service intake:** Can patients complete the digital check-in process on their own devices?
- ☐ **Patient experience:** Is the patient's intake experience contained in a single, easily accessible place that doesn't require them to download an app or create an account?

Revenue cycle management

- ☐ **Eligibility and benefits:** Does the solution automatically verify patients' insurance before the visit and calculate their financial responsibility?
- ☐ **Patient payments:** Does the vendor support multiple options, such as card on file, payment plans, and mobile or online payments? What about mobile wallets, like Apple Pay® and Google Pay™?
- ☐ **Merchant processing:** Are the vendors' payment processing rates competitive? Do they provide in-house support and assist with PCI compliance?
- ☐ **Single platform:** Can the vendor provide end-to-end payment capabilities across multiple locations from a single platform?

Clinical content and patient outreach

- ☐ **Clinical screening tools and patient-reported outcomes (PROs):** Which screening tools or PROs can be included in patient-intake workflows? Does the software automatically score and aggregate results? What tools exist to help you track patients' progress over time?
- ☐ **Social determinants of health:** Does the vendor support screening patients for unmet social needs using validated measures? Can you view and track those results over time?
- ☐ **Patient satisfaction surveys:** Does the solution include automated, post-visit patient satisfaction surveys? Can you easily view, analyze and aggregate patients' responses?
- ☐ **Targeted digital outreach:** Can the platform send tailored messaging to engage patients between visits? Are templated messages available as well?

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 online 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

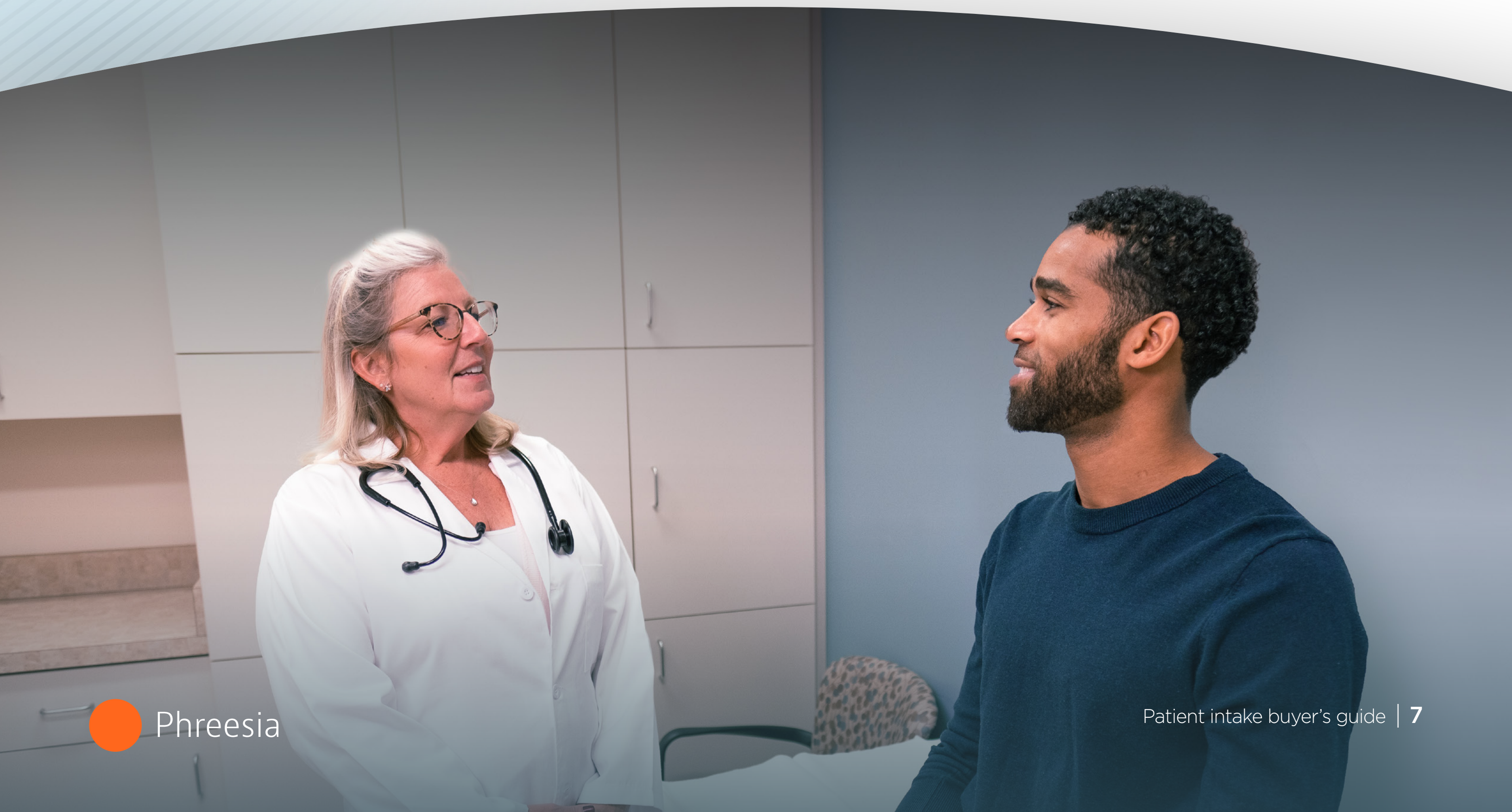
- ☐ **Automation:** Is bidirectional integration available for your PM/EHR or host system? Do updates and new data automatically flow back into your systems?
- ☐ **PM/EHR updates:** Is data added via discrete integration, note field updates and/or PDF attachments? Are consents attached as documents or flagged in your systems?
- ☐ **Payment posting:** Do payments post automatically to your PM system?
- ☐ **Appointments:** Can appointments be scheduled directly from the patient intake solution with real-time updates to your PM/EHR system?

Reporting and analytics

- ☐ **Product usage:** Does the vendor see high adoption rates across locations, staff members and modalities, and can you monitor usage over time?
- ☐ **Financial performance:** Can you track patient payments across your organization and reconcile them at the end of the day? Can you track each batch posted to your bank account?
- ☐ **Quality improvement:** Is data easily aggregated and to help you meet reporting requirements?
- ☐ **Patient experience:** Can you track patient satisfaction by location and/or provider to identify opportunities for improvement?

Security

- ☐ **Certifications:** Is the vendor certified with industry-leading security organizations like HITRUST CSF and SOC 2 Type 2?
- ☐ **Secure payments:** 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)?



Step 3: Investing in the right solution

At this point, you likely have a list of patient intake solutions that could meet your needs. Now, it's time to determine which one is right for your healthcare organization.

Review product demos

Most vendors will be happy to show you a demonstration of their software and integration. **To get the most out of these demos, follow these quick tips:**

- Share your key goals, desired outcomes and timeline with the vendor before you meet.
- Let the vendor know what you'd like them to cover before the demo starts.
- Invite your key stakeholders to the demos, including representatives from your front-desk and clinical teams, to ensure you consider your organization's needs.
- Take notes and evaluate how the vendor performs against your main goals.
- Ask the vendor to walk you through the experience for both new and returning patients—as well as the experience for staff!—so you can see if the software is intuitive for all users.
- 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 of information about intake solutions that might work for you. When engaging with vendors, ask them to share the names of one or two reference clients that are similar to your organization. Try to speak with organizations that are similar in specialty, size, PM/EHR or host system, challenges and goals, and prioritize conversations with clients who have been using the solution for at least six months.

Ask your references:

- What is 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** do you use to evaluate whether the software is truly helpful?
- How has the solution **improved efficiency, saved staff time** or otherwise helped you meet your goals?
- What might you have done **differently** in selecting/implementing this software?

Conclusion

Your needs are unique to your organization, and the search for any patient intake software will require time and resources. But those efforts will pay off: **Finding the right partner with the right tools can transform your organization** and help you create the modern, convenience experience that staff need and patients expect.

> "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, what we've done and how far we've come."
>
> – **Rose Hudepoh**, Practice Administrator, Northeast Cincinnati Pediatric Associates

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About Phreesia

Phreesia is the trusted leader in patient activation, giving providers, health plans, life sciences companies and other organizations tools to help patients take a more active role in their care. Founded in 2005, Phreesia enabled more than 120 million patient visits in 2022 – more than 1 in 10 visits across the U.S. – scale that we believe allows us to make meaningful impact. Offering patient-driven digital solutions for intake, outreach, education and more, Phreesia enhances the patient experience, drives efficiency and improves healthcare outcomes.

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

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