

Long-term success:

How to operate a profitable practice with Phreesia





Introduction

Primary care groups today are tasked with lots of responsibilities beyond caring for patients—managing costs, allocating resources and improving health outcomes at scale. But changing compensation models are making it tough to retain physicians and maintain profits. Without deep pockets, how can your organization succeed?

With the right partner, you can.

In this step-by-step guide, we'll illustrate how to operate a profitable practice with Phreesia. Our platform helps provider groups efficiently engage patients, automate operational tasks, generate more revenue and improve the wellbeing of providers and staff.

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To learn more about how Phreesia can help you operate a profitable practice, **[visit our website.](#)**

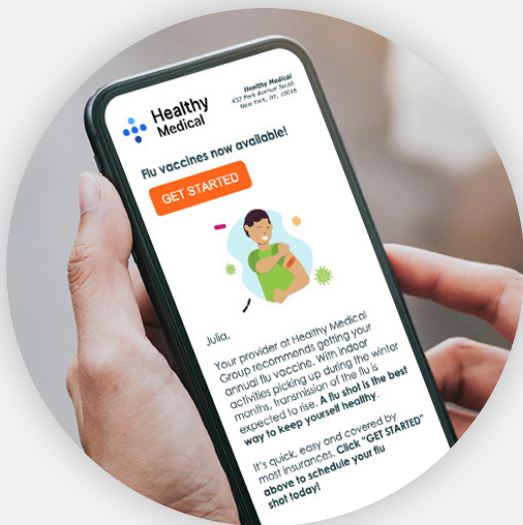
Succeeding in value-based care arrangements

As value-based care models become more common, primary care practices like yours are laser-focused on improving patients' health outcomes to maximize financial rewards.¹ But without the right workflows, it can be tough to quantify your organization's impact on patients' health.

Fortunately, Phreesia can solve that problem, helping you deliver high-quality care, increase reimbursement and meet reporting requirements for value-based care contracts.

Here's how we do it, step by step:

1 Automated patient recall



Phreesia automatically contacts patients via email or text message when they're due for care. We offer pre-built recall messages for a wide variety of appointment types—immunizations, screenings, Medicare Annual Wellness Visits and more—and you can even create custom messages if needed.

Our recall messages include:

- ➔ Your organization's name and branding
- ➔ Details about needed or overdue care
- ➔ Context about why receiving that care is important
- ➔ A button to schedule or request an appointment

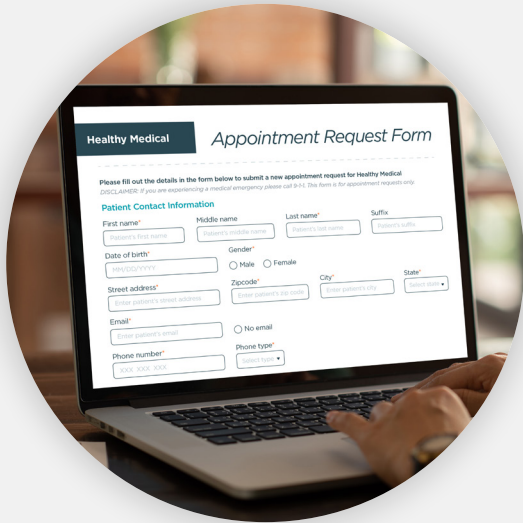
By consistently recalling patients for preventive or follow-up care, you can prevent health complications, improve outcomes and control costs of care—all of which are vital for excelling in value-based care programs.



2 Simplified scheduling

After clicking the button in your recall message, patients are automatically prompted to request or schedule an appointment.

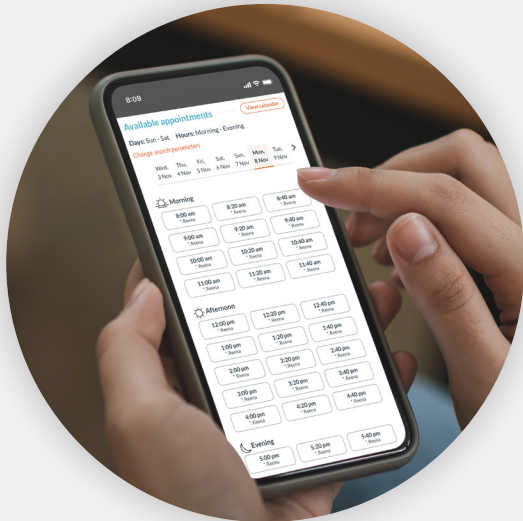
Phreesia offers two distinct scheduling options:



Online appointment requests

Let patients request an appointment from an online form. We'll white-label the form with your organization's name and branding, and you can customize every field to collect the same information you'd ask for over the phone.

After a patient submits the form, your staff can review and approve their request. Then, we'll automatically notify the patient when their appointment is scheduled.



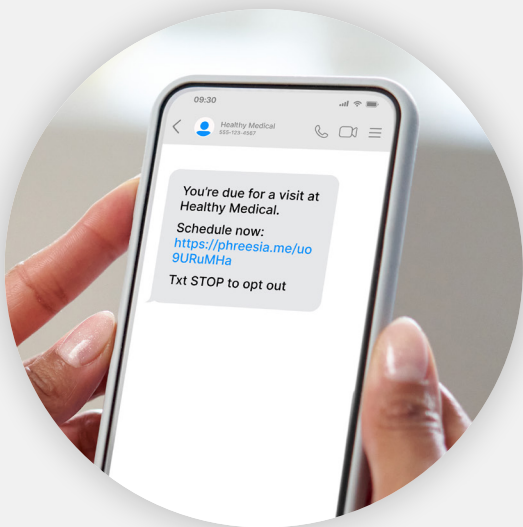
Self-scheduling*

Let patients book an appointment whenever it's most convenient, even outside of business hours. Phreesia integrates with your PM system in real time to only offer open appointment slots that meet your unique rules and templates.

You can also enable self-scheduling on your website to give every patient an easy way to book a visit—even those who haven't received a recall message.

** Available for select PM/EHR systems*

No matter which option you choose, we automatically populate every appointment request into your Phreesia **Appointments Hub**. The Appointments Hub lets you manage all your appointments from one place—and track them throughout their lifecycle—to ensure no patients get lost in the shuffle.



But that's not all! After scheduling is complete, Phreesia automatically reminds patients about their upcoming appointment via email, text message or phone call—and prompts them to confirm, cancel or reschedule it.

Across our network, Phreesia clients see a **79% reduction in no-shows** among patients who confirm their appointment. That translates to better resource allocation and optimized care delivery—both of which are crucial for sustainable success in value-based care programs.

3 Standardized intake

Once a patient is on your schedule, Phreesia handles the administrative processes you need to complete before they can receive care. We offer:

- ✔ **Pre-visit registration:** Patients are given a link to complete all their intake paperwork digitally—demographics, consents, insurance information and more—before their visit.
- ✔ **E&B verification:** Once a patient submits their insurance information, we automatically and repeatedly verify their eligibility and benefits, so you'll know their financial responsibility before they arrive.
- ✔ **Clinical screenings:** Patients are prompted to complete relevant screenings—such as the PHQ-9, GAD-7 and/or SDOH questionnaires—when they check in, and Phreesia automatically sends their responses to their provider.

4 Quality reporting

If you've completed the steps above, your patients should be getting the care they need—and your reimbursement rates will reflect that! Now, it's time to document your great work so you can fulfill quality measure thresholds for your value-based care program.

That's why Phreesia offers real-time analytics and reporting tools to help you quantify the care you've delivered. Our platform:

- ✔ **Tracks screening rates** for childhood and adolescent development, substance use, cancer, falls risk, mental health, SDOH and more
- ✔ **Captures standardized data** for reporting requirements, including age, race, ethnicity, income, insurance status, sexual orientation and gender identity
- ✔ **Monitors visit rates** for preventive care and routine appointments, such as physicals and annual wellness visits

All the data you collect with Phreesia can be exported into a PDF or CSV file, making it easy to demonstrate your impact on patient outcomes when it's time to report.

Improving resource allocation

Assessing patients' social needs is key to improving outcomes and providing whole-person care—and it can help you achieve higher reimbursement rates.² But addressing SDOH can be labor-intensive. Without a scalable process to conduct SDOH screenings and connect patients to relevant services, you may struggle to know which patients have social needs and how your organization can best help them.

That's why Phreesia developed a workflow that **pairs SDOH screenings with the Patient Activation Measure® (PAM®)**—an evidence-based assessment tool backed by nearly two decades of research. PAM provides a snapshot of each patient's ability to self-manage their health, enabling you to connect proactive patients with self-service resources and provide individualized support to those who need it most.

Here's how it works:

- 1 Patients complete an SDOH screening,** such as PRAPARE® or Health Leads, from their own device or using in-office hardware. When patients self-identify one or more social needs, they are prompted to complete PAM.
- 2 Patients complete PAM,** and their results are scored. Your care team can access PAM results directly from the Phreesia Dashboard.
- 3 Phreesia automatically enrolls** higher-activated patients in a self-service workflow that allows them to access SDOH resources on their own.
- 4 Phreesia automatically notifies your staff** about lower-activated patients who may benefit from 1:1 support with a community health worker or other care team member.

There are two key benefits to this approach. By automating SDOH screenings, you can complete more of them and better fulfill quality measures tied to screening volume. In addition, you can meaningfully impact patients' outcomes without sacrificing limited staff time—an important differentiator for Phreesia clients like HealthLinc.



PAM helps HealthLinc connect 43% more patients with the resources they need

“By using PAM to support our SDOH efforts, we've been able to better allocate our community health workers to help patients who need direct intervention. It has made a huge difference, and we've been able to quickly scale it across our patient population.”

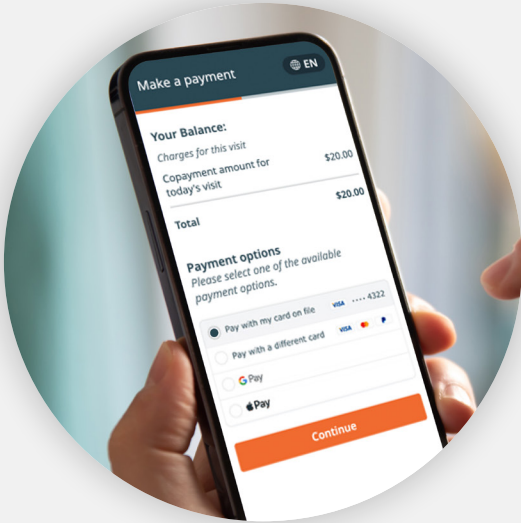
— **Melissa Mitchell, MS, LSSGB, CEO, HealthLinc**

Maximizing earned revenue

So, you're delivering better care and effectively using your resources—but margins are still tight. Perhaps you're frequently refunding or adjusting copays due to inaccurate insurance information, or you're taking on bad debt due to uncollectable balances.

We can help with that!

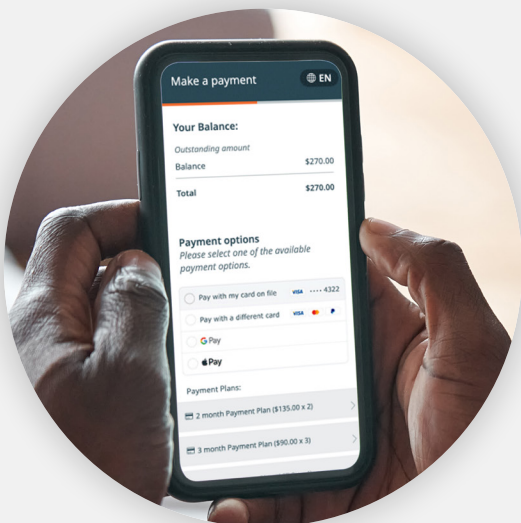
You can use Phreesia to collect the revenue you've earned:



Copays

Days before a scheduled visit, we automatically verify a patient's eligibility and benefits and calculate their copay and deductible. If the patient doesn't have insurance information on file, we'll prompt them to enter it when they pre-register—and ask them to pay their copay when they check in.

Complex appointment types? No problem. Phreesia supports specialty benefits, copay tiering, self-pay workflows and more. And if you still end up with unpaid or missing copays, we'll provide your staff with a worklist so they can collect them as quickly as possible.



Balances and visit charges

Phreesia offers a range of tools to collect payments during the visit or after patients leave your office, including:



Automated collections:

Charge patients' card on file once insurance claims are adjudicated



Payment reminders:

Notify patients about their outstanding charges and provide a link for them to make a secure payment



Payment plans:

Allow patients to split large bills into manageable monthly installments

Phreesia supports a wide variety of payment modalities, including credit, debit and FSA/HSA transactions, cash and check tracking, mobile wallets and more. Plus, your staff can keep tabs on all payments with PM system integrations that automate end-of-day reconciliation.



DID YOU KNOW?

Across Phreesia's network, patients pay **88%** of their copays and **67%** of their balances at the time of service.

Achieving manageable growth

Congratulations! You've met your quality measures, balanced your physicians' workloads and generated more revenue. You've prioritized patient care in every decision, and it shows. Your team is happy, and your patients are even happier.

Now, it's time to focus on growth—and we can help with that, too. Phreesia offers two solutions to help your organization strategically scale:



MediFind

MediFind is the only doctor finder powered by objective data—not subjective reviews. It uses cutting-edge technology to connect physicians with patients seeking their expertise.

Millions of doctors are listed on MediFind, but only providers that use Phreesia can receive appointment requests from MediFind directly within their Appointments Hub.

Providers with this feature enabled show up higher in MediFind search results, making it easier for them to get found and chosen by the 1M+ patients who use MediFind every month.

Even if you're not yet a Phreesia client, you can **claim your physicians' profiles** for free.



New-provider promotion

As you get more patients, you'll eventually need to bring in more providers. Traditionally, new providers' schedules take a long time to fill up—but they don't have to.

That's because Phreesia offers customizable outreach messages that let you notify patients when a new provider joins your practice. You can write a bio, add a headshot, and even include a link for patients to schedule an appointment with them.

MyOBGYN, a Phreesia client in Las Vegas, took this approach when a new provider joined their practice—and her schedule was completely full within a week. Need we say more?

We hope you found this useful. Phreesia is proud to help thousands of healthcare organizations attract the right patients—and we hope you'll reach out to learn what we can help you achieve.

Get started today at phreesia.com.



End notes:

- 1 [“Value-Based Care: What It Is, and Why It’s Needed,”](#) The Commonwealth Fund, Feb. 7, 2023.
- 2 [“Identifying and Addressing Social Needs in Primary Care Settings,”](#) Agency for Healthcare Research and Quality, May 2021.