2019 | BUYER'S GUIDE REPORT
Patient Intake Solutions

Healthcare organizations face increasing pressure to increase efficiency, provide a great patient experience, enhance quality and navigate a challenging reimbursement environment. Patient intake management solutions can provide the tools to drive success across all of these areas by eliminating redundant processes, improving data capture, offering an individualized, consumer-centric experience and boosting profitability.

But not all solutions are created equal. When choosing a patient intake solution and management partner, it's important to carefully evaluate functionalities, features and capabilities to be sure your organization selects the right solution to meet your needs. The following buyer's guide provides a framework of key considerations and questions to keep in mind as you evaluate each vendor.

Key Consideration: Patient Intake Modality Options and Dynamic Question Capabilities

- ✔ **DEVICE OPTIONS**: Does the vendor offer multiple intake modalities (e.g., mobile, tablets, kiosks)?
- ✔ **MOBILE ADOPTION**: What percentage of clients have adopted the vendor's mobile intake solution? What percentage of patients complete registration on a mobile device?
- ✔ **CUSTOM PATIENT WORKFLOWS**: Can patients be presented with individualized workflows (e.g., by gender, age, reason for visit, insurance status, medical history)? Across all intake modalities?
- ✔ **PRACTICE CUSTOMIZATION**: Can patient intake questions be customized to meet the unique needs of your organization (e.g., for each location, provider, specialty, appointment type)?

Key Consideration: Operational, Financial and Clinical Impact

- ✔ **INSURANCE VERIFICATION**: Does the patient intake solution automate eligibility and benefits verification in real-time and by batch? Can staff easily access copay, deductible and coinsurance information? Are results clearly displayed so staff can manage exceptions prior to and at the time of service?
- ✔ **PATIENT PAYMENTS FUNCTIONALITY**: What options are available to patients for paying copays and balances (e.g., mobile, tablets, kiosks, payment plans, card on file, online payments)?
- ✔ **CARD PROCESSING**: Does the patient intake solution offer better card processing options than your existing processor (e.g. full daily deposits, timely funding, competitive rates)?
- ✔ **E-CASHIERING**: How can staff track all cash, check, and card payments and reconcile them at the end of each day? Will reports replace manual processes?
- ✔ **CONSENTS**: Can all policies (e.g., financial, privacy, clinical) be captured digitally with e-signatures during the intake process? Can they be automated to prompt patients to sign at regular time intervals (e.g., annually, bi-annually)? Is reporting available to audit consent compliance?
- ✔ **CLINICAL**: What clinical screeners or patient-reported outcomes assessments can be included in patient intake workflows?
- ✔ **PATIENT ACTIVATION**: How does the patient intake solution support quality improvement initiatives (e.g., preventive screenings, social determinants of health) for organizations that participate in value-based/risk-based arrangements?

- **SATISFACTION SURVEYS**: Does the solution include post-visit satisfaction surveys? Are they sent out automatically, and do they include real-time reporting and analytics (e.g., by location and provider)?
- **APPOINTMENTS**: Can patients request or schedule appointments from your website?
- **REFERRALS**: Can staff manage and track incoming referrals from other providers?

Key Consideration: Integration Capabilities

- **AUTOMATION**: Is bi-directional integration available for your PM or EMR system? Does the demographic and clinical data already in your system pre-populate for patients to review during intake? Do updates and new data flow back into your systems?
- **PM/EMR UPDATES**: What patient-captured data integrates discretely, what goes into a note field and what attaches as a PDF? 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 the PM system?

Key Consideration: Reporting and Analytics

- **UTILIZATION**: Are you able to monitor how well the solution is being utilized across locations, staff members and modalities? Can you use the analytics to identify areas to improve the intake process?
- **FINANCIAL PERFORMANCE**: Are you able to 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?
- **CLINICAL RESULTS**: Is reporting or data available to meet any quality measures?
- **PATIENT EXPERIENCE**: Can you track patient satisfaction results by location and provider to identify areas for improvement?

Key Consideration: Enterprise Capabilities and Security

- **PRIVACY & SECURITY CERTIFICATION**: Is the vendor certified with industry-leading security organizations (i.e., HITRUST CSF, SOC 2)?
- **PAYMENTS SECURITY**: If the vendor accepts patient payments, are they Level 1 PCI-compliant? Is all payments hardware encrypted? Does the vendor have a solution for Point-to-Point Encryption (P2PE)?
- **SINGLE SIGN-ON**: Can the patient intake solution be integrated into your single sign-on platform for easy staff access?
- **DEVICE AND USER MANAGEMENT**: Does the solution support local device and user management?
- **REPORTING**: Is reporting available by location/ department, and are permissions role-based?
- **CONNECTIVITY**: Can the vendor support secure and automated data exchange among your key systems (e.g., PM, EMR, HIE, data warehouse, data lake)?
- **DEPLOYMENT**: Does the vendor have the resources and capabilities to deploy the solution across multiple locations according to your goals? Does the vendor offer train-the-trainer programs?
- **SUPPORT**: Does the company offer dedicated enterprise support and implementation teams?
- **BRANDING**: Can the solution incorporate your specific branding elements (e.g., logos)?