

# Top Factors to Consider While Evaluating a Digital Patient Intake Solution for Your Practice

Healthcare organizations juggle competing priorities every day. Increasing efficiency, maintaining profitability, reducing physician burnout, and managing the staffing crisis are only some of the challenges that practices face today. Meanwhile, if you want to hold your own against the competition, you cannot lose sight of delivering an excellent patient experience too.

With an effective digital front door strategy, practices can solve many of these critical challenges. Here's how.

On the one hand, digital tools help create a consumer-centric experience by digitizing patient intake, simplifying payments, and strengthening communication. And on the other, automated workflows can eliminate manual tasks, increase patient data accuracy, improve front desk and clinical workflows, and accelerate your revenue collection.

However, many players in the market offer a suite of digital tools. So, how do you choose a digital patient intake solution that can address your expectations? Here's a quick checklist to keep in mind while evaluating a solution provider.



## 1 Digital Patient Intake



### Patient Intake and Digital Data Capture

- ☐ **Practice-specific Workflow:** Can the solution provide custom workflows specific to your practice (i.e., based on appointment type, location, provider, and specialty)?
- ☐ **Appointment-specific Workflow:** Are you able to control digital forms based on appointment type, including virtual visits and in-facility visits?
- ☐ **Patient-specific Workflow:** Is the solution flexible enough to create visit-specific questionnaires for patients based on age, gender, reason for visit, medical history, and more?
- ☐ **Clinical Assessments:** Does your solution simplify clinical assessment capture and auto-score the patient data for reporting purposes? (Including critical assessments like Opioid Assessments, PHQ9, ASQs, HOOS, KOOS, Alcohol screening, etc.)
- ☐ **On-demand Forms:** Can you maintain a 100% digital workflow by triggering on-demand forms before, during, or even after a patient has checked in? (Including clinical and non-clinical consents, screeners, and assessments)
- ☐ **E-signature:** Is it possible to use a digital signature to capture patient consent for all documents?
- ☐ **Image Capture:** Can your patients easily capture and upload a profile picture, driver's license, and insurance card images?



### Check-in Device Flexibility

- ☐ Do you have the choice to offer different self-service and assisted modes for patients to complete their intake? (i.e., kiosks, tablets, mobile devices)



## Digital Convenience for Patients

- ☐ **True self-check-in:** Can the solution allow patients to complete self-check-in without the intervention of the staff?
- ☐ **Convenient Solution:** Can the solution offer your patients a “No app, no password” check-in experience?
- ☐ **Multilingual:** Do you have the flexibility to provide intake forms in multiple languages (e.g., English, Spanish, and Arabic)?
- ☐ **Auto-save and Continue Later Forms:** Can the solution auto-save forms and allow patients to resume and complete their intake process from where they have left off?
- ☐ **Simplified Form-filling:** Can the solution pre-populate patients’ existing demographics and clinical data from the EHR/PM system into the forms to speed up patient intake?
- ☐ **Patient Access to Health Information:** Can you email consent forms and clinical PDFs to patients directly via the solution?



- ☐ **Preferred Communication Mode:** Does the solution offer the flexibility for patients to select their preferred mode of communication to receive information or even choose not to receive any communication?

## Zero-touch Workflow

- ☐ **Pre-visit Registration:** Is it possible for your patients to pre-register from anywhere and complete the check-in process before the visit? Can they use their personal device, i.e. laptop or mobile phone, to pre-register?
- ☐ **Pre-visit Registration Invitation:** Do you have the option to send automated and on-demand pre-registration invitations via email and/or SMS? Are you able to set up standard and custom templates for pre-registration notification?
- ☐ **QR Code Arrival:** Does the solution offer a zero-touch workflow that allows patients to confirm arrival at your facility by scanning a QR code using their mobile device?
- ☐ **Telehealth:** Does the solution allow you to integrate your telehealth workflow into your check-in platform? Which telehealth vendors can it support?

## 2 Patient Engagement



### Appointment Self-scheduling

- ☐ Does the solution offer or partner with a vendor to provide appointment self-scheduling?
- ☐ Can the solution provide a secure way for patients to request an appointment from the practice’s website?

- ☐ Does the solution offer the ability for your patients to confirm appointments or request for a cancellation and rescheduling via appointment reminders?
- ☐ Is it possible to send automated or on-demand payment reminders via text or email using the solution?
- ☐ Does the solution offer the flexibility to include or exclude weekends and holidays while sending out patient communication?



### Secure Chat

- ☐ Does the solution offer two-way, HIPAA-compliant secure chat? Can the patient and staff initiate the conversation at any time?
- ☐ Does the secure chat feature allow you to upload and receive files, including PHI?
- ☐ Is it possible to include custom chatbot-like templates for the secure chat to help patients navigate different options such as appointments, billing, queries, etc.?
- ☐ Can the solution send the documents shared via secure chat to your EHR/PM system?



### Patient Outreach

- ☐ Are you able to send targeted broadcast messages via text and email using the solution?
- ☐ Does the solution offer the flexibility for your practice to send health campaigns and educational information to a specific patient population?
- ☐ Does the solution allow you to upload a patient list for sending out a broadcast message?
- ☐ Can you apply filters to send a broadcast message based on appointment type, age, gender, and other parameters?



### Automated Reminders

- ☐ Can the solution send automated appointment reminders via text and Interactive Voice Response (IVR)? Are you able to send appointment reminders on-demand?



## Patient Surveys

- ☐ Does the solution allow you to automate post-visit patient satisfaction surveys?
- ☐ Do you have the flexibility to set up anonymous and non-anonymous surveys at different stages of care, i.e., at the facility or post-visit?
- ☐ Can you link other online review websites to your surveys for collecting patient feedback?
- ☐ Are you able to apply different filters to view survey results?

## 3 Revenue



### Automated Insurance Eligibility Check

- ☐ **Batch & On-demand Eligibility Check:** Can the solution conduct real-time and batch insurance eligibility verifications, including verification for Medi-CAL and Medi-CAL managed care plans?
- ☐ **Financial Details:** What financial information can the patients and staff view using the solution? Are you able to access primary and secondary insurance information, including co-pay, deductibles, and co-insurance?
- ☐ **Co-pay Mapping:** Do you have the capability to automatically select the correct co-pay and set the default co-pay?
- ☐ **Eligibility for Preventive Care Services:** Does your solution have the capability to automatically verify patient eligibility and the due date for annual patient visits and other preventive care services offered under Medicare?
- ☐ **Eligibility Check via HCPCS Code:** Does your solution have the capability to verify eligibility for a particular service using HCPCS code and provide the benefit details like co-pay, co-insurance etc.?



### Payment Convenience for Patients

- ☐ **Payment Channels:** Does the solution allow your patients to pay during different stages of their care journey, i.e., during pre-registration, check-in, check-out, or even without an appointment?



### Financial Transparency & Revenue Collection

- ☐ **Payment Modes:** Do the payment modes include cash, check, and credit/debit card? Can your patients pay using a mobile device, kiosk, website widget, or even pay at the front desk?
- ☐ **Payment Plan:** Does the solution allow you to configure flexible payment plans based on a fixed amount and/or fixed duration? Can your patients easily choose payment plans during pre-registration or even during check-out?
- ☐ **Payment Collection:** Can your staff collect payments from patients with and without appointments using the solution?
- ☐ **Payment Reversals:** Will you be able to reverse transactions by voiding or refunding payments?
- ☐ **Financial Reconciliation:** Is the solution able to update transactions across the solution, payment processor, and your PM? Can you reconcile and track day-to-day payment collections?
- ☐ **Payment History:** Does the solution allow you to email and print payment receipts of past financial transactions to your internal team and patients?



### Credit Card Processing

- ☐ Does the solution offer competitive card processing rates? Is the solution compatible with card swipe devices?

## 4 Operational Efficiency



### Intake Enablers

- ☐ **Group Check-in:** Are you able to process group check-in for patients with more than one appointment in a day using the solution?
- ☐ **Multiple Authentication:** Does the solution allow patients and guardians/caregivers to digitally sign-off forms using the multiple signature option?



## Dashboard

- ☐ Does the solution provide a centralized dashboard for your staff to monitor patient check-in status, payment processing, patient communication alerts, etc.?



## Patient-reported Outcomes

- ☐ Does the solution provide the option to capture patient data, including Social Determinants of Health (SDOH) and preventive health screening for quality improvement?
- ☐ Can the solution support in collecting and reporting patient-associated data for quality enhancement initiatives such as MIPS?



## Reports & Analytics

- ☐ **Utilization:** Can you track and monitor utilization of the solution across different locations? Does the solution provide reports to measure how patients utilize different check-in modes?
- ☐ **Clinical Data:** Does the solution provide the option to extract discrete data from assessment forms and surveys for research purposes and internal use?
- ☐ **Patient Experience:** Can you track patient satisfaction based on location and providers using the solution?
- ☐ **Scheduled Reports:** Does the solution allow you to set up a schedule for receiving auto-generated, non-PHI-related reports at fixed intervals?

# 5 Integration Capabilities



## Data Mapping

- ☐ What is the extent of the bi-directional integration capabilities offered by the solution?
- ☐ Does the solution offer discrete data mapping with your EHR/PM? Can the solution send back patient data and documents to the EHR/PM?
- ☐ Does the solution update consent forms to the EHR/PM for auditing purposes?
- ☐ Can the solution capture screening scores back to the EHR for analysis purposes?



## Data Quality

- ☐ Are you able to review, approve or reject patient updates to reconcile information in the EHR using the solution?
- ☐ Does the solution provide the ability to automatically post payment details to the PM system for financial accuracy?

# 6 Implementation & Support

- ☐ Does the solution provider offer a dedicated Project Manager, Customer Support Manager, Implementation team, and On-site support to enable the onboarding process?

- ☐ Does the solution provide access to an extensive Customer Resource Center that offers training guides and materials to market the solution to your patients?
- ☐ Does the solution offer support for device and user management?

# 7 Privacy & Security Standards

- ☐ Is the solution capable of ensuring secure data exchange with your EHR/PM without storing PHI?
- ☐ Is the system HIPAA and SOC 2 Type 2 compliant? Is your vendor an ISO 270001 certified organization?

- ☐ Are financial transactions securely transmitted? Is the solution PCI-DSS certified, including encrypted hardware?
- ☐ Does the solution offer single sign-on integration for user authentication capability?

Ready to evaluate a patient intake solution that is ideal for your practice? [Talk to our solution experts today](#)