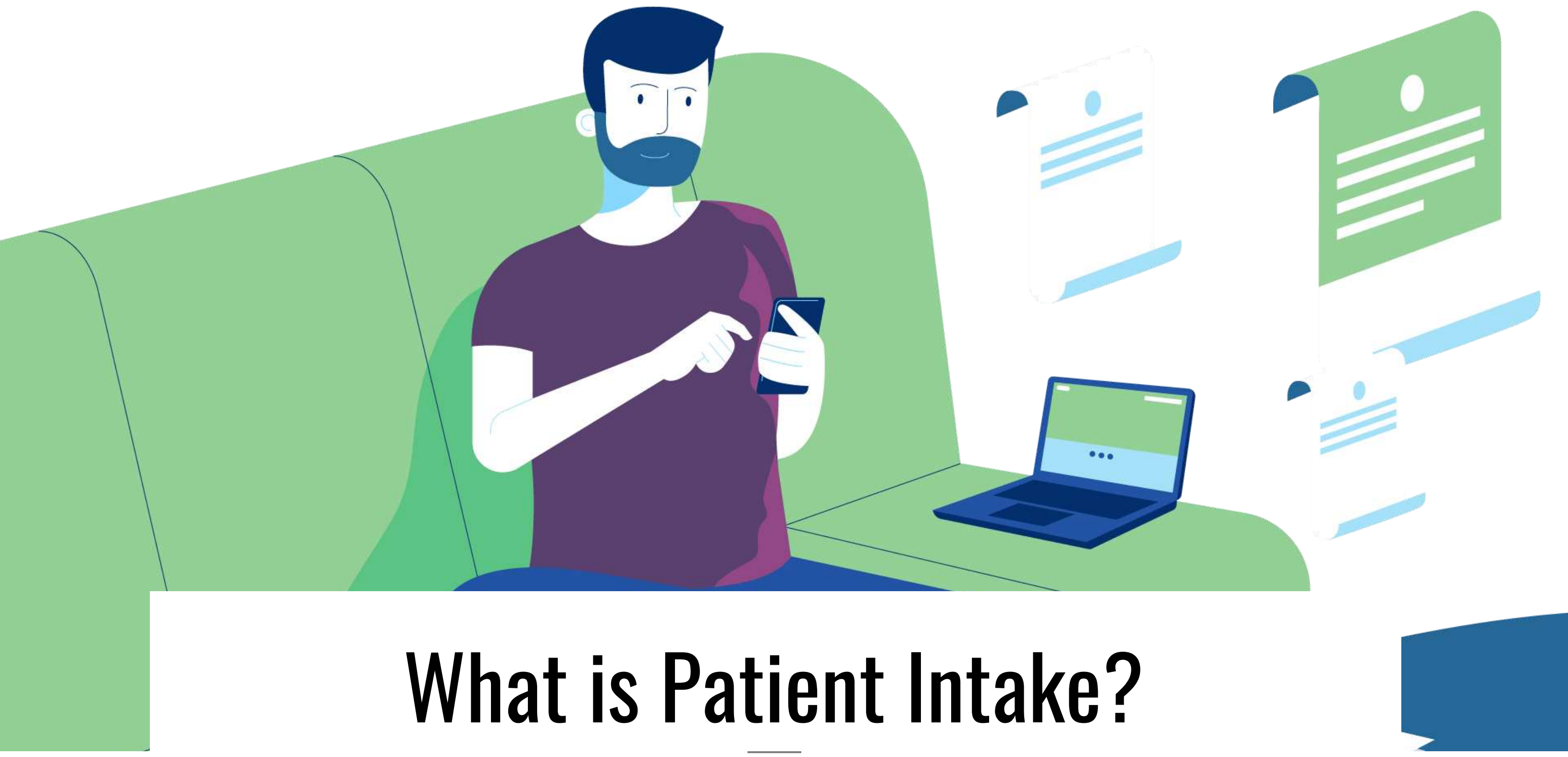
Solving for Patients & Providers with Mobile Patient Intake

The Complete Guide to eRegistration

Solving the bottlenecks and inefficiencies caused by paper intake strategies to drive better financial results, happier patients, and more productive medical practices.

RELATIENT®



What is Patient Intake?

Patient intake refers to the process of obtaining patient data, verifying the accuracy of the data, and initiating the beginning of a patient's medical appointment when they arrive. The data obtained during this process feeds several downstream processes, including clinical decision making, medical claims, reimbursement, patient payments, care coordination, follow-up, preventive health, and more. Because medical errors, which can be driven by bad data, account for 10% of all U.S. deaths, it's important that patient intake produces reliable and complete patient information that is easily accessible by a patient's healthcare decision-makers.
Patient intake is often referred to as patient registration but registration is really one of three major components of patient forms, insurance verification, and check-in.

Executive Summary

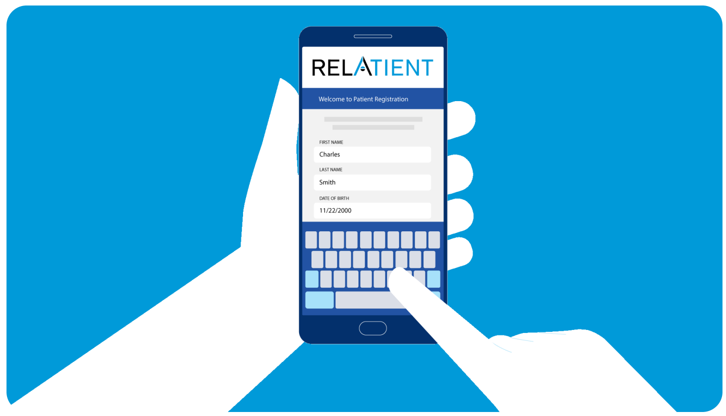
- Patient intake is important because the information collected during this process impact the billing cycle, clinical decision making, patient throughput, and staff workload.
- Manual patient intake processes create bottlenecks that slow patient flow, increase patient wait times, create significant manual data entry, and restrict the accessibility of patient health information.
- Fixing patient bottlenecks requires a solution that can move the completion of patient forms to a pre-appointment task and can be done from a mobile device. This is why online forms, portals, and kiosks have been incapable of truly solving patient intake problems.
- Mobile patient intake does a better job of protecting patient privacy and is a patient satisfier because today's patient expectations center on convenience, self-service, and mobile access.
- Entering the marketplace in search of a mobile patient intake vendor can be overwhelming as there are many options. Be sure to look for best practice features like custom forms and workflows, OCR scan, EHR/practice management system integration, on-demand registration links, custom branding, and a user-friendly dashboard.
- Features are only as good as the implementation, training, and support that stands behind them. Be sure to vet your vendor of choice and ask for a reference or case study before making your selection.
- While mobile patient intake can stand alone, it will yield the highest ROI when it is a piece of a larger digital front door strategy. Because patients interact intuitively through mobile devices and text messaging, a mobile-first digital font door strategy will do more for an organization's no-show rate, productivity, patient satisfaction, revenue, and cost goals than voice or e-mail only strategies.

Components of Patient Intake

Patient Forms

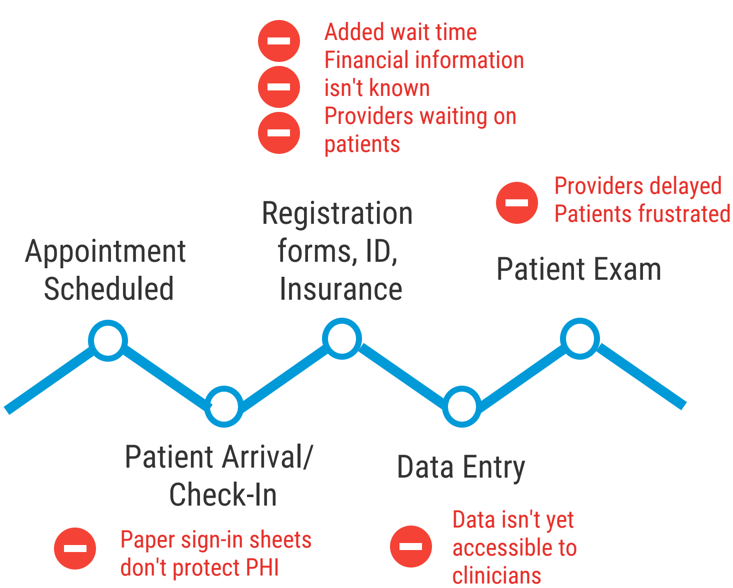
Patient data for use by providers, administrative staff, and billing is captured via patient forms which as the most basic, includes medical history, family medical history, current medications, medical coverage, and the reason for the visit. This process has evolved over many years and while it has undergone many changes and improvements, there are still many medical practices utilizing outdated, manual processes to capture this information.

Insurance Verification



Verifying a patient's medical coverage gives clinic staff the opportunity to understand what a patient owes at the time of the visit and what portion of the financial responsibility is likely to fall on the patient's shoulders. Armed with this information, staff can collect copays and patient deductibles at the time of the visit, something the data shows is crucial to the financial well-being of a medical practice because any portion of the patient responsibility that isn't collected at the time of service becomes much harder to collect once the patient leaves the clinic. Perhaps more importantly, it gives clinic staff the opportunity to identify patients that are under-insured or who will need a payment plan or financial assistance to help cover the cost of their care. Because patients will often avoid follow-up or preventive health when they fear they won't be able to afford the bill—helping patients understand how large financial responsibility can be broken down into smaller payments or helping them gain access to financial help may ultimately improve patient compliance and create healthier patient populations. The process of educating patients about their financial responsibility and the options they have in regards to those obligations is the most effective prior to the patient visit.

Manual Patient Intake Flow Chart



Check-In

When a patient arrives for an appointment, the ubiquitous process for check-in seems to be a clipboard with a paper check-in sheet. Patients write their name, the time they arrived, the scheduled time of their appointment, and which provider they are seeing. To comply with HIPAA, staff use this checklist to begin the paperwork process and "check them in", then either peel off the row that contains their check-in information or use a black marker to cross it out so other patients checking in on the same sheet can't see it (even though they still can).

Why Previous Strategies Couldn't Fix Patient Intake

The old ways of patient intake no longer serve healthcare providers or their patients effectively, some may argue that they never did. First-generation solutions, like kiosks, portals, and online static forms, failed to address the long patient wait times, the overwhelming manual burden on staff, and limited access of patient health information that providers need at the time of a patient exam. Each attempt to improve the process has brought us closer to something that really solves for patients and providers alike but left much to be desired as a true answer to patient intake.

Papers, Pens, & Clipboards

In what can sometimes take a patient upwards of 20 minutes to complete, it's no wonder manual patient intake wreaks havoc on patient flow, slowing down providers and hampering productivity for providers and staff alike. The stack of forms each patient completes translates into manual data entry or time spent scanning documents for entry into the EHR and/or practice management software. Meanwhile, patients take longer to get in and out of the practice and the longer they wait, backtrack their steps, and repeat information they have already provided, the lower their satisfaction with their experience. In fact, 97% of patients report that they're frustrated with long wait times and 41% say they would be willing to see someone else in order to reduce their wait time. This strategy leaves no opportunity for staff to know ahead of the appointment what they should collect from the patient and it robs the patient of the opportunity to receive education about resources that could help them shoulder the financial burden of their care. This is problematic because 40% of patients admit they've delayed their care at some point because they're stressed about the cost of care.

Static Forms

As medical practices began addressing patient intake as a bottleneck to their daily patient flow and operations, they started placing blank patient forms on their websites so patients could print them, fill them out, and bring them to their appointments completed. This was the beginning of a necessary shift to move the registration step of patient intake to become a pre-appointment activity but it left other intake pitfalls unaddressed. Patients still had to write out all their private health information, clinic staff were still left with a mountain of data entry, and data accuracy was dependent on staff's ability to read, decipher, and interpret patient handwriting and responses.

Patient Portals

When EHR vendors developed patient portals to expand access to patient health information, it seemed a promising solution to bridge many of the common patient engagement gaps hospitals, healthcare organizations, and medical practices grapple to solve. But portals failed to deliver the kind of engagement providers were hopeful for because they violate the requirements of behavior change, which say that a trigger, motivation, and ability must all be present to change behavior. Portals require patients to remember a username and password and aren't easily navigated, resulting in the absence of both motivation and ability and rendering portals incapable of solving the intake bottleneck. Portals also fail to engage new patients as only established patients are granted access. It's easier for patients to delay the paperwork and wait until they reach the clinic than it is to dig out a username and password they haven't used in a year. As a result, patients continue to sit in waiting rooms with clipboards while throughput slows and productivity suffers.

Kiosks

Kiosks were an exciting introduction to healthcare facilities and medical practices as they were familiar to patients who had used them in airports, at Redbox locations, and more. They don't require paper or data entry and because forms are electronic, there's no handwriting detective work. While kiosks offer providers and healthcare leaders some big wins, they lack the ability to guard patient privacy and they fail to smooth intake. Due to the size of registration kiosks, practices can only house a couple in one location, so patients may have to wait for a kiosk to free-up or resort to paper forms when a clinic is busy. They also require software updates, infection control procedures, and other forms of upkeep necessary for hardware.

The Case for Mobile Patient Intake

Mobile patient intake, also commonly referred to as eregistration or online registration, solves problems that previous patient intake solutions couldn't because it:

- Lives outside of portals or passwords (motivation)
- Can be accessed from a mobile device (ability)
- Can be prompted from a text message (trigger)

Convenience has become paramount to a patient's decision about where and how to receive care, Healthcare Dive recently reported that in a survey of 223,000 patients, 51% said that convenience and access to care were the most important factors in their healthcare decisions. Regardless of demographics like age, location, and education, mobile access is a major component of that convenience because it empowers patients to engage on their terms and according to their schedules. As patients take on more ownership of their healthcare experience, they will continue to look for mobile, self-service tools that allow them to determine how and when they interact with Healthcare. Organizations that leverage and facilitate this kind of patient experience will draw new patients to their providers and services, retain more of their current patient base, score higher in patient satisfaction, and achieve higher reimbursement rates than those that fail to embraces patients as consumers.

Patients Expect Mobile Access

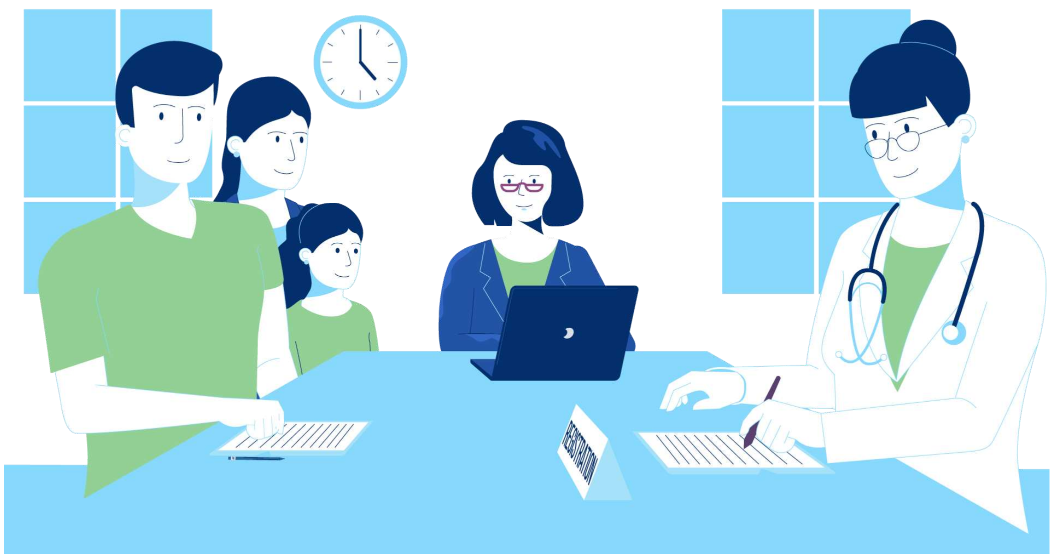
Patients have become consumers with more power in the healthcare marketplace than ever before. Companies like Amazon, Netflix, and Uber are shaping consumers' healthcare expectations, creating pressure on healthcare providers and systems to provide similar access. Gone are the days when patients are willing to navigate phone trees and wait on hold for answers to simple questions and small tasks. Each touchpoint in a patient's journey is an opportunity for healthcare organizations to either engage patients in a meaningful, mobile-first interaction or risk the patient falling through the cracks. Registration and check-in are two of these key touchpoints in which medical groups and systems can earn a place as a patient's preferred healthcare provider or create a gap the patient will fill elsewhere.

Mobile Pre-Registration Means Staff Can Verify Insurance and Understand Patient Financial Responsibility Prior to The Appointment

Information is power, for patients and healthcare providers alike. When medical payer questions are part of the patient's pre-registration process, staff gain an opportunity to verify coverage and identify the patient's portion of the bill before the patient arrives. While staff may wish to avoid having financial conversations with patients, 91% of patients report wanting to know their payment responsibility prior to a visit. With copay, deductible, and coverage information at their fingertips, staff can communicate to patients what they should expect to pay prior to the appointment and when needed, direct them to a payment plan or financial resources. Without this kind of information, staff simply aren't prepared to have a helpful financial conversation with patients will often avoid trying to collect anything at the time of service. This is problematic because patient balances that aren't collected at the time of service are at much greater risk of becoming bad debt once the patient leaves the premises.

Mobile Patient Intake Makes it Easier to Care for Patients

Patients utilize mobile pre-registration because it's quick, convenient, and reduces the time they spend in the clinic but it's a win for clinic staff because [integrated eregistration solutions] eliminate the manual data entry associated with patient forms. Integration is the connection that allows a mobile preregistration solution to send data to the scheduling software or EHR. Without this kind of integration, staff are still burdened with manual data uploads and data entry, which can't offer the fluid data sharing, accessibility, and time savings offered by an integrated solution.



Thanks to interoperability or the ability for two systems to communicate and make use of shared data, [providers report that mobile or digital patient intake helps them focus more on patient care]. Digital pre-registration enables providers to access patient information as they need it without having to wait on staff to scan paperwork or enter patient data into the EHR. This equips providers with a more complete picture of the patient's medical history and current condition so the examination and diagnosis can be more complete, treatment options are better understood, and everyone spends less time waiting.

Finally, quality controls are helpful in ensuring patient data will be complete, something that's impossible to ensure with paper forms. Required fields prevent a patient from leaving critical fields blank, formatting fields with drop downs, text, and radial button helps drive patients through a complete pre-registration process. It's also worth mentioning that there's no handwriting to interpret and because patients aren't stuck in the waiting room with paperwork to complete, they can be roomed and seen by a provider without delay. This increases throughput and drives better productivity—helping providers see more patients more effectively and completely each day.

"Relatient relieves the burden of data entry on our staff. Prior to Relatient, we had practices who required a full-time employee solely for the purposes of data entry—now those employees are in patient-facing roles which is a much better utilization of our resources."

Dana Etheredge, Applications & Integrations Project Manager , U.S. Dermatology Partners

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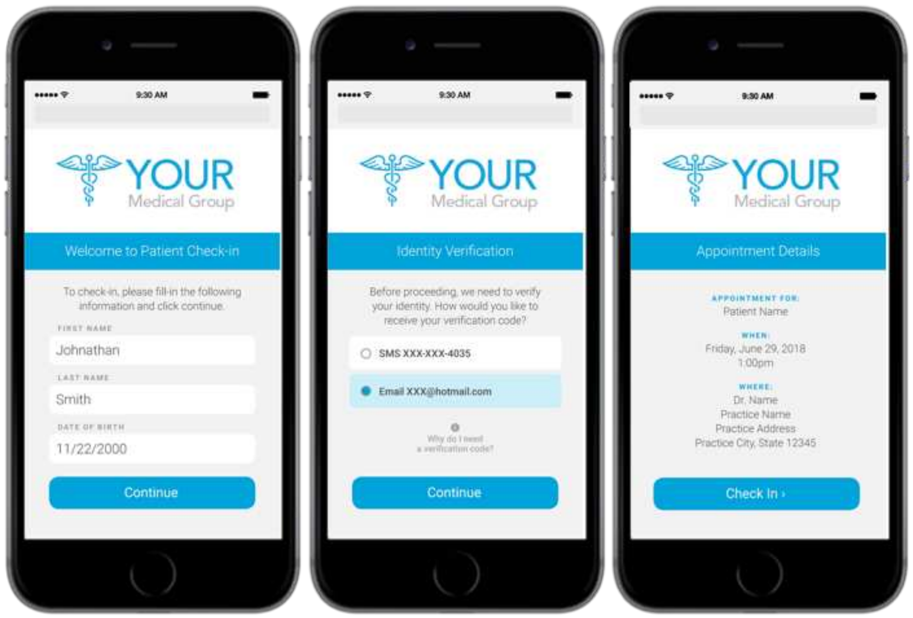
Mobile Check-In Must Be HIPAA Compliant and Patient-Friendly



Mobile patient intake should also address the check-in process, eliminating the sheet of paper at the front desk and the black sharpie staff use to cross out patient names. While this practice may be technically HIPAA compliant, it most certainly doesn't safeguard patient privacy. Mobile check-in allows patients to communicate that they've arrived for an appointment from the ease of a mobile device, keeping their data private and the practice HIPAA compliant.

While a patient kiosk is a step towards protecting patient privacy, it's still possible for others to see patient data on a large kiosk screen. Kiosks also create an uncomfortable lobby experience wherein patients can feel like they are on display while they navigate the use of a kiosk. This only grows more uncomfortable for the patient if they encounter questions or software glitches while using the kiosk. If the patient needs assistance or has a question, they would have to leave the kiosk to go ask for help—either leaving their private information vulnerable to others or having to close out and start over when they return with help.

Best Practice Features of a Digital Patient Intake Solution

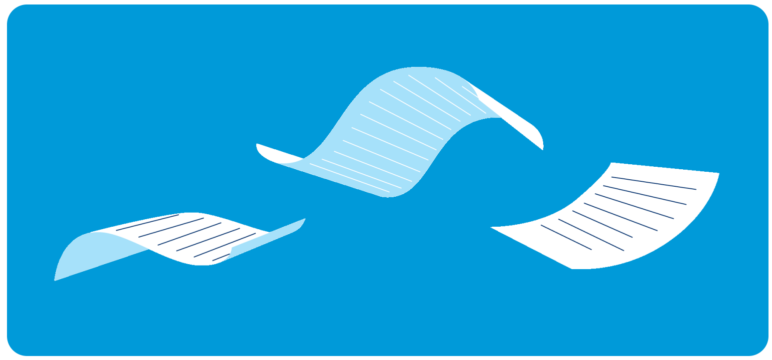
It won't take long into the search for an eRegistration solution to find that there are plenty of options in the marketplace. Whether that's encouraging or overwhelming, beginning the process with a matrix for organizing important features by the weight or importance of each one can help alleviate that angst of getting started. Here are some best-in-class features worth considering while creating such a matrix.

Custom Forms

This feature tops the list because ensuring a solution can truly deliver results means it has to fit seamlessly into the daily processes of running a medical practice. Relatient CTO, Kevin Montgomery, often cautions healthcare organizations against adopting technology solutions without the input of the employees who will need to access and use the solution on a daily basis. While it's important that a mobile patient intake vendor can offer products built with best practices "baked-in", it's even more important that they can offer their customers the opportunity to mimic the same forms and workflows they currently utilize, made better by automation.

Configurable Workflows & Conditional Logic

Patient type and specialty drive the need for different pieces of patient information, it's likely you require different information from a new patient than an existing patient and that you require additional information from a patient that is scheduled for diagnostic testing than one who isn't. Forcing every patient through the exact same workflow will create a redundant and irritating process for patients and possibly result in incomplete information for providers and staff.



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EHR/ Practice Management System Integration

The value and ROI of a digital intake solution are heavily impacted by the solution's ability to transport patient data into the right systems. If data accessibility and accuracy is the goal, it must eliminate manual data entry, which is primed for errors and mistakes. This ability to eliminate data entry is also central to a vendor's ability to reduce the drain on resources and help healthcare organizations achieve better productivity and patient throughput. There are several practice management systems and EHR's available to organizations of all sizes and specialties and it's not uncommon for a medical practice to upgrade or make a change to one or more systems at some point in time. This is an important consideration when selecting an eregistration vendor because a vendor who can offer only a few integrations will likely need replaced if the EHR or practice management system is changed at some point. A vendor who truly specializes in patient engagement, has a strong track record in the market, and integrates with all the major EHR and practice management systems will be someone that can not only continue serving your medical practice after making a change but can also help you navigate the switch for a smooth transition and uninterrupted service.

OCR Scan

OCR scan is a feature that scans the image of an insurance card and grabs the discrete data, like group and policy numbers, and enters them automatically. This is an invaluable feature that saves patients time entering numbers from their small mobile device screens and eliminates human error.

Multiple Pre-Registration Reminders & On-Demand Registration Links

Patients are busy, the likelihood that they'll drop what they're doing every time you send them information or a task to complete is nearly zero. With multiple reminders and the ability to use a combination of different communication methods, organizations can achieve 90% patient adoption of mobile pre-registration. In the case that a patient arrives at the clinic without having completed their registration forms and/or has lost the link, you'll want the ability to send it to them on the spot so they can still complete their forms with the ease and convenience of their own mobile device.

All Forms & Documents Signed From One Digital Signature

Providing multiple signatures shouldn't be necessary with mobile patient intake or eRegistration. When forms are complete, one digital signature should be the final step to finalize and submit patient information. A feature like this captures the patient signature and uses it to sign all forms and consents in the appropriate places to complete preregistration without multiple signatures.

Common Patient Forms

- Patient Information
- Medical History
- Problem History
- Family History
- Medication List
- Allergy List
- Workers Compensation
- Motor Vehicle Accident Report
- Mental Health Assessments
- Well Child Assessments
- HIPAA
- Financial Policy
- PHI Consent

A User-Friendly Dashboard

Data can be actionable only when it is easily accessible. The administrative dashboard is an important feature of a digital intake solution because it's where staff and providers can oversee check-in activity, keep track of which patients have completed their forms and which have not, send additional reminders, or complete any number of other administrative tasks that enable a medical practice to operate seamlessly.

Custom Branding

While logos and colors may seem minor to some, it's important that your patients recognize the eRegistration process as a part of your practice. The ability to incorporate your unique color scheme and logo helps create a cohesive patient experience and confirms they are sharing their personal health information with a known entity.

Finding the Right Mobile Patient Intake Partner

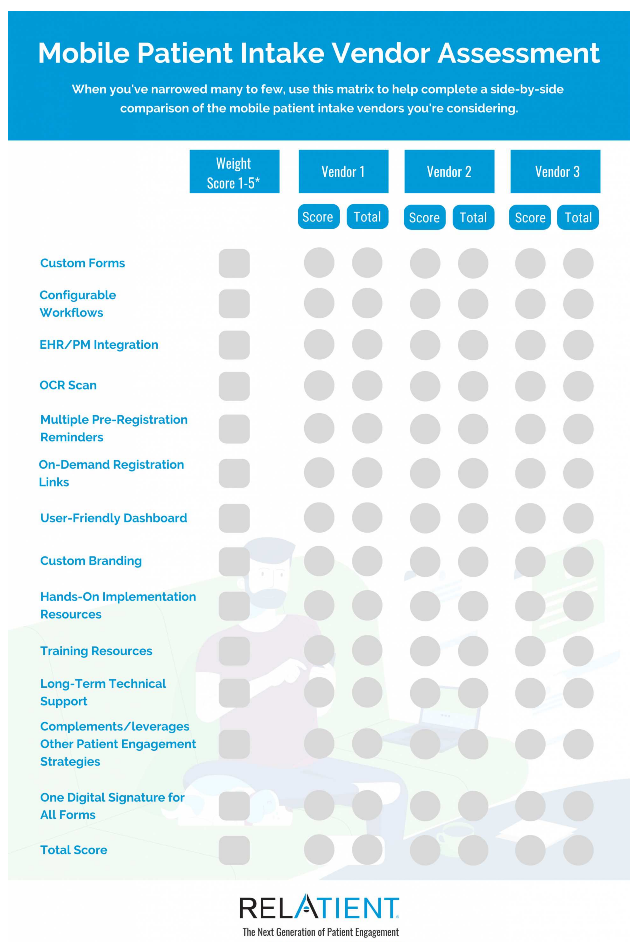
It's a noisy marketplace, asking good questions can quiet the noise.

A strong mobile patient intake partner is more than a list of features, be sure to ask good questions during the demo process to ensure your initiative will be successful before, during, and after go-live. Here are a few additional suggestions for finding the right partner:

- What does the implementation process look like? How long does implementation typically take?
- Will we have a dedicated resource or will our project lead change week-to-week?
- What training resources are available and how can we train new employees who join us in the future?
- Where do I go for help after go-live? Will I be able to reach live help or is technical support strictly a ticket-submission process?
- Do you offer any kind of ongoing/continuing education or Q&A for customers?
- Is your support team dedicated to healthcare or do they support multiple industries?
- What's your average ticket-closure time for technical support?
- Can we talk to one of your customers?

Use A Tool to Track How Vendors Compare to Each Other

Using a matrix or assessment tool helps ensure all the vendors are asked the same questions and evaluated against the same criteria. A tool, like the one below, helps you accounts for the importance of each feature. Give each vendor a score and then a total score by multiplying the weight by the raw score. Calculate the sum of each vendors scores at the bottom of the assessment to see how each compared. You can [download a PDF of this tool here.](#)



Mobile Patient Intake Is One Piece of a Digital Front Door Strategy

Patient engagement encompasses all the touchpoints of the patient journey, though we are focusing this conversation on the ambulatory patient journey. Mobile intake should help you streamline registration, improve patient throughput and satisfaction, and drive productivity, but it should also be a complementary component of a larger strategy focused on engaging patients between appointments. The most effective patient engagement strategies are independent of apps and portals and utilize a multi-modal communication strategy that hinges on the use of text messaging, as this form of outreach yields a 90% response rate. Implementing mobile access and text outreach at every step of the patient journey creates a seamless patient experience and optimized workflows for staff and providers.

To take your patient engagement strategy to the next level, be sure each patient touchpoint has the capability of leveraging the outreach and communication from other touch points. For example, a practice that utilizes automated appointment reminders and a mobile patient intake process can drive patient adoption of mobile pre-registration by providing the pre-registration link in the appointment reminder text itself. If a patient has a scheduling or registration question, a practice who also utilizes two-way patient chat can text a resolution to the patient without playing the dreaded "phone tag" with them. Many practices have included a component of their patient engagement strategy for addressing gaps-in-care, like Health Campaigns. A solution like this utilizes clinical EHR data to trigger messaging to patients who are overdue for follow or preventive care. When combined with patient self-scheduling, these practices can leverage the two to remind a patient they are overdue for care and deliver a link to book an opening without requiring the patient to make a phone call or log into a portal account. It's this kind of streamlined patient experience that was never possible before patient-centered engagement software became widely available but that patients are expecting in order for healthcare to operate on the same level as other consumer industries.

Just as patients utilize the web to compare their healthcare options and make informed decisions, there are third-party online resources for healthcare leaders that help them do the same. Review sites, like Capterra, or reports from market research organizations like KLAS, equip decision-makers with side-by-side comparisons of leaders in a given marketplace. Seeking out a resource like the these offers unbiased insight into the features, functionality, support, and reputation of each potential partner.

Relatient® Patient Journey

Conclusion

Given the tools available to medical practices and health systems today, there's no reason to continue suffering through the patient intake bottleneck with manual processes that irritate patients and create extra work for staff. Mobile-first patient intake strategies offer healthcare organizations the opportunity to delight patients, improve patient satisfaction, reduce patient wait times, and make dramatic improvements to patient flow and staff productivity.

Perhaps the most important advantage of digital intake strategies is the potential to improve collections by collecting patient payment information and medical coverage prior to the patient visit. This key information equips staff to verify coverage, determine patient responsibility, collect copays, and connect patients to payment plans and financial assistance when necessary. Kiosks, portals, and paper processes cannot do this.

Electronic pre-registration or eRegistration is part of patient engagement. While there are many patient engagement vendors in the marketplace, few will be able to offer the integration, customization, and workflows that will help your practice or organization deliver results. You can identify the few who are capable of meeting your needs by pre-determining what product and vendor features are important to your organization and prioritizing them in a matrix or assessment tool that gets used in the same way for each vendor.

Finally, while eRegistration & Check-in can function as stand-alone solutions for your practice, you'll find the greatest success when plug these solutions into a larger digital front door strategy that can help expand patient access and stay relevant in today's quickly changing healthcare environment.