



# PERFECTING PATIENT INTAKE



# Introduction

The health care landscape has been changing over the course of a number of years, largely due to patients who are approaching health care with a more consumerist attitude as they are responsible for more of their care costs than ever before. Now, with the addition of the impact of a global pandemic, the need for transformation on the part of medical practices is even more evident. One area where this is perhaps more true than any other is that of the patient intake process. Patients are busy and expect convenience, and with the distancing necessary to prevent the spread of infectious disease, the traditional methods of patient intake simply aren't feasible anymore.

In this eBook, we'll take a look at the patient intake process and how it can be improved for today's health care landscape. We'll begin by exploring what the patient intake process is and how it has traditionally worked. From there we'll examine the problems that exist with the current process before discovering a better way forward and the benefits such a transition can bring. Finally, we'll finish up by discussing how Henry Schein SolutionsHub can help your practice make this adjustment and serve your patients more efficiently. Let's get started.



# What is Patient Intake?

The term patient intake refers to the process by which a health care organization collects information including demographics, consent forms, insurance cards, and payments from both returning and new patients prior to their appointment. Many tasks fall under the umbrella of patient intake, including obtaining patient addresses, emails, and phone numbers, noting medical and social history; verifying insurance benefits and eligibility; collecting patient payments; gathering patient generated health data; and collecting signed consent forms. This process is one of the first opportunities your practice has to engage with your patients and make an impression as to what they may expect out of their experience. For this reason, you'll want to provide the most pleasant, efficient process possible in order to set the tone for a satisfactory encounter overall and start earning patient trust early.





# How does Patient Intake Usually Work?

**The traditional method of patient intake is very paperwork heavy and requires a lot of time on the part of both the patient and the office staff.**

This process begins when a patient decides to schedule a doctor's appointment. Under the traditional method of patient intake, that patient will call the medical practice and wait to speak with a receptionist who will take them through the scheduling process over the phone. Once the appointment is scheduled, the patient intake process is halted until the day the patient arrives for their scheduled appointment.

When the patient arrives for their appointment, the process will vary somewhat for an established patient versus a new patient. An established patient will sign in for their appointment, and the receptionist will review a few key pieces of demographic information such as address and insurance coverage. If any consent forms are outdated in the system, the patient will need to sit in the waiting room and fill those out; otherwise, the patient is free to sit and wait to be called back to the exam room. A new patient will sign in for their appointment and be handed a clipboard with a number of intake forms that ask for demographic information, personal and family medical history, insurance coverage, and more. They are expected to fill out these forms completely and accurately, on the spot, while sitting in the waiting room. At this point, the receptionist also will typically scan or copy the patient's insurance card. Once any forms are filled out, whether the patient is established or new, it is the receptionist's job to decipher the patient's handwriting and transcribe all the information on the forms into the EHR system. As you can see, the traditional patient intake process is very hands-on.





# Problems with the Current Process

There are a few issues with the patient intake process as it traditionally occurs, the first of which being that it has the potential to be wildly inaccurate. To start with, patients may inaccurately recall details when being asked for information on the spot. Their handwriting can be indecipherable, leaving the office staff with a guessing game during transcription. Even if the patient has fantastic handwriting, the office staff has the potential to make a typographical error while transcribing the information into the EHR, leading to inaccurate patient information. Depending on the specific error, at the very least this could lead to patient inconvenience; at the worst, it could be dangerous or even life-threatening.

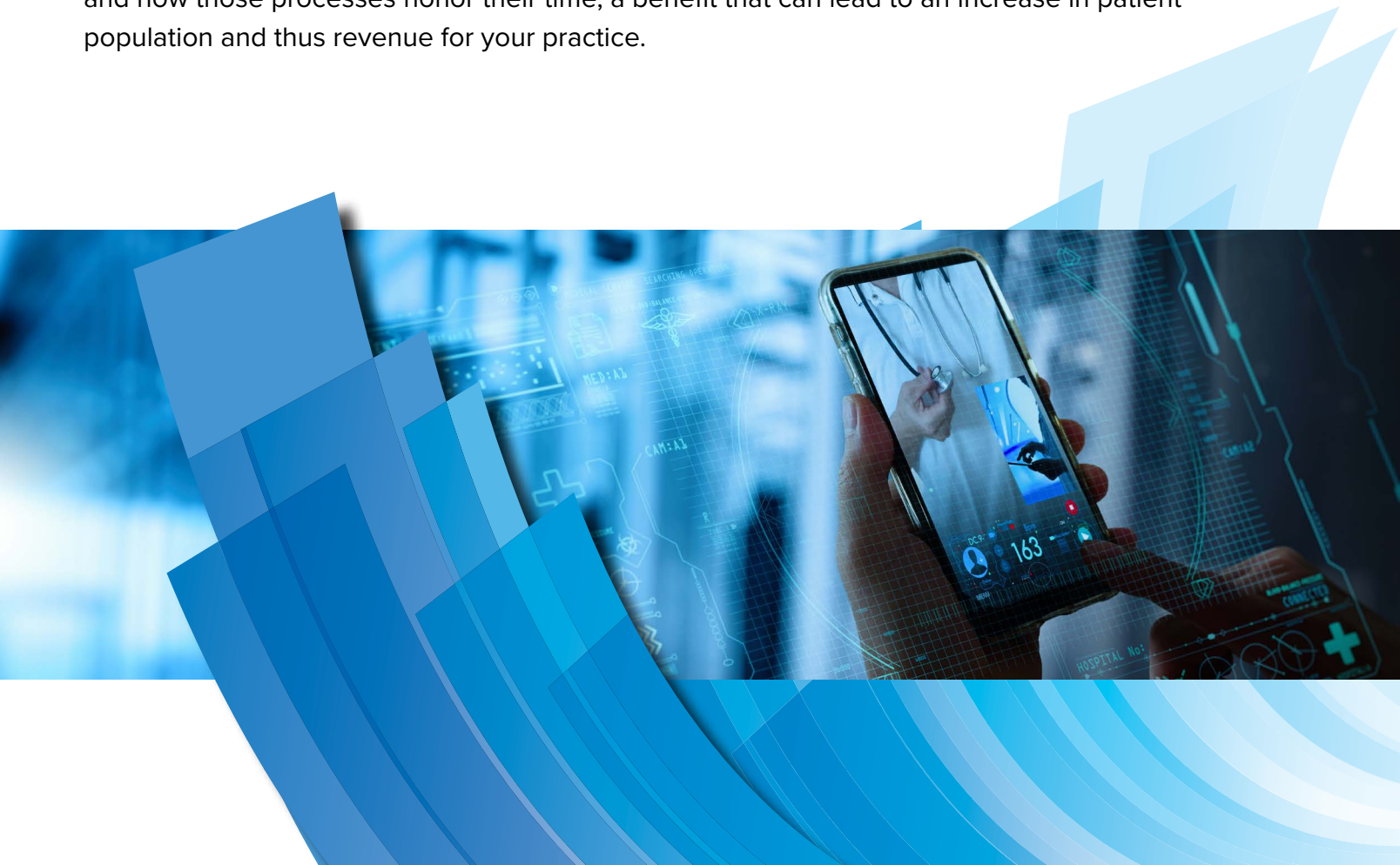
The next issue with the traditional method of patient intake is the amount of time it takes. Copying down all of your demographic information, along with personal and family medical history, and insurance coverage information by hand takes a long time and it's also frustrating to try to accurately remember all of those important details on the spot. Most patients dread the clipboard full of forms they're handed when they visit a new doctor for the first time. Additionally, it takes a long time for the office staff to transcribe that information once they get the completed forms back. This is time that could be better spent if used on more valuable tasks.

Finally, particularly in a post-COVID world, there's the consideration of patient and staff safety. Filling out forms in waiting rooms, touching communal clipboards and pens, and passing insurance and payment cards back and forth all provide ample opportunity for the spread of illness between patients and staff. In the wake of a viral crisis such as COVID-19, it's now more necessary than ever to figure out a way to conduct business in as contactless a way as possible for the safety of all involved.

# A Better Way Forward

The traditional way of performing patient intake isn't the only way, though. Now there are digital patient intake solutions that allow for automation and added convenience in this important process. Patient intake solutions often allow for online scheduling, electronic registration forms, online payment, and digital communication. This allows for this formerly tedious and time-consuming process to be automated, resulting in improved patient experience and satisfaction, reduced administrative costs and burden, and even additional revenue.

There are a number of benefits that come along with an automated, pre-arrival focused, patient intake system starting with less phone calls for appointment scheduling due to patients' ability to schedule online. This saves time for the staff and frustration for patients who would otherwise be forced to wait on hold. Another benefit is less potential for spread of illness due to the elimination of clipboards full of forms and extra contact between patient and staff. Another benefit is improvement in the accounts receivable process as payments can be made more conveniently online, increasing the likelihood that patients will pay their balances in a timely fashion. Finally, all of this will lead to better reviews of your practice as patients are more satisfied with the efficiency of your processes and how those processes honor their time, a benefit that can lead to an increase in patient population and thus revenue for your practice.





# Conclusion

The patient intake process as it has always transpired isn't feasible for today's health care landscape. Patients desire convenience and recent health crises have highlighted the need for reduced contact in medical settings. The best way to respond to these needs is through the use of digital patient intake tools. These tools allow for the automation and added convenience of online scheduling, electronic patient intake forms, online payments, and more. Henry Schein SolutionsHub is ready to help you move into the future of patient intake through our partnership with Yosi Health. Yosi Health is a 5-star rated digital patient scheduling, registration, payment, and communication solution designed for busy care centers and their waiting rooms. With Yosi Health, your patient's experience with your practice will begin at home with the ability to self-schedule their appointment, fill out forms, and make payments prior to their arrival. This not only saves time and frustration, but adds to safety for both your patients and your staff. Are you ready to learn more about how Yosi Health can help your practice see an increase in revenue and patient satisfaction?

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