



What is digital patient registration... and why should your organization consider it?



Rated #1 in Patient Intake Management

September 26, 2023

AGENDA

- ✓ Introductions
- ✓ What is digital patient registration and engagement?
- ✓ The experience patients expect
- ✓ Implementing a digital strategy
- ✓ Try Phreesia + Q&A



Creating a **better, more engaging** healthcare experience



Who we are: The trusted leader in patient activation—giving provider organizations tools to help patients take a more active role in their care

What we do: Enhance the patient experience, drive efficiency and improve healthcare outcomes by facilitating 120 million+ patient visits annually across the U.S.

How we do it: Patient-driven digital solutions for intake, revenue cycle, outreach, education and more

**PHR
LISTED
NYSE**



**HITRUST
CSF Certified**



ONE INTAKE EXPERIENCE FOR ALL PATIENTS AT SCALE ACROSS YOUR HEALTH SYSTEM



Workflows Include:

- ➔ Hospital Outpatient
- ➔ Physician Visit
- ➔ Emergency
- ➔ PAT/Surgery
- ➔ Main Admitting



Scheduled Patients
Including multiple
same day



Walk-Ins

Phreesia has customizable workflows to meet the unique needs of all your care settings and service lines

What is digital patient registration and engagement?



Definition: Using technology and electronic methods to collect, authenticate and transmit data

- ✓ An effective platform makes it easy for patients to provide personal data required for billing, and clinical details that inform clinical care
- ✓ Can come in a variety of implementations, from an end-to-end solution to an integration with other apps
- ✓ Engages both patients and staff to drive care outcomes and efficiently complete critical administrative tasks

WHAT WE HEAR FROM YOUR PEERS

Healthcare organizations with antiquated intake processes experience...

Paper forms need to be manually transcribed into EHR

Poor staff experience

Wasted staff time due to transcription or poor EHR integration

Operational inefficiency

Redundant paperwork, long wait times, hard-to-understand forms, registration is “one-size-fits-all”

Patient dissatisfaction

Incomplete or inaccurate data; clinicians lack time to ask meaningful questions

Uninformed patient exams

Lost revenue due to no-shows and last-minute cancellations

Reduced profitability

MAKE A GOOD FIRST IMPRESSION WITH DIGITAL CHECK-IN

- ✓ Make it easy for patients to do what you want and need them to do
 - Demographic collection
 - ID/insurance capture
 - Consent management
 - Copay/balance collection
- ✓ Leverage digital patient registration to drive clinical outcomes



ENGAGE PATIENTS TO INCREASE REVENUE



33%

of healthcare organizations do not seek payment before date of service¹



51%

of healthcare organizations have no formal policies or procedures for point-of-service collections¹



Providers expect to collect only **50-70%** of a patient balance after a visit²



4 in 10

U.S. adults say they have difficulty paying for their healthcare, demonstrating a need for improved access to financial counseling³

¹ ["Analyzing pre-payment and point-of-service collections efforts,"](#) HFMA, August 15, 2021

² ["How much should I collect up front?,"](#) Rivet Health

³ ["Americans' Challenges with Health Care Costs,"](#) Kaiser Family Foundation, July 14, 2022

PATIENTS PREFER ONLINE CHECK-IN

Why do you prefer online check-in for your medical appointments?



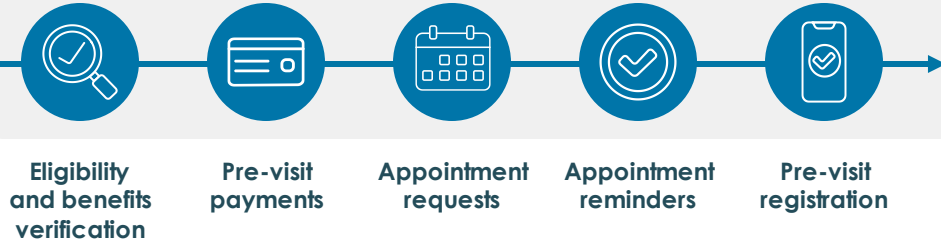
1 in 6
patients would consider switching doctors if their physician doesn't offer online check-in

84%
of patients that check in online do so on their mobile device

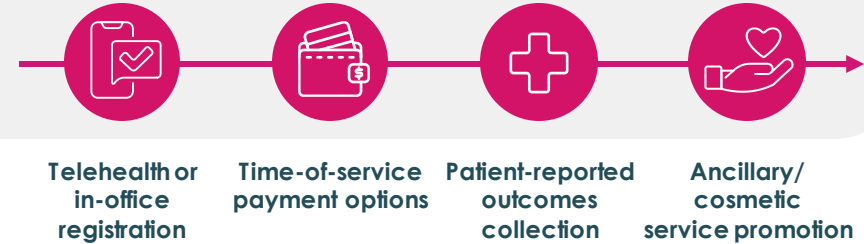
Source: Phreesia survey, 2022

THE DIGITAL FRONT DOOR

Before the visit



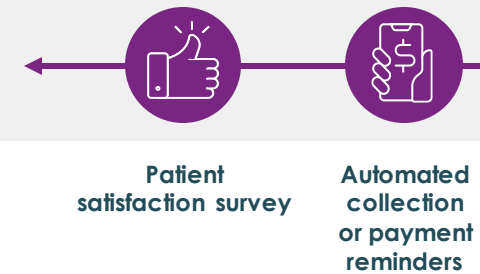
During the visit



Between visits



After the visit



PEELING BACK THE LAYERS OF YOUR DIGITAL STRATEGY



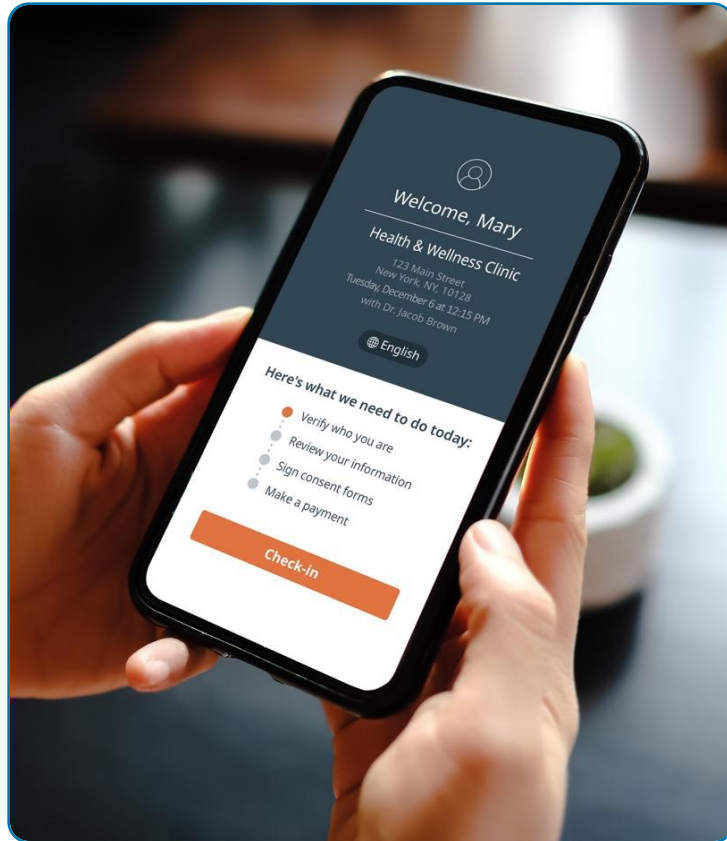
The clinical and data layer:
the EHR/PM layer



The experience layer:
a patient-facing platform that
engages patients in their care



CHECK IN FOR A VISIT!



Check in here!

WHAT YOU MIGHT EXPECT TO SEE WITH PHREESIA

Phreesia typically drives a return on investment of **5x or more** for health systems and medical groups



Save staff time

Get back five minutes of staff time with every patient check-in using Phreesia



Improve data collection

20% of patients will update their contact information within the first 30 days after launching Phreesia



Create a better patient experience

85% of patients prefer using Phreesia over paper forms

“Our patients like Phreesia. They like being able to complete registration at their convenience, consistently, when they want to, in advance of their appointment.”

-Joseph Koons, Senior VP and Chief Revenue Officer, LifeBridge Health

**Figures above reflect the 75th percentile performance across all clients of this specialty in the Phreesia network*



Q & A

THANK YOU

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APPLICATIONS TO MANAGE THE ENTIRE PATIENT JOURNEY FROM ACCESS TO INTAKE

 Access	 Registration	 Revenue cycle	 Patient activation	 Clinical support
<p>Appointment recall</p> <hr/> <p>Online referral tools and local referral networks</p> <hr/> <p>Faxing service to process incoming referrals</p> <hr/> <p>Online appointment booking</p> <hr/> <p>Auto-fill cancellations*</p> <hr/> <p>Auto-rebook no-shows and bumps*</p> <hr/> <p>Central hub to track all referrals and appointments</p>	<p>Intake workflows</p> <hr/> <p>Consent management</p> <hr/> <p>Mobile</p> <hr/> <p>Intake for Telehealth</p>	<p>Insurance verification</p> <hr/> <p>Financial Counseling</p> <hr/> <p>Payment plans</p> <hr/> <p>Payments – POS and Online</p> <hr/> <p>Card on file</p> <hr/> <p>Payment assurance</p>	<p>Broadcast messaging</p> <hr/> <p>Appointment reminders</p> <hr/> <p>Patient surveys</p> <hr/> <p>Two-way patient chat</p> <hr/> <p>Digital patient engagement</p>	<p>COVID-19 Screening Module</p> <hr/> <p>COVID-19 Vaccine Management Solution</p> <hr/> <p>Patient-reported outcomes for 25+ specialties</p> <hr/> <p>Behavioral health screenings for primary care</p> <hr/> <p>Social determinants of health (SDOH) screenings</p> <hr/> <p>Health campaigns</p>

* Available for select PM systems



Real-time **integration** with leading PMs and EHRs



Robust **analytics** tools

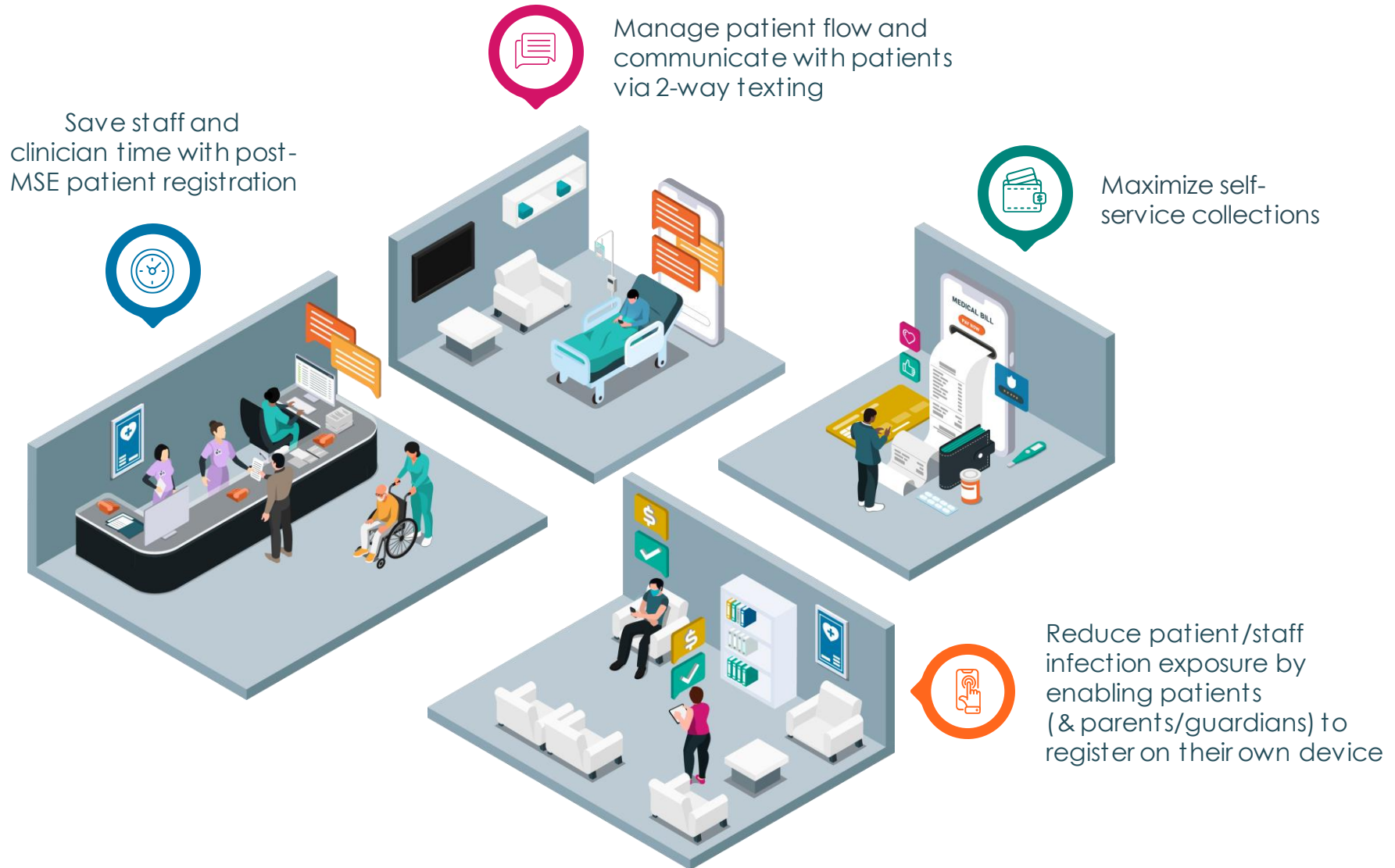


Reliable and **scalable** platform



Commitment to **privacy** and **security**

EMERGENCY DEPARTMENT



MAIN ADMISSION/REGISTRATION

Save staff and clinician time with pre-service patient registration



Capture clinical quality and outcome data



Manage patient flow and reduce patient and staff contact



Maximize self-service collections

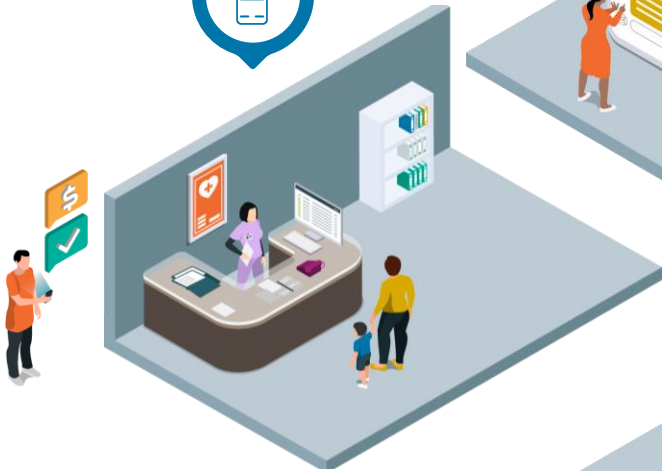


URGENT CARE/WALK-INS

Communicate wayfinding instructions and wait times with patients via 2-way texting



Create staff capacity with Phreesia Mobile



Reduce patient/staff infection exposure by enabling patients (and parents/guardians) to register on their own device



Maximize self-service collections

AMBULATORY PRACTICE

Save staff and clinician time with pre-service patient registration



Manage patient flow and reduce patient and staff contact



Capture clinical quality and outcome data



Maximize self-service collections



CONNECT PATIENTS WITH FINANCIAL ASSISTANCE

- ➔ **Phreesia helps connect eligible patients with financial support before the visit,**
- ➔ **Here's how it works in an ED setting:**
 - ✓ Before the visit, patients scan a QR code or click a link in a text or email to learn more about their health system's financial assistance program
 - ✓ While waiting, patients fill out appropriate information to start their application
 - ✓ After the visit, they fill out additional information about their needs and upload documents such as proof of income
 - ✓ Counselors submit applications in full without any need to track down patient
- ➔ **Phreesia's fully digital solution allows most patients to fully qualify and apply for assistance without meeting with a counselor, allowing counselors to focus on more complex cases**



AN INDIVIDUALIZED EXPERIENCE FOR EVERY PATIENT



PATIENT NAME

Anna

PATIENT AGE

35

APPOINTMENT TYPE

New OB Patient

INSURANCE

Aetna – high deductible

REASON FOR VISIT

New pregnancy

PRIMARY LANGUAGE

Polish

PROs AND SCREENING TOOLS

Genetic screening questions

CONSENT FORMS

HIPAA, consent to treat, financial policy

PAYMENT

Puts card on file



PATIENT NAME

Camila

PATIENT AGE

48

APPOINTMENT TYPE

Well Woman Visit

INSURANCE

Anthem – PPO

REASON FOR VISIT

Annual well woman visit

FAMILY MEDICAL HISTORY

Breast cancer

PROs AND SCREENING TOOLS

Myriad Cancer Risk Assessment

PROMPTED TO SCHEDULE

Annual mammogram

POST-VISIT

Patient satisfaction survey