



referral **md**

# **Modernizing Patient Intake: Why It Matters & How to Get It Right**

A practical guide for healthcare organizations ready to simplify workflows and elevate patient experience.

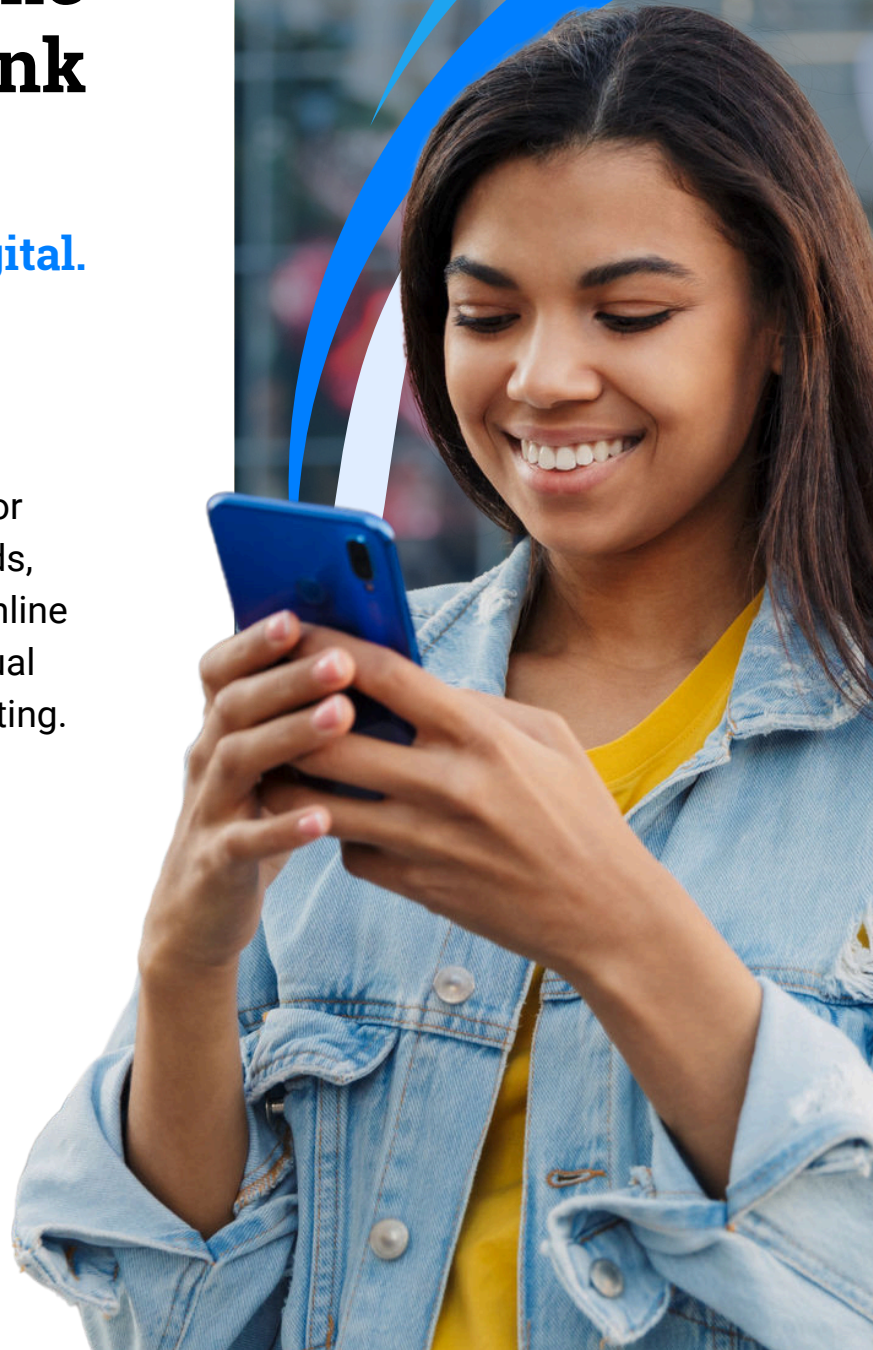
# Why Patient Intake Deserves a Rethink

**Your patients have gone digital. Has your intake process?**

The intake experience is the first impression your patients get—and for many, it still involves pens, clipboards, and scanning forms. In a world of online banking and mobile check-ins, manual processes feel outdated and frustrating.

**Digital intake isn't just about convenience. It's about:**

- Reducing wait times
- Preventing data entry errors
- Freeing up staff
- Improving compliance and accuracy



**72% of patients say they prefer digital registration over paper forms.**

*(Source: Healthcare IT News)*



# The Pain of Paper-Based Intake

## Old Way



Paper forms + clipboards



Manual entry, delays



Front desk bottlenecks



Illegible handwriting

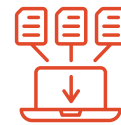


Scanning, shredding, storage

## Modern Way



Mobile-friendly digital forms



Real-time data capture



Streamlined check-in process



Clean, accurate data



Cloud-based and secure



# What to Look for in a Digital Intake Solution

Choosing a platform that works for your team—not against it.

When evaluating digital intake solutions, look for platforms that are:

- Easy for patients to use (especially older or less tech-savvy patients)
- Seamlessly integrated into your existing workflow
- Scalable across multiple locations and specialty departments
- Built with healthcare compliance in mind
- EHR agnostic, so it works with your current system
- Designed to reduce, not add to, your administrative burden



# How ReferralMD Simplifies Digital Intake

Digital intake, redefined.



## Mobile-First Solution

Patients complete intake process from any device, before or at point of care.



## Conversational AI

Complete the intake process using Conversational AI versus filling out forms.



## Custom Workflows

Tailor intake templates by location, provider, or specialty—no coding required.



## EHR-Friendly Integration

Works with your systems—no rip-and-replace required.



## Real-Time Progress Visibility

Track completions and identify gaps instantly.



## Reduces No-Shows & Admin Time

Pre-visit instructions, reminders, and verifications built in.





# Ready to Simplify Your Intake Process?

**Meet patients where they are.  
Leave the paper behind.**

See how ReferralMD makes intake easier—for everyone.



**(800) 343-3729**

**[GetReferralMD.com](https://www.GetReferralMD.com)**