



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.

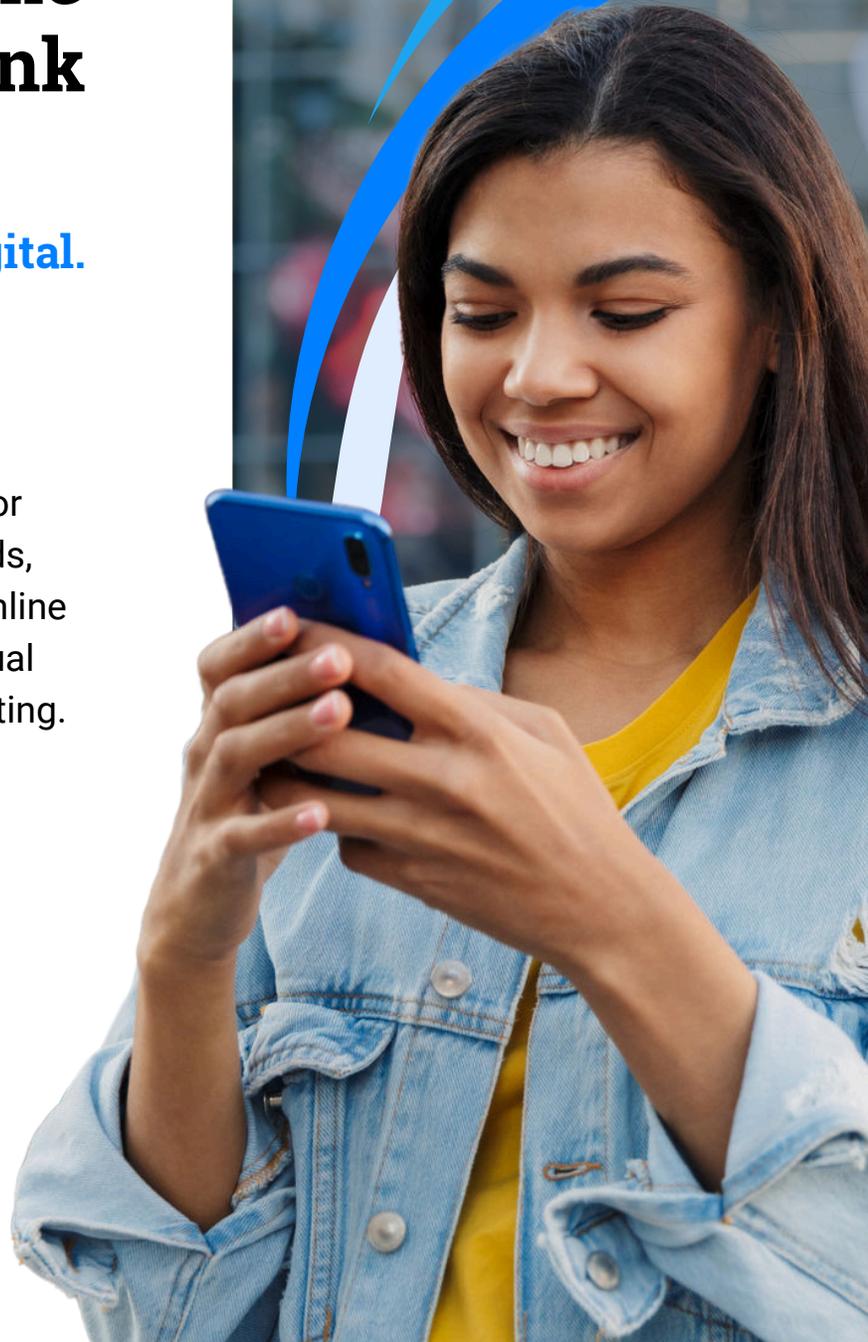
Why Patient Intake Deserves a Rethink

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 In a world of online banking and mobile check-ins, manual processes feel outdated and frustrating.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

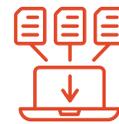


Scanning, shredding, storage

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

ReferralMD.com