

# Comprehensive patient intake

Incomplete and inaccurate orders are a perennial problem for post-acute providers – often causing staff to chase down errors after the order has already moved through processing. This challenge is even more pronounced when dealing with high staff turnover that requires regular new-hire training on the intake process. But what if your process was designed to intuitively get correct and complete information upfront, so you can trust you'll get paid? **You now have tools within your Brightree Business Management Software.**

## Benefits

- Reduce training time for new staff
- Reduce errors upfront
- Reduce work stoppage
- Reduce billing errors

## How it works

Comprehensive patient intake streamlines the intake process, guiding your staff through a customized process based on their job function so that patients and orders are qualified prior to delivery based on payer-specific product criteria.

### Role-based

Establishes and surfaces the data fields required for different roles based on the payer and product.

### User-defined fields

Limits the ability to move forward with a sales order or delivery until all required information is filled out.

### Single page

Surfaces necessary fields to complete order entry in one area to eliminate confusion and keystrokes.

### Validations

Sets up an automatic process for diagnosis-driven products to default to WIP states and sales order classification.

### Sales order defaults

Limits which products are available to put on an order for a given payer and establishes predefined rent versus purchase for each payer.

## Learn more

To schedule your implementation of comprehensive patient intake, contact us at **1.833.916.1554** or **info@brightree.com**