Phreesia
by Head of Digital Product

`Patient Intake`

Details

Review Date	08/21/2023
Purchase Date	Q2'22
Implementation Time	8 weeks
Product Still in Use	Yes
Purchase Amount	$150 per full-time provider per month
Intent to Renew	75%
Review Source	Elion

Product Rating

Product Overall		3.5
Use Case Fit		3.5
Ease of Use		4.0
API		N/A
Integrations		3.0
Support		2.0
Value		4.0

About the Reviewer

`Implementation Team`   `Product Oversight`

Reviewer Organization

`Specialty Practice`   `Women's Health`

Reviewer Tech Stack

`athenahealth`

Other Products Considered

`DrChrono`   `Kareo`   `Qure4u`

Summary

- **Product Usage: Phreesia is employed for automating patient intake processes, communicating with patients, managing insurance and billing data, and enabling patient self-scheduling through links embedded in the company's patient app and website.**

- **Strengths: Phreesia's strengths lie in its comprehensive functionality, flexibility, configurability, and the simplicity of making changes through its front end, and the self-scheduling tool worked well for the company.**

- **Weaknesses: The company experienced issues with data interoperability between Phreesia and their EHR system, Athena, often encountering errors that surfaced during patient check-ins; the user experience could be improved for easier navigation, and challenges were faced with the account management team.**

- **Overall Judgment: Despite Phreesia being the best option available at the time of implementation, with advancements in technology and emerging competitors, the company might reconsider its choice as issues persist.**

We're chatting about Phreesia and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?

Sure. Our company is a modern women's health practice. Our care model is different from traditional OB/GYN care, as we have a team of providers including doulas, midwives, social workers, and mental health therapists. We aim to support women from all angles and fill in the gaps to improve women's health outcomes. From a business perspective, we target remote areas where there is greater need.

My role at the company is Head of Product. I work with our product and design teams to build and support our technology, including our patient mobile app and our integration with Phreesia.

How long have you been using Phreesia?

About 14 months.

Why did your company look into purchasing Phreesia?

We had chosen to implement Athenahealth as our EHR, and our main concern was finding a way to manage patient intake. The available options on the market were limited, considering that we wanted to choose options from the Athenahealth marketplace. We had a relatively small tech and product team at the time, so the chief product officer decided to go with the option that would be the most straightforward and involve the least amount of risk. I think she evaluated DrChrono and CareCloud, but Phreesia stood out, as it offered the necessary functionality at a good price point.

What problems did you need Phreesia to solve for you?

The main issue we were facing was figuring out a way to obtain and gather patient intake forms and data effectively. We also needed to streamline the collection of insurance and billing information. Additionally, we were looking to automate and manage the regular communication we have with patients before their appointments.

What were some of the requirements you used to decide between Phreesia and their competitors?

One major consideration was the price point. We wanted a pricing model that would allow for flexibility and rapid scaling, rather than being locked into a high fixed cost that we couldn't afford. Usability was also a big factor, as our clinic staff in rural areas are not typically tech-savvy. We needed a system that was highly usable and configurable to align with our workflows. And the level of integration with Athena and the availability of APIs were also important factors.

Now that you've been using Phreesia, how would you characterize its relative strengths and weaknesses?

In terms of strengths, I would say the functionality is certainly there. It's a robust platform that allows for the creation of structured patient intake processes. We have the flexibility to build different workflows for different patient segments, which is great. Each patient segment may require different forms or logic, and Phreesia supports that. The ability to configure things through the front end of Phreesia is also super helpful. If we need to make changes to email templates or text messaging copy, we can easily do it ourselves, which is really convenient.

However, one major weakness we face is the data interoperability between Phreesia and Athena. Even though we're supposed to be fully integrated, we often encounter issues. For example, sometimes there are billing fields that Phreesia passes to Athena that Athena doesn't recognize, resulting in errors. These errors usually surface in real time during patient check-ins, causing operational burden and cost for us. Another area that could be improved is the user experience (UX). It might be a result of the platform's robust functionality, but navigating Phreesia can be a bit challenging. We often rely on a product-savvy person to make front-end tweaks when it should ideally be user-friendly for anyone.

One other thing I'd like to mention, we've also been facing quite a few challenges with our account management team and resolving issues promptly.

What made you choose Phreesia?

I think there's definitely room for improvement, which is why we're still considering other solutions in the market. Phreesia wasn't a perfect fit for us, but it was the best option available when we made the decision. It met the most criteria for us.

Can you discuss some of the other vendors and products and how they stacked up against Phreesia?

We considered other vendors, including DrChrono, Kareo, CareCloud, and Qure4U. The main issue we found with them was the limited data transfer between their platform and Athena. Phreesia, on the other hand, seemed to offer more interoperability. You can access all the necessary patient chart details, such as name, date of birth, chart number, appointment provider, appointment type, and even billing and insurance information like payor name and plan. This is crucial for our schedulers and front desk staff during the check-in process.

The competitors had limitations on the integration depth, and their UX was not impressive either. Although Phreesia's UX is not perfect, it's still better than what the other competitors offer. Our main focus was finding a solution that is easy for non-tech-savvy users to efficiently handle a high daily patient volume. Pricing was another factor we considered. Some competitors charged based on API call volume or a flat usage fee, which was significantly higher than what we could afford at the time. It made more sense for us to pay per provider, considering our current scale and the number of clinics we had.

How was the onboarding and setup process?

Overall, I thought the onboarding process was pretty smooth. They had a strong system in place for gathering all the necessary information from our end and developing a project plan. The account owners were responsible for overseeing all the different project milestones. It's possible that our positive experience was due to the specific account manager we worked with, because it felt like we received excellent support and project management during the initial onboarding phase. However, this level of support seemed to wane post implementation, particularly when it came to continuous support and issue resolution.

That being said, the setup process itself went smoothly and stayed on track according to our timeline. One of their representatives even visited one of our clinics to provide training, which was really valuable. In general, they were highly responsive and addressed our concerns promptly.

What are some of the use cases where you are using Phreesia?

In terms of patient intake, we use Phreesia for appointment confirmations. Initially, when someone books an appointment, whether it's their first or a follow-up appointment, we send out text messages and/or emails. Leading up to their appointment, we send out a series of messages through Phreesia, which may include intake paperwork, necessary forms, or appointment reminders. Phreesia automates this entire process for us.

When the patient comes in for their appointment, our front desk staff uses Phreesia to check them in. If anything is missing or needs to be reviewed with the patient again, they handle it all through Phreesia. The best part is that they don't have to switch between Phreesia and Athena, or at least they shouldn't have to. It's convenient that they can manage everything in one interface.

A more recent development is that we launched a self-scheduling tool through Phreesia toward the end of last year. This tool is available through our patient app and website, allowing patients to schedule their own appointments. When they use this tool, it opens up a Phreesia interface that we designed using Phreesia's templates.

What works well with Phreesia, and what's lacking?

The self-scheduling tool has been working well for us. We made the decision to buy it after looking at several competitors. Phreesia offered more options for customization. For example, we wanted to have flexibility in determining which appointment type is recommended for each patient and any additional questions they need to answer. Phreesia has delivered on that, and we're really happy with it. On the admin side, our team can easily review self-scheduled appointments to ensure everything is scheduled correctly with the right provider and time slot. It's been a smooth process.

On the other hand, we've had some issues with data interoperability errors. When someone at the front desk tries to check a patient in, they often encounter a generic error message that doesn't provide much information. With all the fields and processes involved, it's difficult to pinpoint the problem, and we've had to reach out to our product team to work with Phreesia or manually check every field to understand what's happening. This has been costly for us.

So every time someone at the front desk is trying to check in a patient and it fails, someone on the product team effectively has to be on call?

Yes, we make an effort to do that, but what usually happens is that the front desk person has to manually transfer everything into Athena so that they can check the patient in, as that's what's required to start the appointment in Athena. After that, we go back to Phreesia and try to figure out what went wrong. However, most of the time, they can't really give us a clear answer about what happened.

Is the platform reliable?

I would say it's reliable about 85% of the time, but we have definitely encountered bugs along the way. For instance, when we were launching the self-scheduling feature, the link provided to us for embedding into our patient app was causing an error during our testing. We spent a few days troubleshooting with Phreesia, but they couldn't find a solution as to why the error was occurring on our end. Eventually, we had to rebuild the link from scratch in order to fix the

issue. During the 85% of the time when it does work without issues, things generally go smoothly. However, when bugs do arise, they tend to be quite costly and time-consuming to resolve.

Do you integrate Phreesia with other parts of your stack, or just Athena at this point?

I wouldn't necessarily call it an integration, but the only other connection, or overlap, we have is through our patient app. We simply have a link to the Phreesia self-scheduling tool. Apart from that specific example of getting the link live on our app, we haven't encountered any issues in that regard. Right now, we just don't see a need to fully integrate Phreesia and our app because we don't handle patient intake through the app.

Was the integration process between Phreesia and Athena all handled during the initial implementation?

Yes.

Other than the issue you mentioned about data syncing, how good is the integration?

I have to say, while setting up the integration, we encountered some unexpected workarounds, considering they claim to be fully integrated. For instance, in Athena, they have a list of standard insurance plans along with the self-pay option and an option to enter "other." However, when Phreesia pulls in that list, there is no option to enter "other." So what we've had to do is input self-pay for anyone not on the standardized list in Phreesia. Then, when it syncs with Athena, we have to add a note stating the person's actual plan is X, Y, or Z. These seemingly simple issues have been brought up to the team, and their response is often, "It's on our product roadmap." So I think there might be a lack of true integration in certain areas that they haven't prioritized, which ends up causing delays or bottlenecks for us.

How do you feel about account management now that you're in production post implementation?

Yeah, we've actually had three different account managers in the last six months. It seems like there's some turnover happening on their end that's causing it. And I have to say, the new account managers are not as strong as the ones we had during the initial implementation. We have a regular check-in call with them where our operational team brings up issues and questions, but they often don't have the answers right away. They usually say, "We'll check on this and get back to you." It's clear that they aren't very knowledgeable about the platform, so we often have to follow up to get the answers we need. So yeah, account management is definitely an area that needs improvement.

Looking back, do you feel that you made the correct choice in going with Phreesia at the time?

At that time, yes. We didn't really have many other options through the Athena marketplace. But now, with the advancements in our product and technology resources, and considering the presence of other competitors in the market, even beyond the Athena marketplace, I believe we might make a different decision.

Are there any growth areas that you would highlight for Phreesia?

Definitely. Prioritizing the data integration issues is a major aspect. I believe that, for others evaluating them as a platform, it will be one of the top requirements. If that aspect doesn't work well, it would be a significant pitfall. Besides that, I would suggest investing in further enhancing the UX. I understand they face a challenge due to the massive amount of data on their platform, but I believe there's certainly room for improvement in terms of platform design and usability.

Do you have any advice for a buyer who might be selecting this type of product?

For someone running a business like ours, it's important to think ahead and consider what your requirements might look like at scale. We made our decision early on, and it's helpful to think a few years ahead to envision the ideal state of your business and ensure that the chosen solution meets all the functionality you might need down the line. There are other players in the market who excel at patient intake and also offer additional functionalities, like care management or patient RPM. These bonus features can make the decision cheaper or easier for you if they align with your needs. So, my advice would be to be sure to consider what your business will require when it is fully scaled.