

Phreesia: Inbound Documents Workflow

Last Modified on 06/08/2021 10:05 am EDT

About

When an appointment is confirmed or upon arriving for an appointment, the Phreesia patient pre-registration/intake workflow is initiated. Phreesia will work with the practice to customize your patient's pre-registration/intake experience. One of the ways the practice can customize the intake experience is by inserting forms for the parent/patient to fill out electronically, these can consist of:

- Consent forms.
- Practice policies.
- Clinical questionnaires that can be specific to the visit type of the appointment.
- Clinical history that can be specific to the visit type of the appointment.

All completed forms and documents within the Phreesia intake workflow will be posted into OP by Phreesia as a PDF document. These PDF documents will be placed in Document Management in the Item type and Item category assigned to that type of document during implementation with Phreesia.

Inbound Documents Workflow



Important: It is recommended, prior to implementing Phreesia, the practice is strategic in how messages will display in the Unread Portal tab of the Message Center. The subject of the message is associated to your Item types and Item categories found in Document Management. How the subject displays will be the manner in which the practice staff has to filter clinical or non-clinical inbound Phreesia documents. The staff assigned to the External-Departments department will have the ability to use the Search feature to quickly find documents/questionnaires specific to their role. For information on assigning staff to the External-Departments department in OP, review [Phreesia: Setup in OP](#) article by clicking the link here.

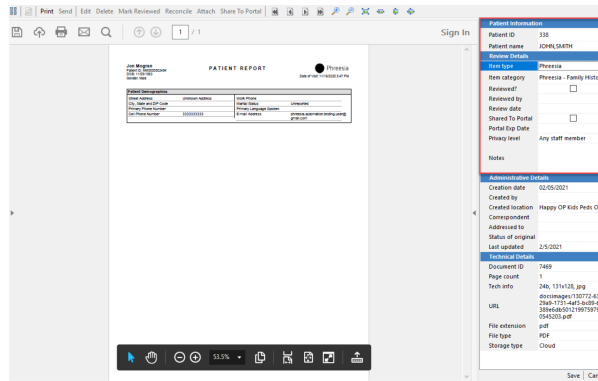
Review Documents from Message Center

1. Navigate to the Unread Portal tab in the Message Center: **Main Navigation Panel > Portal button**
2. Select the patient with the Phreesia questionnaire or document, click the document icon in the message panel.

Read	Patient Name	Subject	Date/Time of Message	Spoke With	Sender	Recipient(s)
<input type="checkbox"/>	TEST, TEST	Insurance	02/08/21 07:24 pm		Web Portal User	Shannon Administrator
<input checked="" type="checkbox"/>	TEST, TEST	Phreesia - Questionnaires	02/08/21 07:17 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Shannon Test	02/08/21 07:16 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Phreesia Test	02/08/21 06:41 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Phreesia Test	02/08/21 06:41 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Phreesia Test	02/08/21 06:41 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Phreesia Test	02/08/21 06:37 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	TEST, TEST	Phreesia - Questionnaires	02/08/21 06:36 pm		Web Portal User	Shannon Administrator
<input type="checkbox"/>	JOHN, SMITH	Phreesia - Family History	02/05/21 03:57 pm		Web Portal User	Shannon Administrator

Date Entered	Date/Time of Message	Spoke With	Sender	Recipient(s)
02/08/2021 07:17 pm	02/08/2021 07:17 pm		Web Portal User	Shannon Administrator

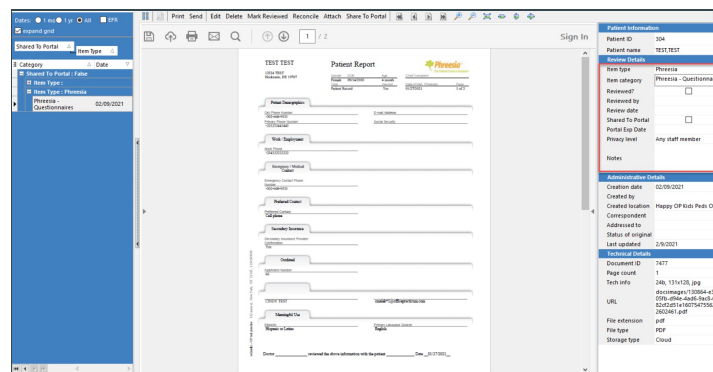
3. The Manage Documents window displays. Follow the practice policy on reviewing the document.



- Once the questionnaire or document has been reviewed and the Manage Documents window is closed, you are returned to the Unread Portal tab of the Message Center.
- Mark the message read and complete, follow your practice policy.

Review Documents from Document Management

- Navigate to the Unread Portal tab in the Message Center: **Main Navigation Panel > Portal button**
- Select the patient with the Phreesia questionnaire or document, click the **Document Mgmt** button.
- The Manage Documents window displays, complete one of the following.



- Click the **Edit** button and modify the information in the Document Details panel. Once all changes are made, click the **Save** button.
- Click the **Mark Reviewed** button if no changes are required.

Note: If you need additional information on the Document Details panel you may review the section [Labeling a Document](#) in [Scanning a New Document](#)

- Once the questionnaire or document has been reviewed and the Manage Documents window is closed, you are returned to the Unread Portal tab of the Message Center.
- Mark the message read and complete, follow your practice policy.