



# HANDLING PATIENT INTAKE FORMS AT A SURGICAL PRACTICE

How PDFfiller helped New York Bariatric Group Process  
Patient Intake Forms More Effectively



## WHO?

**New York Bariatric Group** is a surgical group specializing in weight loss. They perform gastric bypass, lap band, gastric sleeve procedures as well as other surgical and non-surgical bariatric procedures.

Surgeries are performed laparoscopically in-house with a team of seven surgeons spread working across six offices throughout New York with one in Connecticut. NYBG also gives consultations and psychological and nutritional advice through out-patient care at their offices.



**PATIENT INTAKE FORM**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

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**Desired Procedure:** First Choice Seco

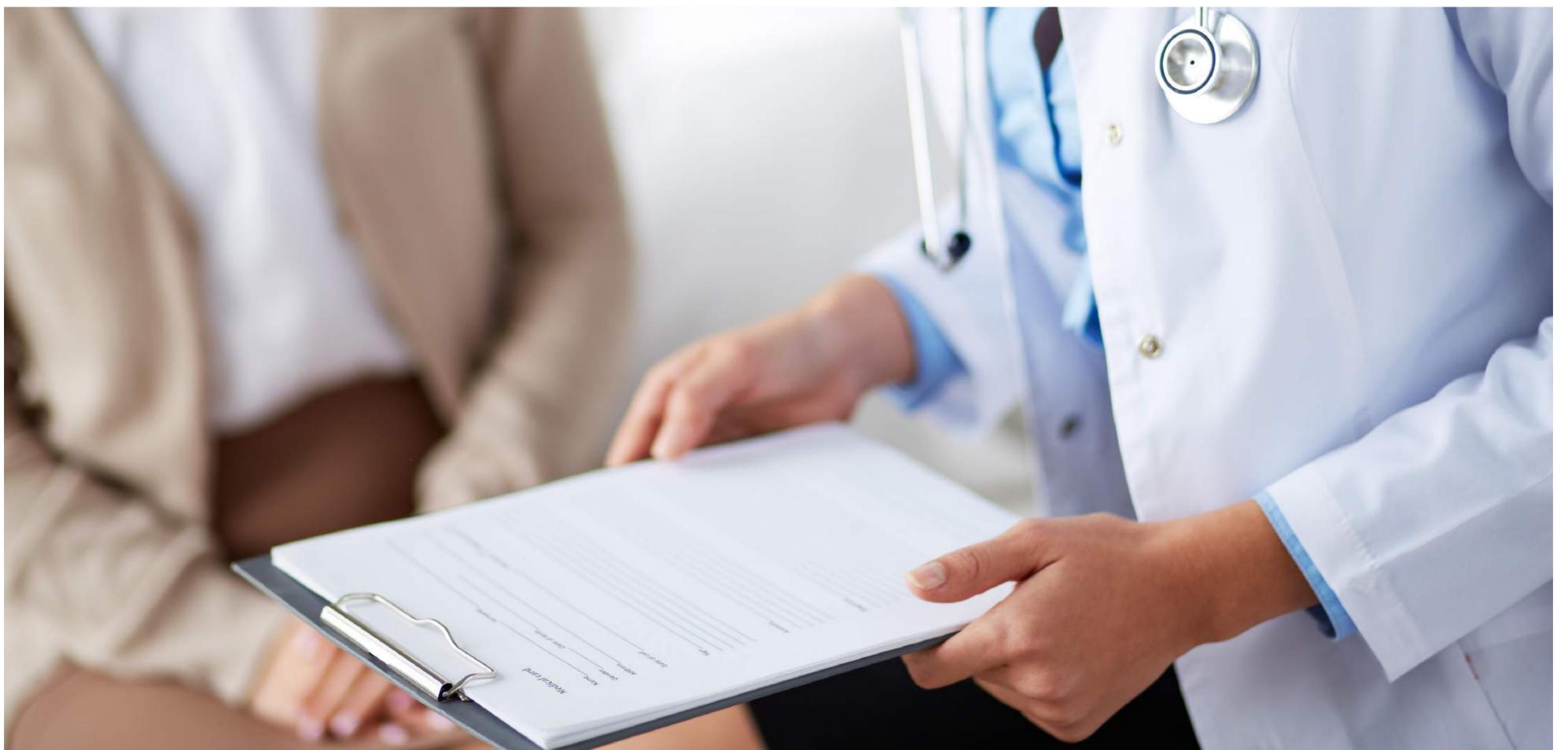
- Roux-En-Y Gastric Bypass
- Adjustable Gastric Band
- Gastric Sleeve
- Revision
- Stomaphyx
- Undecided

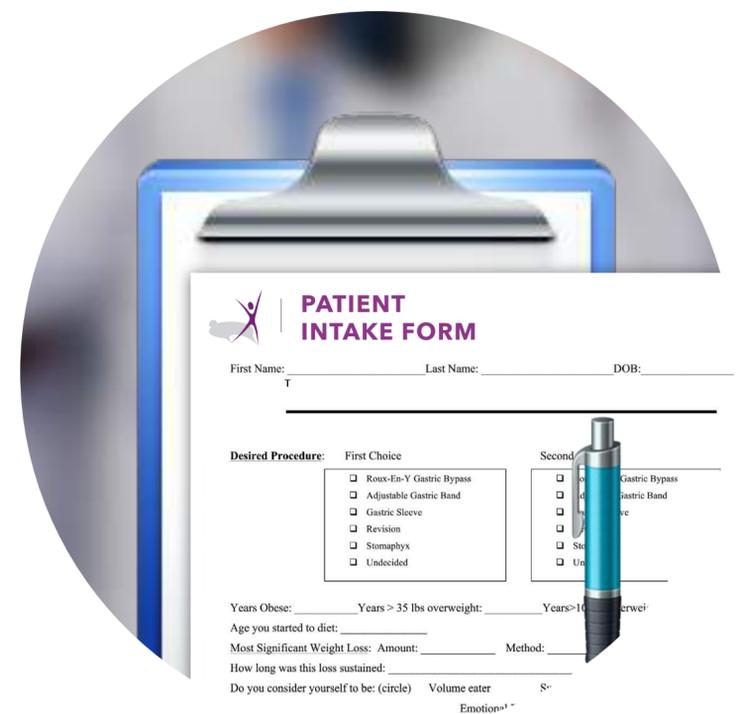
Weight: \_\_\_\_\_ Years > 35 lbs \_\_\_\_\_

## THE PROBLEM

New York Bariatric Group (NYBG) had a problem: with dozens of patients everyday but only seven surgeons, NYBG was struggling to get patients out of the waiting room and to the point of care efficiently. Doctors, already overloaded, ended up waiting for patients to fill out forms and be processed by the front office staff meaning there were gaps and delays in their fully booked schedule.

Based in New York City, NYBG's patients were in a rush and so too were their doctors. With only seven surgeons to care for the huge patient intake, time was at a premium. NYBG needed a streamlined document solution that could help them process more patients more quickly.





## BEFORE PDFfiller

As in most doctor's offices, NYBG patients were required to fill out paper forms by hand in the waiting room, but that process was time consuming, inefficient and frustrating for the patients and staff. Before NYBG started using PDFfiller, the only alternative option for patients was either to download and complete an intake form at home by hand or make a separate trip into the office before their appointment to pick up a printed form. These options posed a few problems: patients didn't have the time or inclination to stop by the office before their appointment and for the fraction of patients that completed the form and brought it into the office, the NYBG staff still had to manually input the information into their EMR system.

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– Jon Libasci, practice administrator

Before NYBG started using PDFfiller, Jon Libasci, the practice administrator, said, “we were emailing patients a PDF file — that would require them to print it, fill it out manually and bring it back in. We found only 10% of people were doing it. So it was an exercise in futility.”

# 5

Getting patients to complete an intake form without PDFfiller was a time-consuming and involved multi-step process that many failed to go through, leaving New York Bariatric Group to process the majority of the forms in the office waiting room. This process not only cost their patients time and energy, but it also cost NYBG a significant amount of time and money. The whole patient intake process left busy NYBG surgeons waiting for patients who could have been processed much more efficiently. The daily delays meant that NYBG couldn't provide important medical care to as many patients as possible.

” “We were thinking of different ways to get paperwork-intensive stuff away from patients sitting a half hour with all this paperwork, and get this stuff into an electronic format.”

– Jon Libasci, practice administrator

Frustrated by the fact that their surgeons were unable to treat their patients as well or as efficiently as possible, NYBG went looking for a solution that would make the patient intake process easier for their patients, front-office staff, and doctors. “[We were] thinking of different ways to get paperwork-intensive stuff away from patients sitting a half hour with all this paperwork,” said Libasci, “[We wanted to] get this stuff into an electronic format.”

Then, NYBG found PDFfiller.

# THE SOLUTION

## PDFfiller: a seamless patient intake form and more

Faced with the need to efficiently process patient intake forms, New York Bariatric Group needed a simple, secure solution. They turned to PDFfiller.

NYBG uses PDFfiller every day to collect crucial medical information from their clients. Every day, the data and documents uploaded through PDFfiller are downloaded directly into NYBG's EMR system.

The process is easy and HIPAA compliant: NYBG uploaded their forms to PDFfiller, drew fillable fields on top of the form using the PDFfiller fillable forms wizard, and made the fillable form available via a URL with one click. Customers simply click on the link, fill in the denoted fields, add their electronic signature using the PDFfiller digi-sign technology, and click the DONE button. The document is immediately submitted to NYBG and data is imported into the EMR.

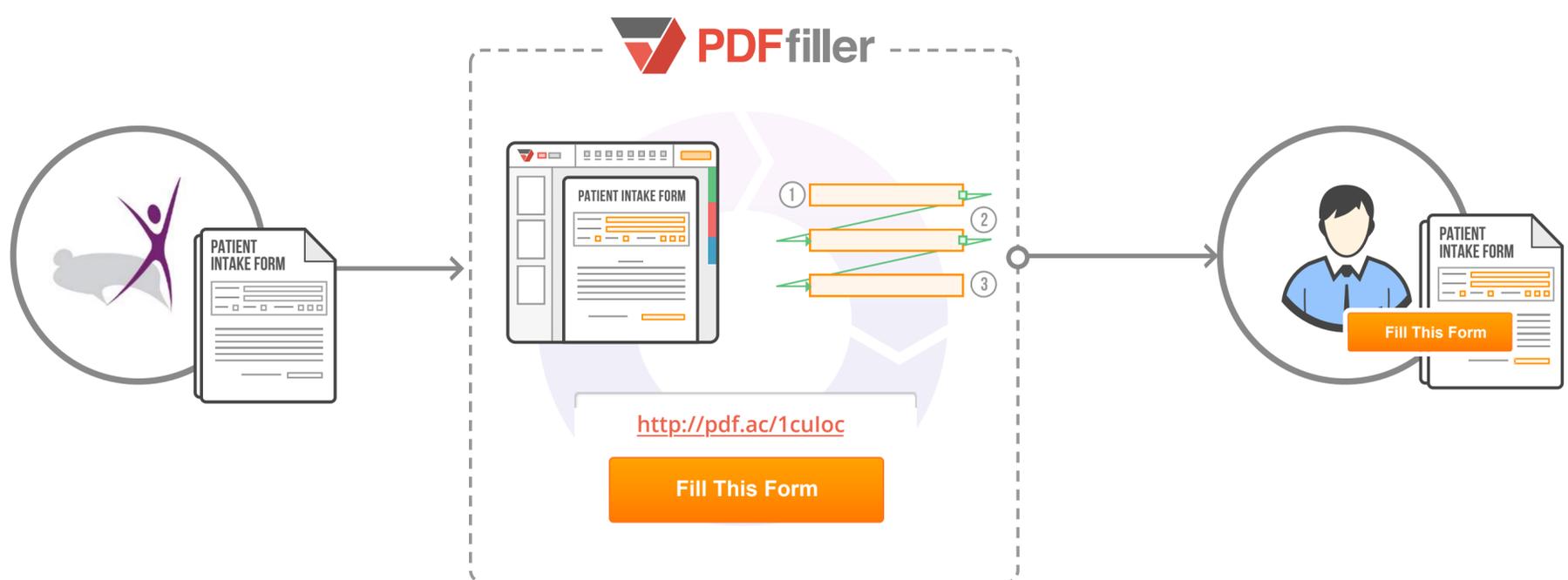


Fig A. – Creating a fillable patient intake form with PDFfiller

Making a fillable form using PDFfiller is easy for any medical care facility or PDFfiller user — just select or upload your form, pick what kind of fillable field you want (text field, checkbox, date or signature), and choose whether you want this field to be required for submission. Drag and drop the field onto the document and you're done. Adding fillable fields to an existing patient intake form takes just 10 minutes.

PDFfiller allows NYBG to create a “public-facing intake form” accessible by a link or QR code on their website that their patients can access and complete on any device from anywhere at anytime. These fillable, interactive PDFs give patients the ability to fill out the form and allow NYBG to receive the data, the signed forms and all requisite information electronically and in a timely manner.

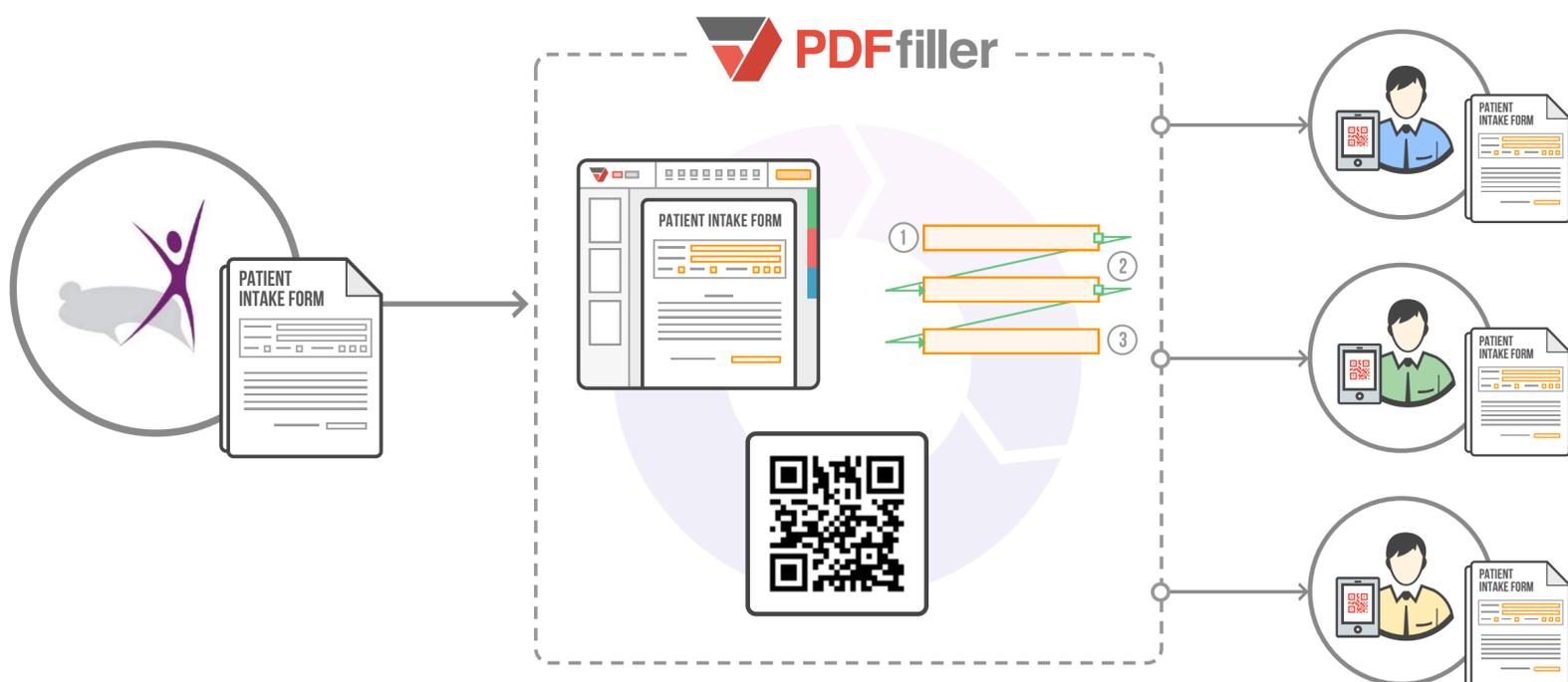


Fig C. Creating a fillable public-facing intake form with PDFfiller.

“The key factor is allowing patients to type it on the computer,” (or any other mobile device) said Jon Libasci. With PDFfiller, NYBG gets “the necessary information that we need [without] having to have patients print out forms which is a barrier for getting this [information]... the idea that patients can fill out [intake forms] online and that we can receive them online,” is a powerful solution to a problem that had previously plagued NYBG.

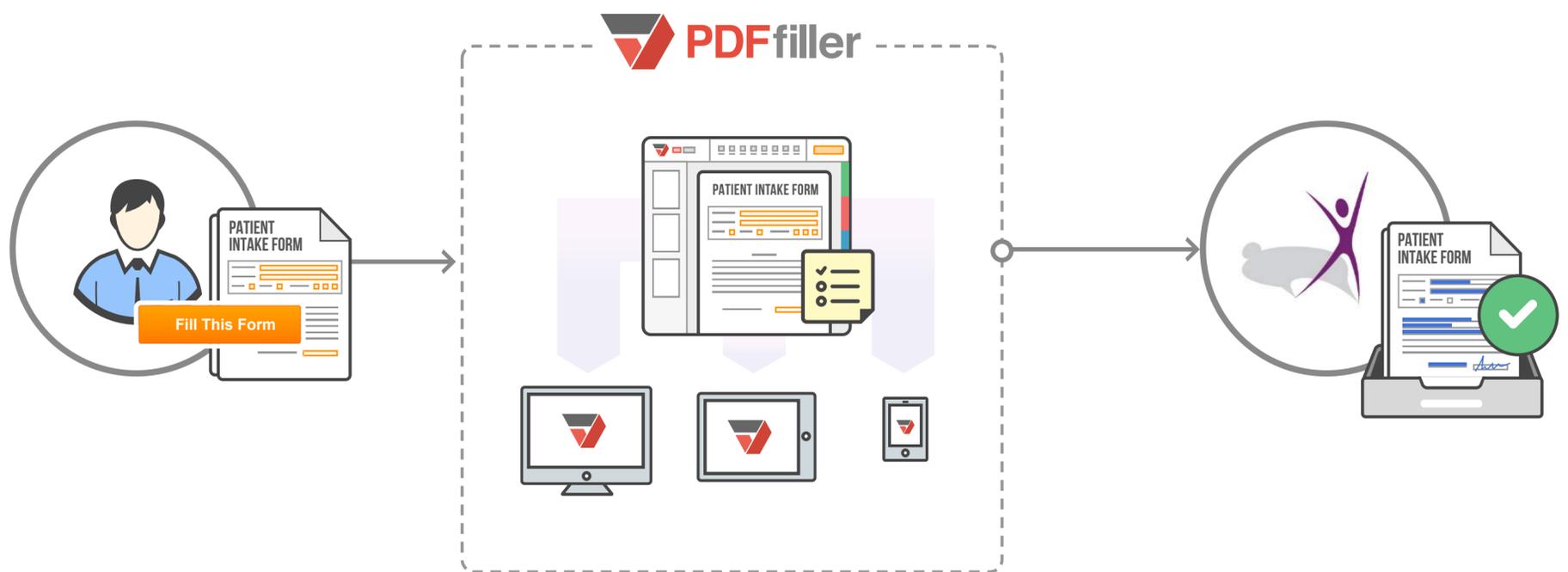


Fig B. Filling patient intake form by the user with PDFfiller.

## PDFfiller Electronic forms are better than paper

PDFfiller forms are better than paper because they are full of features, easy to distribute, and completely secure. NYBG relies on PDFfiller's 'LinkToFill' feature to create forms which are distributed electronically to patients, filled out by them online, and then returned and electronically processed in NYBG's office. 'LinkToFill' enables NYBG to make fields in their patient intake form required or optional and also to assign names to different fields. "Enforcing the instructions that were the most important to us," was crucial Libasci said. Documents can also be signed through PDFfiller online and using LinkToFill to "enforce the field for signature," for instance, which is a crucial component in sending personal medical documents, "has been the latest and greatest help for us," said Libasci.

PDFfiller also allows NYBG to create 'duplicate fields' — once enabled, this feature allows NYBG to assign certain fields that pop up throughout the form, such as name or date, to be automatically filled in after being completed once by the patient. This cuts down the time that patients spend filling in repetitive information and makes sure that the information is always accurate.

Moreover, PDFfiller enables care providers and businesses like NYBG to request the name and email address of the person completing the form before submission. This ensures that the person completing the form can be properly identified and contacted after submission. NYBG has opted to make this an integral part of their electronic form completion process, a decision that has helped them organize data and communicate with clients more efficiently.

NYBG uses PDFfiller every day to process patient forms and has rapidly improved the efficiency of their office through PDFfiller's digital solutions. PDFfiller's electronic document completion and sending services "really makes communication with the patient easier," Libasci said.

## **PDFfiller Electronic forms are better than web forms**

PDFfiller's electronic forms are an improvement to the web forms that some organizations use. PDFfiller's online forms take less time to produce than web forms because all you need to do to make them fillable is add fields on top of your existing documents. Unlike web forms, PDFfiller's online forms also preserve the formatting of existing forms and keep pictures and information exactly where you intended them to be.

Moreover, you can annotate PDFfiller's online forms and add data wherever you wish. Gone are the demands of hosting a document on your own website — instead, just upload your document to PDFfiller, where customers or patients can complete it securely from any internet-connected device anywhere without taxing your servers or site.

# THE BENEFITS OF USING PDFfiller



PDFfiller offers a number of features to NYBG — but these numerous benefits are applicable to many business and medical care providers.



## Speed

PDFfiller enables NYBG to collect client data more quickly and efficiently. NYBG's use of PDFfiller's LinkToFill Fillable Forms enables an unlimited number of clients to fill out and then submit unique forms electronically in a fast and secure manner. NYBG uses a client-facing form to receive and process all of their patient information digitally, greatly expediting their data collection process.



## Accuracy

PDFfiller is the most precise way to collate medical information. Master fields can be copied across the whole form, allowing patients to complete a field once and have that information automatically added in relevant places throughout the document, minimizing the chance of mistake and ensuring the document is completed as quickly as possible. Moreover, text can be spell checked throughout the document. And most important, PDFfiller's electronic document completion solution mitigates the chance of potentially compromising misprints or illegibility, an especially important factor in medical care.



## Cost Savings

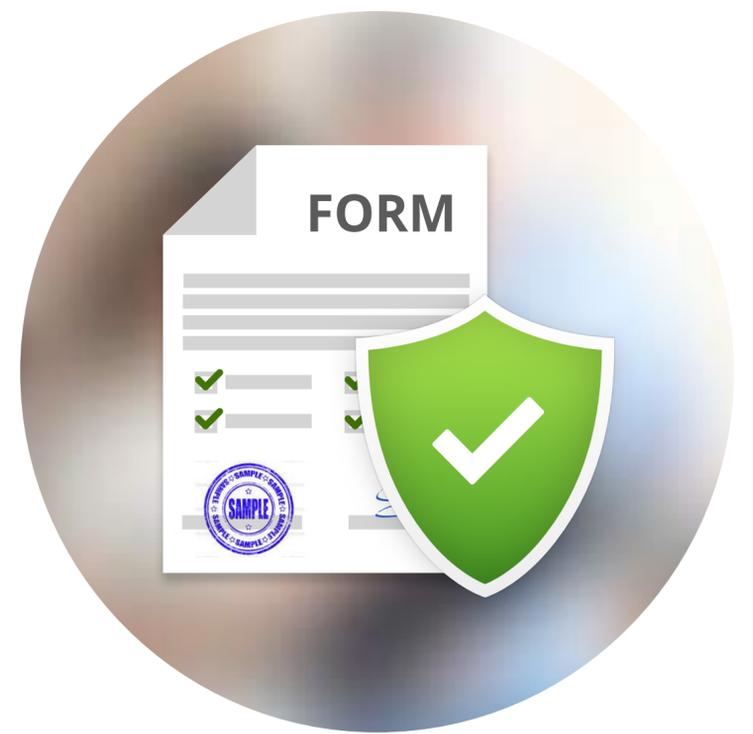
Expediting patient intake and consolidating the data collection process has saved NYBG time and meant that their surgeons can now attend to more patients. “The efficiency of having this information and assuring that the patients are filling in forms before they come in saves money throughout the continuum of care, Libasci said. “Anytime we’re not sitting around waiting for a patient to fill out paperwork is money saved and it means we can see more patients a day.”



## Convenience

PDFfiller’s digital answer to document submission means that the NYBG office has been able to eliminate the waste and inefficiency of paper-based patient intake forms and allowed their office to go completely paperless. That “patients can fill forms out online and we can receive them online,” is an important factor in making the patient intake process as efficient and effective as possible, said Libasci.

Not only is this patient information automatically collected and stored by NYBG’s office, but it also has the potential to be easily accessed by the doctors themselves through tablets and in-room computers. “Doctors have the ability to access the file,” said Libasci, “so access is an important feature.”



## Ease of Use

NYBG wanted to make the patient intake process faster for patients and easier for themselves. Rather than the slow and clumsy alternatives, NYBG decided to use PDFfiller. PDFfiller's easy and intuitive online services meant that more clients were able to fill out the intake documents more quickly. Having all of this information digitized made it easily accessible to NYBG doctors and staff who can now access it instantly anywhere in the office, from the front desk to the examining room.



## Security

Information and access however, are potential liabilities for an establishment that demands patient security. PDFfiller is, however, HIPAA compliant — an “extremely” important attribute of the service, said Libasci — “any audit or breach of HIPAA is extremely troublesome for a medical practice.” PDFfiller's client security is a crucial factor when integrating it into a sensitive business or medical care provider.



## Customer Service

PDFfiller offers a range of simple and advanced features with customer service that enables clients to make the most of all of them. In fact, customer service was one of the most important factors when NYBG decided to make PDFfiller an integral part of their office; the level of customer service PDFfiller provides “was instrumental [in] getting online” and integrating new services into their existing business. Besides providing direct support, PDFfiller listens to its customers and the feedback NYBG provided has, in fact, been integrated directly into the service that all PDFfiller clients are using.

## CONCLUSION

The range of services PDFfiller offers, especially the HIPAA compliant ability to complete documents, add signatures and transmit documents electronically made PDFfiller an ideal choice for solving NYBG's issues. The level of customer service and security meant that NYBG faced no difficulty or risk integrating PDFfiller into their workflow. Enabling patients to complete and sign their forms online streamlines the patient data collection process. The ability to automatically collect and then centralize this information by downloading and exporting the data in digital form has also cut down on NYBG's office work and overhead, enabling them to consolidate and process this information in an ideal manner.

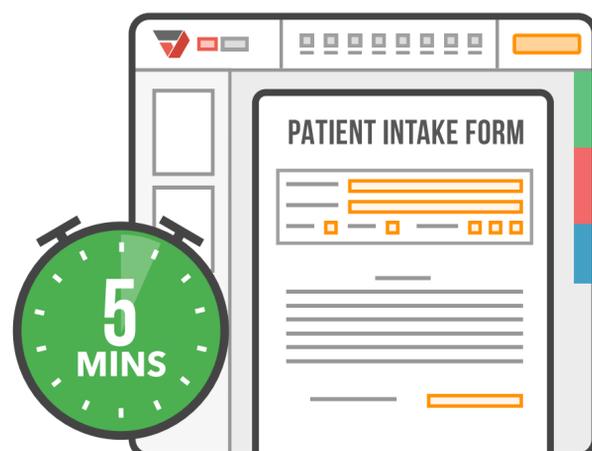
For medical establishments like New York Bariatric Group, PDFfiller's range of services made it an ideal solution for communicating with their customers and collecting their information in a quick and secure way.

"The key point," said Libasci, "is it saves time and time is money and it really has excellent customer service that benefits both the office and the patients."

### WITHOUT PDFfiller



### WITH PDFfiller



**Saving 4 Hours per Week**