

# CERTIFY HEALTH PATIENT EXPERIENCE PLATFORM (PXP) READINESS CHECKLIST :

## Evaluate Your Patient Experience Maturity & Identify Gaps Worth Closing

- \* For healthcare teams who want to improve access, streamline workflows, reduce denials, and increase loyalty.

### How to use this checklist:

- ✓ Complete in 5–7 minutes
- ✓ Check each statement that accurately describes your current state
- ✓ Review your score and gaps
- ✓ Discover how CERTIFY Health's PXP can help solve your biggest bottlenecks



# Scheduling & Front-Door Access

## Outcome statements — check if TRUE for your practice

- Patients 24/7 self-schedule appointments online without staff assistance
- Provider availability shown in real time (no double-books)
- Automated confirmations and reminders decrease phone volume
- Waitlist (ASAP list) fills canceled slots immediately
- Walk-in traffic is managed through digital queueing
- Mobile + kiosk check-in options are regularly used

## Why this matters:

Automated scheduling and reminders can reduce no-shows by up to **38%** and free front-desk time for higher-value tasks.



## Gaps you might have:

If patients still call to schedule, or staff manually manage waitlists, you're losing efficiency and revenue.

## CERTIFY PXP solves this with:

- \* 24/7 self-scheduling
- \* ASAP list + automated cancellations backfill
- \* Mobile & kiosk check-in



# Intake & Verification Efficiency

## Outcome statements — check if TRUE for your practice

- ≥90% of patients can complete intake before arrival
- Intake works on mobile, kiosk, and staff tablet
- eConsent and digital signatures replace paper forms
- Insurance cards are captured via OCR, not manually
- Real-time eligibility checks reduce denials
- ID verification (photo/FaceCheck) confirms patient identity

## Why this matters:

Digital intake and pre-arrival verification reduce check-in times by **40–60%** and minimize errors that cause claim denials.



## Gaps you might have:

Paper forms, last-minute intake, and manual insurance entry waste staff time and damage the patient experience.

## CERTIFY PXP solves this with:

- \* Multi-channel intake
- \* eConsent workflows
- \* ID + eligibility verification

# Communication & Patient Engagement

## Outcome statements — check if TRUE for your practice

- Two-way messaging (SMS/email) is used for patient follow-ups
- Communication supports multiple languages
- Appointment, check-in, payment reminders are automated
- Broadcast alerts (closures, weather notices) are sent centrally
- Campaigns (reactivation, seasonal care) are built and measured

## Why this matters:

Better engagement drives repeat care. Automated reminders reduce no-shows AND increase loyalty.



## Gaps you might have:

If teams use manual texting or call lists for outreach, this increases staff time and causes inconsistency.

## CERTIFY PXP solves this with:

- \* Secure 2-way messaging
- \* Multilingual support
- \* Automated nudges + campaigns

# Payments & Insurance Performance

## Outcome statements — check if TRUE for your practice

- Patients can see estimated cost before arriving
- Co-pays & balances are collected at POS or digitally
- Multiple payment methods are available (cards, HSA/FSA, wallets)
- Automated payment reminders are sent
- Eligibility checks occur before the visit to reduce denials

## Why this matters:

Point-of-service collections and pre-visit eligibility checks improve cash flow and reduce revenue leakage.



## Gaps you might have:

If payments are still collected weeks later or if eligibility is checked after services, you're leaving money on the table.

## CERTIFY PXP solves this with:

- \* Real-time estimates
- \* Contactless payment paths
- \* Automated nudges for outstanding balances

# Post-Visit Experience & Retention

## Outcome statements — check if TRUE for your practice

- Post-visit feedback (surveys) is automated
- Educational follow-ups are sent to build trust
- Digital visit summaries support continuity of care
- Patients are reactivated with smart nudges if inactive
- Referral programs are automated

## Why this matters:

Closing the loop with feedback and educational content boosts patient satisfaction and adherence.



## Gaps you might have:

Manual feedback collection or no follow-ups make it easy for patients to disengage.

## CERTIFY PXP solves this with:

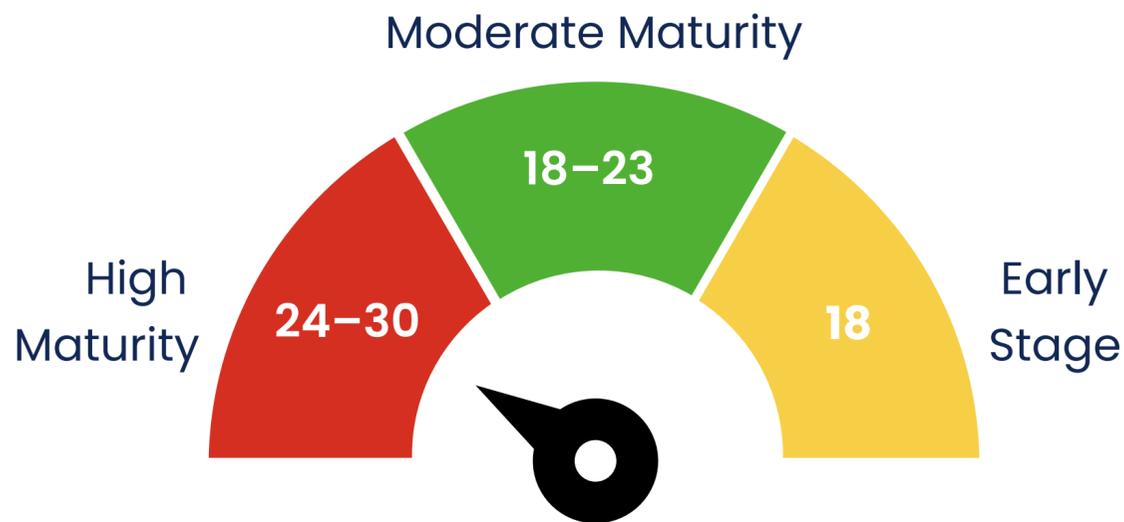
- \* Automated surveys
- \* Digital summaries
- \* Reactivation campaigns

# MATURITY SCORE & INTERPRETATION

## Scoring instructions

1 point for each checked item | Total possible points: 30

## Interpret your score:



- You have a strong digital foundation. Adding CERTIFY PXP will amplify performance and drive measurable ROI.
- You have core systems but critical gaps remain. CERTIFY PXP can streamline workflows and unlock growth.
- Manual processes, inconsistent access, and low automation expose operational and financial risk. CERTIFY PXP can serve as a foundation upgrade.

## BEFORE vs AFTER using CERTIFY Health :

Before	AFTER using CERTIFY Health
Manual scheduling & high phone volume	24/7 online self-scheduling + automated confirmations
Paper intake & front-desk bottlenecks	Digital intake across devices + pre-visit verification
Manual outreach	Two-way SMS/email + automated campaigns
Post-visit ambiguity	Automated feedback & summaries
Payment delays & denials	Real-time estimates & pre-visit eligibility



## Review your score with a CERTIFY expert

- \* Book a short consult to explore your highest gaps.
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## Get a personalized demo

- \* See how automation saves time and money.

Contact Us 