



CUSTOMER STORY

Beal Wellness Saves 10+ Minutes Per Patient, Collects Payments Before Visits with Luma

📍 ATLANTA, GA + SPECIALTY PRACTICE



10+ minutes
of time saved
per patient

2,900+
pre-visit payments
(over \$530K)
collected annually

2+ days
before the visit
patients complete intake,
on average

THE PROBLEM

Broken intake was driving patients away

Beal Wellness needed patients ready for behavioral health visits before they arrived. But the free intake platform it relied on was frustrating patients and creating extra work for staff.

Patients received the wrong forms, completed duplicate paperwork, struggled to find payment information, and sometimes never received the Zoom link for a virtual visit. Different behavioral health visits required different intake workflows, but even minor changes required Beal to go back to the vendor.

Patients arrived with intake still unfinished, leaving staff to answer questions, resend forms, and troubleshoot problems at check-in. “We had patients literally leave our practice due to a frustrating intake experience,” said Casey Fields, Administrator at Beal Wellness. “That was the breaking point for us.”

“

Intake is the first way most patients experience our practice. We want that experience to be easy, not frustrating.”

Casey Fields
Administrator, Beal Wellness



THE SOLUTION

Simple, stress-free check-in

Beal now gives patients one pre-visit checklist tailored to their visit type, with the forms, estimates, payments, and other tasks they need. Patients complete everything before they arrive, while staff spend less time answering questions, resending forms, and troubleshooting intake.

Patients now complete intake at least 2 days before their visit, saving more than 10 minutes on average per patient.

HOW IT WORKS

- 1 Each visit type has a pre-visit checklist with the right forms, estimates, payments, and other tasks.
- 2 Patients complete everything in one place before their visit.
- 3 Completed information goes directly into eClinicalWorks, so staff are ready when patients arrive.

OUTCOMES

Get their results

 Look for a vendor with flexibility for complex visit types HOW-TO: “In behavioral health, every visit needs its own forms, consents, and evaluations,” said Casey Fields.	 Get intake done days before the visit HOW-TO: Each patient has a customized checklist to complete, including forms, insurance, and copay.
 Let staff focus on higher-value work HOW-TO: “We were paying staff to make up for technology not doing what it should,” said Jennifer Fields, CEO.	 Eliminate work downstream HOW-TO: Beal is now saving staff the added work of correcting forms, answering payment questions, and finishing intake at check-in.

Luma can help you simplify patient intake, collect payments before visits, and reduce manual work for staff.

→ Learn more at lumahealth.io