

PHREESIA TRAINING PRACTICE TEST (SAMPLE)

STUDY GUIDE



**SAMPLE STUDY GUIDE
WITH LIMITED QUESTIONS**

**VISIT US ONLINE FOR
THE FULL VERSION STUDY GUIDE**

<https://phreesiatraining.examzify.com>



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Introduction

Preparing for a certification exam can feel overwhelming, but with the right tools, it becomes an opportunity to build confidence, sharpen your skills, and move one step closer to your goals. At Examzify, we believe that effective exam preparation isn't just about memorization, it's about understanding the material, identifying knowledge gaps, and building the test-taking strategies that lead to success.

This guide was designed to help you do exactly that.

Whether you're preparing for a licensing exam, professional certification, or entry-level qualification, this book offers structured practice to reinforce key concepts. You'll find a wide range of multiple-choice questions, each followed by clear explanations to help you understand not just the right answer, but why it's correct.

The content in this guide is based on real-world exam objectives and aligned with the types of questions and topics commonly found on official tests. It's ideal for learners who want to:

- Practice answering questions under realistic conditions,
- Improve accuracy and speed,
- Review explanations to strengthen weak areas, and
- Approach the exam with greater confidence.

We recommend using this book not as a stand-alone study tool, but alongside other resources like flashcards, textbooks, or hands-on training. For best results, we recommend working through each question, reflecting on the explanation provided, and revisiting the topics that challenge you most.

Remember: successful test preparation isn't about getting every question right the first time, it's about learning from your mistakes and improving over time. Stay focused, trust the process, and know that every page you turn brings you closer to success.

Let's begin.

How to Use This Guide

This guide is designed to help you study more effectively and approach your exam with confidence. Whether you're reviewing for the first time or doing a final refresh, here's how to get the most out of your Examzify study guide:

1. Start with a Diagnostic Review

Skim through the questions to get a sense of what you know and what you need to focus on. Your goal is to identify knowledge gaps early.

2. Study in Short, Focused Sessions

Break your study time into manageable blocks (e.g. 30 – 45 minutes). Review a handful of questions, reflect on the explanations.

3. Learn from the Explanations

After answering a question, always read the explanation, even if you got it right. It reinforces key points, corrects misunderstandings, and teaches subtle distinctions between similar answers.

4. Track Your Progress

Use bookmarks or notes (if reading digitally) to mark difficult questions. Revisit these regularly and track improvements over time.

5. Simulate the Real Exam

Once you're comfortable, try taking a full set of questions without pausing. Set a timer and simulate test-day conditions to build confidence and time management skills.

6. Repeat and Review

Don't just study once, repetition builds retention. Re-attempt questions after a few days and revisit explanations to reinforce learning. Pair this guide with other Examzify tools like flashcards, and digital practice tests to strengthen your preparation across formats.

There's no single right way to study, but consistent, thoughtful effort always wins. Use this guide flexibly, adapt the tips above to fit your pace and learning style. You've got this!

Questions

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- 1. What is the recommended workflow to handle duplicate patient records during registration in Phreesia?**
 - A. Keep duplicates and reconcile later.
 - B. Merge duplicates in the EHR, confirm identifiers (DOB, name, contact), use merge tools in Phreesia if available, update forms to reference the correct patient, audit for duplicates.
 - C. Delete duplicates without verification.
 - D. Ignore duplicates and proceed.

- 2. Which option correctly describes a common, appropriate method to customize the front desk workflow in Phreesia?**
 - A. Build or modify intake forms, configure routing rules, and set required fields and automations.
 - B. Install third-party plugins to modify workflow.
 - C. Change the patient portal login color.
 - D. Remove routing rules entirely.

- 3. What is the role of templates in Phreesia form design?**
 - A. Templates provide standard fields and structure.
 - B. Templates enable real-time payments processing.
 - C. Templates control user access to PHI.
 - D. Templates schedule patient appointments automatically.

- 4. How do payment plans benefit patients?**
 - A. They allow payments to be made only in one lump sum
 - B. They charge interest on unpaid balances
 - C. They let patients pay off balances in smaller, manageable amounts
 - D. They require no payment until the balance is fully due

- 5. What is the main function of a Practice Management (PM) system?**
 - A. To store medical history
 - B. To manage financial and administrative functions
 - C. To provide medical care
 - D. To report insurance claims

- 6. What is the purpose of conditional logic in Phreesia forms?**
- A. To enforce field length
 - B. To dynamically show or hide fields based on prior responses
 - C. To randomize questions
 - D. To change the form color scheme
- 7. Which of the following aspects of Phreesia helps improve patient engagement?**
- A. Intake workflows
 - B. Two-way patient chat
 - C. Electronic Health Records integration
 - D. Revenue cycle management
- 8. How can Phreesia help with patient appointment reminders?**
- A. Reminders are not supported
 - B. Reminders can be sent only by phone
 - C. Reminders are sent automatically via text, email, or phone according to configured workflows
 - D. Reminders are only sent on the day of appointment
- 9. Which type of healthcare program primarily serves individuals who are 65 or older?**
- A. Medicaid
 - B. Medicare
 - C. Private Healthcare
 - D. Value-Based Care
- 10. What does the Revenue Cycle - POST-VISIT PAYMENT feature allow practices to do?**
- A. Charge patients immediately after the visit
 - B. Set up a payment plan for patients unable to pay in full
 - C. Send paper statements to patients
 - D. Automate insurance verification

Answers

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1. B
2. A
3. A
4. C
5. B
6. B
7. B
8. B
9. B
10. B

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Explanations

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1. What is the recommended workflow to handle duplicate patient records during registration in Phreesia?

- A. Keep duplicates and reconcile later.
- B. Merge duplicates in the EHR, confirm identifiers (DOB, name, contact), use merge tools in Phreesia if available, update forms to reference the correct patient, audit for duplicates.**
- C. Delete duplicates without verification.
- D. Ignore duplicates and proceed.

Handling duplicate patient records during registration means actively creating and maintaining a single, accurate patient profile. Start by confirming the patient's identifiers—date of birth, full name, and contact details—to ensure you're merging the correct records. Then merge the duplicates in the EHR, and use Phreesia's merge tools if available, so all history and data consistently belong to one patient. After merging, update forms and templates used during registration so they reference the unified record, preventing future mix-ups. Finish with an audit to catch any remaining duplicates and put safeguards in place to minimize duplicates going forward, such as standardized data entry practices and validation prompts at registration. This approach prevents misattribution, supports accurate billing and communications, and preserves a complete patient history.

2. Which option correctly describes a common, appropriate method to customize the front desk workflow in Phreesia?

- A. Build or modify intake forms, configure routing rules, and set required fields and automations.**
- B. Install third-party plugins to modify workflow.
- C. Change the patient portal login color.
- D. Remove routing rules entirely.

Customizing the front desk workflow in Phreesia is about shaping how data comes in and how work moves through the system. Building or modifying intake forms lets you collect exactly the patient information you need at check-in. Configuring routing rules ensures each piece of data and each task goes to the right team or queue. Setting required fields and automations enforces data quality and speeds up processing by triggering actions automatically when certain conditions are met. This built-in approach keeps the workflow coherent and maintainable, adapting as your procedures evolve. Third-party plugins aren't the typical way to tailor front desk processes and can introduce compatibility or support issues. Cosmetic changes like altering the patient portal login color don't impact how work flows or data is captured. Removing routing rules would remove essential control over how information is routed and processed.

3. What is the role of templates in Phreesia form design?

- A. Templates provide standard fields and structure.**
- B. Templates enable real-time payments processing.
- C. Templates control user access to PHI.
- D. Templates schedule patient appointments automatically.

Templates in Phreesia form design act as predefined blueprints that shape what a form looks like and what information it collects. By providing standard fields and a consistent structure, templates ensure every intake form follows the same data layout, making data capture reliable and quicker to deploy. This consistency reduces errors, speeds up form creation, and helps staff and patients know what to expect. In healthcare, having a uniform set of fields (like demographics, contact info, and consent sections) supports clear data collection and smoother interoperability. Other functions like real-time payments processing belong to the payments feature, while controlling who can access PHI is a security/access control concern, and scheduling appointments automatically belongs to the scheduling system. Templates are specifically about standardization and reusable form structure.

4. How do payment plans benefit patients?

- A. They allow payments to be made only in one lump sum
- B. They charge interest on unpaid balances
- C. They let patients pay off balances in smaller, manageable amounts**
- D. They require no payment until the balance is fully due

Payment plans benefit patients primarily by allowing them to pay off their balances in smaller, manageable amounts. This approach makes healthcare costs more accessible and less daunting, as patients can budget their expenses over time rather than facing a large, one-time bill that might be difficult to pay in full. Smaller payments help alleviate financial stress and increase the likelihood that patients will be able to fulfill their financial obligations without compromising their ability to seek necessary medical care. The structure of payment plans thus promotes a more patient-friendly approach to managing healthcare costs, ultimately encouraging timely payments and supporting overall financial wellness.

5. What is the main function of a Practice Management (PM) system?

- A. To store medical history
- B. To manage financial and administrative functions**
- C. To provide medical care
- D. To report insurance claims

The main function of a Practice Management (PM) system centers around managing financial and administrative functions within a healthcare practice. Such systems streamline operations by encompassing various administrative tasks, including appointment scheduling, billing, and patient registration. PM systems facilitate the efficient handling of day-to-day operational workflows, allowing healthcare providers to focus more on patient care rather than on the administrative burdens. By managing financial functions, the PM system plays a crucial role in tracking patient payments, handling insurance claims, and ensuring that the practice is financially viable. This is essential for the sustainability of health practices and contributes to efficient revenue cycle management. Essentially, while other options highlight important aspects of healthcare delivery, the overarching goal of a PM system is to ensure that the administrative and financial facets are organized and effective.

6. What is the purpose of conditional logic in Phreesia forms?

- A. To enforce field length
- B. To dynamically show or hide fields based on prior responses**
- C. To randomize questions
- D. To change the form color scheme

Conditional logic in Phreesia forms lets the form adapt in real time by showing or hiding specific fields depending on what the user has answered earlier. This keeps the form focused and efficient: if a patient indicates they have a particular condition or need a certain service, follow-up questions related to that condition or service appear; if not, those questions stay hidden. This approach reduces clutter, guides the user through a logical data-collection flow, and improves data quality by capturing only relevant information. For example, answering "yes" to needing medication details can reveal dosage and pharmacy fields, while answering "no" keeps those fields out of view. Other features like validating input length, randomizing question order, or changing visual styling serve different purposes and don't drive the adaptive visibility that conditional logic provides.

7. Which of the following aspects of Phreesia helps improve patient engagement?

- A. Intake workflows
- B. Two-way patient chat**
- C. Electronic Health Records integration
- D. Revenue cycle management

Two-way patient chat significantly enhances patient engagement by enabling real-time communication between patients and healthcare providers. This feature allows patients to ask questions, receive immediate responses, and get clarification about their care, which fosters a sense of connection and involvement in their healthcare journey. Engaging patients in this way can lead to improved satisfaction, adherence to treatment plans, and overall health outcomes, as it empowers them to be active participants in their care. The other options also play roles in patient care but focus more on administrative and operational efficiencies rather than direct patient engagement. For instance, intake workflows streamline the process of gathering patient information, while Electronic Health Records integration enhances data accuracy and accessibility for providers. Revenue cycle management focuses on financial aspects, ensuring that services are billed correctly and collected efficiently, which indirectly supports the healthcare system but does not directly engage patients in their care.

8. How can Phreesia help with patient appointment reminders?

- A. Reminders are not supported
- B. Reminders can be sent only by phone**
- C. Reminders are sent automatically via text, email, or phone according to configured workflows
- D. Reminders are only sent on the day of appointment

Automated, multi-channel reminders are what Phreesia provides. Reminders can be sent automatically via text, email, or phone according to configured workflows, so you can tailor how and when each patient is reminded and through their preferred channel. This approach boosts attendance by reaching patients in the way they're most likely to notice, without manual effort from staff. The option that claims reminders aren't supported isn't accurate, and limiting reminders to just phone or restricting them to the appointment day doesn't reflect the flexible, pre-appointment reminder capabilities Phreesia offers.

9. Which type of healthcare program primarily serves individuals who are 65 or older?

- A. Medicaid
- B. Medicare**
- C. Private Healthcare
- D. Value-Based Care

Medicare is a federal healthcare program specifically designed to serve individuals who are 65 years of age and older. It provides various coverage options, including hospital insurance (Part A), medical insurance (Part B), and prescription drug coverage (Part D). This program aims to assist seniors in accessing essential healthcare services, addressing their unique medical needs as they age. While Medicaid also serves vulnerable populations, including some seniors, it primarily focuses on low-income individuals and families rather than being exclusively for older adults. Private healthcare can be obtained by individuals of any age and is not limited to seniors. Value-based care refers to a healthcare delivery model that emphasizes quality of care and patient outcomes rather than the volume of services provided, which does not specifically target seniors either. Thus, Medicare stands out as the correct answer because it is dedicated to providing support and healthcare resources for those aged 65 and older.

10. What does the Revenue Cycle - POST-VISIT PAYMENT feature allow practices to do?

- A. Charge patients immediately after the visit
- B. Set up a payment plan for patients unable to pay in full**
- C. Send paper statements to patients
- D. Automate insurance verification

The Revenue Cycle - POST-VISIT PAYMENT feature is designed to streamline the payment process for practices by allowing them to set up flexible payment plans for patients who may not be able to pay their bills in full immediately after their visit. This capability is especially beneficial for practices aiming to improve patient satisfaction and retention, as it provides an accessible way for patients to manage their medical expenses, thereby reducing the likelihood of non-payment. By offering a structured payment plan, practices can accommodate individual financial situations, which may help to ensure that they receive the revenue they are owed while also providing their patients with a manageable way to address their financial obligations. This feature is vital in maintaining a positive relationship between the practice and the patient, fostering trust and support in the overall healthcare experience.

Next Steps

Congratulations on reaching the final section of this guide. You've taken a meaningful step toward passing your certification exam and advancing your career.

As you continue preparing, remember that consistent practice, review, and self-reflection are key to success. Make time to revisit difficult topics, simulate exam conditions, and track your progress along the way.

If you need help, have suggestions, or want to share feedback, we'd love to hear from you. Reach out to our team at hello@examzify.com.

Or visit your dedicated course page for more study tools and resources:

<https://phreesiatraining.examzify.com>

We wish you the very best on your exam journey. You've got this!

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