Integrating Kareo with the Web PT™ EHR

November 2011

Table of Contents

1. Overview

Welcome to the Kareo guide for integrating Kareo's medical billing and practice management system with WebPT™, an electronic health record system (EHR). The technology integration between Kareo and WebPT currently supports a uni-directional data interface: When you enter certain information into WebPT and submit an encounter, that information will automatically transfer into the Kareo system. Because this is uni-directional, note that information will not currently transfer from Kareo into WebPT.

Note: The Kareo and WebPT integration is available on all Kareo subscription plans except the Basic plan.

General information that will transfer from WebPT into Kareo:

- Patient information
- Provider information
- Insurance information (WebPT) = Case (Kareo)
- Service locations
- Case information
- Daily Note information (WebPT) = Encounter (Kareo)

To see details on what information gets mapped to Kareo, please see Section 7.3, *Table on Information Mapping*.

As you begin your integration process, a WebPT representative will contact you to conduct training.

2. Integration Setup: Current Kareo and WebPT Users

In order to establish an interface between Kareo and WebPT, you must have certain information mapped between WebPT and Kareo; a WebPT Member Representative will assist you.

Note: This process can take up to two weeks depending on the number of patients, cases, etc.

For integration to occur, the following information will need to be mapped from WebPT to Kareo:

- Patients
- Providers
- Referring Physicians
- Insurance Companies and Plans
- Cases

To map existing information from WebPT into Kareo

1. Contact your WebPT Success Member: 1-866-221-1870 and press 701 for Kayla Milburn.

3. Integration Setup: New Users

In order to establish an interface between Kareo and WebPT, you will first need both a Kareo and a WebPT account. Once you have set up and configured those accounts, WebPT will run a data check to confirm that all the necessary information matches.

In order to get started, you will need to complete the following:

- Activate a WebPT EHR account.
- Add physician and insurance information within WebPT.
- Activate a Kareo account with a subscription level of Plus, Complete or Max.
- Set up at least one practice in Kareo: Using the New Practice Setup Wizard, this will include setting up at least one provider, one service location and the fee schedule, all of which are necessary for the integration.

3.1 Activate a WebPT EHR Account

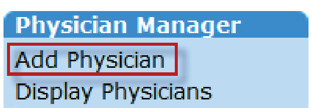
If you do not have a WebPT EHR account, you can sign up by visiting www.webpt.com or call 1-866-221-1870.

3.2 Add Referring Physician and Insurance Information in WebPT

To add a referring physician

When you add a referring physician in WebPT, you will also need to add the referring physician to the Referring Physician list in Kareo.

1. Under Physician Manager in the left menu, click **Add Physician**.



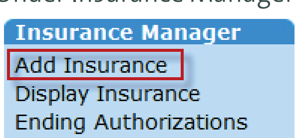
2. In the *Dr Type* drop-down menu, select the type of physician.
3. Complete the physician general information.

Note: Ensure the fax and email fields are exact, as these will be used to send documents to this physician.

4. Click **Add Physician**.

To add insurance

1. Under Insurance Manager in the left menu, click **Add Insurance**.



2. In the *Type* drop-down menu, select the type of insurance plan.
3. Enter the applicable information for the insurance plan.
4. Click **Add Insurance**.

3.3 Activate a Kareo Account

If you don't have a Kareo account, you can sign up through the Kareo website: www.kareo.com.

To install the application

1. Go to http://www.kareo.com/support/download-kareo.
2. Review the Setup Instructions.
3. In order to download the software, you will need a user name and password:
   - **Individual users:** Contact your Kareo application administrator. The Kareo application administrator is the person within your business office who is responsible for setting up and managing the application for the company and all its client practices.
   - **Kareo application administrators:** Refer to your confirmation email or contact Kareo Customer Support (support@kareo.com).
4. Click **Download Kareo Now** and follow the installation prompts.

3.4 Set Up a Practice in Kareo

If you have not configured at least one practice within Kareo, you will need to do so prior to integrating with WebPT. The New Practice Setup Wizard will guide you to complete all necessary data fields for correctly setting up a practice.

Important: In order for the information to match, you must enter it in Kareo exactly as you entered it in WebPT.

To launch the setup wizard

1. On the Settings menu, click **Company > New Practice**. The setup wizard will launch.
2. In the setup wizard, you will want to complete the following:
   - Practice information
   - Providers (add at least one)
   - Locations (add at least one)
   - Fees

4. Manage Patient Information

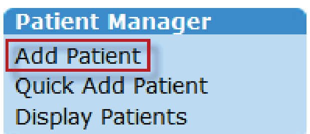
New patients entered in WebPT are transferred into Kareo automatically after you save the patient record. When adding a new patient you will also add at least one case. General patient information that gets transferred into Kareo:

- Full name
- Social Security Number
- Date of birth
- Gender
- Marital Status
- Address
- Contact Information
- Service Location

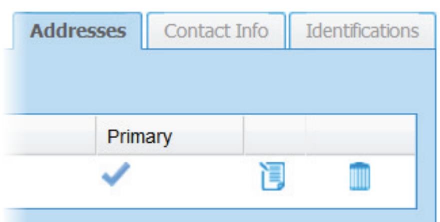
4.1 Patient Information in WebPT

To add a new patient in WebPT

1. Log in to WebPT.
2. Under Patient Manager in the left menu, click **Add Patient**.

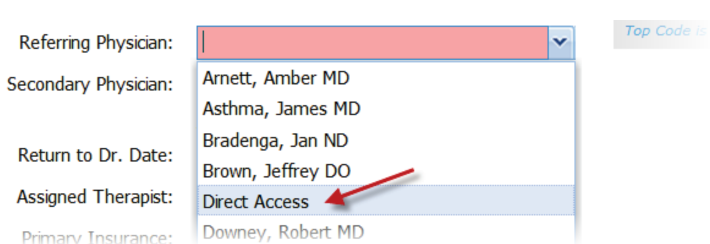


3. Complete the patient general information.
4. Click **Add Address** to enter patient address.
5. In the *Add Address* box, there are two additional tabs on the right:
   - Contact Info (required): Enter patient phone or email address
   - Identifications (optional): Enter social security number



6. Click **Add Insurance** to enter insurance plan information.
7. Click **Add Case** to enter a case for the patient. The following information is required when creating each case:
   - Case Title
   - Diagnosis Code
   - Related Cause
   - Referring Physician

   If there is no referring physician, select *Direct Access* in the drop-down menu.



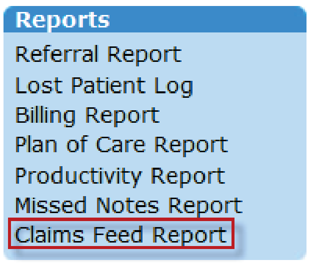
- Assigned Therapist
- Primary Insurance (you can add a secondary insurance). If patient is self pay, select *Self Pay* as the primary insurance.

Note: You can require an authorization which will transfer into Kareo.

8. Click **Save Patient**. Patient case will appear in Kareo within 3-5 minutes.

To verify transmission from WebPT into Kareo

1. Under Reports in the left menu, click **Claims Feed Report**.

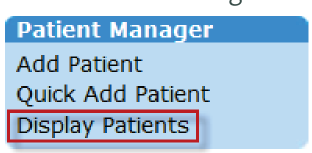


2. Under Reconciliation Mode, choose *Transmission* in the drop-down menu.
3. Click **Generate Claims Feed Report** to refresh the screen. The Status column will indicate when the transmission is successful or if corrections need to be made:
   - Initiated: The record is submitted for transmission
   - NOT RE-BILLED: Addendum that was finalized and not re-billed.
   - Transmission Successful: The record has been transmitted to Kareo
   - Validation Failed: The record has errors and was not transmitted. Click **Validation Failed** to view errors. See Section 6.2 below on how to make edits by adding an Addendum. You can re-submit the claim from the Validation Failed pop-up.

To edit patient information in WebPT

When you make changes to patient information, updates will be sent to Kareo.

1. Under Patient Manager in the left menu, click **Display Patients**.

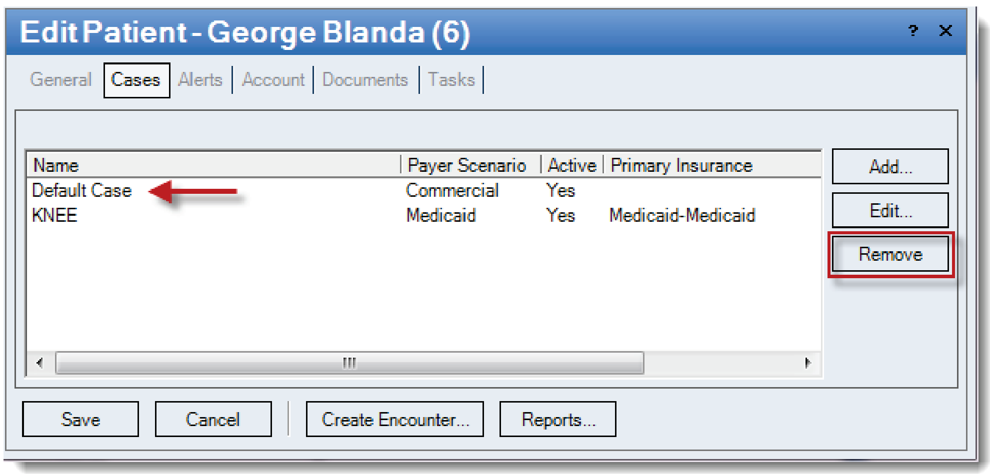


2. Click a patient's name. The patient record will open.
3. Click **Patient Info** at the top.
4. To the right of each item, click the Edit icon  to make changes.
5. Click **Save Patient**.

4.2 Patient information in Kareo

To view patient information in Kareo

1. Log in to Kareo.
2. Click **Patients** in the left menu.
3. Once you find the patient record, double-click to open it. Patient information from WebPT is located under the *General* tab.
4. Under the *Cases* tab you will see a "Default Case" listed each time you create a new patient in WebPT. This is a "dummy" case and can be deleted. Click on "Default Case" to highlight it. Click **Remove** on the right of the window.



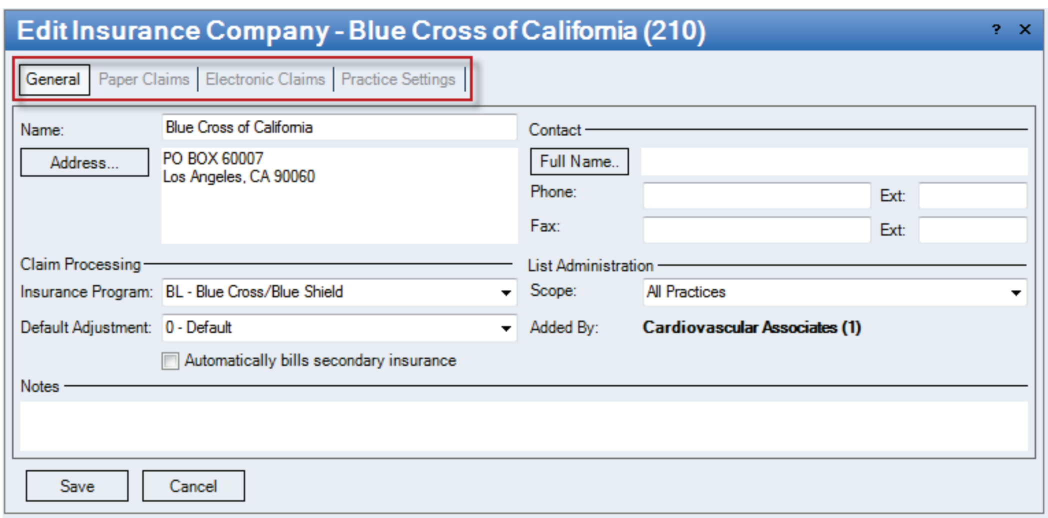
5. Manage Insurance Information

Each time you enter a new insurance company in WebPT, it will transfer into Kareo when you reference that insurance company with a patient. When the insurance company transfers into Kareo, you must configure the claim settings for it in order to process a claim. **Please note:** It is not recommended to merge insurance companies or plans within Kareo; this can adversely affect the insurance information mapping between WebPT and Kareo.

To configure claim settings

1. Click **Settings > Insurance > Insurance Companies** in the left menu.
2. Once you find the insurance company, double-click to open it.
3. Click each tab to enter insurance company information and select the claim settings.

   For more information on configuring claim settings, see *New Insurance Company* in the Kareo help files or register for Webinar 3 – *Setting Up Kareo for Claims Processing*.

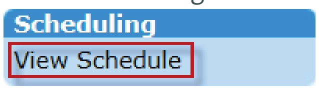


6. Enter Copay through the Scheduler

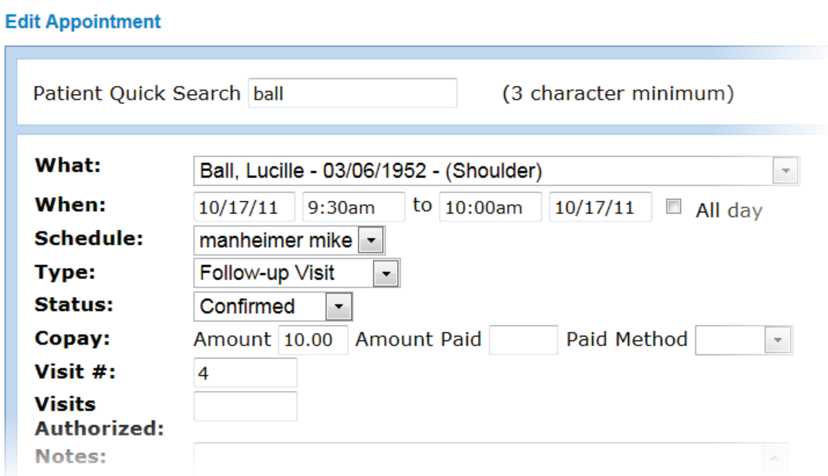
A copay can be entered directly into the WebPT scheduler which is then transferred as an unapplied payment into Kareo once the Daily Note has been finalized.

To schedule an appointment

1. Log in to WebPT.
2. Under Scheduling in the left menu, click **View Schedule**.



3. Navigate to the date of the appointment you want to schedule.
4. Click on a timeframe. The Edit Appointment window opens.
5. Enter appointment information:
   - Patient Quick Search: Use to find patient
   - What: Select correct case in the drop-down menu
   - When: Select the time of the appointment
   - Schedule: Select the provider
   - Copay: Auto-populated from the case or enter a copay amount



6. Click **Save**.

To enter a copay

1. Open the scheduler.
2. Locate the appointment and click on it. The Edit Appointment window opens.
3. Click **Check In**.
4. Enter the copay amount received and select the payment method.
5. When the Daily Note is finalized, the copay will transfer with it into Kareo as an unapplied amount. (See section, View Cases and Encounters in Kareo.)

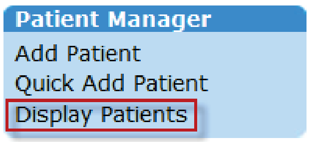
7. Encounters (Daily Notes) and Cases

Encounters in Kareo are called Daily Notes in WebPT. The first patient visit requires an Initial Examination to be completed in WebPT. When a Daily Note is finalized, the information will transfer into Kareo as an encounter.

7.1 Enter an Initial Examination or Daily Note

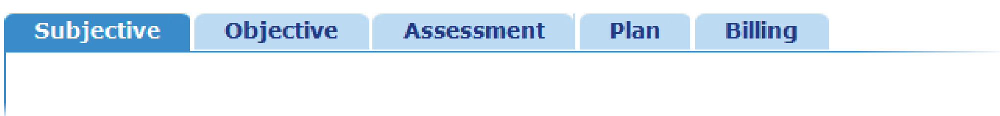
To enter an Initial Examination in WebPT

1. Log in to WebPT.
2. Under Patient Manager in the left menu, click **Display Patients**.



3. When you've found the patient, click the name to open the record.
4. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create an Initial Examination.
5. Click **Add Initial Examination** on the right side of the window.
6. Complete the fields in each section, starting with the *Subjective* tab. Click **Next** at the bottom of the window to move to the next tab.

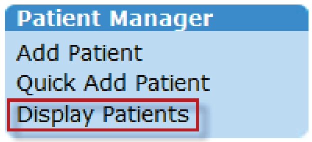
*Note: If you would like to review your entries, click a tab to jump to that section. Anytime you want to exit out of the Initial Examination, click **Save as Draft** on the right.*



7. You have a choice to add a Daily Note after completing the Initial Examination or creating it at a later time:
   - Click **Next** to add a Daily Note. On the Billing tab, check "Include Daily Note with this Initial Examination."
   - Click **Finalize Initial Examination** to complete it without creating a Daily Note.

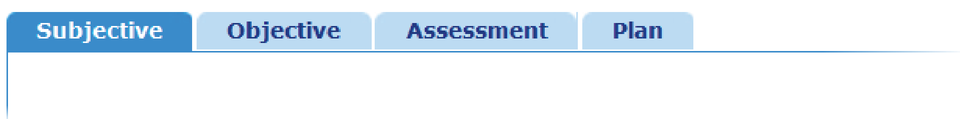
To enter a Daily Note

1. Under Patient Manager in the left menu, click **Display Patients**.



2. When you've found the patient, click the name to open the record.
3. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create a Daily Note.
4. Click **Add Daily Note** on the right side of the window.
5. Complete the fields in each section, starting with the *Subjective* tab. Click **Next** at the bottom of the window to move to the next tab. Billing information is completed on the *Objective* tab.

   *Note: If you would like to review your entries, click a tab to jump to that section. Anytime you want to exit out of the Daily Note, click **Save as Draft** on the right.*



6. When all information is complete, click **Finalize Daily Note**.
7. You can verify transmission into Kareo by viewing the Claims Feed Report.

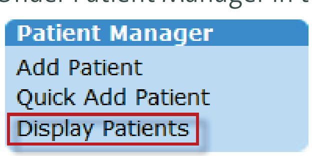
7.2 How Edits to Daily Notes in WebPT Affect Encounters in Kareo

When you finalize a Daily Note, it creates a PDF document in WebPT and that Daily Note gets transferred into Kareo as an encounter. If you make any changes to patient information, insurance or a Daily Note, it does not update the encounter in Kareo. Therefore, when you make those changes in WebPT, you must then delete the incorrect encounter within Kareo.

To make edits by adding an Addendum

Any changes you make that will affect the Daily Note need to be added as an Addendum in WebPT. After you finalize it, WebPT sends the updated encounter to Kareo. You must then delete the incorrect encounter in Kareo.

1. Under Patient Manager in the left menu, click **Display Patients**.



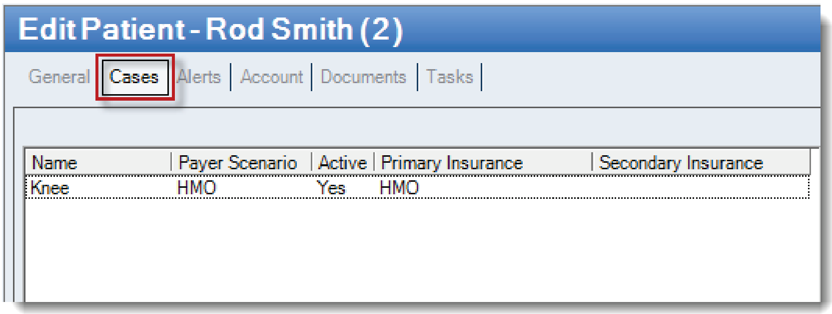
2. When you've found the patient, click the name to open the record.
3. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create an Addendum.
4. In the drop-down menu to the right of the Daily Note, select **Add Addendum**.
5. When you finalize the Addendum, a new (updated) encounter is sent to Kareo.
6. In Kareo, locate the incorrect encounter and delete it.

   Note: If the encounter has already been submitted to the insurance company, you will need to call the insurance company, prior to submitting the updated claim, and instruct them not to process the original claim to avoid errors or duplication.

7.3 View Cases and Encounters in Kareo

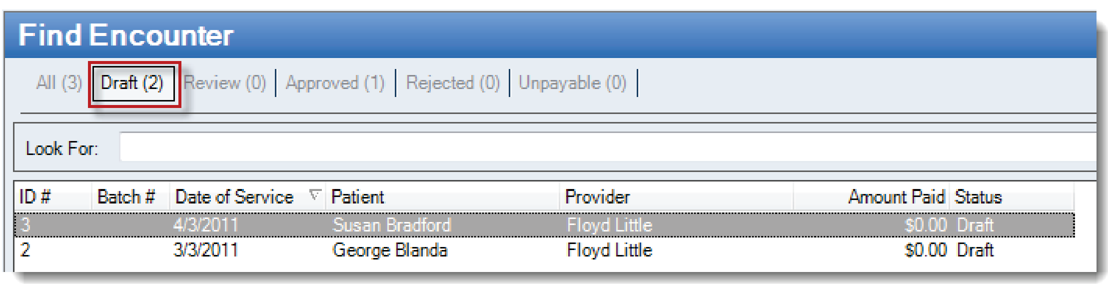
To view a case in Kareo

1. Log in to Kareo.
2. Click **Patients** in the left menu.
3. Once you find the patient record, double-click to open it. Cases from WebPT are located under the *Cases* tab and will only appear once a Daily Note has been finalized in WebPT.



To view an encounter in Kareo

1. Click **Encounters > Encounters** in the left menu.
2. Cases are located under the *Draft* tab.
3. Once you find the encounter, double-click to open it. Encounters will only appear once a Daily Note has been finalized in WebPT.
4. If you are satisfied with the information, click **Approve** on the bottom of the window.



8. Table of Information Mapping

Information transferred into Kareo is dependent upon the information you enter into WebPT.

Patient	Case	Encounter
• AddressLine1	• Authorizations	• DiagnosisCode
• AddressLine2	○ AuthorizationID	• AuthorizationNumber
• City	○ EndDate	• Case
• Country	○ InsurancePlanID	• CaseID
• DateofBirth	○ InsurancePlanName	• CaseName
• EmailAddress	○ Number	• EncounterStatus
• Employer	○ NumberOfVisits	• Patient
• EmploymentStatus	○ StartDate	○ FirstName
• EmploymentStatus	○ InsurancePolicyAuthorizationUpdateReq	○ LastName
• Employer	○ InsurancePolicyAuthorizationUpdateReq	○ PatientID
• FirstName	• CaseID	• PostDate
• Gender	• CaseName	• PracticeName
• HomePhone	• RelatedToAutoAccident	• ReferringProvider
• HomePhoneExt	• RelatedToOther	○ FirstName
• LastName	• AccidentDate	○ LastName
• MaritalStatus	• InjuryStartDate	○ MiddleName
• MiddleName	• PayerScenario	• RenderingProvider
• MobilePhone	• Policies	○ FirstName
• MobilePhoneExt	○ Active	○ LastName
• Practice	○ AddressLine1	○ MiddleName
• PracticeName	○ AddressLine2	○ Prefix
• Practice	○ City	○ Suffix
• Prefix	○ CompanyName	• SupervisingProvider
• SocialSecurityNumber	○ Copay	○ FirstName
• State	○ Copay	○ LastName
• Suffix	○ Country	○ MiddleName
• WorkPhone	○ InsurancePolicyID	○ Prefix
• WorkPhoneExt	○ Insured	○ Suffix
• ZipCode	○ AddressLine1	• ServiceEndDate
• DefaultServiceLocation	○ AddressLine2	• ServiceLines
○ AddressLine1	○ City	○ ProcedureCode
○ AddressLine2	○ Country	○ ProcedureModifier1
○ BillingName	○ DateofBirth	○ ProcedureModifier2
○ City	○ Employer	○ ProcedureModifier3
○ Country	○ FirstName	• ServiceStartDate

Patient	Case	Encounter
○ FaxPhone	○ Gender	• Units
○ LocationName	○ LastName	• LocationName
○ NPI	○ PatientRelationshipToInsured	
○ Phone	○ PolicyThroughEmployer	
○ State	○ SocialSecurityNumber	
○ ZipCode	○ State	
	○ ZipCode	
	○ Insured	
	○ PlanID	
	○ PlanName	
	○ PolicyGroupNumber	
	○ PolicyNumber	
	○ Precedence	
	○ State	
	○ ZipCode	