



*Building Custom Reports Using the
Kareo Add-in for Microsoft Excel*

December 2008

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1. Overview

Welcome to the Kareo feature guide on building custom reports using the Kareo Add-In for Microsoft Excel! This guide will show you how to install and use the Kareo Add-In for Microsoft Excel to retrieve data from the Kareo service and use the power of Microsoft Excel to analyze your data and build advanced reports.

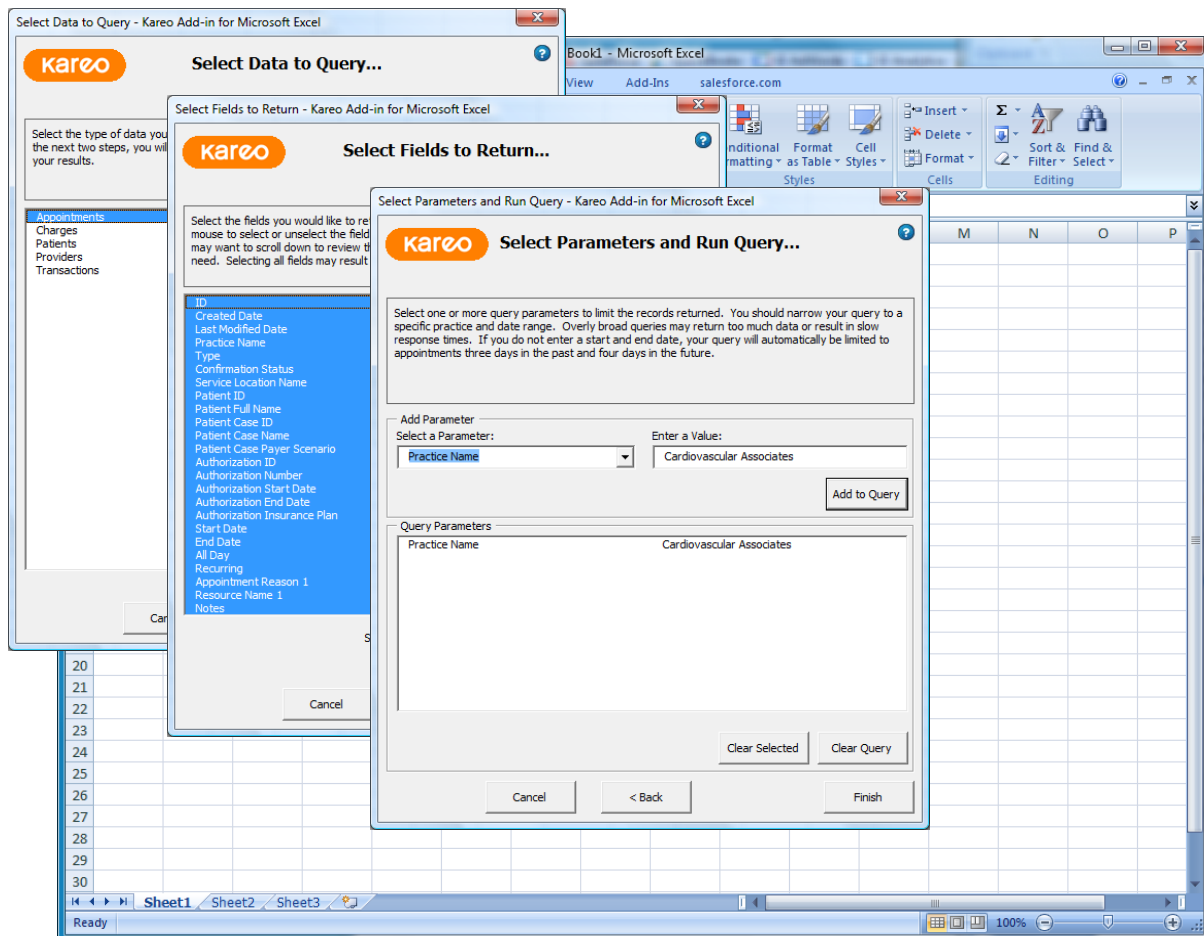
With the Kareo Add-In for Microsoft Excel, you'll be able to:

- Retrieve records from five different types of data including appointments, charges, patients, providers, and transactions
- Select fields to return from a list that includes all of the available fields for each type of data
- Enter query parameters to limit the data returned by date range or other custom criteria

Once your Kareo data is retrieved from Kareo and loaded into Microsoft Excel, you'll be able to:

- Filter your data by advanced criteria
- Sort the rows of your data by any field
- Group and subtotal rows by any field
- Build advanced reports using pivot tables
- Create graphs to analyze your data
- Print your data in custom formats

The chapters that follow provide detailed instructions on how to take full advantage of the exciting custom reporting capabilities of the Kareo Add-In for Microsoft Excel.



2. Installing the Add-In

The topics in this chapter explain how to install the Kareo Add-in for Microsoft Excel and configure the Kareo security settings that are necessary to use this feature.

2.1 Downloading the Add-In

To download the Kareo Add-in for Microsoft Excel, follow the steps below:

1. Open your **My Documents** folder on your PC.
2. Create a new sub-folder named **Kareo** under the **My Documents** folder on your PC.
3. Go to <http://help.kareo.com/setup/downloads/add-in/>.
4. Click on the **Download the Kareo Add-in for Microsoft Excel** link.
5. When the **File Download** dialog box appears, click on the **Save** or **Save As** option (depending on your web browser).
6. When the **Save As** dialog box appears, navigate and save the file to the **Kareo** sub-folder under your **My Documents** folder.
7. Navigate to the **Kareo** sub-folder under your **My Documents** folder.
8. Verify that the file **Kareo Add-in for Microsoft Excel.xla** has been saved to your PC.

2.2 Installing the Add-In into Microsoft Excel

To install the Kareo Add-in into Microsoft Excel, follow the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.



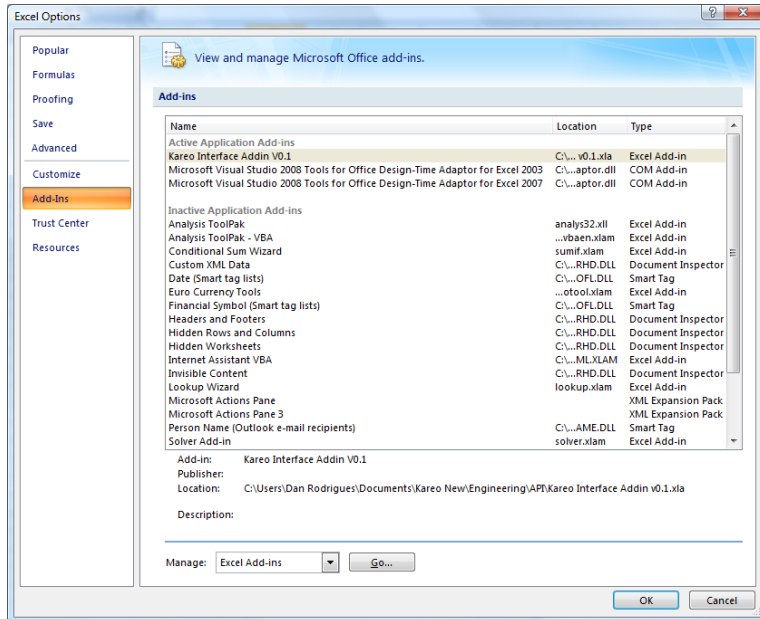
2. Click on the **Office** button located in the top left corner of **Microsoft Excel 2007**.



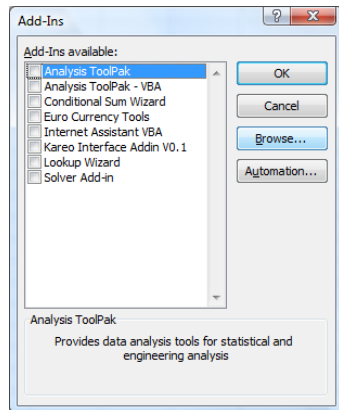
3. From the Office drop-down menu that appears, click on the **Excel Options** button.



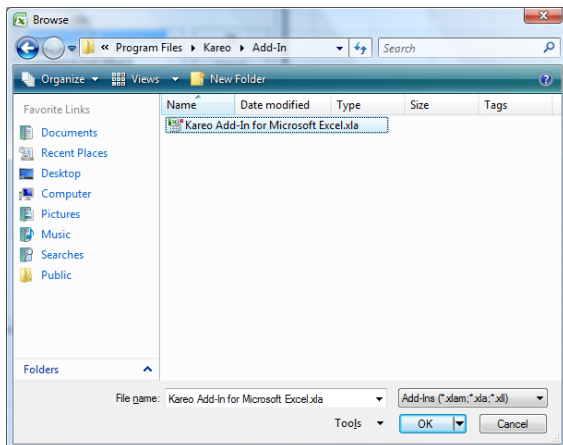
- When the **Excel Options** dialog box appears, click on the **Add-Ins** button on the left column of the dialog box



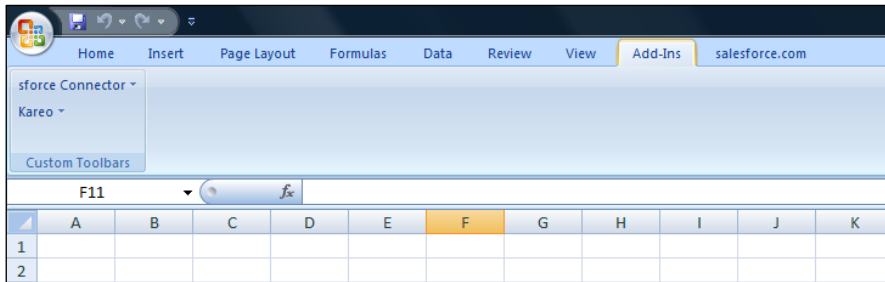
- When the **Add-Ins** subsection appears, click on the **Go...** button next to the **Manage Excel Add-Ins** drop-down box.



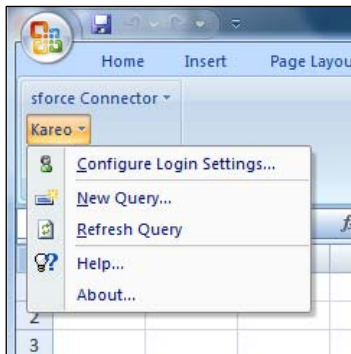
- When the **Add-Ins** dialog box appears, click on the **Browse...** button.
- Navigate to the **Kareo** sub-folder under your **My Documents** folder.



- Select the file named **Kareo Add-in for Microsoft Excel.xla** that you saved to your PC by following the instructions of the previous topic entitled **Downloading the Add-In**.
- Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.



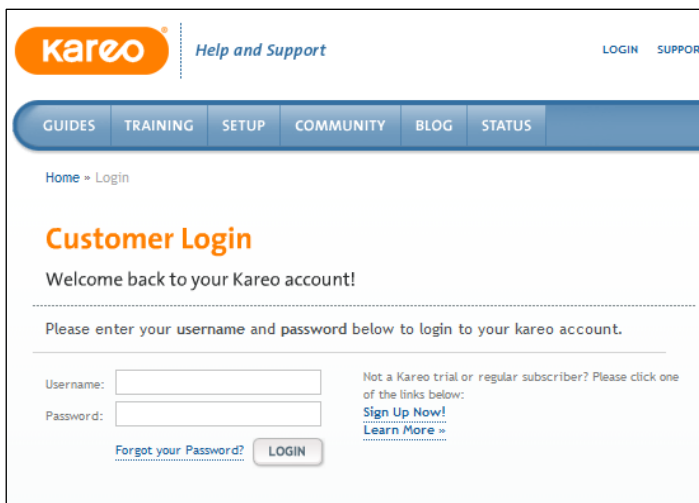
- Verify that the Add-In has been installed by noting the new **Kareo** button.



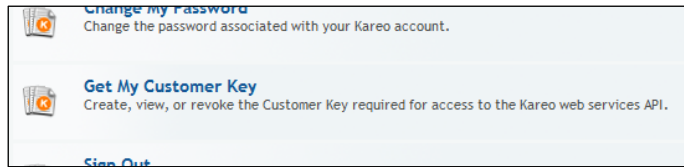
2.3 Getting Your Customer Key

Kareo requires that a special Customer Key be used as an added security precaution when you access your data outside the Kareo application. You must supply your Customer Key in addition to your Login and Password when using the Kareo Add-in for Microsoft Excel. If you do not have a Customer Key, or you do not know what your Customer Key is, follow the steps below:

- Login to <http://help.kareo.com/login/>.



2. Select the **Get My Customer Key** option.



3. If your Customer Key has not yet been provisioned, click the **Create My Customer Key** option.
4. Otherwise, print or take note of your **Customer Key**.



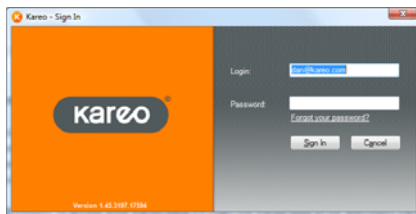
In Section 3.2, Configuring Login Settings, you will need the Customer Key you created in this step in order to log in and use the Kareo Add-in for Microsoft Excel.

2.4 Granting Security Permissions

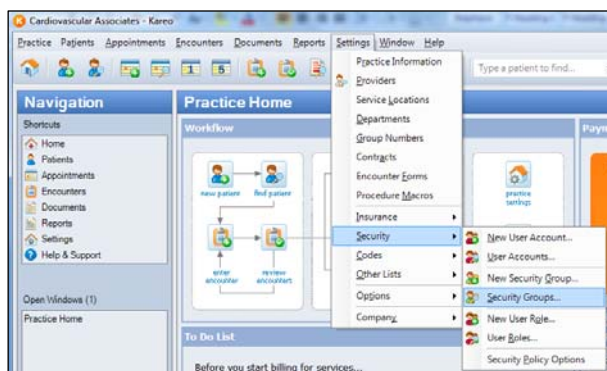
The Kareo Add-in for Microsoft Excel accesses your Kareo data using the Kareo Web Service. The Kareo Web Service is a special technology that Kareo developed that enables third-party computer programs, such as Microsoft Excel, to access your data outside of the main Kareo user interface. In order to keep your data secure, your system administrator must configure the security settings in Kareo to grant you permission to use the Kareo Web Service before you can use the Kareo Add-In for Microsoft Excel.

To grant a user security permission to access your Kareo data through the Kareo Add-in for Microsoft Excel, follow the steps below:

1. Login to the main **Kareo** application.



2. Select the menu item **Settings > Security > Security Groups**.



- Double-click on one of the **Security Groups** to which the user is a member.

Name	Description
System Administrator	
System Administrator 2	

- Within the **Permissions** list, select the **Web Service Access** option.
- Within the **Permissions for Web Service Access** sub-list, select the **Full Control** item and click the **Allow** button.

Area	Description	Permissions
Managing Workers Comp Offi	Manage Workers Comp Offices, including adding and updating Workers Comp Office reco	Full Control
Scheduling Appointments	Scheduling appointments and viewing the calendars.	Full Control
Setting Up Payers	Maintaining the master list of insurance plans and configuring electronic claims settings.	Full Control
Setting Up Practices	Configuring practice settings including providers, service locations, group numbers, and m	Full Control
Signing On	Signing on to Kareo applications.	Full Control
Web Service Access	Accessing Kareo web services	Full Control

Function	Description	Allow	Deny
Full Control	Full control of all features in Web Service Access	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Connect to Kareo web service	Connect to Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Appointment Data	Read appointment data via Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Charge Data	Read charge data via Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Patient Data	Read patient data via Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Provider Data	Read provider data via Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Transaction Data	Read transaction data via Kareo web services	<input checked="" type="checkbox"/>	<input type="checkbox"/>

- Click the **Save** button to save your changes to this **Security Group**.

3. Using the Add-In to Request Data from Kareo

The Kareo Add-in for Microsoft Excel enables you to build and execute custom requests for data from your Kareo account and load the results into Microsoft Excel where the data can be reviewed and manipulated using the power of Microsoft Excel. This topic explains how to access the Kareo Add-In for Microsoft Excel and return data from the Kareo service into your spreadsheets.

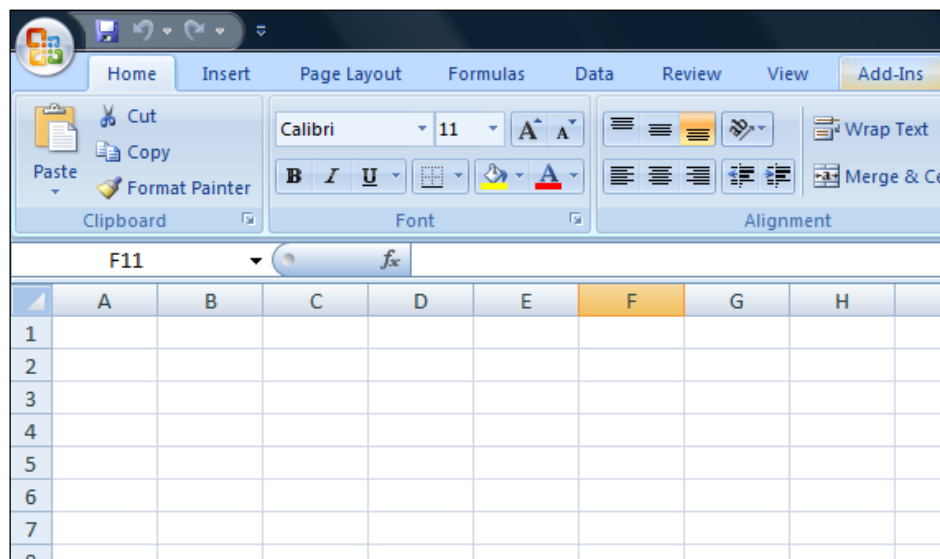
3.1 Accessing the Add-in

If you have successfully completed the steps described in Section 2.2, Installing the Add-In into Microsoft Excel, then you can access the Kareo Add-In for Microsoft Excel by following the steps below:

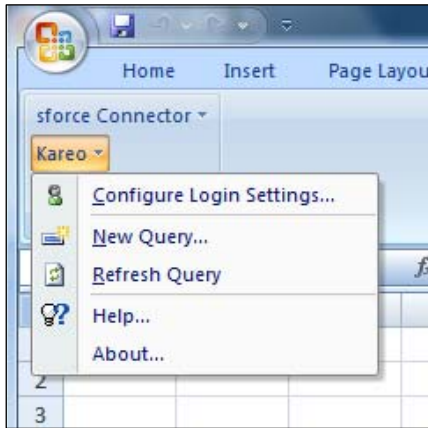
1. Open the **Microsoft Excel 2007** program installed on your PC.



2. Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.



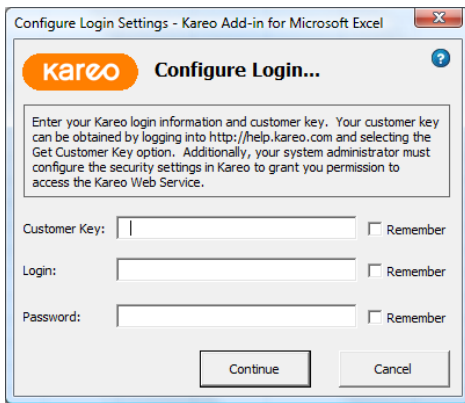
3. Click on the **Kareo** button to access the functions of the **Kareo Add-In for Microsoft Excel**.



3.2 Configuring Login Settings

Before you can use the Kareo Add-In for Microsoft Excel, you must configure your login settings by following the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.
3. Click on the **Kareo** button.
4. When the **Kareo** drop-down menu appears, click on the **Configure Login Settings** menu item.



5. When the **Configure Login Settings** dialog box appears, enter your **Customer Key**, **Login**, and **Password**.
6. If you would like to have the Kareo Add-In for Microsoft Excel remember your login settings in future sessions, click the **Remember** check box next to the **Customer Key**, **Login**, and **Password** fields.

Security Note: Since checking the Remember box will store a copy of your login credential on the local PC, you should not check the Remember box if you are using a computer other than your own.

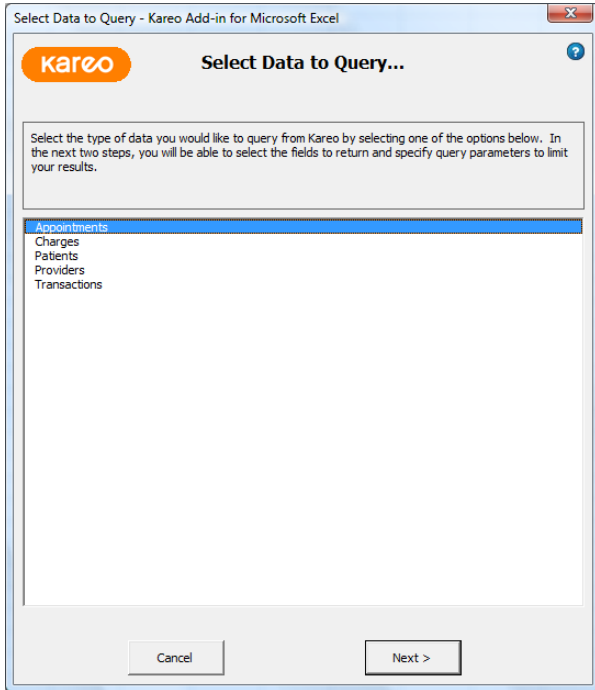
7. Click the **Continue** button to save your changes.

3.3 Building a New Query

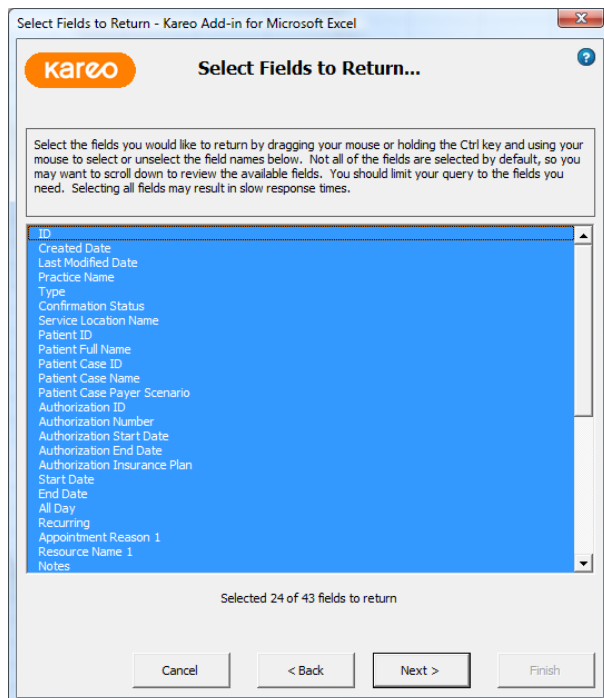
To retrieve data from the Kareo service into Microsoft Excel, you must build and execute a new query by following the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.

3. Click on the **Kareo** button.
4. When the **Kareo** drop-down menu appears, click on the **New Query** menu item.
5. When the **Select Data to Query** screen appears, select the type of data you would like to query by selecting one of the options in the list, and then click the **Next** button.

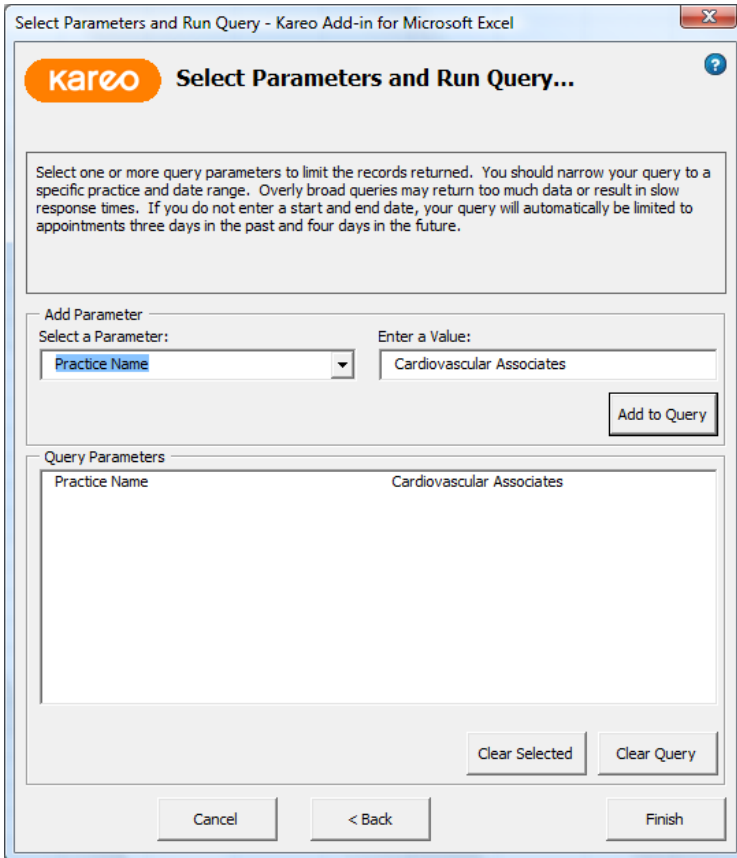


6. When the **Select Fields to Return** screen appears, hold down the **Ctrl** key and use your mouse to select or unselect one or more fields from the list, and then click the **Next** button.



Tips for Selecting Fields: Not all of the fields are selected by default, so you may want to scroll down to review the available fields. You should limit your query to the fields you need. Selecting all fields may result in slow response times.

7. When the **Select Parameters and Run Query** screen appears, use the controls on the screen to select one or more query parameters to limit the records returned, and then click the **Next** button.



Tips for Selecting Parameters: You should use the query parameters to narrow your query to a specific practice, and if applicable, a specific date range. Overly broad queries may return too much data or result in slow response times.

8. Click the **Finish** button to execute your query.

It may take several minutes for the Kareo Add-In for Microsoft Excel to return your data. While your query is in progress, status information will be displayed. If you wish to cancel your query, type **Ctrl + Break**.

When your data is returned, the Kareo Add-In for Microsoft Excel will create two new worksheets in your spreadsheet, as follows:

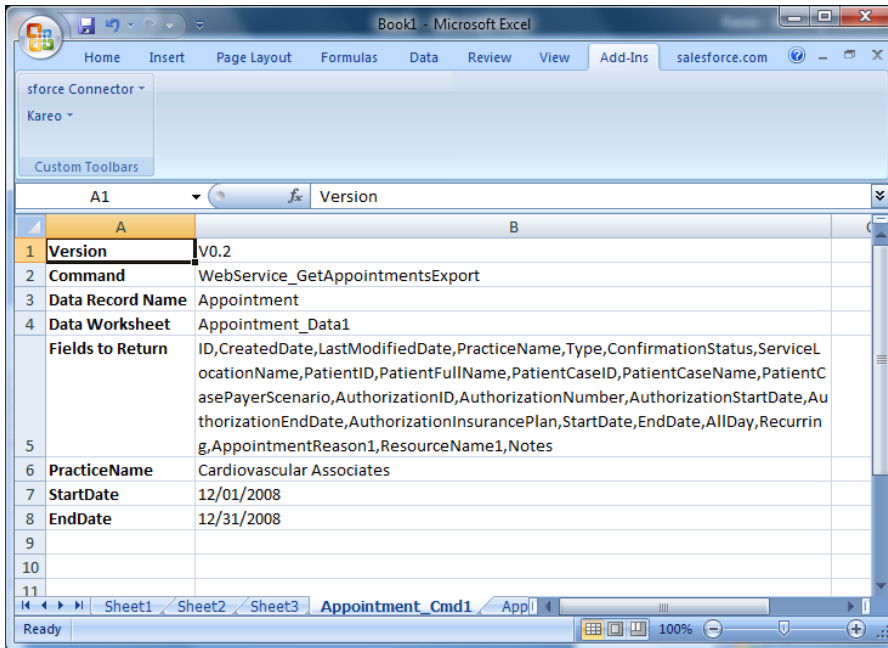
- **Data Worksheet** – This worksheet includes your data organized into rows and columns and is named with a “_Cmd1” suffix.
- **Command Worksheet** – This worksheet saves a copy of the query settings you entered and is named with a “_Data1” suffix.

3.4 Editing an Existing Query

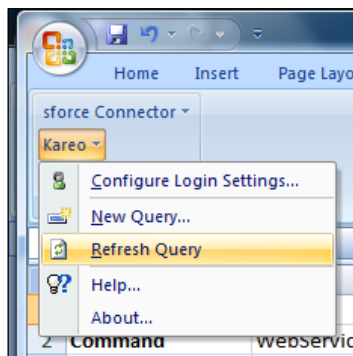
After you build and execute a query using the Kareo Add-In for Microsoft Excel, you can make changes to your query parameters and refresh your data without stepping through the full process for building a new query.

To edit an existing query and refresh your data, follow the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Open a previously saved **Microsoft Excel 2007** spreadsheet with your pre-existing query.
3. Go to the **Command Worksheet** associated with your previous query.



4. Select the cell to the right of any one of your query parameters, and then change the value.
5. Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.
6. Click on the **Kareo** button.
7. When the **Kareo** drop-down menu appears, click on the **Refresh Query** menu item.

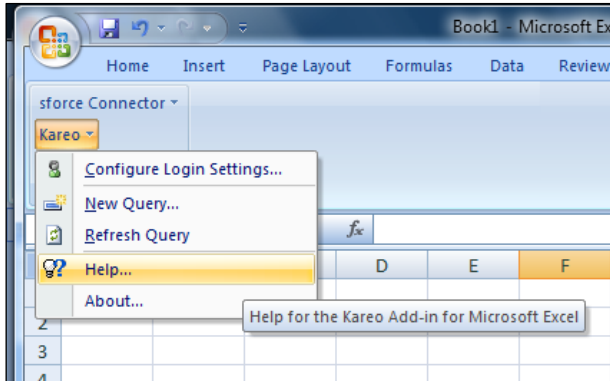


The Kareo Add-In for Microsoft Excel will re-execute your existing query with your new settings and update the **Data Worksheet** with the new data. It may take several minutes for the Kareo Add-In for Microsoft Excel to return your data. While your query is in progress, status information will be displayed. If you wish to cancel your query, type **Ctrl + Break**.

3.5 Getting Help for the Add-In

The Kareo Add-In for Microsoft Excel provides an online help system you can use to get answers to your questions. To access the online help system, follow the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Click on the **Add-Ins** main menu in **Microsoft Excel 2007**.
3. Click on the **Kareo** button.
4. When the **Kareo** drop-down menu appears, click on the **Help** menu item.



4. Using Microsoft Excel to Analyze Your Data

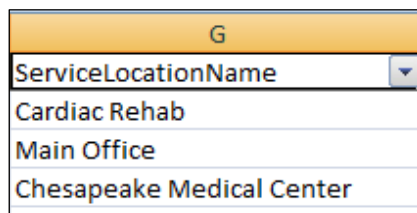
The Kareo Add-in for Microsoft Excel was built on top of Microsoft Excel so that you could query your data from the Kareo service and use the powerful data analysis, reporting, and graphing tools of Microsoft Excel to build advanced reports. This topic highlights just a few of the many powerful Microsoft Excel features you can use to analyze and report on your Kareo data.

4.1 Filtering Data by Criteria

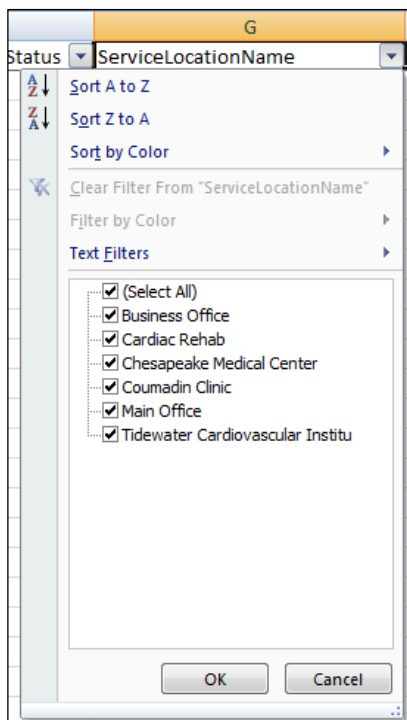
You can use Microsoft Excel to filter the data in your **Data Worksheet** using advanced filtering techniques. By default, the Kareo Add-In for Microsoft Excel automatically enables filtering for every field returned from the Kareo service.

To filter your Kareo data using Microsoft Excel filters, follow the steps below:

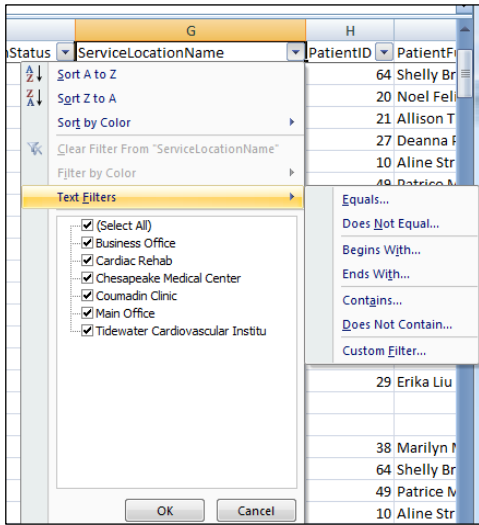
1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Open a previously saved Microsoft Excel spreadsheet with your pre-existing query results.
3. Go to the **Data Worksheet** associated with your previous query
4. Within the first row of the worksheet, click on down-arrow button within the field you would like to filter.



5. When the filter drop-down menu appears, use one of the following techniques to filter your data:
Select Specific Values – Microsoft Excel presents a list of all of the unique values that display in your data. You can select or unselect one or more values by clicking the check boxes next to specific data values.



Use Filter Rules – Microsoft Excel also offers advanced filtering rules that vary by the type of data in each column. You can click the ... Filters > sub-menu item to access and configure advanced rules, such as ranges for dates, greater or less than for numbers, or sub-string searches for text.



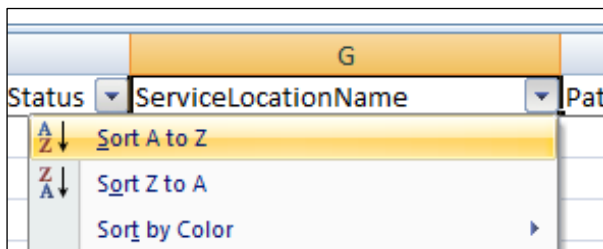
6. Click the **OK** button and your data will be filtered based upon the settings you entered.

4.2 Sorting Rows by Field

You can use Microsoft Excel to sort the data in your **Data Worksheet** by any field. By default, the Kareo Add-In for Microsoft Excel automatically enables sorting for every field returned from the Kareo service.

To sort your Kareo data using Microsoft Excel sorting, follow the steps below:

1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Open a previously saved **Microsoft Excel 2007** spreadsheet with your pre-existing query results.
3. Go to the **Data Worksheet** associated with your previous query.
4. Within the first row of the worksheet, click on down-arrow button within the field you would like to sort by.
5. When the sorting drop-down menu appears, select one of the sorting options that appear at the top of the menu.



6. Click the **OK** button and your data will be re-sorted based upon the settings you entered.

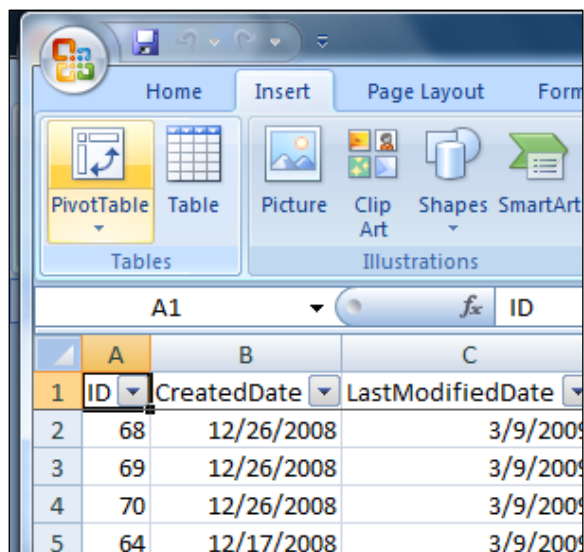
4.3 Creating Reports Using Pivot Tables

You can use Microsoft Excel to create advanced reports with a feature known as Pivot Tables. A Pivot Table is a powerful feature in Microsoft Excel that enables you to quickly summarize large amounts of data. A Pivot Table is especially designed for:

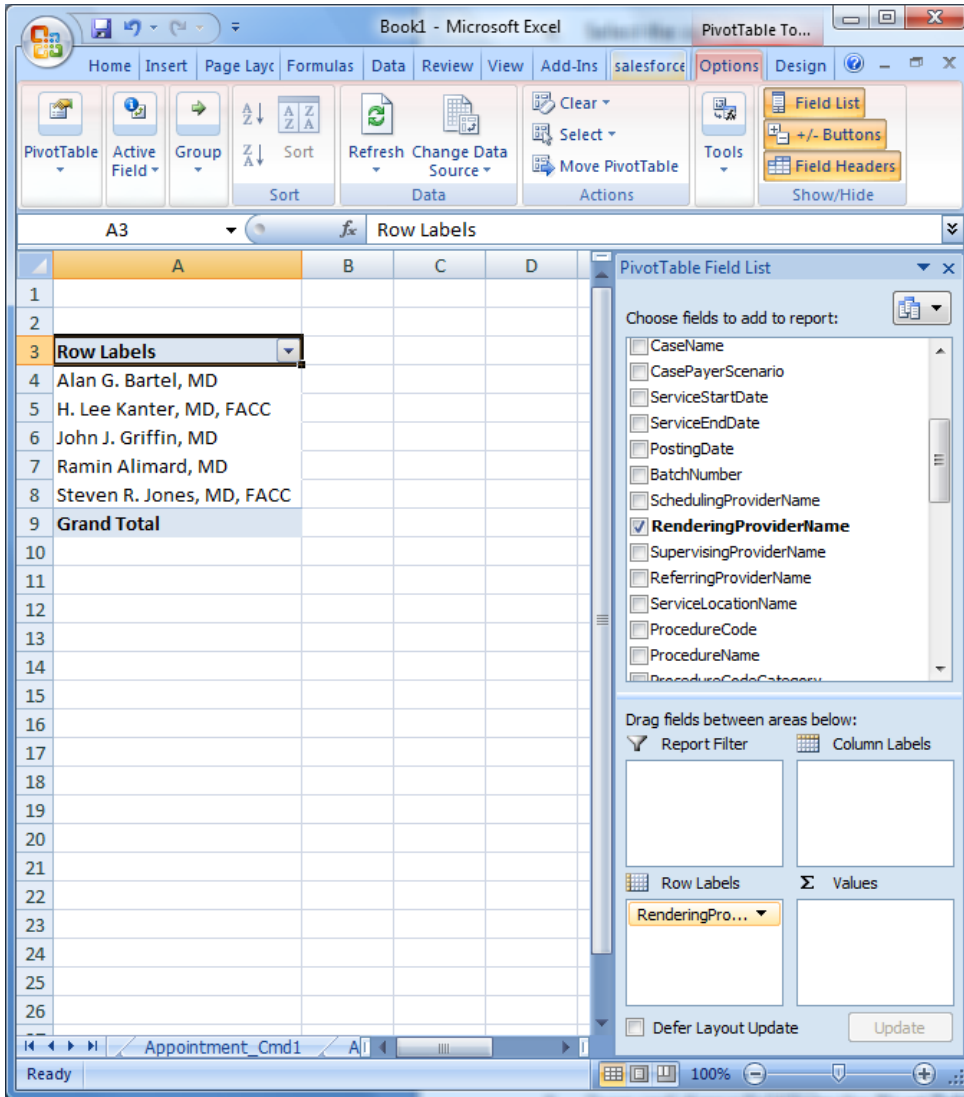
- Querying large amounts of data in many user-friendly ways.
- Subtotaling and aggregating numeric data, summarizing data by categories and subcategories, and creating custom calculations and formulas.
- Expanding and collapsing levels of data to focus your results, and drilling down to details from the summary data for areas of interest to you.
- Moving rows to columns or columns to rows (or "pivoting") to see different summaries of the source data.
- Filtering, sorting, grouping, and conditionally formatting the most useful and interesting subset of data to enable you to focus on the information that you want.
- Presenting concise, attractive, and annotated online or printed reports.

To create a Pivot Table from your Kareo data using Microsoft Excel 2007, follow the steps below:

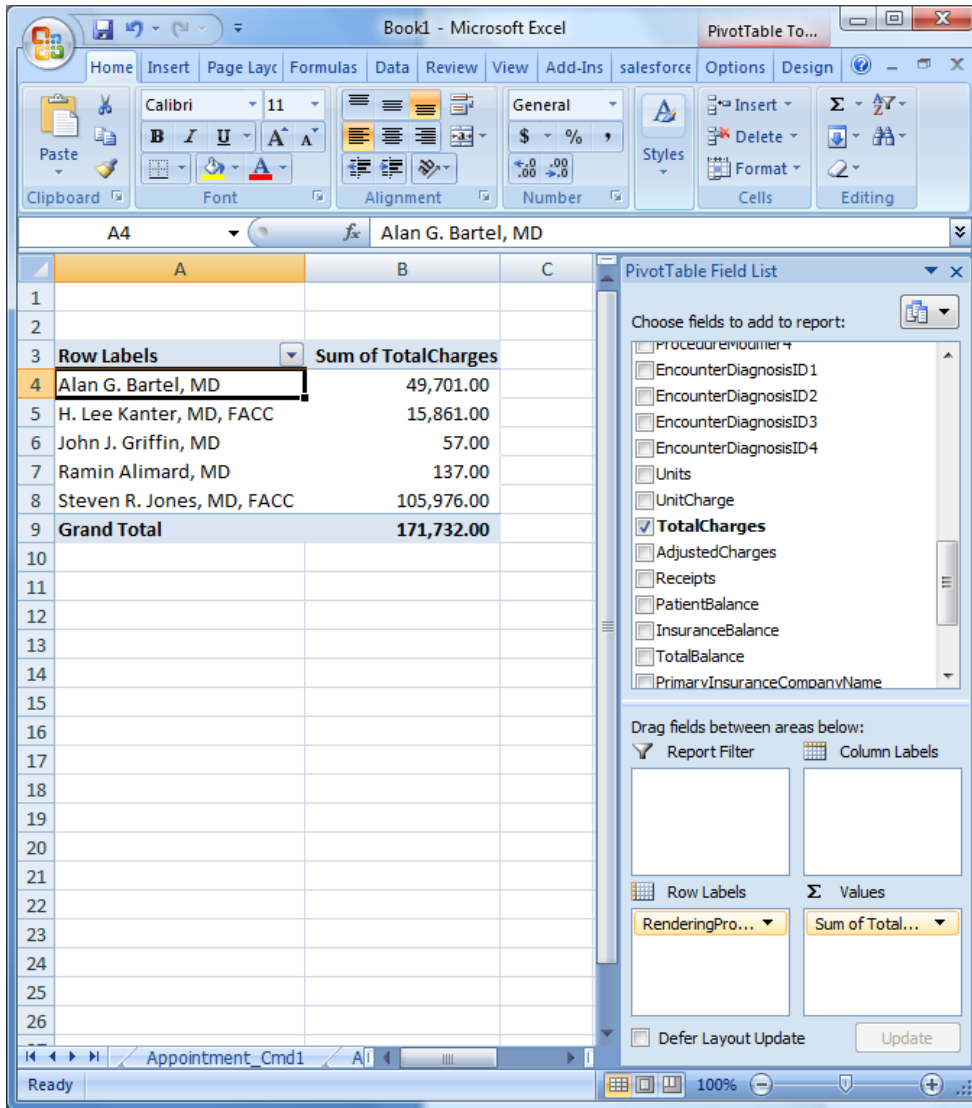
1. Open the **Microsoft Excel 2007** program installed on your PC.
2. Open a previously saved **Microsoft Excel 2007** spreadsheet with your pre-existing query results.
3. Go to the **Data Worksheet** associated with your previous query.
4. Select the cell A1
5. Click on the **Insert** main menu in **Microsoft Excel 2007**.
6. Click on the **PivotTable** button and click the **OK** button when the Create Pivot Table dialog box appears. This will create a new worksheet and display the Pivot Table tools panel on the right.



7. Drag-and-drop a field from the **Pivot Table Field List** into the **Row Labels** list to group your report by the selected field.



8. Drag-and-drop a field from the **Pivot Table Field List** into the **Values** list to subtotal your report by the selected field.



4.4 Creating Charts Using Pivot Tables

You can use Microsoft Excel to create advanced graphs with a feature known as Pivot Charts. A Pivot Chart is a powerful feature in Microsoft Excel that enables you to quickly visualize large amounts of data summarized in a Pivot Table.

To create a Pivot Chart from your Kareo data using Microsoft Excel, follow the steps below:

1. Create a **Pivot Table** by follow steps 1-8 of the section entitled **Creating Reports Using Pivot Tables**.
2. Click on one of the cells of the Pivot Table to activate the **Pivot Table Tools** menu.
3. Click on the **PivotChart** button.

The screenshot shows Microsoft Excel with a PivotTable and the PivotTable Field List task pane. The PivotTable is located in the range A4:H9 and has the following data:

Row Labels	Sum of TotalCharges
Alan G. Bartel, MD	49,701.00
H. Lee Kanter, MD, FACC	15,861.00
John J. Griffin, MD	57.00
Ramin Alimard, MD	137.00
Steven R. Jones, MD, FACC	105,976.00
Grand Total	171,732.00

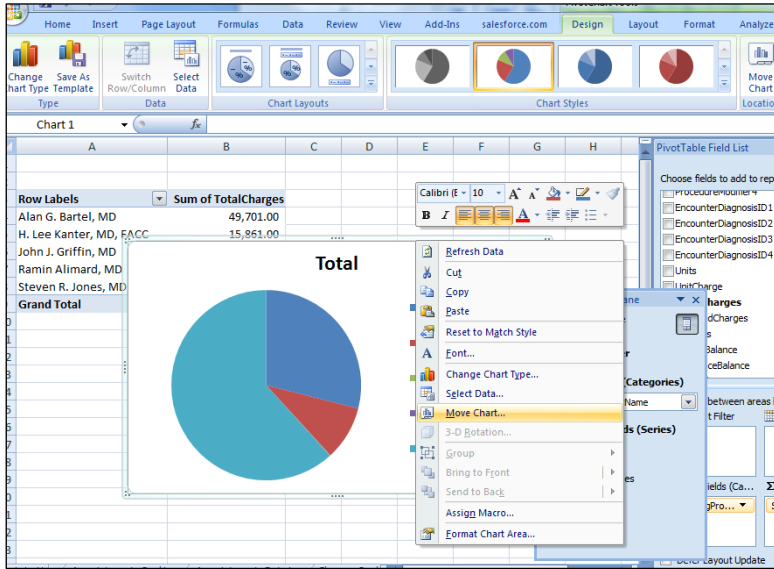
The PivotTable Field List task pane on the right shows the following configuration:

- Choose fields to add to report: TotalCharges
- Report Filter: (empty)
- Column Labels: (empty)
- Row Labels: RenderingPro...
- Values: Sum of Total...

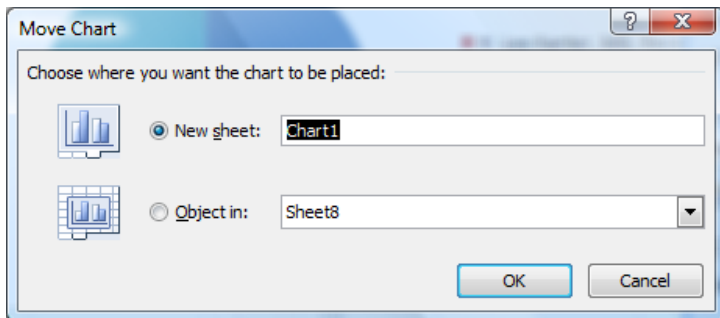
4. When the **Insert Chart** dialog box appears, select the type of chart you would like to create and click the **OK** button.

The screenshot shows the Insert Chart dialog box in Microsoft Excel. The 'Pie' chart type is selected in the left-hand list. The main area displays various chart templates for Line, Pie, and Bar charts. The 'Pie' chart type is highlighted, and the 'OK' button is visible at the bottom right.

5. Select the chart, right-click, and select the **Move Chart** menu option.



6. Select the **New sheet** option, enter a name for your chart, and then click the **OK** button.



4.5 Getting Additional Help with Microsoft Excel

The instructions above provide a short introduction to using filtering, sorting, grouping, Pivot Tables, and Pivot Charts. An exhaustive tutorial of these subjects is outside the scope of this feature guide. However, we recommend you use the Microsoft Excel online help system to learn more about how you can use the powerful features of Microsoft Excel to analyze, summarize, report, and chart your Kareo data.

5. Understanding the Tables and Fields

The Kareo Add-in for Microsoft Excel enables you to query various types of data from the Kareo service. This topic provides a detailed definition of the tables and fields you can use.

5.1 Appointments

The Appointment table is used to return appointment data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Field Name	Description	Where to Find in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the appointment.	Appointment details	No	Yes
Created Date	The date the appointment was created.	n/a	Yes	Yes
Last Modified Date	The date the appointment was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this appointment.	Settings > Find Practice > Edit Practice	Yes	Yes
Type	The type of appointment; either "Patient" or "Other".	Appointment	Yes	Yes
Confirmation Status	The status of the appointment.	Appointment	Yes	Yes
Service Location Name	The location of the appointment.	Appointment	Yes	Yes
Patient ID	The unique identifier for the patient related to this appointment.	Patient	Yes	Yes
Patient Full Name	The full name of the patient related to this appointment.	Appointment	Yes	Yes
Patient Case ID	The unique identifier for the case related to this appointment.	n/a	No	Yes
Patient Case Name	The name of the case related to this appointment.	Appointment	No	Yes
Patient Case Payer Scenario	The payer scenario for the case related to this appointment.	Patient > Case	Yes	Yes
Authorization ID	The unique identifier for the authorization related to this appointment.	n/a	No	Yes
Authorization Number	The authorization number related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Authorization Start Date	The authorization start date related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Authorization End Date	The authorization end date related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Authorization Insurance Plan	The insurance plan related to the authorization related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Start Date	The start date and time of this appointment.	Appointment	Yes	Yes
End Date	The end date and time for this appointment.	Appointment	Yes	Yes
All Day	If this is an all day appointment, then true. Otherwise, false.	Appointment	No	Yes
Recurring	If this is a recurring appointment, then true. Otherwise, false.	Appointment	No	Yes
Appointment Reason 1	The first reason entered for this appointment.	Appointment	Yes	Yes
Resource Name 1	The first provider or scheduling resource related to this appointment.	Appointment	Yes	Yes
Notes	The notes or comments related to this appointment.	Appointment	No	Yes
Practice ID	The unique identifier of the practice related to this appointment.	Settings > Find Practice > Edit Practice	No	No

Appointment Reason 2	The second reason entered for this appointment.	Appointment	No	No
Appointment Reason 3	The third reason entered for this appointment.	Appointment	No	No
Appointment Reason 4	The fourth reason entered for this appointment.	Appointment	No	No
Appointment Reason 5	The fifth reason entered for this appointment.	Appointment	No	No
Appointment Reason 6	The sixth reason entered for this appointment.	Appointment	No	No
Appointment Reason 7	The seventh reason entered for this appointment.	Appointment	No	No
Appointment Reason 8	The eighth reason entered for this appointment.	Appointment	No	No
Appointment Reason 9	The ninth reason entered for this appointment.	Appointment	No	No
Appointment Reason 10	The tenth reason entered for this appointment.	Appointment	No	No
Resource Name 2	The second provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 3	The third provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 4	The fourth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 5	The fifth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 6	The sixth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 7	The seventh provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 8	The eighth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 9	The ninth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 10	The tenth provider or scheduling resource related to this appointment.	Appointment	No	No

5.2 Charges

The Charges table is used to return charges / service line data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Field Name	Description	Where to Find in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the claim.	Claim details	No	Yes
Created Date	The date the claim was created.	n/a	Yes	Yes
Last Modified Date	The date the claim was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this charge.	Encounter	Yes	Yes
Encounter ID	The unique identifier of the encounter related to this charge.	Encounter	No	Yes
Patient ID	The unique identifier of the patient related to this charge.	Encounter	No	Yes
Patient Name	The name of the patient related to this charge.	Encounter	Yes	Yes
Patient Date of Birth	The date of birth of the patient related to this charge.	Encounter	No	Yes
Case Name	The name of the case related to this charge.	Encounter	No	Yes
Case Payer Scenario	The payer scenario of the case related to this charge.	Patient > Case	Yes	Yes
Service Start Date	The service start date of this charge.	Encounter	Yes	Yes
Service End Date	The service end date of this charge.	Encounter	Yes	Yes
Posting Date	The posting date of the encounter related to this charge.	Encounter	Yes	Yes

Batch Number	The batch number associated with the encounter related to this charge.	Encounter	Yes	Yes
Scheduling Provider Name	The name of the scheduling provider related to this charge.	Encounter	Yes	Yes
Rendering Provider Name	The name of the rendering provider related to this charge.	Encounter	Yes	Yes
Supervising Provider Name	The name of the supervising provider related to this charge.	Encounter	No	Yes
Referring Provider Name	The name of the referring physician related to this charge.	Encounter	Yes	Yes
Service Location Name	The name of the service location related to this charge.	Encounter	Yes	Yes
Procedure Code	The procedure code related to this charge.	Encounter	Yes	Yes
Procedure Name	The name of the procedure related to this charge.	Encounter	Yes	Yes
Procedure Code Category	The category of the procedure related to this charge.	Encounter	Yes	Yes
Procedure Modifier 1	The first modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 2	The second modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 3	The third modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 4	The fourth modifier of the procedure related to this charge.	Encounter	No	Yes
Diagnosis Code 1	The first diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 2	The second diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 3	The third diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 4	The fourth diagnosis code related to this charge.	Encounter	Yes	Yes
Units	The number of units of the procedure related to this charge.	Encounter	No	Yes
Unit Charge	The unit charge of the procedure related to this charge.	Encounter	No	Yes
Total Charges	The total charges related to this charge.	Encounter	No	Yes
Adjusted Charges	The total charges minus all adjustments related to this charge.	Claim	No	Yes
Receipts	The total payments applied to this charge.	Claim	No	Yes
Patient Balance	The patient balance related to this charge.	Claim	No	Yes
Insurance Balance	The insurance balanced related to this charge.	Claim	No	Yes
Total Balance	The total balance related to this charge.	Claim	No	Yes
Primary Insurance Billed Company Name	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Primary Insurance Billed Plan Name	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Secondary Insurance Billed Company Name	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter.	Encounter	No	Yes

Secondary Insurance Billed Plan Name	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Billed To	The party that was last billed for this charge.	Claim	Yes	Yes
Status	The status of this charge.	Claim	Yes	Yes
Practice ID	The unique identifier associated with the practice related to this charge.	Settings > Company > Find Practice	No	No
Appointment ID	The unique identifier associated with the appointment related to this charge.	Encounter	No	No
Scheduling Provider ID	The unique identifier associated with the scheduling provider related to this charge.	Settings > Providers	No	No
Rendering Provider ID	The unique identifier associated with the rendering provider related to this charge.	Settings > Providers	No	No
Supervising Provider ID	The unique identifier associated with the supervising provider related to this charge.	Settings > Providers	No	No
Referring Provider ID	The unique identifier associated with the referring provider related to this charge.	Settings > Referring Physicians	No	No
Copay Amount	The amount of the copay related to this charge.	Encounter	No	No
Copay Method	The copay payment method related to this charge.	Encounter	No	No
Copay Category	The copay payment category related to this charge.	Encounter	No	No
Copay Reference	The copay reference number related to this charge.	Encounter	No	No
Minutes	The minutes related to this charge.	Encounter	No	No
Line Note	The line note related to this charge.	Encounter	No	No
Ref Code	The reference code related to this charge.	Encounter	No	No
Type of Service	The type of service insurance code related to this charge.	Encounter	No	No
Hospitalization Start Date	The hospitalization start date related to this charge.	Encounter	No	No
Hospitalization End Date	The hospitalization end date related to this charge.	Encounter	No	No
Local Use Box 10d	The local use box 10d custom insurance field related to this charge.	Encounter	No	No
Local Use Box 19	The local use box 19 custom insurance field related to this charge.	Encounter	No	No
Do Not Send Claim Electronically	True if the claim should not be sent electronically. False otherwise.	Encounter	No	No
Do Not Send Electronically to Secondary	True if the claim should not be sent electronically to the secondary insurance. False otherwise.	Encounter	No	No
E-Claim Note Type	The line note related to this charge.	Encounter	No	No
E-Claim Note	The line note related to this charge.	Encounter	No	No
Service Location ID	The unique identifier of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Billing Name	The billing name of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Place of Service Code	The place of service insurance code related to this charge.	Settings > Service Locations	No	No
Service Location Place of Service Name	The name of the place of service insurance code related to this charge.	Settings > Service Locations	No	No
Service Location Address Line1	The first address line of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Address Line2	The second address line of the service location related to this charge.	Settings > Service Locations	No	No
Service Location City	The city of the service location related to this charge.	Settings > Service Locations	No	No

Service Location State	The state of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Country	The country of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Zip Code	The zip code of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Phone	The phone number of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Phone Ext	The phone number extension of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Fax	The fax number of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Fax Ext	The fax number extension of the service location related to this charge.	Settings > Service Locations	No	No
Service Location NPI	The national provider identifier of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Facility ID Type	The facility ID type of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Facility ID	The facility ID of the service location related to this charge.	Settings > Service Locations	No	No
Service Location CLIA Number	The CLIA number of the service location related to this charge.	Settings > Service Locations	No	No
Allowed Amount	The allowed amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts	No	No
Expected Amount	The expected reimbursement amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts	No	No
Primary Insurance Address Line1	The first address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Address Line2	The second address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance City	The city of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance State	The state of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Country	The country of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Zip Code	The zip code of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Batch ID	The unique identifier of the billing batch associated with the primary insurance policy on the case related to this charge.	n/a	No	No
Primary Insurance First Bill Date	The date the charge was first billed to the primary insurance policy on the case related to this charge.	Case	No	No
Primary Insurance Last Bill Date	The date the charge was last billed to the primary insurance policy on the case related to this charge.	Case	No	No
Primary Insurance Payment ID	The unique identifier of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Posting Date	The posting date of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Adjudication Date	The adjudication date of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No

Primary Insurance Payment Ref	The reference number of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Method Desc	The payment method of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Category Desc	The category of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Allowed	The allowed amount of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Contract Adjustment	The amount of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Secondary Adjustment Reason	The reason of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment	The payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Deductible	The deductible posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Coinsurance	The coinsurance posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Copay	The copay posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Address Line1	The first address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Address Line2	The second address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance City	The city of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance State	The state of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Country	The country of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Zip Code	The zip code of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Batch ID	The unique identifier of the billing batch associated with the secondary insurance policy on the case related to this charge.	n/a	No	No
Secondary Insurance First Bill Date	The date the charge was first billed to the secondary insurance policy on the case related to this charge.	Case	No	No
Secondary Insurance Last Bill Date	The date the charge was last billed to the secondary insurance policy on the case related to this charge.	Case	No	No
Secondary Insurance Payment ID	The unique identifier of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Posting Date	The posting date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No

Secondary Insurance Adjudication Date	The adjudication date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Ref	The reference number of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Method Desc	The payment method of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Category Desc	The category of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Allowed	The allowed amount of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Contract Adjustment	The amount of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Secondary Adjustment Reason	The reason of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment	The payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Deductible	The deductible posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Coinsurance	The coinsurance posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Copay	The copay posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Company Name	The first address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Plan Name	The second address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Address Line1	The city of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Address Line2	The state of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance City	The country of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance State	The zip code of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Country	The unique identifier of the billing batch associated with the tertiary insurance policy on the case related to this charge.	n/a	No	No
Tertiary Insurance Zip Code	The date the charge was first billed to the tertiary insurance policy on the case related to this charge.	Case	No	No
Tertiary Insurance Batch ID	The date the charge was last billed to the tertiary insurance policy on the case related to this charge.	Case	No	No
Tertiary Insurance Payment ID	The unique identifier of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No

Tertiary Insurance Payment Posting Date	The posting date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Adjudication Date	The adjudication date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Ref	The reference number of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Method Desc	The payment method of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Category Desc	The category of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Allowed	The allowed amount of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Contract Adjustment	The amount of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Secondary Adjustment Reason	The reason of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment	The payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Deductible	The deductible posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Coinsurance	The coinsurance posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Copay	The copay posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Patient Batch ID	The batch number associated with the patient payment related to this charge.	Payment	No	No
Patient First Bill Date	The date the patient was first billed for this charge.	Claim	No	No
Patient Last Bill Date	The date the patient was last billed for this charge.	Claim	No	No
Patient Payment Ref	The reference code related to the patient payment posted for this charge.	Payment	No	No
Patient Payment ID	The unique identifier of the patient payment posted for this charge.	Payment	No	No
Patient Payment Posting Date	The posting date of the patient payment posted for this charge.	Payment	No	No
Patient Payment Method Desc	The payment method of the patient payment posted for this charge.	Payment	No	No
Patient Payment Category Desc	The category of the patient payment posted for this charge.	Payment	No	No
Patient Payment Amount	The amount of the patient payment posted for this charge.	Payment	No	No
Other Adjustment	The type of other adjustment associated with the patient payment posted for this charge.	Payment	No	No

5.3 Patients

The Patients table is used to return patient data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Field Name	Description	Where to Find in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the patient.	Patient details	No	Yes
Created Date	The date the patient was created.	n/a	Yes	Yes
Last Modified Date	The date the patient was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this patient.	Patient	Yes	Yes
Full Name	The full name of the patient.	Patient	Yes	Yes
Prefix	The prefix of the patient.	Patient	No	Yes
First Name	The first name of the patient.	Patient	No	Yes
Middle Name	The middle name of the patient.	Patient	No	Yes
Last Name	The last name of the patient.	Patient	No	Yes
Suffix	The suffix of the patient.	Patient	No	Yes
Social Security Number	The social security number of the patient.	Patient	No	Yes
Date of Birth	The date of birth of the patient.	Patient	Yes	Yes
Age	The age of the patient.	Patient	No	Yes
Gender	The gender of the patient.	Patient	Yes	Yes
Medical Record Number	The medical record number for the patient.	Patient	No	Yes
Marital Status	The marital status of the patient.	Patient	No	Yes
Employment Status	The employment status of the patient.	Patient	No	Yes
Employer Name	The name of the employer related to this patient.	Patient	No	Yes
Referral Source	The referral source of the patient.	Patient	Yes	Yes
Address Line1	The first address line of the patient.	Patient	No	Yes
Address Line2	The second address line of the patient.	Patient	No	Yes
City	The city of the patient.	Patient	No	Yes
State	The state of the patient.	Patient	No	Yes
Country	The country of the patient (if different than the U.S.).	Patient	No	Yes
Zip Code	The zip code of the patient.	Patient	No	Yes
Home Phone	The home phone number of the patient.	Patient	No	Yes
Home Phone Ext	The home phone number extension of the patient.	Patient	No	Yes
Work Phone	The work phone number of the patient.	Patient	No	Yes
Work Phone Ext	The work phone number extension of the patient.	Patient	No	Yes
Mobile Phone	The mobile phone number of the patient.	Patient	No	Yes
Mobile Phone Ext	The mobile phone number extension of the patient.	Patient	No	Yes
Email Address	The email address of the patient.	Patient	No	Yes
Practice ID	The unique identifier for the practice related to this patient.	Patient	No	No
Default Rendering Provider Full Name	The name of the default rendering provider related to this patient.	Patient	Yes	No
Default Rendering Provider ID	The unique identifier of the default rendering provider related to this patient.	Settings > Providers	No	No

Primary Care Physician Full Name	The name of the primary care physician related to this patient.	Patient	Yes	No
Primary Care Physician ID	The unique identifier of the primary care physician related to this patient.	Settings > Referring Physicians	No	No
Referring Provider Full Name	The name of the referring provider related to this patient.	Patient	Yes	No
Referring Provider ID	The unique identifier of the referring provider related to this patient.	Settings > Referring Physicians	No	No
Default Service Location ID	The unique identifier of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name	The name of the default service location related to this patient.	Patient	Yes	No
Default Service Location Name Address Line1	The first address line of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Address Line2	The second address line of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name City	The city of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name State	The state of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Country	The country of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Zip Code	The zip code of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Billing Name	The billing name of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Phone	The phone number of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Phone Ext	The phone number extension of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Fax Phone	The fax number of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Fax Phone Ext	The fax number extension of the default service location related to this patient.	Settings > Service Locations	No	No
Guarantor Different Than Patient	The type of guarantor if different than the patient.	Patient	No	No
Guarantor Prefix	The prefix of the guarantor if different than the patient.	Patient	No	No
Guarantor First Name	The first name of the guarantor if different than the patient.	Patient	No	No
Guarantor Middle Name	The middle name of the guarantor if different than the patient.	Patient	No	No
Guarantor Last Name	The last name of the guarantor if different than the patient.	Patient	No	No
Guarantor Suffix	The suffix of the guarantor if different than the patient.	Patient	No	No
Most Recent Note 1 User	The user associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 1 Date	The date associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 1 Message	The message associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 2 User	The user associated with the second most recent note related to this patient.	Patient	No	No
Most Recent Note 2 Date	The date associated with the second most recent note related to this patient.	Patient	No	No
Most Recent Note 2 Message	The message associated with the second most recent note related to this patient.	Patient	No	No

Most Recent Note 3 User	The user associated with the third most recent note related to this patient.	Patient	No	No
Most Recent Note 3 Date	The date associated with the third most recent note related to this patient.	Patient	No	No
Most Recent Note 3 Message	The message associated with the third most recent note related to this patient.	Patient	No	No
Most Recent Note 4 User	The user associated with the fourth most recent note related to this patient.	Patient	No	No
Most Recent Note 4 Date	The date associated with the fourth most recent note related to this patient.	Patient	No	No
Most Recent Note 4 Message	The message associated with the fourth most recent note related to this patient.	Patient	No	No
Default Case ID	The unique identifier of the default case related to this patient.	n/a	No	No
Default Case Name	The name of the default case related to this patient.	Patient	No	No
Default Case Description	The description of the default case related to this patient.	Patient > Case	No	No
Default Case Referring Provider ID	The unique identifier of the referring provider associated with the default case related to this patient.	Settings > Referring Physicians	No	No
Default Case Referring Provider Full Name	The name of the referring provider associated with the default case related to this patient.	Patient > Case	No	No
Default Case Send Patient Statements	If patient statements should be sent for charges under the default case related to this patient, then true. Otherwise, false.	Patient > Case	No	No
Default Case Payer Scenario	The payer scenario of the default case related to this patient.	Patient > Case	Yes	No
Default Case Condition Related To Auto Accident	If the default case for this patient is related to an auto-accident, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Auto Accident State	The state of the auto accident for the default case related to this patient.	Patient > Case	No	No
Default Case Condition Related To Employment	If the default case for this patient is related to employment, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Pregnancy	If the default case for this patient is related to pregnancy, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Abuse	If the default case for this patient is related to abuse then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Other	If the default case for this patient is related to other, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To EPSDT	If the default case for this patient is related to EPSDT, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Family Planning	If the default case for this patient is related to family planning, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Emergency	If the default case for this patient is related to an emergency, then true. Otherwise, false.	Patient > Case	No	No
Default Case Dates Injury Start Date	The start date of the injury of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Injury End Date	The end date of the injury of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Same or Similar Illness Start Date	The start date of the same or similar illness of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Same or Similar Illness End Date	The end date of the same or similar illness of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Unable to Work Start Date	The start date the patient was unable to work for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Unable to Work End Date	The end date the patient was unable to work for the default case related to this patient.	Patient > Case	No	No

Default Case Dates Related Disability Start Date	The start date of a disability for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Disability End Date	The end date of a disability for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Hospitalization Start Date	The start date of a hospitalization for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Hospitalization End Date	The end date of a hospitalization for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last Menstrual Period Date	The last menstrual period of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last Seen Date	The date the patient was last seen for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Referral Date	The referral date for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Acute Manifestation Date	The acute manifestation date of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last X-Ray Date	The last x-ray date of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Accident Date	The accident date of the default case related to this patient.	Patient > Case	No	No
Primary Insurance Policy Company ID	The unique identifier of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Company Name	The name of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Primary Insurance Policy Plan ID	The unique identifier of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Name	The name of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Primary Insurance Policy Plan Address Line1	The first address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Address Line2	The second address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan City	The city of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan State	The state of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Country	The country of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Zip Code	The zip code of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Full Name	The adjuster name with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Phone Number	The adjuster phone number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Phone Number Ext	The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Primary Insurance Policy Adjuster Fax Number	The adjuster fax number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Fax Number Ext	The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Number	The policy number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Group Number	The group number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Copay	The copay associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Deductible	The deductible associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Effective Start Date	The effective start date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Effective End Date	The effective end date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Patient Relationship To Insured	The patient relationship to the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Full Name	The full name of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Address Line1	The first address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Address Line2	The second address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured City	The city of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured State	The state of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Country	The country of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Zip Code	The zip code of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured ID Number	The ID number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Social Security Number	The social security number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Date of Birth	The date of birth of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Gender	The gender of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Notes	The notes on the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Company ID	The unique identifier of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Company Name	The name of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Secondary Insurance Policy Plan ID	The unique identifier of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Secondary Insurance Policy Plan Name	The name of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Secondary Insurance Policy Plan Address Line1	The first address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Address Line2	The second address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan City	The city of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan State	The state of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Country	The country of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Zip Code	The zip code of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Full Name	The adjuster name with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Phone Number	The adjuster phone number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Phone Number Ext	The adjuster phone number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Fax Number	The adjuster fax number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Fax Number Ext	The adjuster fax number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Number	The policy number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Group Number	The group number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Copay	The copay associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Deductible	The deductible associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Effective Start Date	The effective start date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Effective End Date	The effective end date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Patient Relationship To Insured	The patient relationship to the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Full Name	The full name of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Address Line1	The first address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Address Line2	The second address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured City	The city of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Secondary Insurance Policy Insured State	The state of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Country	The country of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Zip Code	The zip code of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured ID Number	The ID number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Social Security Number	The social security number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Date of Birth	The date of birth of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Gender	The gender of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Notes	The notes on the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Authorization 1 Number	The authorization number associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Insurance Plan Name	The insurance plan name associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Number Of Visits	The number of visits authorized with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Number Of Visits Used	The number of visits used for the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Full Name	The insurance contact name associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Phone	The insurance contact phone number associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Phone Ext	The insurance contact phone number extension associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Notes	The authorization notes associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Start Date	The start date associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 End Date	The end date associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number	The authorization number associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Ins Plan Name	The insurance plan name associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number Of Visits	The number of visits authorized with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number Of Visits Used	The number of visits used for the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Contact Full name	The insurance contact name associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Contact Phone	The insurance contact phone number associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Contact Phone Ext	The insurance contact phone number extension associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Notes	The authorization notes associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No

Authorization 2 Start Date	The start date associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 End Date	The end date associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Number	The authorization number associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Ins Plan Name	The insurance plan name associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Number Of Visits	The number of visits authorized with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Number Of Visits Used	The number of visits used for the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Full name	The insurance contact name associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Phone	The insurance contact phone number associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Phone Ext	The insurance contact phone number extension associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Notes	The authorization notes associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Start Date	The start date associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 End Date	The end date associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Alert Message	The alert message related to this patient.	Patient > Alerts	No	No
Alert Show When Displaying Patient Details	True if the alert message related to this patient should show when displaying patient details. False otherwise.	Patient > Alerts	No	No
Alert Show When Scheduling Appointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	Patient > Alerts	No	No
Alert Show When Entering Encounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	Patient > Alerts	No	No
Alert Show When Viewing Claim Details	True if the alert message related to this patient should show when viewing claim details. False otherwise.	Patient > Alerts	No	No
Alert Show When Posting Payments	True if the alert message related to this patient should show when posting payments. False otherwise.	Patient > Alerts	No	No
Alert Show When Preparing Patient Statements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	Patient > Alerts	No	No
Collection Category Name	The name of the collection category related to this patient.	Patient > Account	Yes	No
Statement Note	The last statement note posted to this patient's account.	Patient > Account	No	No
Last Diagnosis	The last diagnosis entered for this patient.	Patient > Account	No	No
Last Appointment Date	The last appointment scheduled for this patient.	Patient > Account	No	No
Last Encounter Date	The service date of the last encounter entered for this patient.	Patient > Account	Yes	No
Last Statement Date	The date of the last patient statement sent to this patient.	Patient > Account	No	No
Last Payment Date	The posting date of the last payment received from this patient.	Patient > Account	No	No
Charges	The total charges entered for this patient.	Patient > Account	No	No
Adjustments	The total adjustments entered for this patient.	Patient > Account	No	No
Insurance Payments	The total insurance payments posted for this patient.	Patient > Account	No	No
Patient Payments	The total patient payments posted for this patient.	Patient > Account	No	No
Insurance Balance	The insurance balance pending on charges associated with this patient.	Patient > Account	No	No

Patient Balance	The patient balance on charges assigned to this patient.	Patient > Account	No	No
Total Balance	The total balance related to this patient.	Patient > Account	No	No

5.4 Providers

The Provider table is used to return provider and referring provider data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Field Name	Description	Where to Find in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the provider.	Provider details	No	Yes
Created Date	The date the provider was created.	n/a	Yes	Yes
Last Modified Date	The date the provider was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes
Type	Either "Normal Provider" or "Referring Provider".	Settings > Providers or Settings > Referring Physicians	Yes	Yes
Full Name	The full name of the provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes
Prefix	The prefix of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
First Name	The first name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Middle Name	The middle name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Last Name	The last name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Suffix	The suffix of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Degree	The degree of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Social Security Number	The social security number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
National Provider Identifier	The national provider identifier (NPI) of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Specialty Name	The specialty name associated with the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Billing Type	The type of provider for Kareo billing purposes.	Settings > Providers or Settings > Referring Physicians	No	Yes
Active	True if the provider is active. False otherwise.	Settings > Providers or Settings > Referring Physicians	No	Yes
Department Name	The department name related to this provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes

Encounter Form Name	The name of the encounter form related to this provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Address Line1	The first address line of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Address Line2	The second address line of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
City	The city of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
State	The state of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Country	The country of the provider (if different than the U.S.).	Settings > Providers or Settings > Referring Physicians	No	Yes
Zip Code	The zip code of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Email Address	The email address of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Home Phone	The home phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Home Phone Ext	The home phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Work Phone	The work phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Work Phone Ext	The work phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Mobile Phone	The mobile phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Mobile Phone Ext	The mobile phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Pager	The pager number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Pager Ext	The pager number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Fax	The fax number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Fax Ext	The fax number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Notes	The notes related to this provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Practice ID	The unique identifier of the practice related to this provider.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Active	True if the provider performance email reports are active for this provider. False otherwise.	Settings > Providers or Settings > Referring Physicians	No	No

Provider Performance Report Scope	The information presented on the provider performance email reports: Provider, Practice, or Both.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Frequency	The frequency with which the provider performance email reports are sent to this provider.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Delay	The delay in days for the provider performance email reports from the end of a period.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report CC Email Recipients	The email address of any recipients that should receive the provider performance email reports in addition to the provider.	Settings > Providers or Settings > Referring Physicians	No	No

5.5 Transactions

The Transactions table is used to return financial transaction data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Field Name	Description	Where to Find in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the transaction.	n/a	No	Yes
Last Modified Date	The date the transaction was last modified.	Varies by transaction	Yes	Yes
Practice Name	The name of the practice related to this transaction.	Varies by transaction	Yes	Yes
Transaction Date	The date the transaction was entered by the user.	Varies by transaction	Yes	Yes
Posting Date	The posting date of the transaction as specified by the user.	Varies by transaction	Yes	Yes
Service Date	The service date of the transaction, if applicable.	Varies by transaction	Yes	Yes
Type	The type of transaction.	Varies by transaction	Yes	Yes
Patient ID	The unique identifier of the patient related to this transaction, if applicable.	Varies by transaction	No	Yes
Patient Full Name	The full name of the patient related to this transaction, if applicable.	Varies by transaction	No	Yes
Payer Type	The payer type related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Insurance Order	The order of the insurance related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Insurance ID	The unique identifier of the insurance related to this transaction, if applicable.	Varies by transaction	No	Yes
Insurance Company Name	The name of the insurance company related to this transaction, if applicable.	Varies by transaction	No	Yes
Insurance Plan Name	The name of the insurance plan related to this transaction, if applicable.	Varies by transaction	No	Yes
Procedure Code	The procedure code related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Description	The description of this transaction.	Varies by transaction	No	Yes
Amount	The amount of this transaction, if applicable.	Varies by transaction	No	Yes
Practice ID	The unique identifier of the practice related to this transaction.	Varies by transaction	No	No