



## Document Storage Policy & Best Practices

Document storage within the Kareo application is available for practices subscribed to a Plus, Complete or Max plan. You can add a maximum of 100MB per month, per provider of faxed, scanned or digital (e.g., Word/Excel) documents; if your storage exceeds 100MB for a provider within a month, your account will be charged \$15 for each additional 100MB of storage space. Because scanned documents can take up a large amount of storage space, this document provides recommendations to help you maximize it.

With document scanning you can:

- Scan documents directly into Kareo using any Windows-compatible, TWAIN-compliant scanner
- Preview pages as they are scanned
- Adjust the page size, color mode, resolution, brightness or contrast
- Add a description

We recommend scanning documents at the lowest resolution and in black & white whenever possible.

Resolution is counted in terms of dots per inch (dpi): the lower the dpi, the lower the quality of the scan, however, lower resolution images will also take up less storage. For all but very detailed images, we recommend keeping the resolution around 150 dpi.

Documents with colored images affect your storage space; the less color in a document, the less storage is required. For any image that does not require color, or a lot of detail, we recommend keeping the *Color Mode* set to *Black and White*.

- Colored images require at least 24 times the amount of storage than black and white.
- Black and white images require only 30-50 kilobytes of storage per scanned page around 150 dpi.
- Grayscale images will store a black and white image, but will differentiate shades of gray; grayscale requires at least 8 times more storage than black and white images.
- Palette images, if available with your scanner, will store some limited color information, and will take as much storage as grayscale images.

A helpful rule of thumb is: If certain pages within a document require more detail than black and white, try grayscale first before opting for color. If you need to scan information that requires color, do so only for the few pages that require it.

For detailed instructions on scanning, faxing and storing documents, see *Documents* in the Kareo help files.

For information about TWAIN-compliant devices, visit [www.twain.org](http://www.twain.org).

