

The Kareo logo consists of the word "kareo" in a lowercase, sans-serif font, with a stylized infinity symbol integrated into the letter 'o'. The logo is white and is contained within a white rounded rectangular shape. A small "TM" trademark symbol is located to the upper right of the logo.

kareo™

New Customer  
Implementation Checklist  
September 2010



## Kareo Implementation Checklist

√	Tasks	Description	Person Responsible	Date Completed	Comments
	Getting started	Sign up for Kareo, select edition and support plan, complete account information, and download application.			
	Enroll in electronic services	Learn about the enrollment process and complete enrollment requirements.			
	Arrange data import	Arrange for data import services if you wish to import your data from another system.			
	Set up company	Set up each practice record. Set up company security policy, security groups and users, insurance companies/plans, code sets, and other company-wide settings.			
	Set up one or more medical practices	Set up providers, service locations, group numbers, departments, contracts and other practice-specific settings.			
	Set up appointment scheduler for each medical practice	Set up appointment scheduler for each medical practice that will be using the appointment scheduler, including setting up office hours, practice resources, reasons, scheduling rules, etc. Note that the appointment scheduler is only available in the Enterprise, Solo or Trail Edition.			
	Set up patient records for each medical practice	Set up patient records, including patient demographic information, cases, insurance policy information, etc.			

On the following pages you will find a breakdown of each of the task groups listed above; along with links to the Kareo website, the Kareo Help & Support site, or to the Online Help system where you will find step-by-step instructions for completing each task.

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 M/C– Max and Complete

P/B - Basic Edition  
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## Getting Started

√	M C	P B	To Do	Description	Resource
	X	X	Introducing Kareo	Learn about Kareo and take a tour	See <a href="http://www.kareo.com/tours">http://www.kareo.com/tours</a>
	X	X	Review Software Editions	Learn about the benefits of each Kareo edition, and view the product comparison chart	See <a href="http://www.kareo.com/pricing">http://www.kareo.com/pricing</a>
	X	X	Sign Up	Click the Signup button to sign up for Kareo and a Support Plan	See <a href="http://www.kareo.com/pricing">http://www.kareo.com/pricing</a>
	X	X	Create Account & Place Order	Complete the account information; including company name, contact information, and payment method, if applicable.	
	X	X	Download Application	Download and install the application.	See <a href="http://www.kareo.com/support/download-kareo">http://www.kareo.com/support/download-kareo</a> See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See "Kareo User Manual" at <a href="https://help.kareo.com/documents/pdf/Kareo_UserManual">https://help.kareo.com/documents/pdf/Kareo_UserManual</a>
	X	X	Get to Know the Work Environment	Learn the menu system, tool bar controls, navigation pane, task panes, and data entry tips. Also learn how to use search functions to locate records in the system.	<b>Online Help:</b> Help > Kareo Help > Getting Started > Understanding the Work Environment  For graphic illustrations of the work environment, see Sections 2.2 and 2.3 of the "Business Office Quick Reference Guide." This Guide can be downloaded from the "Guide" section of the Kareo Help & Support Website at <a href="http://www.kareo.com/support/guides">http://www.kareo.com/support/guides</a> .

## Enrollment

√	M C	P B	To Do	Description	Resource
	X	X	Enroll in Electronic Claim Services	<p>Enrolling in electronic services for those payers that do not require a payer-specific enrollment agreement, you need only to complete Kareo's Online Enrollment Request form. This form can be accessed from the Enrollment section of Kareo's Help &amp; Support website.</p> <p>For payers that do require a separate payer enrollment agreement prior to submitting electronic claims, receiving electronic remittance reports, and receiving electronic funds transfers, you will need to access the enrollment section of the Kareo Help &amp; Support website, find payers, download and complete the individual payer agreements, and then submit those agreements directly to the payer.</p>	To learn more about the enrollment process, see <a href="https://help.kareo.com/documents/pdf/Kareo_EnrollmentGuideForElectronicServices">https://help.kareo.com/documents/pdf/Kareo_EnrollmentGuideForElectronicServices</a>
	X	X	Learn about Patient Statement services	Learn about patient statements services, and how to configure your system to send patient statements.	To learn more about Kareo's patient statement services, see <a href="https://help.kareo.com/documents/pdf/Kareo_PatientStatementGuide">https://help.kareo.com/documents/pdf/Kareo_PatientStatementGuide</a>

## Data Import

√	M C	P B	To Do	Description	Resource
	X	X	Arrange for Data Import Services	<p>Most companies prefer to start off with a fresh database as they transition over to Kareo. However, you can also import your data from another billing system if desired.</p> <p>If you have the technical knowledge to get your patient data into the Kareo standard file format, we can provide a quick turnaround for your data conversion. If you are currently using one or of the more common practice management applications on the market, chances are we have built conversion tools that makes this process easy. For more complex or sophisticated data import projects, our programmers offer custom data import as a professional service.</p> <p>Please note that it could take up to 3 or 4 weeks to complete your data import, depending on the option you choose. To learn more about importing your data, please refer to the Setup&gt;Data Import section of the Kareo Help &amp; Support website.</p>	To learn more about Kareo's data import services, see <a href="https://help.kareo.com/setup/data">https://help.kareo.com/setup/data</a>

## Set up The Company

√	M C	P B	To Do	Description	Resource
	X	X	Add Practices	Add one or more practice records. The practice record identifies the name of the practice, and includes the practice's Tax ID and NPI number; the software edition used by the practice; general contact information as well as the contact information for the administrator and billing office. You can also assign a kFax number to those practices that use the Max, Complete, or Plus edition of the software.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> . <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Managing Practices > Adding a Practice
	X	X	Configure Security Groups	Set up one or more security groups. When you sign up for Kareo, you will automatically be assigned a security group level as application "Administrator" which allows you access to all areas of the application. However, you will need to set up additional security groups for other users that will be accessing the system. A Security Group Template has been designed to assist you in defining the various levels of security groups. This template can be found under the "Guides" section of the Help & Support Website.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> . See recorded webinar entitled "Configuring Users and Security" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> . See "Security Group Template" at <a href="https://help.kareo.com/documents/xls/Kareo_SecurityGroupTemplate">https://help.kareo.com/documents/xls/Kareo_SecurityGroupTemplate</a> . <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Configuring Users and Security > Configuring Security Groups
	X	X	Add User Roles	<b>Optional</b> – There are already two default user roles set up in the system; one for Medical Office Users, and one for Business Office users. However, if you wish to define additional user roles, you can use this task to do so.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> . See recorded webinar entitled "Configuring Users & Security" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> . <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Configuring Users and Security > Setting up User Roles
	X	X	Add User Accounts	Set up a user account for each person within the business office and within the client practices you serve. When you set up a user account, you will enter the general contact information for each user, select the role of the user, select the security group the user will be assigned to, and select one or more medical practices to which the user will have access.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> . See recorded webinar entitled "Configuring Users & Security" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> . <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Configuring Users and Security > Setting up User Accounts

X	X	Configure Security Policy	Configure the security policy that will apply to your entire organization, including all practices associated with your company account. Kareo has set up a basic set of defaults in the system that meet the needs of most companies. However, the administrator has the option of changing any of these default settings if desired.	See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See recorded webinar entitled “Configuring Users & Security” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Configuring Users and Security > Configuring the Security Policy
X	X	Set up Insurance Companies/Plans	Set up the list of insurance companies and plans that will be used for submitting claims.  When setting up the insurance companies in the system, you will also configure various settings required to submit paper and electronic claims. You may wish to set up all of your insurance company records first; and then once you have enrolled in electronic services, and once you have set up your provider and group numbers in the system, you can then return to each insurance company record and configure the paper and electronic claim settings for the insurance company.	See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See recorded webinar entitled “Setting Up Insurance Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Setting up Insurance Lists
X	X	Set up Codes	Kareo automatically provides a standard list of procedure, procedure modifier, diagnosis, and adjustment codes. You can add to or edit these codes as needed. You can also provide local names for codes; and, if desired, you can set up procedure categories in the system, and then return to each procedure code record and link certain procedures to specific procedures categories. Setting up procedure categories is optional; however, setting up procedure categories allow you to run certain reports in the system based on procedure category.	See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See recorded webinar entitled “Managing Procedure Codes and Diagnosis Codes” and “Managing Other Codes” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Managing Codes
X	X	Set up Attorney Records	If your client practices have a list of attorneys that are associated with patient records, you can create attorney records in the system and then link those attorneys to patient cases.	See recorded webinar entitled “Setting Up Other Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Setting up Other Lists > Setting up Attorneys
X	X	Set up Employer Records	If your client practices have a list of employers that are associated with patient records, you can create employer records in the system and then link those employers to patient records.	See recorded webinar entitled “Setting Up Other Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Setting up Other Lists > Setting up Employers
X	X	Set up Workers’ Comp Offices	If your client practices have a list of workers’ compensation offices that are associated with patient records, you can create a list of workers’ compensation office records in the system and then link those records to patient cases.	See recorded webinar entitled “Setting Up Other Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up The Company > Setting up Other Lists > Setting up Workers’ Comp Offices

	X	X	Set up Payer Scenarios	<p><b>Optional</b> – Kareo provides a standard list of payer scenarios that are used for patient cases. However, you can add to or customize this list so that it corresponds to the way you want to categorize billing scenarios when generating reports. If desired, you can also opt to withhold patient statements for certain payer scenarios. Setting up payer scenarios can be done at the time of your initial setup, or it can be done at a later time as the need arises.</p>	<p>See recorded webinar entitled “Setting Up Other Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up The Company &gt; Setting up Other Lists &gt; Setting up Payer Scenarios</p>
	X	X	Set up Collection Categories	<p><b>Optional</b> – To assist you in collecting on overdue patient accounts, you can set up collection categories in the system; and once a patient’s account becomes outstanding, you can place that patient in a specific collection category. Setting up collection categories has multiple benefits: You can choose to send or withhold patient statements for a patient that has been placed in a collection category; you can automatically add collection messages on statements sent to the patient; you can generate reports on patients that have outstanding accounts; and you can define alert messages that will automatically appear when performing various tasks in the system (when scheduling a patient appointment, entering patient or insurance payments, etc.) Setting up collection categories can be done at the time of initial setup or it can be done at a later time as the need arises.</p>	<p>See recorded webinar entitled “Setting Up Other Lists” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up The Company &gt; Setting up Other Lists &gt; Setting up Collection Categories.</p>

## Set Up One or More Practices

√	M C	P B	To Do	Description	Resource
	X	X	Viewing Practice Information	When you set up your company, you entered the practice record, selected the Kareo edition and support plan, entered contact information, and set up the kFax number for the practice. Users on the system can review this information by clicking <b>Practice Information</b> from the <b>Settings</b> menu. If any of this information is incorrect, the user can contact you to make any necessary changes.	<b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Viewing Practice Information
	X	X	Set up Providers	Providers are physicians and other medical professionals within the practice who provide billable services to patients. The provider record contains the provider's name, SSN and NPI numbers, specialty, degree, provider type, as well as general contact information. There is also a section to record the provider numbers assigned to the provider by insurance companies, and a section for attaching documents to the provider record.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See "Kareo Claim Settings Guide" at <a href="https://help.kareo.com/documents/pdf/Kareo_ClaimSettingsGuide">https://help.kareo.com/documents/pdf/Kareo_ClaimSettingsGuide</a> (This is a <b>MUST READ</b> prior to setting up provider records.) See recorded webinar entitled "Setting Up Providers" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Setting up Providers
	X	X	Set up Service Locations	Service locations are places where the providers render medical services to patients. This includes the main office, satellite offices, local hospitals, outpatient clinics, rehabilitation centers, etc. Service locations must be set up before scheduling appointments or entering encounters into the system.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> See recorded webinar entitled "Providers, Numbers, and Locations at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Setting up Service Locations
	X	X	Set up Departments	<b>Optional</b> - If a medical practice wishes to categories their providers into separate departments so that they are better able to track financial data related to individual departments, use the New Department task to set up these departments. Along with setting up departments, be sure to return to the provider record and select the default department that is associated with the provider.	<b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Setting up Departments

X	X	Set up Group Numbers	<p>Group numbers are identification numbers assigned to a medical practice by third-party organizations such as government agencies, insurance companies, and other organizations. Group numbers are required by many insurance companies for reimbursement of medical claims.</p> <p>Note: Only applies to customers that signed up for Kareo before November 7, 2009.</p>	<p>See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a></p> <p>See Kareo Claim Settings Guide“ at <a href="http://www.kareo.com/documents/pdf/Kareo_ClaimSettingsGuide">http://www.kareo.com/documents/pdf/Kareo_ClaimSettingsGuide</a> (This is a <b>MUST READ</b> prior to setting up group numbers for the practice.)</p> <p>See recorded webinar entitled “Providers, Numbers, and Locations” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up a Practice &gt; Setting up Group Numbers</p>
X	X	Set up Contracts & Fee Schedules	<p>You will use the Contracts task to manage the fee schedules and to manage the contractual agreements between insurance companies and the health care providers within the medical practice.</p>	<p>See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a></p> <p>See recorded webinar entitled “Fee Schedules and Contracts” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up a Practice &gt; Setting up Contracts</p>
X	X	Set up Encounter Forms	<p>Encounter forms are similar to the preprinted encounter forms (also referred to as superbills or fee tickets) used by providers within a practice. Basically, they are templates for the diagnoses and procedures codes normally used during encounters with patients. After setting up one or more encounter forms, be sure to return to the provider record and select the default encounter form that will be used by the provider.</p>	<p>See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a></p> <p>See recorded webinar entitled “Encounter Forms” at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up a Practice &gt; Setting up Encounter Forms</p>
X	X	Set up Procedure Macros	<p><b>Optional</b> - Procedure macros (also referred to as “explosion codes”) are special procedures that, when entered within an encounter, loads multiple procedures, modifiers, and diagnoses codes into a procedure line item. Since many patient visits are nearly identical, these procedure macros provide a convenient shortcut that can dramatically save time when entering procedures performed during an encounter.</p>	<p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up a Practice &gt; Setting up Procedure Macros</p>
X	X	Set up Referring Physicians	<p>Referring physicians are third-party physicians who have referred patients to the various providers within the practice. Entering referring physicians is important for several reasons. First, many insurance companies require information about referring physicians for proper reimbursement on claims. Second, you can use analysis reports that enable you to track the income generated from referrals. Finally, the referring physician records include information you may need in order to contact the referring physician.</p>	<p>See “Kareo Implementation Guide for Company Administrators” at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt; Setting up a Practice &gt; Setting up Referring Physicians</p>

X	X	Set up Categories	<b>Optional</b> - The Categories task allows a practice to set up a custom-defined category field within a payment record and then generate various reports based on payment category.	See recorded webinar entitled "Setting Up Other Lists" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Setting up Categories
X	X	Set the Date for Closing the Books	Set the closing date to prevent changes to financial transactions dated prior to the closing date.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Managing Practice Options > Setting the Date for Closing the Books
X	X	Set Reporting Options	Set the closing date for reports generated by the system. The purpose of setting the report closing date is to give the billing company the flexibility of controlling what the client is able to view within the reports at any given time.	See "Kareo Implementation Guide for Company Administrators" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a> <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Managing Practice Options > Setting Reporting Options
X	X	Configure Electronic Claims Options	Once you have completed the Kareo Enrollment Request form and Kareo has registered the practice with one or more clearinghouse that will be used for processing claims, Kareo will notify you to activate the practice.  Once notified, you will need to use the Electronic Claims Options task to change the setting to "Live Mode." Be sure not to change this setting until you have been notified by Kareo to do so.	See the guide entitled "Instructions for Activating Electronic Claims" at <a href="https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators">https://help.kareo.com/documents/pdf/Kareo_ImplementationGuideForCompanyAdministrators</a>  See recorded webinar entitled "Activating Electronic Claims" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> .  This webinar will demonstrate how to set the practice to live mode, and how to activate an insurance company for sending electronic claims once your enrollment has been approved. <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Managing Practice Options > Configuring Electronic Claims Options
X	X	Configure Patient Statement Options	Before submitting your first batch of patient statements, you will need to use the Patient Statement Options task to configure your settings for patient statement. Once you've sent your first batch of statements, you will be automatically enrolled in this service.	See "Kareo Patient Statement Guide" at <a href="https://help.kareo.com/documents/pdf/Kareo_PatientStatementGuide">https://help.kareo.com/documents/pdf/Kareo_PatientStatementGuide</a>  See recorded webinar entitled "Patient Statements" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> . <b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Managing Practice Options > Configuring Patient Statement Options <b>Online Help:</b> Help > Kareo Help > Preparing Patient Statements.
X	X	Configure Encounter Options	You can set up system defaults; such as the default scheduling provider, rendering provider, supervising provider, and service location that will appear as defaults within the charge entry screen. You can also choose to hide procedure and diagnosis descriptions when entering charges on an encounter record. And, lastly, you can configure the system to automatically bill patients for missed copays.	<b>Online Help:</b> Help > Kareo Help > Setting up a Practice > Managing Practice Options > Configuring Encounter Options

## Set up Patient Records for Each Practice

√	M C	P B	To Do	Description	Resource
	X	X	Set up Patient Records	<p>Enter the patients associated with the medical practice. A patient record includes the patient demographics, guarantors, employers, insurance policies, case details, patient alerts, prior patient activities, document attachments, and more.</p> <p>Note: If you are converting to Kareo from another system, you can also import your existing customer data into Kareo. To learn about data import services see the section within the checklist entitled "Data Import."</p>	<p>See recorded webinar entitled "Managing Patient Records" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a></p> <p><b>Online Help:</b> Help &gt; Kareo Help &gt;Managing Patient Records</p>

## Set Up the Appointment Scheduler for Each Practice

√	M C	P B	To Do	Description	Resource
	X		Set up Resources	You can set up an unlimited number of custom resources for scheduling purposes; appointments with providers, appointments with non-clinical staff members, examination rooms, x-ray rooms, etc.	See recorded webinar entitled "Appointment Scheduling" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Using the Appointment Scheduler > Customizing the Scheduler > Setting up Resources
	X		Set up Appointment Reasons	Use "Appointment Reasons" to create templates for common types of appointments within the practice. With appointment reasons, you can pre-configure appointment types with default options including color codes, one or more providers, one or more resources, and appointment durations. Then when you schedule a new appointment, simply add one of your appointment reasons to the new appointment and the system will automatically set up the color coding, providers, resources, and duration of your new appointment.	See recorded webinar entitled "Appointment Scheduling" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Using the Appointment Scheduler > Customizing the Scheduler > Setting up Appointment Reasons
	X		Configure Appointment Options	Configure global appointment settings for the practice. You can set up the office hours for the practice, configure the increments used for time slots on the calendar, turn color coding on/off, turn the timeblock legend on/off, and turn enforcement of timeblock rules on/off. These settings affect all locations and resources within the practice.	See recorded webinar entitled "Appointment Scheduling" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Using the Appointment Scheduler > Customizing the Scheduler > Configuring Appointment Options
	X		Set up Timeblocks	Use the Timeblock Calendar task to set up timeblocks for specific types of appointments (e.g. New Patient Visits, Established Patient Visits, Surgeries, Emergencies, etc.) You can assign a color to each timeblock. You can also configure recurring timeblocks, establish scheduling rules for your providers, and define permissible reasons and service locations for each timeblock.	See recorded webinar entitled "Appointment Scheduling" at <a href="http://www.kareo.com/support/training-videos">http://www.kareo.com/support/training-videos</a> <b>Online Help:</b> Help > Kareo Help > Using the Appointment Scheduler > Using the Timeblock Calendar

## Training & Support

√	M C	P B	To Do	Description	Resource
	X	X	Online Help	Kareo provides a complete Online Help system to walk you through each step of setting up your company and your practice, entering patient records, entering encounters, managing claims, managing clearinghouse reports, entering and tracking payments and refunds, and working with documents and reports.	<p><b>To access Online Help...</b></p> <p>Once logged into the application, click Help &gt; Kareo Help. This will launch the Online Help system.</p> <p>Also note that a feature has been recently added to the Task Title Bar of many of the tasks within Kareo. If you open a task and see a <b>Question Mark (?)</b> to the left of the <b>Close (X)</b> button on the Task Title Bar, you can click that button to open the specific Help topic that corresponds to that task.</p>
	X	X	Recorded Webinar Training	Kareo offers a comprehensive library of prerecorded webinars to address your training needs. Our webinars are web-based videos covering a variety of topics from setting up a your company and individual practices; managing patient records, entering encounters, tracking claims, entering payments, and managing documents, and generating reports.	<p><b>To access the Recorded Webinars...</b></p> <p>Once logged into the application, click Help &gt; Kareo Support Website; and then click the "Training" tab on the Help &amp; Support Dashboard.</p>
	X	X	Reference Materials	Along with the prerecorded webinars, Kareo also offers a complete library of documentation that can be downloaded and printed that will guide you through using the various features within the Kareo application. These guides include the Kareo User Manual (which is a printed version of Online Help); Quick Reference Guides complete with screen illustrations that can be used for training business and medical office staff members; and various feature guides that will explain in more detail how to perform various functions within Kareo.	<p><b>To access the Library of Reference Materials...</b></p> <p>Once logged into the application, click Help &gt; Kareo Support Website; and then click the "Guides" tab on the Help &amp; Support Dashboard.</p>
	X	X	Kareo Blog	Subscribe to the Kareo Blog. This is a Weblog by the team at <b>Kareo</b> about Kareo's products, partners & competitors, medical billing, healthcare information technology, and much more.	<p><b>To access the Kareo Blog...</b></p> <p>Once logged into the application, click Help &gt; Kareo Support Website; and then click the "Blog" tab on the Help &amp; Support Dashboard.</p>
	X	X	Status	This is an extended Blog; which reports and updates on critical support issues, upcoming software releases, patch releases, maintenance messages, holiday hours, etc.	<p><b>To access Kareo Status...</b></p> <p>Once logged into the application, click Help &gt; Kareo Support Website; and then click the "Status" tab on the Help &amp; Support Dashboard.</p>
	X	X	Live Webinars	Register and participate in a curriculum of over seven of live webinars. Each webinar is scheduled for an hour and open up to Q&A at the end of each presentation.	<p><b>To access the Training Catalog...</b></p> <p>Click onto the link to review the Training Catalog and register for training  <a href="https://student.gototraining.com/82n7r/catalog/109429337">https://student.gototraining.com/82n7r/catalog/109429337</a></p>
	X		One-on-One Training	Kareo also offers one-on-one training. Additional charges apply.	To learn more about one-on-one training, call the Kareo Sales Department at (888) 77-KAREO, (888) 775-2736, option 1.