Kareo PM Implementation Guide

August 2011

Table of Contents

1. Your First Steps with Kareo

Welcome to Kareo! This implementation guide will explain how to get started with the Kareo application. It was written to provide you with an overview of the key concepts you need to know in order to set up your company and one or more practices in Kareo. To ensure a successful and timely implementation of Kareo, please follow the Implementation Checklist below.

In addition to reviewing this guide, Kareo also recommends that you participate in our training program, offered in both live and video formats (see sectionTraining and Help Guides).

1.1 Implementation Checklist

Data Import/ Migration

- ❑ Import data from another system (if applicable)
- ❑ Migrate data from one Kareo account to another (if applicable)

Get Started

- ❑ Download and install the application
- ❑ Attend training Webinars and/or watch video tutorials

Set Up a Practice

- ❑ Setup Wizard: Configure practice information, providers, service locations, contracts, invite users
- ❑ Configure insurance companies/plans
- ❑ Configure security policy, user groups and user roles

Enroll in Electronic Services

- ❑ Read Kareo Enrollment Guide for Electronic Services
- ❑ Find Payers, get enrollment agreements
- ❑ Submit an enrollment request to Kareo

Optional Settings

- ❑ Set up departments, encounter forms, procedure macros
- ❑ Set up other lists and options

Next Steps - Success with Kareo

- ❑ Attend Webinars on using Kareo: encounters, posting payments, sending claims etc.
- ❑ Kareo Blog and industry Webinars that help you improve your billing process

2. Data Import/Migration

If you have data from another practice management application that you want to import into Kareo, or if you want to migrate data from one Kareo account to another, Kareo offers data import/migration services for a flat fee.

Generally, you provide us with your data in either a Comma–Separated Value (.CSV) or Microsoft Excel (.XLS) file format. For more complex data import projects, our programmers offer custom data import as a professional service.

To discuss the requirements of your project and schedule an import or migration, contact one of our knowledgeable Sales Engineers at sales@kareo.com or call 888-775-2736.

3. Get Started

Training Resources	
	Webinar 1 – Getting Started
	Video – Welcome to Kareo

3.1 Install the Application

3.1.1 System Requirements

Minimum Requirements

The following are minimum system requirements for proper use of the application:

- 2 GHz Intel Pentium 4, Pentium D, or Core processor
- Microsoft Windows XP Professional
- Video card capable of 1024 x 768 screen resolution
- 17" Monitor or larger
- 1 GB RAM or greater
- Broadband Internet connection with speed of 768 Kbps or greater
- To print claim forms and various reports from the Kareo application, you will also need access to a printer. This could either be a network printer or a printer connected directly to your computer.

Recommended Requirements

The following are recommended system requirements for best use of the application:

- 1.8 GHz Intel Core2, i5, or i7 processor
- Microsoft Windows 7 Professional
- Video card capable of 1280 x 1024 screen resolution or greater
- 19" Monitor or larger, dual monitors
- 2 GB RAM or greater
- Broadband Internet connection with speed of 1.5 Mbps down, 768 Kbps up or greater
- TWAIN-compliant scanner.
- To print claim forms and various reports from the Kareo application, access to a printer is required. This could either be a network printer or a printer connected directly to your computer.

3.1.2 Download and Install

To install the application

1. Go to http://www.kareo.com/support/download-kareo.
2. Review the Setup Instructions.
3. In order to download the software, you will need a user name and password:
   - Refer to your Kareo confirmation email or contact Kareo Customer Support (support@kareo.com).
4. Click **Download Kareo Now** and follow the installation prompts.

3.2 Log In with User ID/Password

To log in to the application

1. Click **Start > All Programs > Kareo > Kareo** or;

   locate the Kareo icon 

   on your desktop and double-click it.
2. On the *Sign-In* window, enter your user name and password (refer to your confirmation email).
3. Click **Sign In**. If you have not yet set up a practice, the New Practice Setup Wizard will automatically launch.

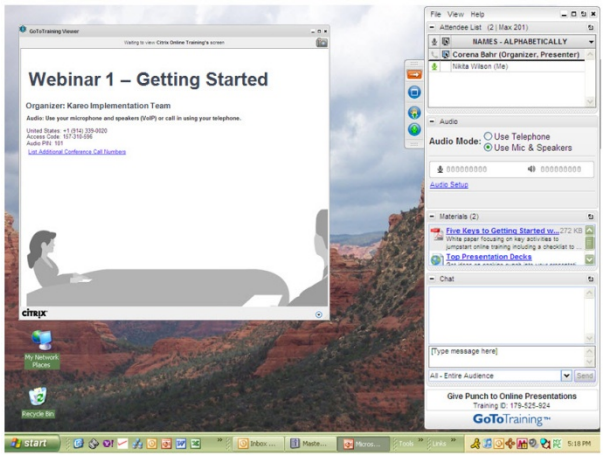
3.3 Training, Help Guides and Support

Kareo offers a comprehensive training program in both live and video formats. Participating in live training is highly encouraged as you will see firsthand how to set up Kareo, learn about usage and best practices as well as have the opportunity to ask questions. Our video library can be accessed at any time, therefore, if you can't make one of the training sessions, or need to review information, the video library is available to fit any schedule.

In addition, Kareo support includes online help files and an extensive library of quick start, implementation and feature-specific help guides.

Answers to FAQ's are here: http://www.kareo.com/support/frequently-asked-questions

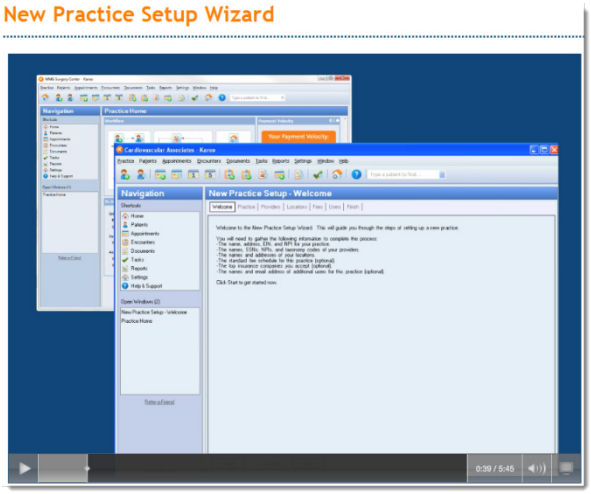
Live Training



As you are setting up and getting to know Kareo, we recommend attending live training which is offered several times per week. Each session takes you step-by-step through Kareo setup and usage, and allows time for question and answer. If you cannot attend live training, recorded versions are available for you to view at yourown pace.

Visit the *Kareo Training Catalog* to register: http://www.kareo.com/support/training/live-webinars

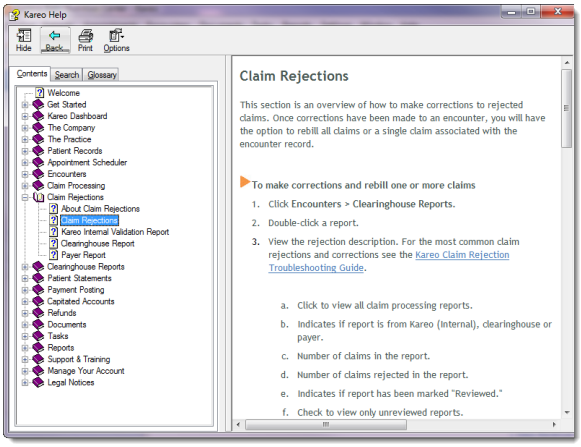
Videos



On-demand video tutorials offer training in a format to fit busy schedules. The videos allow you to watch at your own pace or review information, making them a great supplement to live training.

Visit the *Kareo Support* page to view: http://www.kareo.com/support/training-videos

Kareo Help Files



The Kareo help files, with searchable topics, are accessible from within the Kareo application.

To access the Kareo help files: In Kareo on the top menu, click **Help > Kareo Help**.

Help Guides

Kareo help guides allow you to download and print them for your convenience. The guides vary from a full user manual to more feature-specific ones.

Visit the *Kareo Support* page to view and download: http://www.kareo.com/support/guides

Forum

The User Community gets you in touch with your peers. Exchange best practices or get answers from experienced Kareo users.

You can access the forum with your Kareo login and password: https://help.kareo.com/community/boards

Email and Chat Support

Email and chat support are available to all plan levels.

Hours of Operation: Mon-Fri 5am-5pm (Pacific Time), excluding national holidays.

- Email: Send questions to support@kareo.com. Or, submit and track a support case through the Kareo application: Click **Help > Submit Support Case** in the top menu.
- Chat: To start a chat session, go to www.kareo.com and click **Chat Online Now** in the top right corner of the window.

Phone Support

Phone support is available to Max plans and Email and Phone Support plans. Please have your company information ready.

Hours of Operation: Mon-Fri 6am-5pm (Pacific Time), excluding national holidays.

Phone: 888-775-2736

4. Set Up a Practice

Training Resources	
	Webinar 1 – Getting Started
	Video – New Practice Setup Wizard Video - Setting Up Insurance Lists Video - Configuring Users and Security Video - Getting Started

After you download and install the Kareo application, the next step is to set up at least one practice. Setting up a practice is easy using the *New Practice Setup Wizard*. The setup wizard will automatically launch when you log into Kareo and have not yet set up a practice. If you are a billing company managing multiple practices, you will use the setup wizard to configure each practice.

After completing the setup wizard, you will also need to enter insurance information.

4.1 New Practice Setup Wizard

The New Practice Setup Wizard will guide you to complete all necessary data fields for setting up a practice. When you log in to Kareo and have no practices configured, the New Practice Setup Wizard will automatically launch and guide you through the steps below.

Note that after completing each step, you will have the opportunity to review and confirm the information you entered. If you need to exit out of the setup wizard at any time, the information you entered will be saved.

Welcome: Guides you to identify what information you will need to have on hand in order to complete the setup.

- The name, address, EIN and NPI for your practice.
- The names, SSNs, NPIs and taxonomy codes of your providers.
- The names and addresses of your locations.
- The Standard Fee Schedule for the practice (optional).
- The top insurance companies you accept (optional).
- The names an email address of additional users for the practice (optional).

Practice: Guides you in entering general information about the practice.

Providers: Guides you in entering information about one or more providers who provide billable services.

Locations: Guides you in entering information about one or more service locations; places where healthcare providers render services.

Fees: Guides you in entering the Standard Fee Schedule, which are standard fees billed to health plans and patients for healthcare services. This step is optional and you can choose to add a Fee Schedule at a later time.

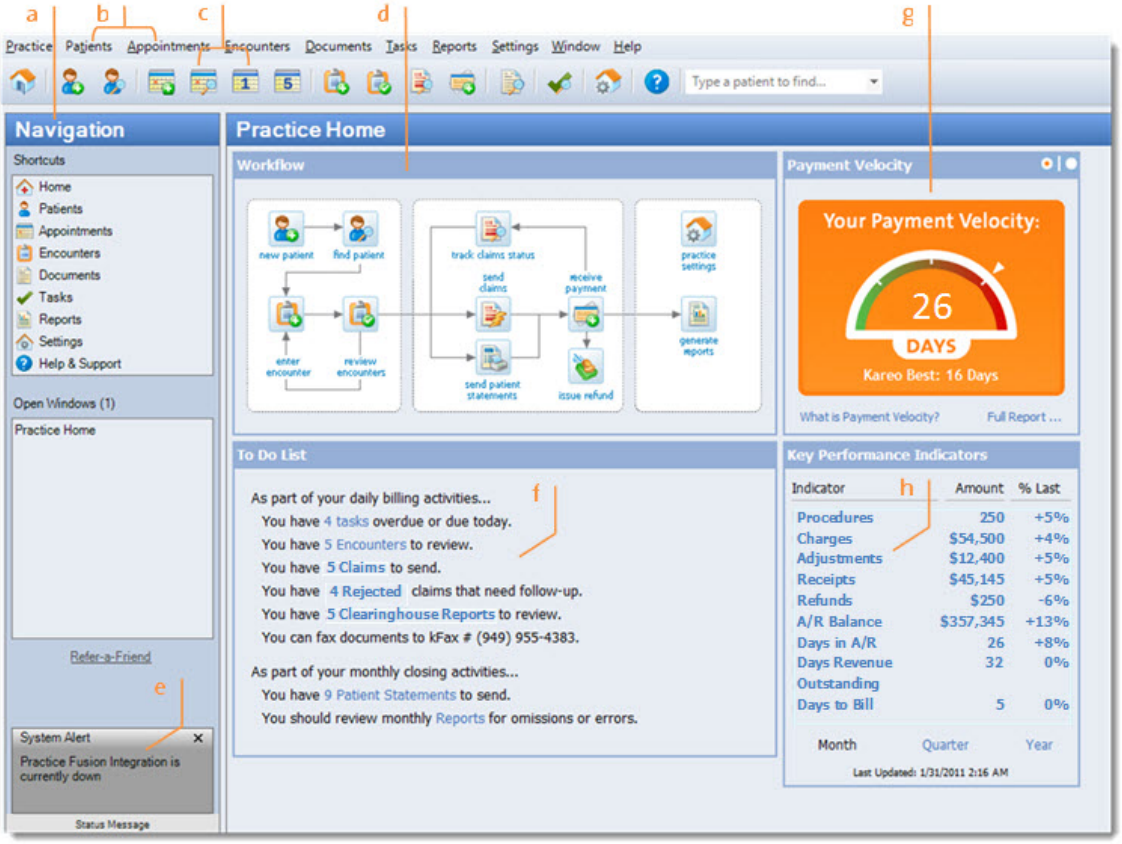
Users: Guides you to adding users who can access the practice information within Kareo, and to select an email invitation for each user you invite. This step is optional and you can choose to add users at a later time.

Finish: Provides options for joining training Webinars, enrolling in electronic claims services and accessing Help & Support.

4.2 Dashboard Navigation

When you open a practice, the Kareo dashboard will always be your starting point, much like a "home page." You can access commands through various points, all depending on your personal preference. The dashboard that you see is determined by your Kareo application administrator.

a. **Navigation:** Lists commonly used shortcuts (Shortcuts) and all windows you have open (Open Windows).
b. **Menu Bar:** Contains drop-down menus of commands.
c. **Toolbar:** Icons denoting shortcuts to most commonly used commands.
d. **Workflow:** A visual guide of shortcuts to your office's workflow.
e. **Status Message:** Notes any messages and alerts as they relate to the Kareo application.
f. **To Do List:** Automatically generated by the Kareo system and helps you track your work. Clickable links take you to the specific area where you can complete that task.
g. **Dashboard Charts:** Depending on your user role, you can switch between the Payment Velocity, A/R Aging and Income Analysis charts.
h. **Key Performance Indicators:** Help you to monitor key metrics that impact the financial and operational health of a medical practice.



4.3 Insurance Information

Kareo stores a single database of insurance information for your account (also known as “Company”). If you manage multiple practices, all practices will be associated with the master insurance list you configure for your account (see section *Insurance Database Management*).

Kareo organizes insurance information into two lists:

- **Insurance Companies:** The insurance company represents a payer or network (Blue Cross Blue Shield, Cigna, Medicare, etc). In Kareo, the insurance company record stores general insurance company information as well as paper and electronic claim settings.
- **Insurance Plans:** The insurance plan represents a specific benefit plan, group or program (PPO, POS, HMO, Healthy Families, etc.) governed or administered by the insurance company. In Kareo, the insurance plan record stores the remit to address which is required for sending paper claims.

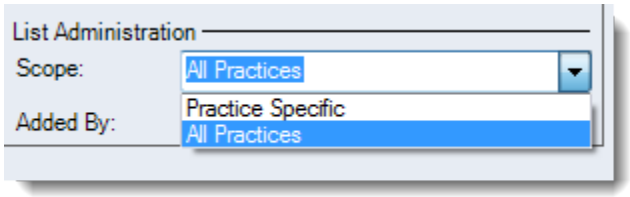
4.3.1 Insurance Database Management

If you manage multiple practices within your account (company), your master insurance list ensures accuracy and eliminates repetitive data entry. The master list you create in Kareo is available across all practices associated with your account. Since a practice may need to add unique insurance records specific to their practice, Kareo provides a setting allowing those insurance records to reflect only within the specified practice; this setting is called the "scope."

You can set the “scope” of any insurance company or plan added to the master list:

All Practices: The insurance company or plan is available to all practices associated with your company.

Practice Specific: The insurance company or plan is only available to the practice you are currently logged into.



The application automatically tracks who added the record and will display this information when this record is accessed in the future. A new insurance company is set to "All Practices" by default. A new insurance plan is set to "Practice Specific" by default.

4.3.2 Insurance Companies

For detailed instructions on configuring insurance company settings, please see *The Company > Insurance Lists* in the online help files.

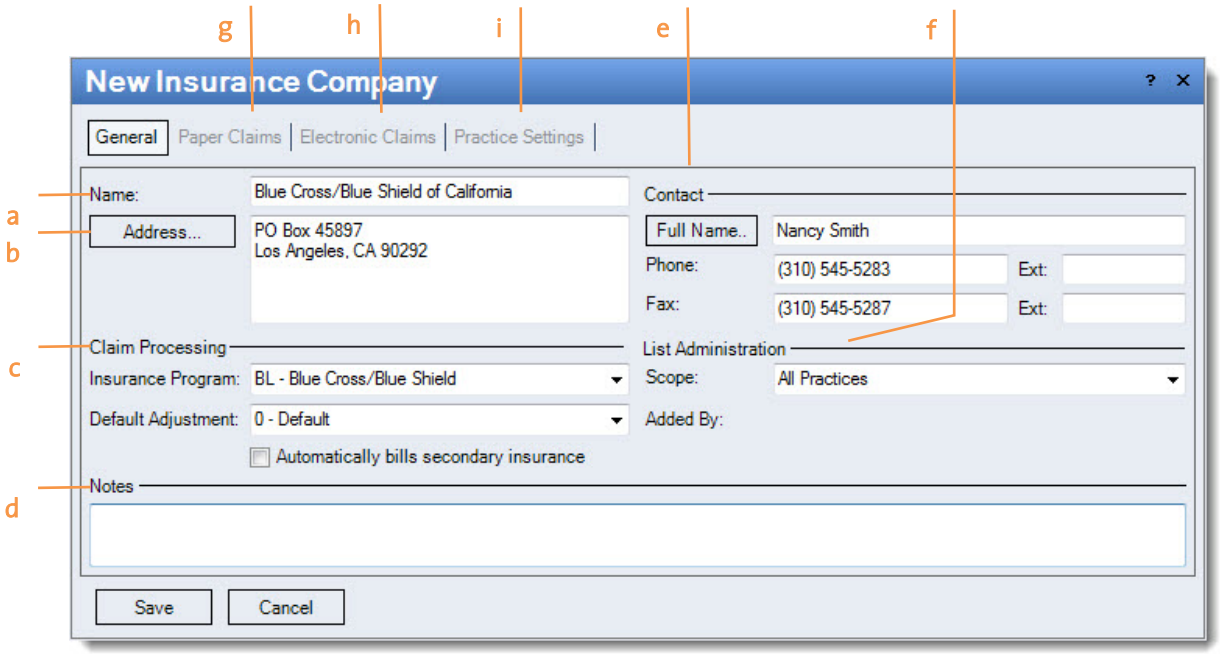
To set up insurance companies

1. Click **Settings > Insurance > New Insurance Company**.

   *Note: As your database grows, it is recommended to first click **Find Insurance Company** each time and check if the insurance company has already been entered. This will avoid duplication.*

2. Enter the information for the insurance company.
3. Click **Save**.

   a. **Name:** Enter insurance company.
   b. **Address (optional):** Enter insurance company address.
   c. **Claim Processing:** Select the insurance program; the most common insurance programs are Blue Cross/Blue Shield, Medicare, Medicaid and Commercial Insurance Co. Select the default adjustment from the drop-down menu. Select if secondary insurance is automatically billed.
   d. **Notes (optional):** Enter any notes for your records regarding this insurance company.
   e. **Contact (optional):** Enter the insurance company contact information.
   f. **List Administration:** Select if this insurance company applies to one or more practices.
   g. **Paper Claims:** Select settings for printing paper claims.
   h. **Electronic Claims:** Select settings for transmitting electronic claims.
   i. **Practice Settings:** Allows you to select practice-specific settings.



4.3.3 Insurance Plans

For detailed instructions on configuring insurance plan settings, please see *The Company > Insurance Lists* in the online help files.

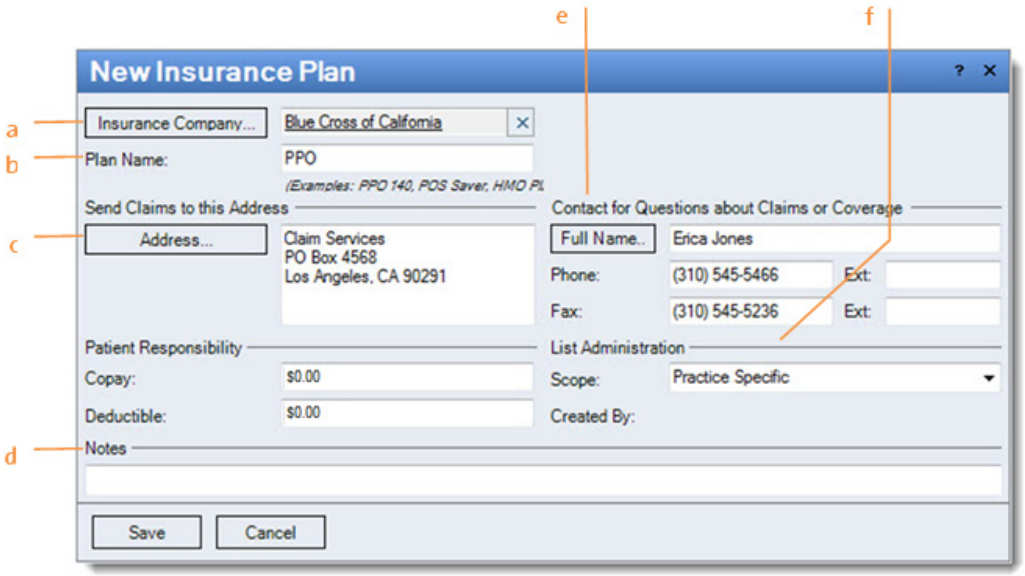
To set up insurance plans

1. Click **Settings > Insurance > New Insurance Plan**.

   *Note: As your database grows, it is recommended to first click **Find Insurance Plan** each time and check if the insurance plan has already been entered. This will avoid duplication.*

2. Enter the information for the insurance plan.
3. Click **Save**.

   a. **Insurance Company:** Click to select the insurance company associated with the plan.
   b. **Plan Name:** Enter the plan name.
   c. **Address:** Enter the address where claims should be sent.
   d. **Notes (optional):** Enter any notes for your records regarding this insurance plan.
   e. **Contact (optional):** Enter the contact information for questions about claims.
   f. **List Administration:** Select if this insurance plan applies to one or more practices. If you are a single practice account, leave the setting at "All Practices."



4.3.4 Claim Settings

Claim settings (for both electronic and paper claims submission) can be formatted after insurance companies and plans have been added into Kareo. For detailed information on claim settings, please see the Kareo Claim Settings Guide.

4.4 Security Policy

The Security Policy applies to your company and all practices associated with it. This is important for proper compliance with the patient privacy regulations of the Health Insurance Portability and Accountability Act of 1996 (HIPAA). The Security Policy allows you to:

- Define password requirements
- Set account lockout policies after failed login attempts
- Configure application lockout after inactivity
- Set contact information for lockout or password problems

Kareo has set up a basic set of defaults that meet the needs of most companies; however, company administrators have the option of changing any of these default settings. To access Security Policy settings, click **Settings > Security > Security Policy Options**.

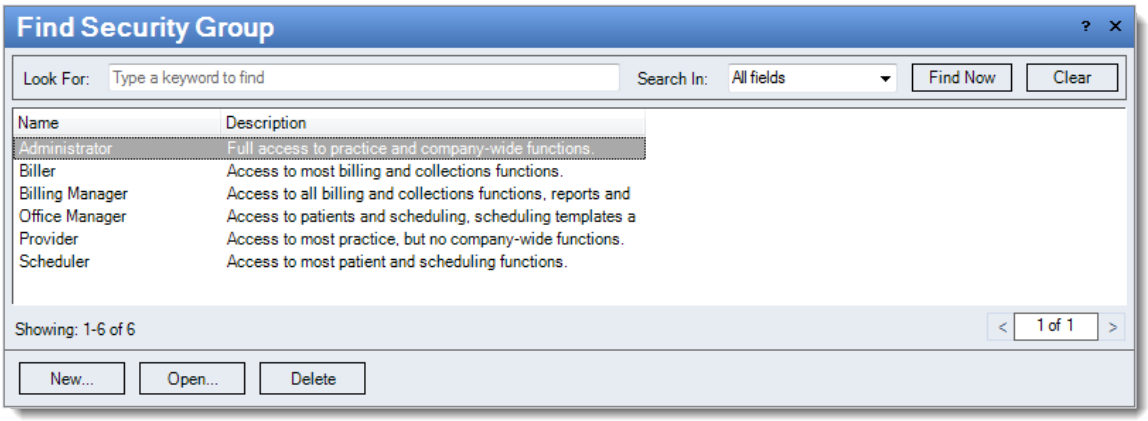
4.5 Security Groups

When you set up a practice, you are prompted to add users to a preconfigured security group. You can edit these groups or create your own. See the Kareo Security Group Template to help you determine the settings for your users.

Note: When assigning a security group to a user (Settings > Security > User Accounts), add only one security group.

To edit security groups

1. Click **Settings > Security > Security Groups**.
2. Double-click a security group to edit settings or click **New** in the bottom of the window to create a new security group.
3. To change permissions, check either the *Allow* or *Deny* box next to the permission.
4. When you have made your edits, click **Save**.

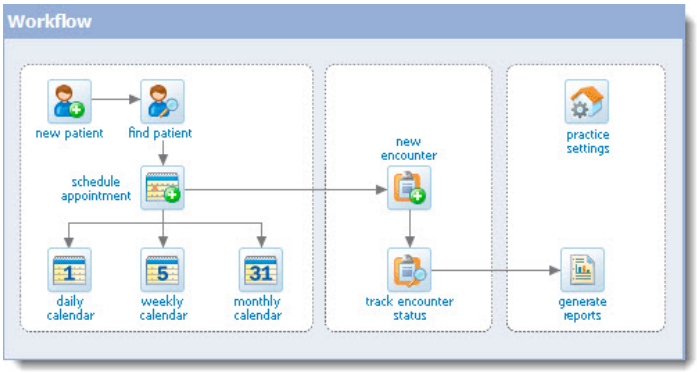


4.6 Assign User Roles

Assigning user roles allows you to filter and group various reports by the user role. User roles also determine the dashboard a user sees when logging into Kareo. Kareo has two preset user roles: Medical Office and Business Office. Each dashboard has workflow shortcuts and dashboard charts specific to the user role.

Medical Office

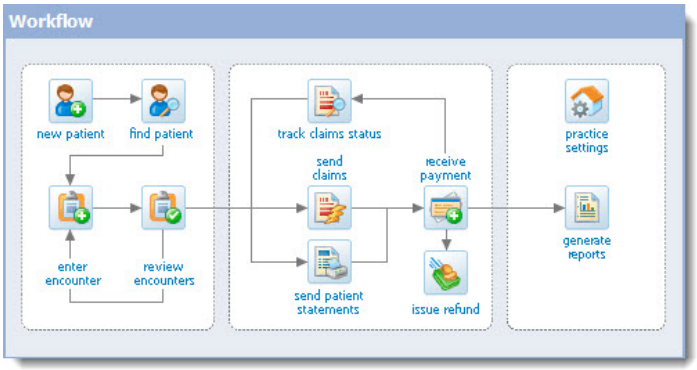
Medical office users have permission levels that allow them to manage a medical office workflow. They can schedule patients, check insurance eligibility, post payments and print receipts. You can also give a medical office user permission to enter and route encounters to the billing office. When medical office users log in to Kareo, they will see shortcuts in the Dashboard typical of medical office functions.



Business Office (Billing Company)

Business office users have permission levels that allow them to manage a business office workflow. They can manage the daily business operations such as reviewing patient demographics, editing encounters, creating claims, managing accounts receivable and issuing refunds. Billing companies can access the multiple practices they manage through one portal.

When business office users log in to Kareo, they will see shortcuts in the Dashboard typical of business office functions.



To assign a user role

1. Click **Settings > Security > User Accounts**.
2. Double-click a user's name.
3. Select a user role in the *User Role* drop-down menu.
4. Click **Save.**

5. Enroll in Electronic Services

Training Resources	
	Webinar 2 – Enrollment for Electronic Services
	Video - Understanding the Enrollment Process Video – Getting Enrollment Agreements Video - Submitting an Enrollment Request

Enrolling in electronic claim services allows you to send electronic claims to, and receive electronic remittance reports from, over 3,000 commercial insurance companies and government payers with the Kareo application. Much faster than managing paper claims, our electronic remittance services also let you download payment reports in order to automatically post payments and reconcile claims.

The enrollment process can take from 7 to 30 days, depending on the requirements of individual payers. Therefore, Kareo highly recommends that you enroll in these services as soon as possible to avoid any delays in your billing cycle.

Step 1 - Read the Kareo Enrollment Guide for Electronic Services

The enrollment process requires several steps, involves multiple third-parties, and can have a negative impact on your cash flow if done incorrectly.

Please read the Kareo Enrollment Guide For Electronic Services and use the Kareo Enrollment Checklist.

Step 2 - Find Payers and Get Enrollment Agreements

The next step of the process is to find and get payer-specific enrollment agreements, complete the enrollment agreements, and have your physicians sign them. These agreements then need to be sent directly to the commercial insurance company or government payer.

To find payers and enrollment agreements, visit: http://www.kareo.com/support/enrollment/payer-search

Step 3 - Submit a Web Enrollment Request Form to Kareo

Once you have sent your enrollment agreements to the payers, you are ready to submit an enrollment request to Kareo. Kareo reviews and forwards your enrollment to the clearinghouse you chose; this final step of the process is necessary so that your practice is enabled to participate in electronic claims services.

To submit a web enrollment request, visit:
https://help.kareo.com/content/setup/enrollment/EnrollmentOrderDetail.aspx?View=NewOrder

6. Optional Settings

Training Resources	
	Webinar 3 – Setting Up Kareo
	Video – Setting Up Departments Video – Managing Procedure and Diagnosis Codes Video – Managing Other Codes Video – Encounter Forms Video – Setting Up Fee Schedules & Contracts

6.1 Departments

If you want to categorize providers by department for reporting purposes, you can set up departments and then assign a department to an individual provider.

To set up departments

1. Click **Settings > Departments**.
2. Click **New** on the bottom of the window.
3. Enter the name and a description for the department you want to add.
4. Click **Save**.
5. Once your departments have been set up, you can then assign departments to providers through each individual provider record.

6.2 Encounter Forms (Max and Complete plans only)

Encounter forms (also referred to as Superbills or Fee Tickets) are used to capture diagnosis and procedure codes determined during encounters with patients. You can set up encounter forms that can be used by one or more providers within a practice; once set up, the encounter forms can be printed with the practice and patient information, directly from the Daily Calendar, therefore eliminating the need to manually fill in this information on the day of the patient visit.

If a practice is using UB-04 forms, we recommend reviewing the Kareo Guide to the UB-04 Form guide.

For detailed instructions on setting up encounter forms, please see *The Practice> Encounter Forms* in the online help files.

To set up encounter forms

1. Click **Settings > Encounter Forms**.

2. Click **New** on the bottom of the window.
3. Enter a name and description for the custom encounter form. Add procedure and diagnosis codes, and then select a print format typically used by the practice. To view sample print formats, visit the Kareo encounter form library.
4. Click **Save**.
5. Once one or more encounter forms have been set up, be sure to return to each of the provider records and select the default encounter form to be used by each provider.

6.3 Procedure Macros

Procedure macros within encounters provide a convenient shortcut to loading multiple procedures, modifiers and diagnoses codes into a procedure line item: When the name of a procedure macro is entered in lieu of a normal procedure code, then all of the procedures, modifiers, and diagnoses are pulled into the encounter when entering charges.

For detailed instructions on configuring procedure macros, please see *The Practice> Procedure Macros* in the online help files.

6.4 Codes

The Kareo application automatically contains the latest version of industry codes: Procedure codes (i.e. HCPCS and CPT), procedure modifiers and diagnosis codes as published by the American Medical Association (AMA) and Centers for Medicare and Medicaid Services (CMS). You can add, modify, or delete codes in your database.

Note: Any additions or modifications to these master lists will affect your entire company.

For detailed instructions on setting up codes, please see *The Company> Codes* in the online help files.

- **Procedure Codes** - Procedure codes are used in the healthcare industry to identify specific medical procedures or other services rendered to patients, and documented on encounter and claim records. These codes correspond with the HPCPS and CPT code databases, the de-facto standards as published once per year by the American Medical Association and the Centers for Medicare and Medicaid Services (CMS).
- **Procedure Modifier Codes** - Procedure modifier codes are used in the healthcare industry to identify specific modifiers to medical procedures or other services rendered to patients, and documented on encounter and claim records. These codes correspond with the HPCPS and CPT code databases, the de-facto standards as published once per year by the American Medical Association.
- **Procedure Categories** - If desired, users can generate certain reports based on procedure categories; procedure categories must first be set up in Kareo and then procedure codes are linked to the specific categories.
- **Diagnosis Codes** - Diagnosis codes are used in the healthcare industry to identify the specific medical diagnosis of patients receiving treatment, and documented on encounter and claim records. These codes correspond with the code list published quarterly by the Centers for Medicaid and Medicare Services branch of the U.S. Department of Health and Human Services.

- **Adjustment Codes** - Adjustment codes are used to identify specific types of adjustments made to payments received from insurance companies and patients. Kareo provides a preset list of adjustment codes, however, you can define your own custom adjustment codes.

6.5 Other Lists and Options

Other Lists

You can set up several company-wide lists that apply to managing records in Kareo. If you manage multiple practices, these lists would be available to all practices.

- Attorneys
- Employers
- Worker's Compensation Offices
- Referring Physicians
- Payer Scenarios
- Referral Source
- Collection Categories

For detailed instructions on setting up other lists, please see *The Company > Other Lists* in the online help files.

Options

You can set up company-wide options that apply to various features within Kareo.

- Closing the Books
- Encounter Options
- Appointment Options
- Reporting Options
- Electronic Claims Options
- Patient Statement Options

For detailed instructions on setting options, please see *The Practice > Practice Options* in the online help files.

6.6 kFax – Document Storage (Plus, Max and Complete plans only)

A kFax number is a fax number to which documents can be faxed and automatically stored within Kareo. You can obtain one for each practice.

To get a kFax number

1. Click **Settings > Company > Find Practice.**
2. Double-click a practice to open it.
3. At the bottom of the window, click **Get kFax Number**.

7. Next Steps – Success with Kareo

7.1 Additional Training

Once Kareo is set up, additional Webinars are available for users to learn key functions in the medical billing process using Kareo.

Visit the *Kareo Training Catalog* to register: http://www.kareo.com/support/implementation-webinars

Webinar 4 – Entering Patients and Insurances

Webinar 5 – Encounters: Entering and Approving Charges

Webinar 6 – Sending Claims and Reviewing Clearinghouse Reports

Webinar 7 – Posting Payments

Webinar 8 – Encounter Forms and Setting up Appointment Scheduler (Complete and Max plans)

Webinar 9 – Appointment Scheduling (Complete and Max plans)

Webinar 10 – Kareo/Practice Fusion Integration (Plus, Complete and Max plans)

7.2 Kareo Blog and Industry Webinars

The Kareo Blog offers information about our products, our partners & competitors, medical billing, healthcare information technology and more. We offer complimentary Webinars with industry experts to help you be successful in medical billing and practice management.

Visit the Kareo Blog at: http://www.kareo.com/blog/