



Kareo Quick Start Guide
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Table of Contents

1. Get Started	1
1.1 Practice Setup	1
1.2 Training, Help Guides and Support	1
1.3 User Login	1
1.4 Dashboard Navigation	2
1.5 Record Search	3
2. Appointment Scheduler	4
3. Patient Records	5
3.1 New Patient	5
3.2 Add Case to Patient Record	6
3.3 Add Insurance Policy to Patient Record	8
4. New Encounter	9
4.1 Enter Encounter for Patient	9
5. Patient Payment	11
5.1 Enter Patient Payment	11
5.2 Print Patient Statement	11
6. Send Claims	12
6.1 Print Paper Claims	12
6.2 Submit Electronic Claims	12

1. Get Started

Welcome to Kareo! This Quick Start Guide has been written for the new Kareo user and covers the very basics of the billing process; from scheduling an appointment and entering a new patient to submitting a paper or electronic claim. For detailed information, please refer to the [Kareo User Manual](#) or the Kareo Help Center: www.kareo.com/help.

1.1 Practice Setup

This guide assumes that your Kareo application administrator has already set up your practice and all its settings. The [Kareo Implementation Guide for Company Administrators](#) provides instructions on setting up and customizing one or more practices. When a practice has not been set up, the New Practice setup wizard will launch upon login.

1.2 Training, Help Guides and Support


Kareo offers a comprehensive training program and video/user guide library. To access our support pages, visit www.kareo.com/help.

1.3 User Login

▶ 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**.

1.4 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.

Note: Kareo is a permission-driven application. Your permission level is determined by your Kareo application administrator. If you don't have access to a specific task or function described in this guide, please contact the person in your office who is the 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.

The screenshot shows the Kareo dashboard interface with several key components labeled with letters a through h:

- a:** Points to the Navigation sidebar on the left, which includes shortcuts for Home, Patients, Appointments, Encounters, Documents, Tasks, Reports, Settings, and Help & Support.
- b:** Points to the Menu Bar at the top, which includes Practice, Patients, Appointments, Encounters, Documents, Tasks, Reports, Settings, Window, and Help.
- c:** Points to the Toolbar below the menu bar, containing various icons for navigation and actions.
- d:** Points to the Workflow section in the center, which displays a visual guide of shortcuts for tasks like new patient, find patient, track claims status, send claims, receive payment, practice settings, generate reports, enter encounter, review encounters, send patient statements, and issue refund.
- e:** Points to a System Alert message at the bottom left that says "Practice Fusion Integration is currently down".
- f:** Points to the To Do List section, which lists tasks such as "4 tasks overdue or due today", "5 Encounters to review", "5 Claims to send", "4 Rejected claims that need follow-up", "5 Clearinghouse Reports to review", "9 Patient Statements to send", and "Review monthly Reports for omissions or errors".
- g:** Points to the Payment Velocity chart on the right, which shows a gauge with the number 26 and the text "Your Payment Velocity: 26 DAYS" and "Kareo Best: 16 Days".
- h:** Points to the Key Performance Indicators table on the right, which lists various metrics and their trends.

Indicator	Amount	% Last
Procedures	250	+5%
Charges	\$54,500	+4%
Adjustments	\$12,400	+5%
Receipts	\$45,145	+5%
Refunds	\$250	-6%
A/R Balance	\$357,345	+13%
Days in A/R	26	+8%
Days Revenue	32	0%
Outstanding		
Days to Bill	5	0%

1.5 Record Search

When searching for a record within Kareo, you can search by entering all or part of a keyword as well as selecting a specific search criteria. When you have located a record, double-click on it to open.

- In the *Look For* field, type all or part of a word or number sequence.
- Select a specific search criteria in the *Search In* field drop-down menu, then click **Find Now**.
- Click any column header to sort the list.
- Click **Clear** to start another search.
- A maximum of 20 results per page is listed. Click the arrows to navigate between pages. Or click in the page number field, type a page number and press **Enter** on your keyboard.

The screenshot shows the 'Find Patient' window. The search bar contains 'Look For: Type a keyword to find' and 'Search In: All fields'. The 'Find Now' button is highlighted in yellow. The table below lists patient records with columns: ID #, Name, Address, DOB, SSN, Phone, Medical Record, Guarantor, and Active. The table shows 13 patient records. At the bottom, there are navigation buttons: 'New...', 'Open...', 'Delete', 'Check Eligibility...', and 'Create Encounter...'. The page number '1 of 26' is displayed at the bottom right.

ID #	Name	Address	DOB	SSN	Phone	Medical Record	Guarantor	Active
4	Blindback, Sara	9928 Orange Dr, Orange, CA 92802	06/03/1986	974-83-2372	(714) 982-7777			Yes
5	Winshell, Kate	990 Peabody, West Hills, CA 90023	04/03/1982	744-87-2770	(310) 838-7737			Yes
6	Johansen, Amy	PO Box 9298, Fullerton, CA 92836	02/21/1986	875-82-2854	(714) 883-8377			Yes
7	Preston, Lisa	993 5th St, Newport Beach, CA 92993	10/24/1979	937-98-2719	(714) 388-3338			Yes
8	Etherington, Jennifer	8988 Sedona, Anaheim, CA 92808	05/27/1981	921-89-2920	(714) 281-8983			Yes
9	Crowler, Erin	PO Box 928, Fullerton, CA 92836	12/02/1985	853-86-2511	(714) 983-8822			Yes
10	Strickler, Aline	PO Box 2828, Santa Ana, CA 92811	08/13/1988	979-87-2544	(714) 937-2233			Yes
11	McAnderson, Holly	2939 Golden West, Westminster, CA 92883	05/13/1984	900-93-2637	(714) 883-8377			Yes
12	Mayor, Debbie	8277 Pond Ave, Irvine, CA 92837	11/22/1994	737-94-2595	(949) 882-7733		Mayor, Am	Yes
13	Rodriguez, Danielle	PO Box 928, Los Angeles, CA 90004	02/02/1986	986-93-2517	(310) 292-9982			Yes



Tips

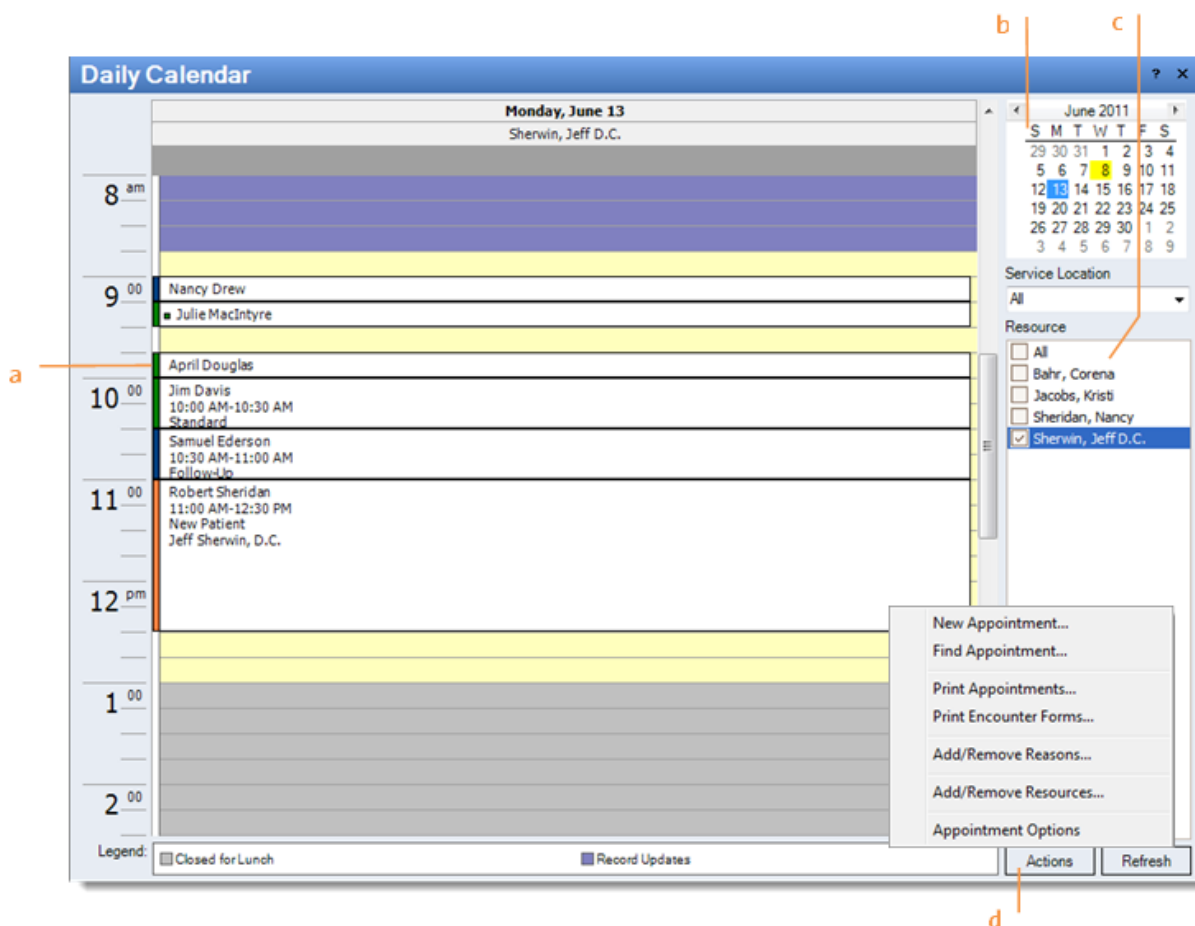
- Name Search: Enter either the first name, last name or partial name.
- Number Search: Use a single number string without dashes or diagonal symbols.
- Insurance Search: Enter the insurance company/plan zip code in the *Look For* box and select *Address* in the *Search In* drop-down menu.
- Code Search: Enter the complete or partial code number; or enter the most descriptive word or abbreviation of the code name (for example, “consult” for consultation).

2. Appointment Scheduler

The appointment scheduler is available to Complete and Max plans only. A user with permissions can customize calendar views, color-coding, appointment reasons, office hours, service locations and timeblocks.

▶ To schedule an appointment

1. Click **Appointments** on the top menu. Select *Daily* or *Workweek* Calendar.
 2. In the Resource section, check the box next to the resource(s) you want to schedule.
 3. Select a date on the calendar in the top right of the window.
 4. Double-click on a time slot in the calendar. A new appointment opens.
 5. Complete the appointment details. If you are scheduling a new patient, click **Patient** and then **New** (see section [New Patient](#)).
 6. Click **Save**.
-
- a. Appointment: Color-coded based on appointment reason.
 - b. Calendar: Select a month, week or day.
 - c. Resource: List of resources for scheduling. Check one or more boxes to view calendars.
 - d. Actions: Click for a list of appointment options.



3. Patient Records

Patient records store information about the patients associated with a medical practice. A patient record includes the patient demographics, guarantor, employer, insurance policies, case details, patient alerts, prior patient activities, document attachments and more.

3.1 New Patient

The tasks associated with creating a new patient record include:

- Entering general patient information
- Creating a patient case
- Adding insurance policies

▶ To add a new patient

1. Click **Patients > Find Patients** on the top menu.

Note: To avoid duplication, a best practice is to first search the patient database to see if the patient already exists in the system.

2. If patient is not in the system, click **New** at the bottom.
3. Enter patient information.
 - a. Enter general patient information.
 - b. Enter patient contact information.
 - c. Select providers.
 - d. If person other than patient is financially responsible, check the box and complete guarantor information.
 - e. Select payer scenario.
 - f. After completing patient information, click **Save & Add Case** to create a case for the patient or **Save & Add Policy** to add insurance information.

New Patient - Alexandra Ackermath

a Full Name: Alexandra Ackermath Marital Status: Married
Social Security Number: 000-55-0011 Employment Status: Employed
Date of Birth: 7/1/1977 Age: 34 Employer: [X]
Gender: Female Referral Source: Physician
Medical Record Number: []

b Contact Information
Address: 1233 N State St, Goleta, CA 93117
Home Phone: (213) 871-0000 Ext: []
Work Phone: [] Ext: []
Mobile Phone: (213) 871-0111 Ext: []
 Send Email Notifications alackermath@email.com Enable Auto Phone Call Reminders
Emergency Name: Steve Ackermath
Emergency Phone: (213) 871-2222 Ext: []

c Providers
Primary Care Physician: [X] Default Rendering Provider: Steve Sherwin, PT [X]
Referring Physician: Jonathan L. Glass [X] Default Service Location: Tidewater Cardiovascular []

d Guarantor
 Person financially responsible (a.k.a. Guarantor) is different than patient

e Insurance
Default Payer Scenario: BC/BS []

Notes
Add a New Note by Corena Bahr on 2/16/2012 (Today) 10:55 AM

f Save Save & Add Policy... Save & Add Case... Save & Schedule... Cancel

3.2 Add Case to Patient Record

Creating individual cases for patient visits simplifies the selection of insurance policies and the order in which insurance plans may be billed. For example, you may have a patient that is being treated for injuries sustained from an auto accident that is covered under one insurance policy; yet that patient may receive treatment during the same visit for a condition unrelated to the auto accident and for which a different policy is billed. Separate cases should be created for each policy type.

▶ To add a case to a patient record

1. In the *New Patient* window, click **Save & Add Case** at the bottom or; click **Patients > Find Patient**. Once you find the patient, double-click to open the record.
2. Click the *Cases* tab at the top.
3. Click **Add** on the right of the window.
4. Enter case information and click **Save**.

- a. Enter name and description for the case.
- b. Select the payer scenario from the drop-down list.

Note: If you select any of the Workers Comp scenarios, the Attorneys and Workers' Compensation tabs will appear at the top to add any attorneys and workers comp information to the case.

- c. *Send patient statement* is checked by default.
- d. Click **Add** to add insurance information if not already present.
- e. Order in which more than one insurance company will be billed. Click **Move Up** or **Move Down** on the right to adjust.
- f. Optional: On the *Conditions* tab, enter the reason for the patient treatment.
- g. If applicable, enter any authorization numbers from an insurance company on the *Authorizations* tab.

- ▶ To add a self pay case to a patient record
1. In the *New Case* window, type “Self Pay” in the *Name* field.
 2. Select *Self Pay* in the Payer Scenario drop-down menu.
 3. Click **Save**.

The screenshot shows the 'New Case' window with the 'General' tab selected. The 'Name' field contains 'Self Pay' and the 'Referring Provider' field contains 'Kristi Jacobs'. The 'Payer Scenario' dropdown menu is set to 'Self Pay'. The 'Insurance' section is empty. The 'Save' and 'Cancel' buttons are visible at the bottom.

Order	Insurance Company	Insurance Plan	Policy #	Group #	Address
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3.3 Add Insurance Policy to Patient Record

▶ To add an insurance policy to a patient record

1. In the *New Patient* window, click **Save & Add Policy** at the bottom or; click **Patients > Find Patient**. Once you find the patient, double-click to open the record.
2. Click the *Cases* tab at the top.
3. Click **Add** on the right of the window.
4. Search your list for the insurance plan associated with the patient.

Note: To avoid duplication, always do a search in your database for existing plans and policies before adding new ones.

5. Double-click on a plan to add it to the patient record or; click **New** at the bottom to add a new plan.
6. Enter policy information and click **Save**.
 - a. Enter insurance information from patient's insurance card.
 - b. Policy Type: Only available for Medicare as a secondary policy.
 - c. Release of Info: Select signed or informed consent.
 - d. The *Eligibility* tab appears for Max and Complete plans only. Through the *Eligibility* tab, you can initiate an eligibility request (enrollment in eligibility verification services required). See *Patient Records > Patient Eligibility* in the online help files.
 - e. Check this box if the insurance policy is through the patient's employer.
 - f. By default, *Patient Relationship to Insured* is set to "Self." If other than self, choose from the drop-down list and complete the *Insured* section (g).

4. New Encounter

Encounters capture charges and store information about a patient visit. The encounter record can be thought of as a digital version of a Superbill and includes general information about the visit, the primary party responsible for payment, and the treatment rendered by the provider.

4.1 Enter Encounter for Patient

 To create a new encounter

1. Click **Patients > Find Patients**.
2. Once you find the patient, click on the name to highlight it.
3. Click **Create Encounter** at the bottom of the window or; click **Encounters > New Encounter** on the top menu.
4. When you have completed the information (see image next page), choose one of the following:
 - **Save as Draft:** Places the encounter in Draft status
 - **Save for Review:** Places the encounter in Review status
 - **Approve:** Places the encounter in Approved status

- a. Enter patient information. Many of these fields are auto-populated. If not, click the buttons to locate the information.
- b. If prior authorization is required, click to select the authorization number.
- c. Enter dates and Batch #.

Note: Batch # is optional. Entering a batch number is helpful for running reports. For example, if you consistently use a naming convention such as date posted + initials of person posting (example: 021411CB), you can easily run reports for specific users who manage payment posting in your office.

- d. Enter providers and location of service.
- e. Enter payment. Once you enter the amount, additional fields become available regarding payment.
- f. Enter procedures, diagnoses and charges.

*Note: These columns can be customized. Right-click on a column and select Customize or Remove Procedure.
 Note: Hover over a procedure or diagnosis code to see the full description.
 Note: Enter a "?" in the procedure or diagnosis fields to launch a searchable list of codes.*

- g. Click the arrows to add additional information regarding hospitalization, ambulance, and other miscellaneous data.

The screenshot shows the 'New Encounter' form for patient Silver, John (6913). The form is divided into several sections:

- General:** Includes fields for Appointment, Patient (Silver, John), Case (Default Case), Primary Insurance (BC of CA PPO), and Prior Authorization.
- Dates:** Includes Service Date (7/20/2011), Post Date (7/20/2011), to Date (optional) (7/20/2011), and Batch #.
- Provider:** Includes Scheduling Provider (None), Referring Provider, Rendering Provider (Alan G. Bartel, MD), Location (Office), Supervising Provider, and Place Of Service (11 - Office).
- Payment:** Includes Copay Due (\$15.00) and Payment Amount (\$0.00).
- Procedures:** A table with columns: From, To, Procedure, Mod 1, Units, Unit Charge, Total Charge, Diag 1, Patient Resp., and Apply Payment. A single row is visible for 7/20/2011 to 7/20/2011 for procedure 1005F: AST... with 1.00 units, a unit charge of \$250.00, a total charge of \$250.00, diagnosis 003..., patient response of \$15.00, and an apply payment of \$0.00. A 'Total' row at the bottom of the table shows 1 procedure, 1.00 units, \$250.00 total charge, \$15.00 patient response, and \$0.00 apply payment.
- Additional Information:** Includes expandable sections for Hospitalization Dates, Miscellaneous, and Ambulance, as well as Medical Office Notes and Business Office Notes.

Callouts a through g point to the following fields:

- a:** Appointment, Patient, Case
- b:** Prior Authorization
- c:** Service Date, Post Date, to Date (optional), Batch #
- d:** Scheduling Provider, Referring Provider, Rendering Provider, Location, Supervising Provider, Place Of Service
- e:** Copay Due, Payment Amount
- f:** Procedures table
- g:** Hospitalization Dates, Miscellaneous, Ambulance

5. Patient Payment

During a patient visit you can enter a patient payment, such as a copay, into the Kareo system. If you are enrolled in the Integrated Credit Card Processing service, you can enter payments made with a credit card.

5.1 Enter Patient Payment

▶ To enter a copay

1. Click **Encounters > Receive Payment** on the top menu.
2. In the *New Payment* window, enter patient and payment information.
 - In the *Type* field, select Patient.
 - In the *Method* field, select payment method.
3. Click **Save & Print Receipt**.
You can apply the payment at a later time.

▶ To enter a credit card payment

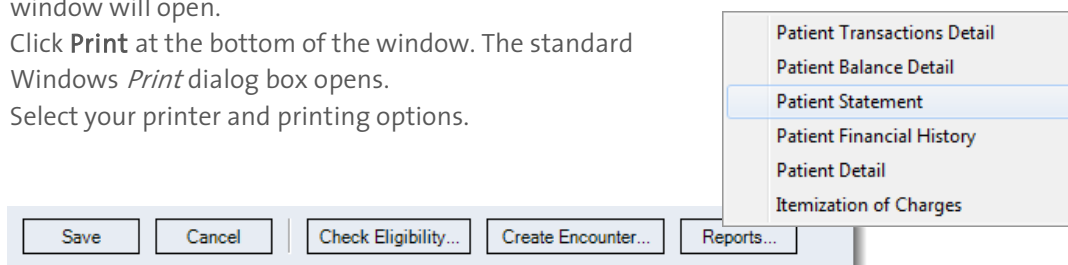
You must be enrolled in the Integrated Credit Card Processing service to process a credit card transaction.

1. In the *New Payment* window, enter patient and payment information.
 - In the *Method* field, select *Credit Card* from the drop-down menu.
2. Click **Process Credit Card Payment**. The *Process Credit Card Payment* window opens to process the credit card transaction.
 - Select *Swipe Card* to process a credit card through a credit card reader attached to your computer; select *Enter information* to manually type in the credit card information.
3. When finished, click **Process Payment**.
4. Click **Save & Print Receipt**.

5.2 Print Patient Statement

▶ To print a patient statement

1. Click **Patients**.
2. Double-click on a patient name to open the record.
3. At the bottom of the window, click **Reports** and select *Patient Statement*. The *Patient Statement* window will open.
4. Click **Print** at the bottom of the window. The standard Windows *Print* dialog box opens.
5. Select your printer and printing options.



6. Send Claims

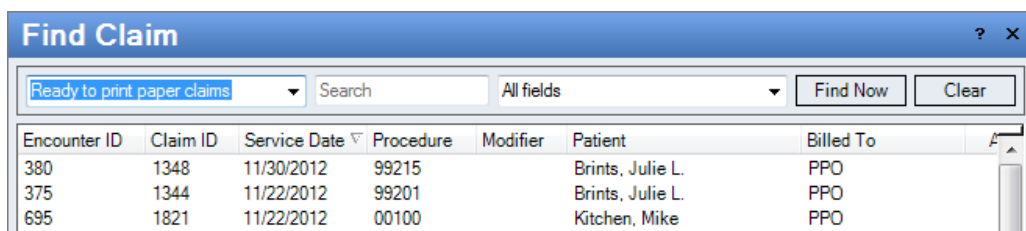
Once an encounter has been approved, the Kareo system automatically generates one or more claims related to the encounter (i.e.: one claim per procedure listed). Claims can then be printed for mailing or submitted electronically.

Note: If you are submitting both paper and electronic claims, we recommend sending all electronic paper claims before printing paper claims.

6.1 Print Paper Claims

▶ To print one or more claims

1. Click **Encounters > Track Claim Status** on the top menu.
2. In the *Find Claims* window, select *Ready to print paper claims* in the drop-down menu to the left of the search bar.



The screenshot shows a window titled "Find Claim" with a search bar and a table of claims. The search bar has a dropdown menu set to "Ready to print paper claims" and a "Find Now" button. The table has columns for Encounter ID, Claim ID, Service Date, Procedure, Modifier, Patient, and Billed To.

Encounter ID	Claim ID	Service Date	Procedure	Modifier	Patient	Billed To
380	1348	11/30/2012	99215		Brints, Julie L.	PPO
375	1344	11/22/2012	99201		Brints, Julie L.	PPO
695	1821	11/22/2012	00100		Kitchen, Mike	PPO

3. Click **Find Now**. This displays a list of claims ready to be printed.
4. Review claims if necessary.
5. Choose one of the following actions:
 - To print a single procedure on a claim: Click on a procedure to highlight it. Right-click and select **Print paper claim**.
 - To print multiple claims: Click **Print Claims** at the bottom of the window. You can print all claims in the queue or select a specific date range, insurance, patient or payer scenario.
6. Select your printer and printing options.

6.2 Submit Electronic Claims

A Kareo application administrator must first complete enrollment in electronic claim services before you can submit claims electronically (see the [Kareo Implementation Guide for Company Administrators](#)).

▶ To submit electronic claims

1. Click **Encounters > Submit Electronic Claims** on the top menu.
2. On the *Submit Electronic Claims* window, select which claims you want to submit.
3. Click **Submit Claims**.