Kareo Quick Start Guide

April 2012

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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.

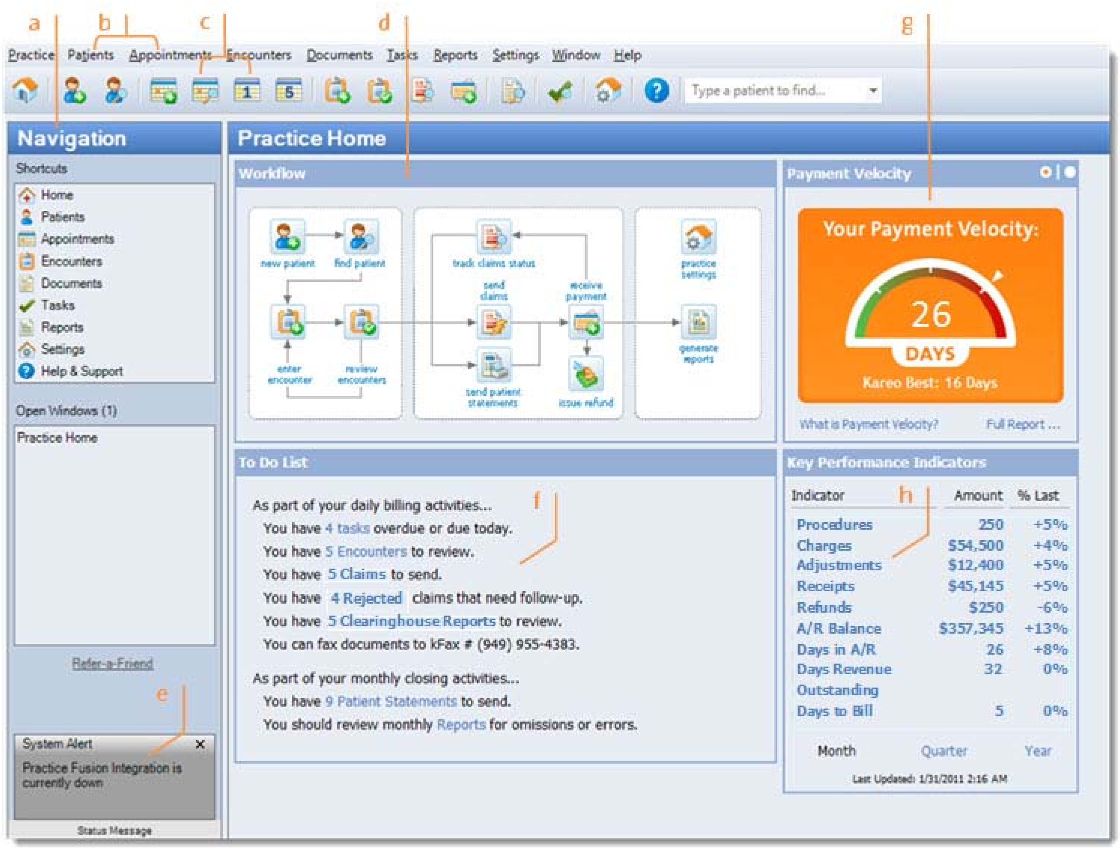
d. **Workflow:** A visual guide of shortcuts to your office’s workflow.

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.



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.

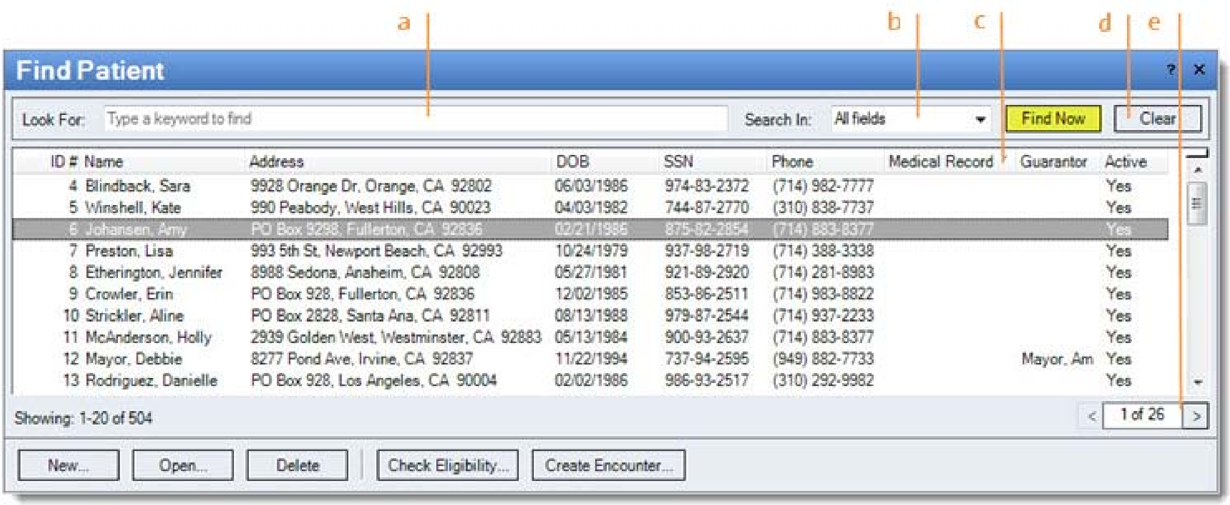
a. In the *Look For* field, type all or part of a word or number sequence.

b. Select a specific search criteria in the *Search In* field drop-down menu, then click **Find Now**.

c. Click any column header to sort the list.

d. Click **Clear** to start another search.

e. 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.



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).

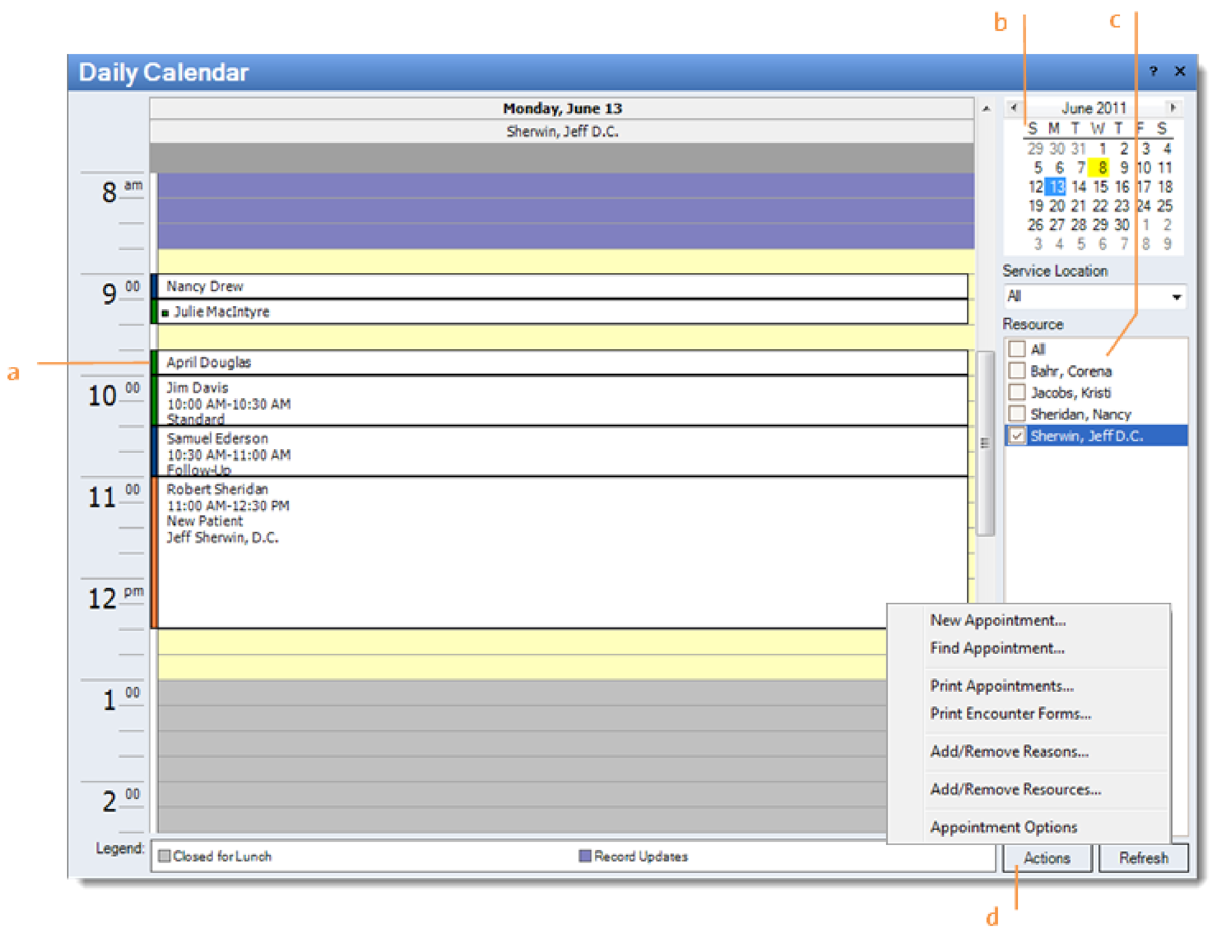
2. Appointment Scheduler

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

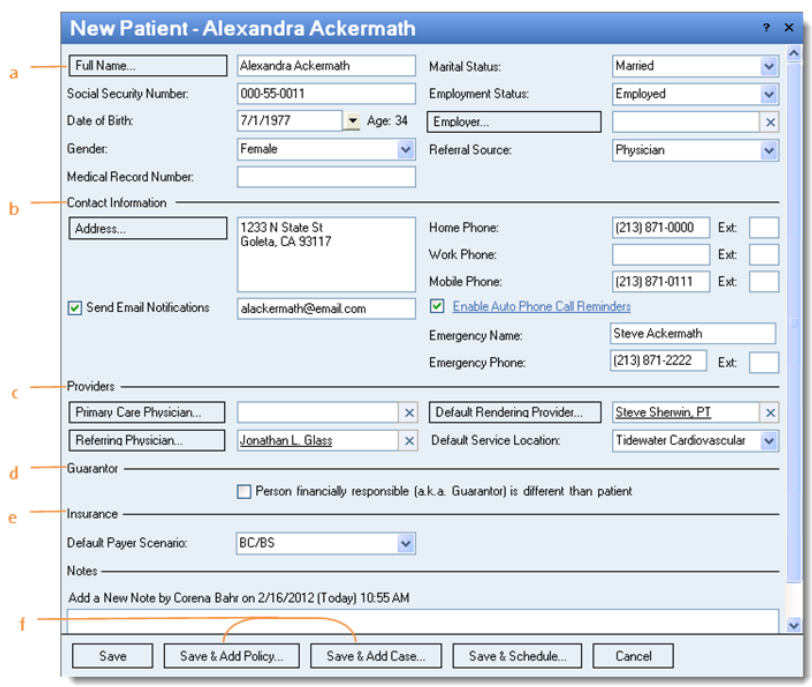
To add a new patient

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.



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.

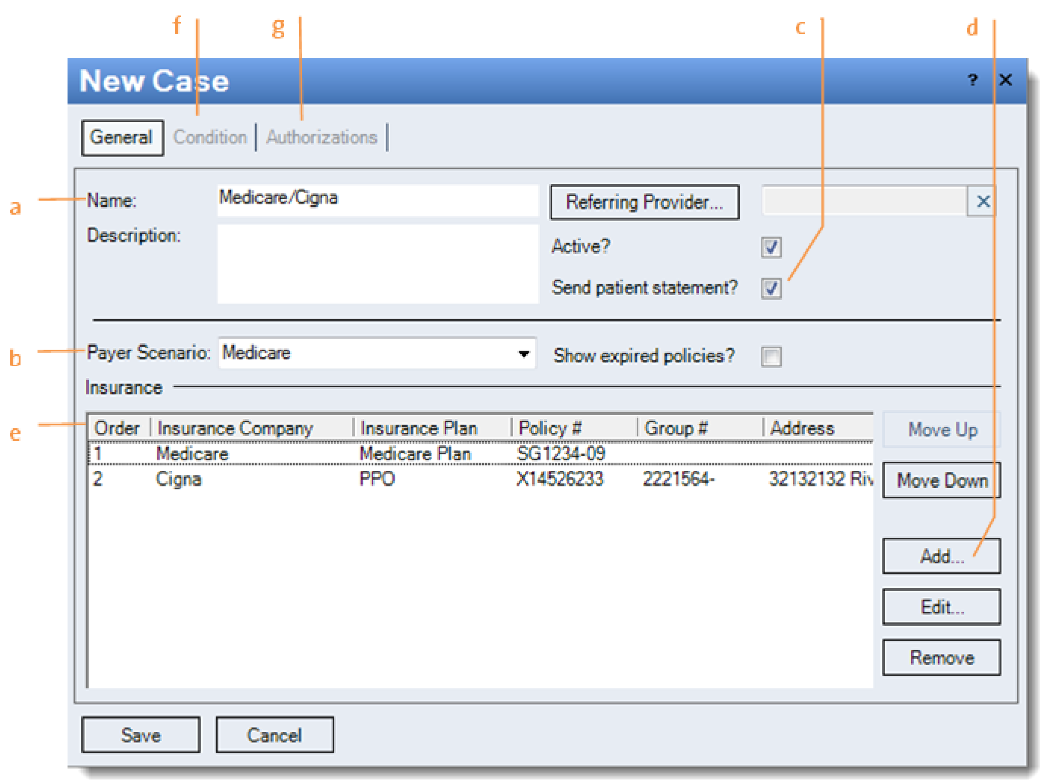
To add a case to a patient record

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.

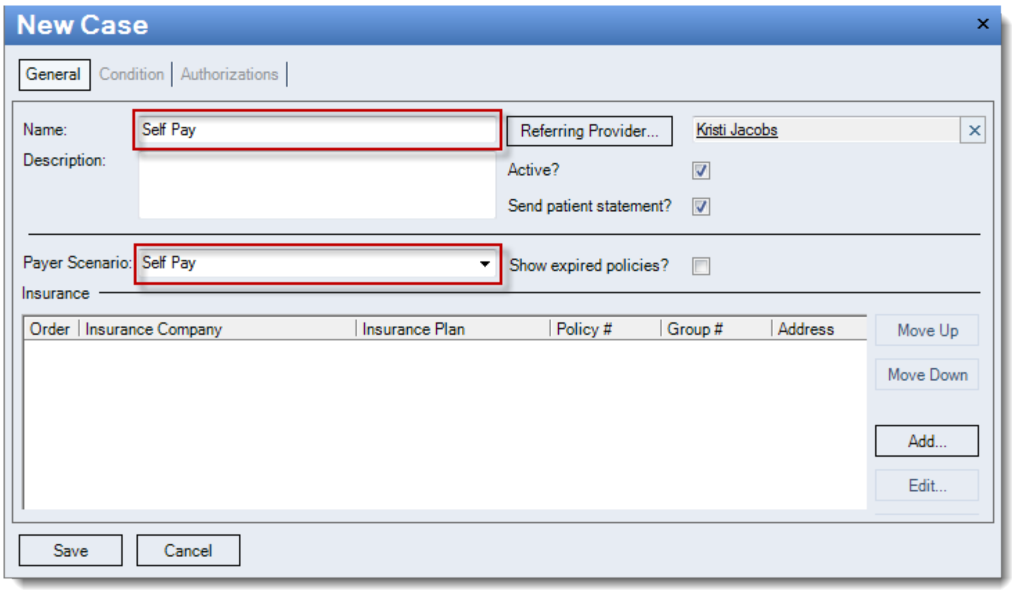
   Note: If you select any of the Workers Comp scenarios, the Attorneys and Workers' Compensation tabs will appear at the top to add any attorneys and workers comp information to the case.

   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**.



3.3 Add Insurance Policy to Patient Record

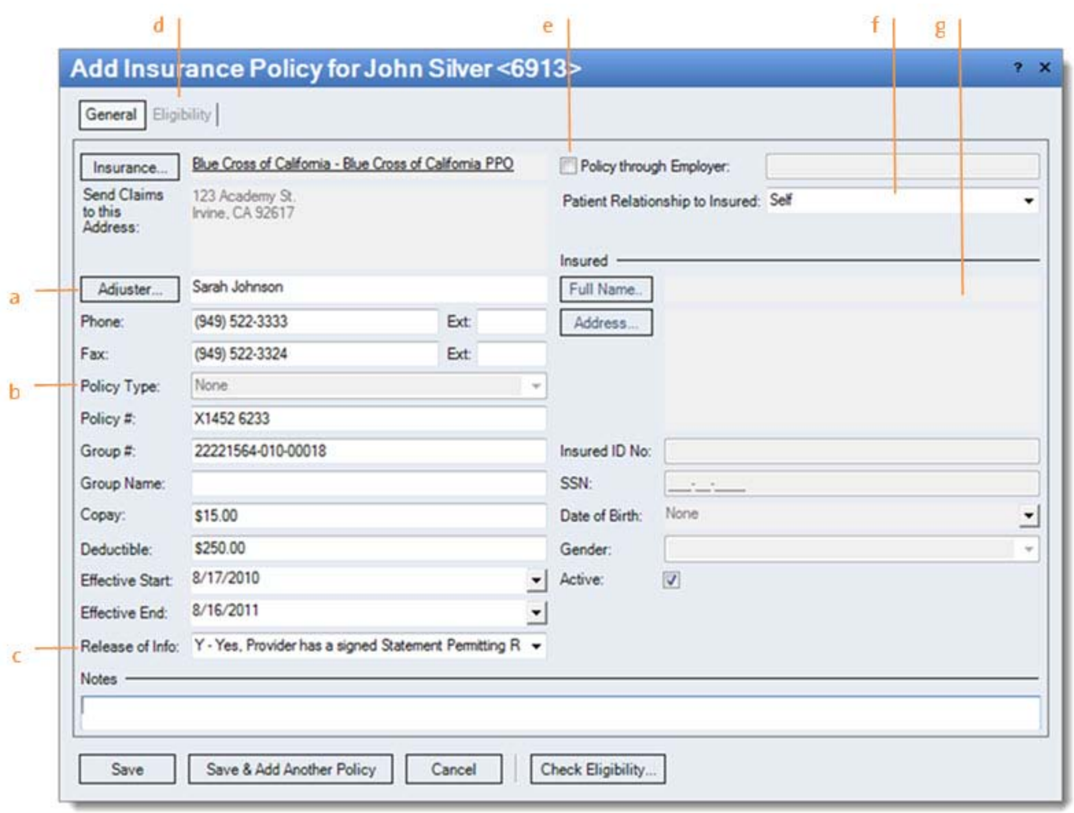
To add an insurance policy to a patient record

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

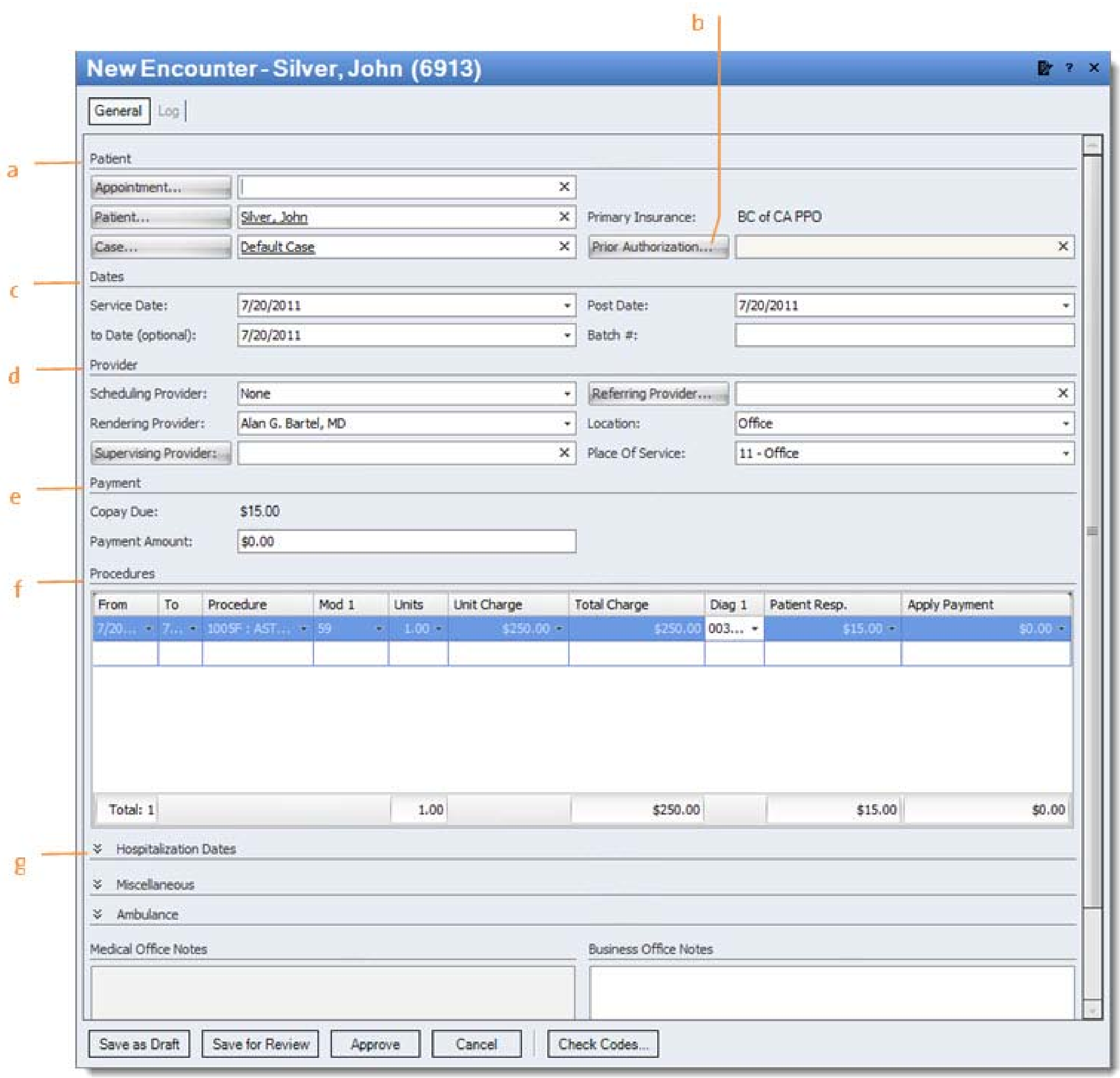
a. Enter patient information. Many of these fields are auto-populated. If not, click the buttons to locate the information.
b. If prior authorization is required, click to select the authorization number.
c. Enter dates and Batch #.

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.



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

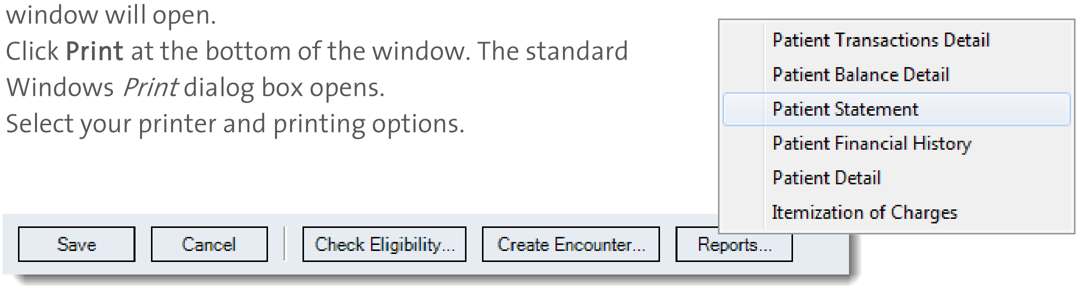
You must be enrolled in the Integrated Credit Card Processing service to process a credit card transaction.

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

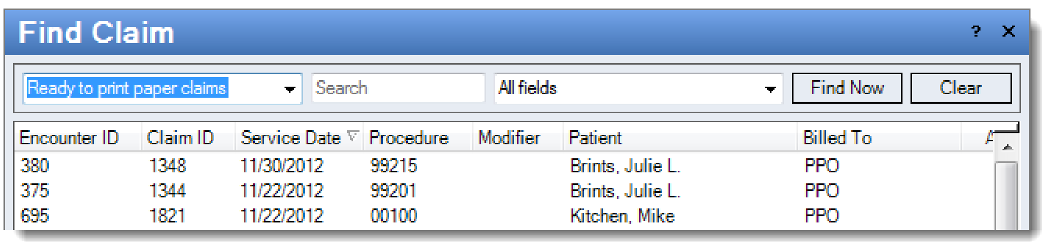
Once an encounter has been approved, the Kareo system automatically generates one or more claims related to the encounter (i.e.: one claim per procedure listed). Claims can then be printed for mailing or submitted electronically.

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.



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**.