



## Instructions for Activating Electronic Claims

After enrolling in electronic claim services with Kareo, you will receive two types of notifications from Kareo's enrollment department. First, you will receive a notification once Kareo has approved the practice for electronic claim submission. At that point, you can begin sending electronic claims to all payers that do not require an enrollment agreement. Second, you will receive individual notifications once Kareo has received an approval from specific payers that require an enrollment agreement. At that point, you can begin sending electronic claims to the specific payer approved.

When you have received your first approval notification from Kareo, please follow these steps to activate your practice and one or more insurance companies for electronic claim submission.

### Step 1 – Activate the Practice

First, you need to configure your practice for electronic claim submission by doing the following:

1. Log in to Kareo and open the practice.
2. Select the menu item **Settings > Options > Electronic Claim Options**.
3. Change the **Enrollment Status** to "Enrolled in Live Mode."
4. Clear the box labeled **Disable electronic claims for this practice**.
5. Click the **Save** button to save your changes to the electronic claims options.

### Step 2 – Activate the Insurance Company

Second, you must link electronic connections to specific insurance companies by configuring electronic claim settings on the Insurance Company record.

To activate an insurance company, do the following:

1. If not already open, log in to Kareo and open a specific practice.
2. Select the menu item **Settings > Insurance > Find Insurance Companies**.
3. Locate and open the insurance company record associated with your approval.
4. Click the "Electronic Claims" tab.
5. Check the box labeled **This payer accepts electronic claims**.
6. Click the **Electronic Payer Connection** button.
7. Locate and select the electronic payer connection associated with the approved payer and clearinghouse. (Be sure that you select the correct clearinghouse that will be used for this payer.)
8. Click the "Practice Settings" tab.
9. Change the **Enrollment Status** to "Enrolled in live mode." **Important Note:** You will only do this for the insurance companies that have been approved for sending electronic claims. (If you have not yet received approval from the Kareo enrollment department for an insurance payor that requires a payor agreement in order to send claims to them, then you must wait until you receive that approval before changing this setting.)
10. Verify that the other settings are correct under the "Practice Settings" tab.
11. Click the **Save** button to save your changes to the insurance company.

For more information on enrolling and setting up electronic claims, please visit the following resources:

Kareo Help & Support Website

<http://help.kareo.com/>

Enrollment Guide for Electronic Services (located under the "Guides" section of the Kareo Help & Support Website)

[http://help.kareo.com/documents/pdf/Kareo\\_EnrollmentGuideForElectronicServices](http://help.kareo.com/documents/pdf/Kareo_EnrollmentGuideForElectronicServices)

Activating Electronic Claims Webinar (located under the "Training" section of the Kareo Help & Support Website)

[http://help.kareo.com/training/recorded\\_webinars/activating\\_eclaims](http://help.kareo.com/training/recorded_webinars/activating_eclaims)