



## Document Management Storage Policies

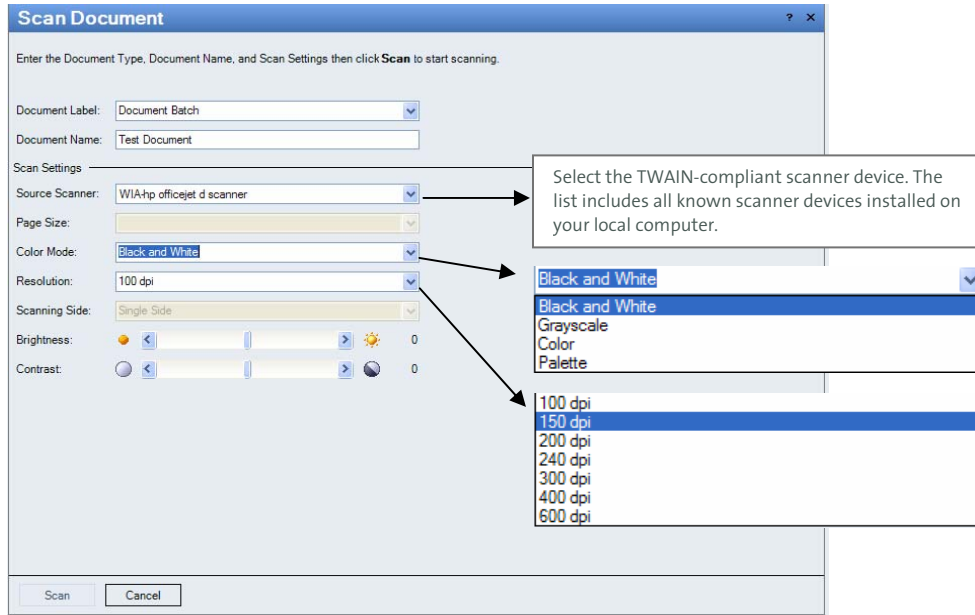
You can scan documents directly into Kareo using our native support for any Windows-compatible, TWAIN-compliant scanner. You can enter information to describe your document. You can adjust the page size, color mode, resolution, brightness, or contrast. You can scan single-sided or double-sided. Finally, you can preview the pages of your document as they are scanned.

To help keep your costs down when it comes to using the document scanning features of the Kareo application, we make the following recommendations.

- Scan at the lowest resolution and lowest amount of color possible.
  - Resolution is counted in terms of dots per inch (dpi): the lower the dpi, the lower the quality of the scan; however, low resolution images will also take up less storage than high resolution images. For all but very detailed images, we recommend keeping the resolution to 150 dpi.
  - Color information will also affect the quality of the image, and the less color stored, the less storage is required for the image. Black and white images will require the least amount of storage, about 30-50 kilobytes per scanned page at 150 dpi. Grayscale images will store a black-and-white image, but will differentiate shades of gray; grayscale requires at least 8 times more storage than black-and-white images. Palette images, if available with your scanner, will store some limited color information, and will take as much storage as grayscale images. Finally, Color images will provide the highest quality of the image, but will require at least 24 times the amount of storage as will black-and-white images. For any image that does not require color, or a great deal of detail, we recommend keeping the Color Mode at Black and White.
- In terms of document storage usage, scanning in a few full-color images, when needed, will not hurt the user; however, scanning in hundreds of pages will most definitely consume more storage space than what you are allotted. If you need to scan in something that requires color, you should do so only for the few pages that require it. If certain pages within a document require more detail than just black and white, you should first try grayscale, since it's a bit more optimized. But in general, you should try to stick to black-and-white when possible.

Kareo provides document storage services to practices that have subscribed to the Enterprise or Team Edition of Kareo. Depending on the subscription edition, Kareo allots a certain amount of additional storage space per practice per month for all scanned, faxed, or digital documents (e.g., Word/Excel files) that have been stored on the Kareo system. It is important to note that if a practice exceeds this monthly allotment in any given month, the practice will be charged a nominal fee for the overage. Please refer to your contract for more information; or refer to the pricing/feature table at [http://www.kareo.com/account\\_signup](http://www.kareo.com/account_signup).

See the below illustration for the recommended settings for document scanning. However, for more complex pages where a higher dpi is needed, or on pages that require color, you can adjust the settings accordingly. Again, keep in mind that the higher the dpi the more document storage area is consumed. Also, as mentioned previously, if you do need to scan in color, it is recommended that you scan those pages as a separate document when possible.



**Important Note:** In order to use Kareo's scanning feature, your scanner device must be TWAIN compliant. For more information refer to [www.twain.org/about](http://www.twain.org/about).

For more detailed information about using all of the document management features of Kareo, including step-by-step instructions for scanning, faxing, and storing your digital files, as well as attaching documents to individual records in the system, please refer to Online Help or the Kareo User Manual under the section entitled **Managing Documents**.