



PROVIDER PERFORMANCE REPORTS

You can now keep your physicians up-to-date on their practice performance with Kareo's new Provider Performance Reports delivered automatically by email on a daily, weekly, or monthly basis. These reports provide both practice and/or provider specific key indicators including patients, encounters, charges, payments, A/R balance, and days revenue outstanding.

You can delay the delivery of these reports by a configurable number of days after the end of a period (i.e., 10th day after the end of the month). You can also carbon copy (CC) one or more recipients to receive copies of the reports.

These email reports will be delivered between midnight and 3am Pacific Time on a daily, weekly, or monthly basis; depending on how you configure your provider records.

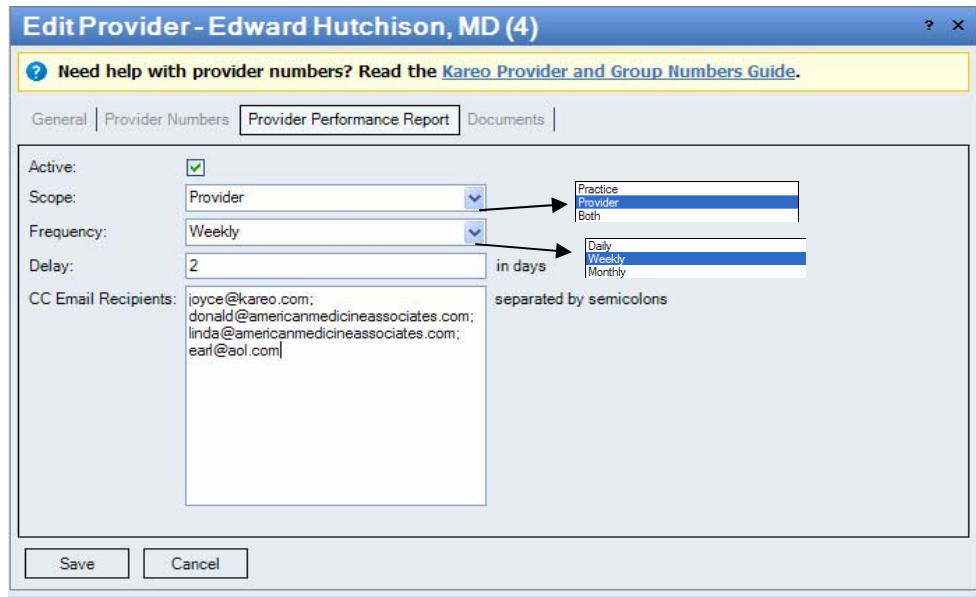
Follow the below steps to configure your providers to automatically receive Provider Performance Reports by email:

1. From the **Company Home** page, log into a specific practice.
2. On the Practice's **Settings** menu, click **Providers**. This opens the **Find Provider** task (or browser), which displays a list of each of the providers associated with the practice.
3. Select a provider record by double-clicking on the provider's name. This opens the **Edit Provider** task for the provider selected.
4. Once the provider record is open, click on the "Provider Performance Report" tab; and then configure this screen as follows: (To view an example of this screen, please see the illustration on page 2.)
 - **Active** – Check this box if you would like to activate the provider to receive automatic Provider Performance Report emails.
 - **Scope** – From the drop-down list, select either "Practice", "Provider" or "Both" as described below:
 - **Practice** – When "Practice" is selected, the email reports will show metrics for the medical practice.
 - **Provider** – When "Provider" is selected, the email reports will show metrics for the specific provider.
 - **Both** – When "Both" is selected, the email reports will show metrics for both the specific provider and the medical practice.
 - **Frequency** – From the drop-down list, select the frequency with which you would like Kareo to email the reports to the provider (e.g., "Daily," "Weekly", or "Monthly")
 - **Delay** – Enter the number of days to delay sending the report after the period ends. For example, the administrator may want to wait 10 days after the end of the month before sending the monthly report to give data entry staff an opportunity to properly post all transactions associated with the month.
 - **CC Email Recipients** – If the **Active** box is checked under the Provider Performance Report tab, then Kareo will automatically send emails to each active provider associated with an active practice associated with an active customer. Kareo will send the performance report to either: a) the email address associated with the provider's user account, if one is available; or b) the email address shown in the **Email** field under the "General" tab of the provider record.

If you would like additional users to receive a copy of the same performance report sent to the provider, then you can use this field to enter the email addresses of the people that should receive a copy of the report. Up to 20 email addresses can be entered (be sure to separate each email address by a semicolon).

- When you finish configuring the new settings, click the **Save** button; or to exit the provider record without saving the new settings, click **Cancel**.

Edit Provider Task



Note: You must be an application administrator or other designated staff member with appropriate user permissions to edit provider records. If you do not have the appropriate user permissions, please contact your application administrator.