



The only complete
technology platform for
your independent practice.

Learn how Kareo helps practices thrive.



What's Inside

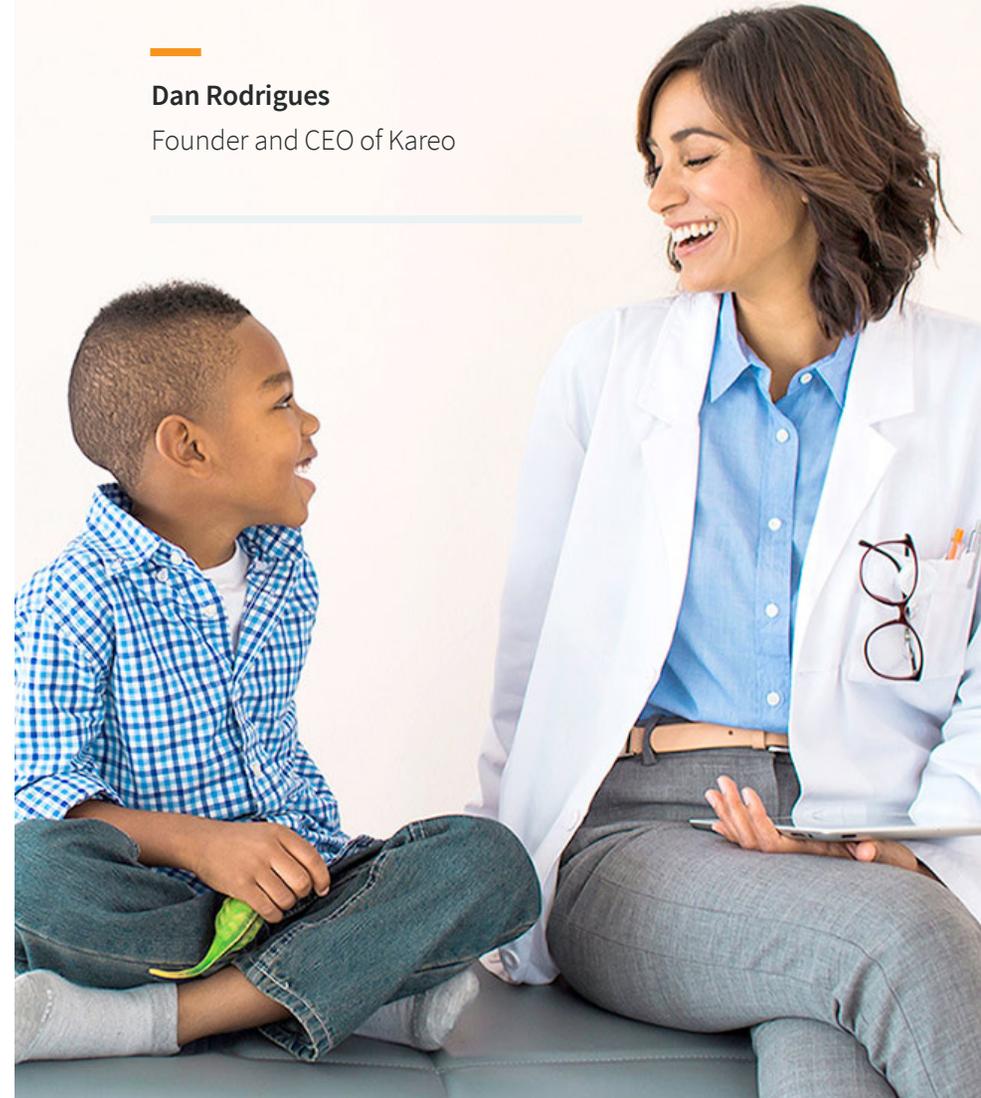
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We believe independent practices are in the best position to provide the personalized, results-oriented, and cost effective care that people demand and deserve.

Dan Rodrigues

Founder and CEO of Kareo



Who is Kareo, and How Are We Different?

Kareo makes it easier and more rewarding for you to run an independent medical practice. We offer the only cloud-based, clinical and business management technology platform dedicated to serving the unique needs of independent practices. Our software helps you engage with patients, run a smarter business, provide better care, and get paid faster. Over 75,000 healthcare providers representing over 150,000 active users rely on Kareo daily.

Unlike other companies that built their offering for large medical groups or hospitals, Kareo is purpose-built for the workflows and unique needs of the independent practice. The result is an affordably priced platform without the bells and whistles that you don't need.

Kareo is Friendly, Flexible, and Transparent

We run our company based on business practices that are friendly, flexible, and transparent because we know you are relying on us to help you succeed. As a Kareo customer, you'll feel appreciated and supported due to the many benefits including:

- Free onboarding, including a dedicated Customer Success Coach to get you up and running.
- Immediate access to role-based training resources through Kareo University.*
- No long-term contracts and flexibility to adjust your subscription without penalty.
- A clear and simple pricing model that offers affordable ways to grow your practice.
- Easy access to support via phone, chat, and email at no additional cost.
- Access to our knowledge base where you can find self-help articles, guides, short training tutorials, product releases and more!

*Kareo University is our online training hub where active customers can learn how to use Kareo in their role/practice. Our trainings are role based and a combination of self-paced training tutorials and live instructor led trainings.

75K+

HEALTHCARE PROVIDERS

rely on Kareo to run a successful practice.

45

UNIQUE SPECIALTIES

across all 50 states are served and supported on the Kareo Platform.

\$25B

ANNUAL CLAIM REVENUE

was processed in insurance claims through the Kareo Platform in 2018.

150K

ACTIVE USERS ON KAREO

trust and log in to Kareo, every day to run a smoother and more efficient practice.

Say Hello to Kareo

A platform unlike any other

For years, medical software played a mixed role for medical practices. It reduced complexity in some areas and added complexity in others. Kareo will help you succeed with intuitive technology that aligns with your existing practice workflow.

Kareo is the first and only complete technology platform built with the independent provider and patient in mind, allowing you to efficiently manage all of the major functions of your practice.

Kareo is unlike any other software in the industry. The easy-to-use, cloud-based platform seamlessly integrates all aspects of running a successful practice.

Trusted and awarded unlike many others. See for yourself.



Meet the Kareo Platform Modules

Purpose built for a people-centric practice model

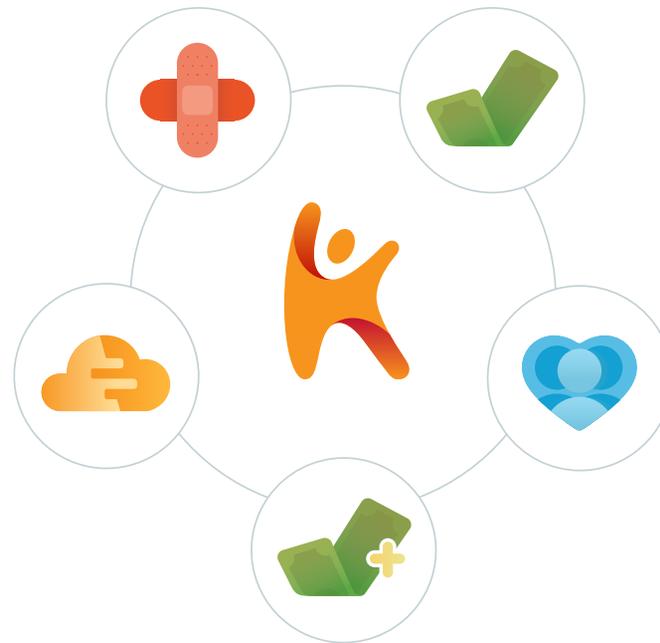
Kareo offers a unique yet fully integrated complete solution suite, designed to meet the needs of each independent healthcare practice. It offers a single, scalable, cloud-based software that streamlines your end-to-end workflows that you utilize every day.

KAREO CLINICAL (EHR)

Kareo Clinical makes your life and job easier. We know you're a healthcare provider, not a technologist. Work faster with easy look ups and create favorites for things you do every day including problem codes, medications, and patient education.

KAREO MARKETPLACE

Kareo Marketplace extends the value of your software. We partnered with some of the most innovative companies in healthcare and enabled the use of ready-to-install application so you can further customize the Kareo platform to the unique needs of your practice.



KAREO BILLING (PM)

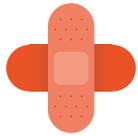
There's no better or more relied upon software to support your billing process and get you paid. Our web and mobile applications help you meet and exceed your goals for patient collections and insurance reimbursements.

KAREO ENGAGE

Kareo Engage helps you create a superior end-to-end patient experience, from getting found online to re-care reminders. The result is better care delivery, increased collections and happier, healthier patients.

MANAGED BILLING (RCM)

Let our network of expert billing partners help you run a more successful clinic so you can focus more on patient care. A Kareo billing partner will identify and eliminate the root cause of billing mistakes so you can get paid faster and improve your financial health.



Kareo Clinical

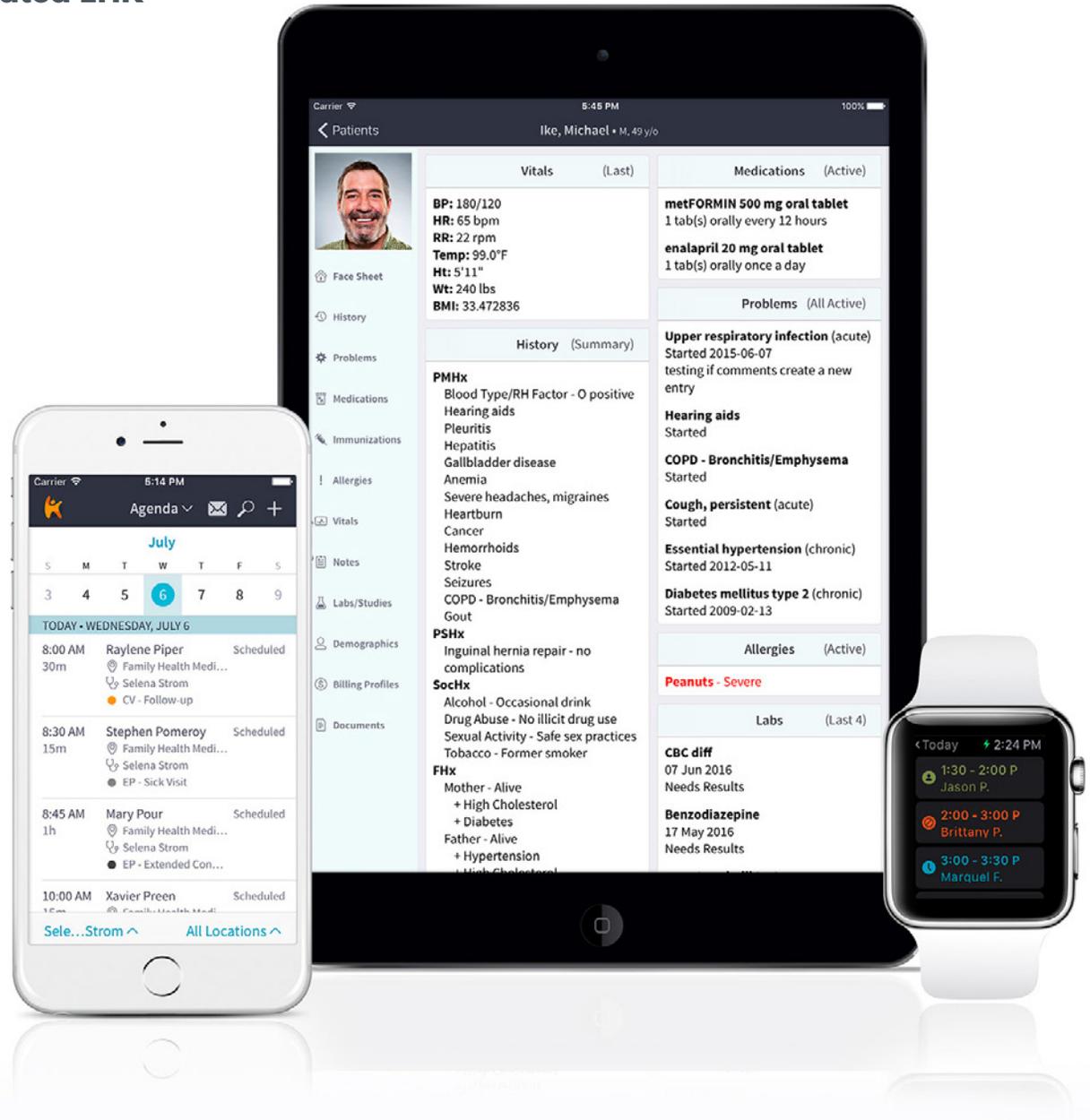
An easy to use and integrated EHR

Let us show you how easy it is to write notes and prescriptions, code encounters, and manage patients in our fully integrated, cloud-based EHR. Find information with easy lookups and create favorites for things you do every day—diagnosis problem codes, prescribe medications, and provide patient education. Superbills can be created and sent in a few clicks!

Included functions:

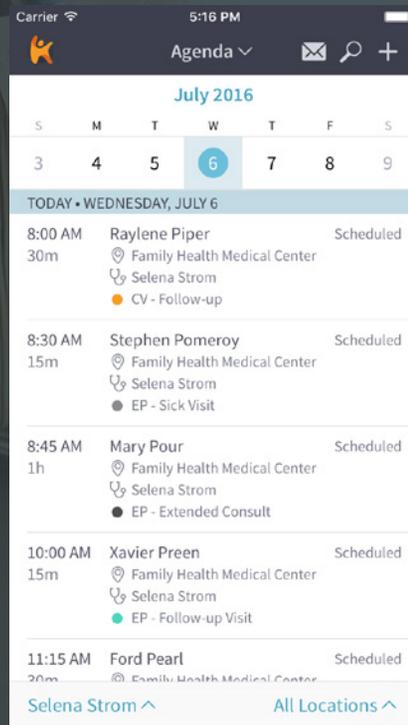
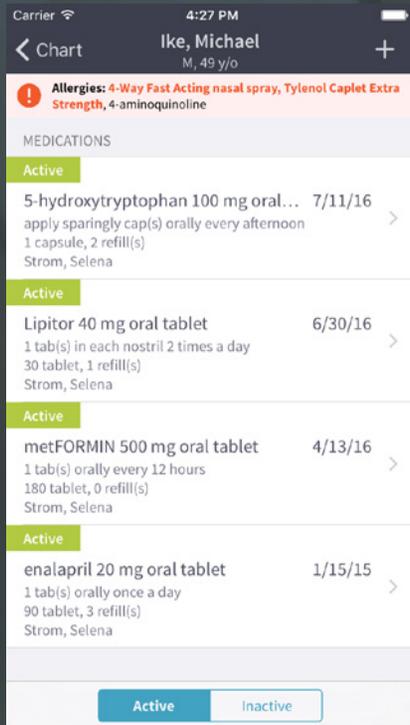
- ePrescribing (including EPCS)
- Labs and Imaging
- Electronic Superbills
- Integrated Telehealth
- Documentation Templates
- Calendar and Scheduling
- Appointment Reminders
- Patient Charting
- Flowsheets
- Documentation Templates
- CMS Incentive Program Reporting

➔ For a complete list of functions and features, see page 28



“I want an EHR that is easy to learn and use every day.”

Kareo Clinical was designed with independent providers in mind. It has the features you need to be successful and none of the unnecessary extras that can get in the way. And it's easy to use!

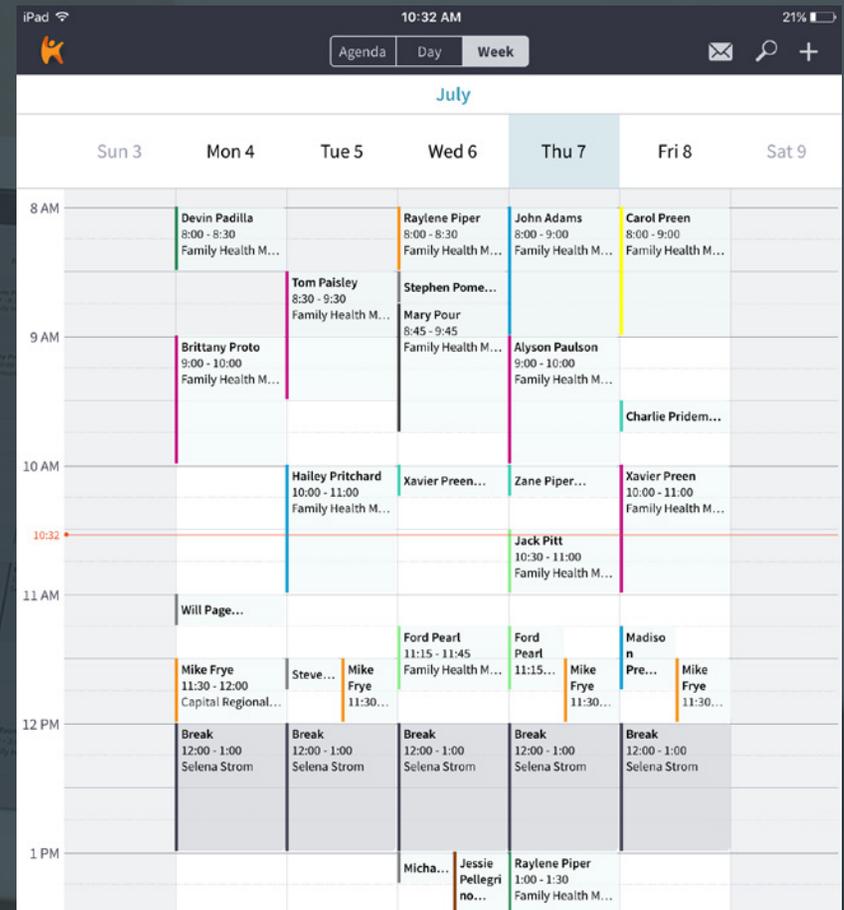


“I want to connect with my patients more and deliver better care.”

The flexibility of Kareo means you can use the device and documentation style of your choice. Spend more time interacting with patients and less time worrying about technology.

“I want functions and features that work for my specialty and my practice.”

Not only is Kareo intuitive, but it can easily be customized to your needs. Filter note types and templates to your specialty and set favorites and shortcuts to save time and focus on patients.





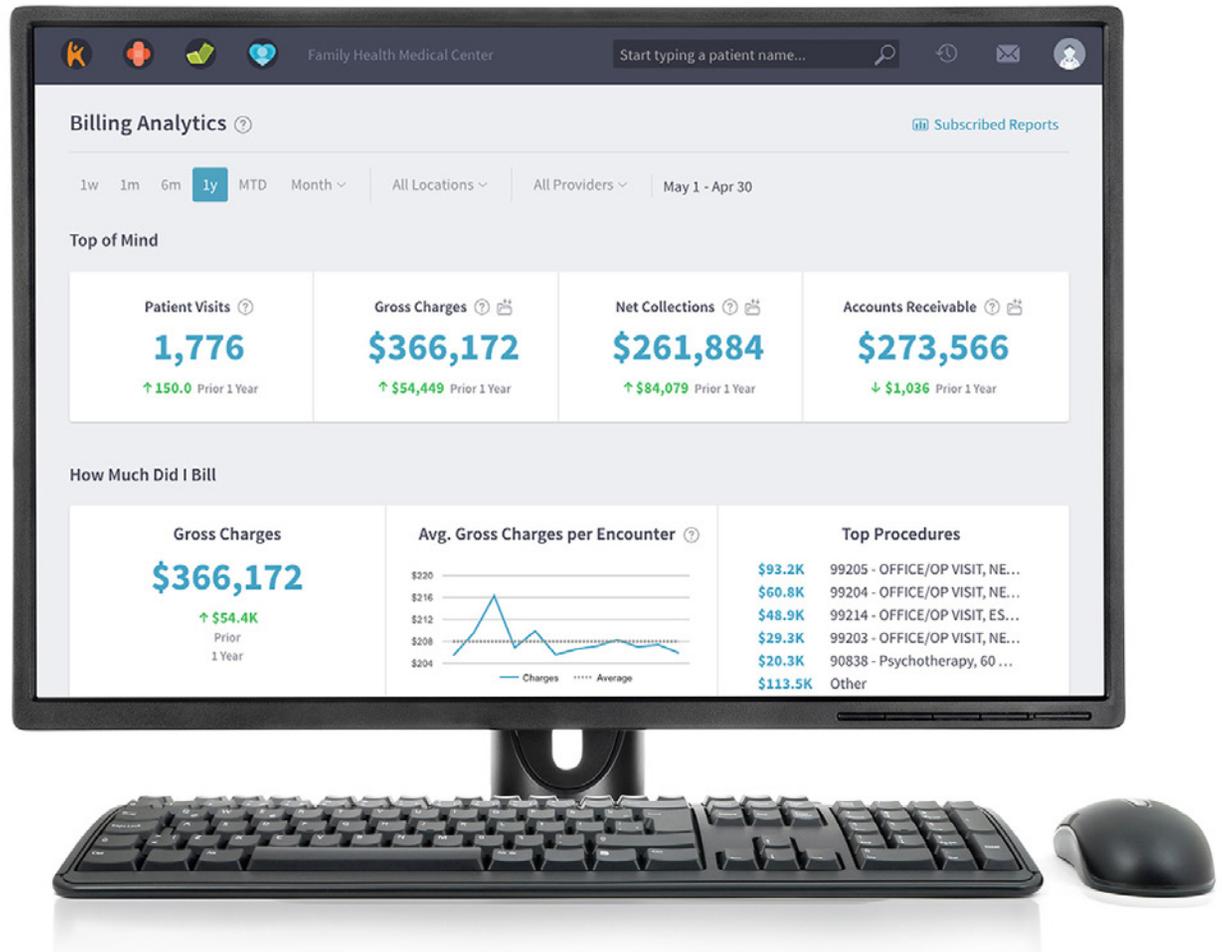
Kareo Billing

Trusted, proven practice management technology

There's no better software to support your billing process. Our web and mobile applications help you easily manage patients and the complications that come with billing insurance. It allows billers to use a robust desktop application that supports flexible workflows, A/R management, reporting and analytics. This gives you total visibility into your financial health.

Included functions:

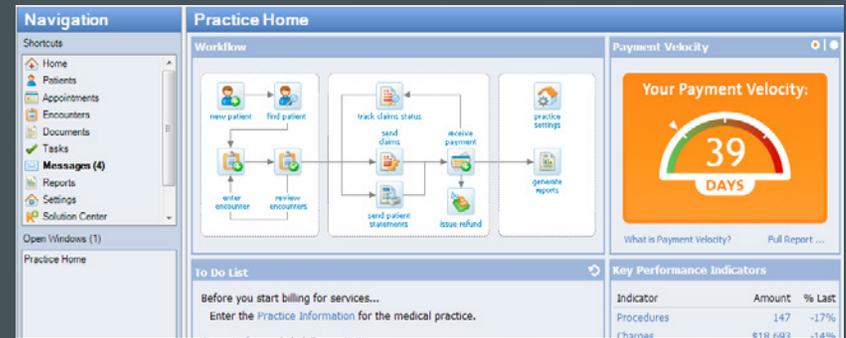
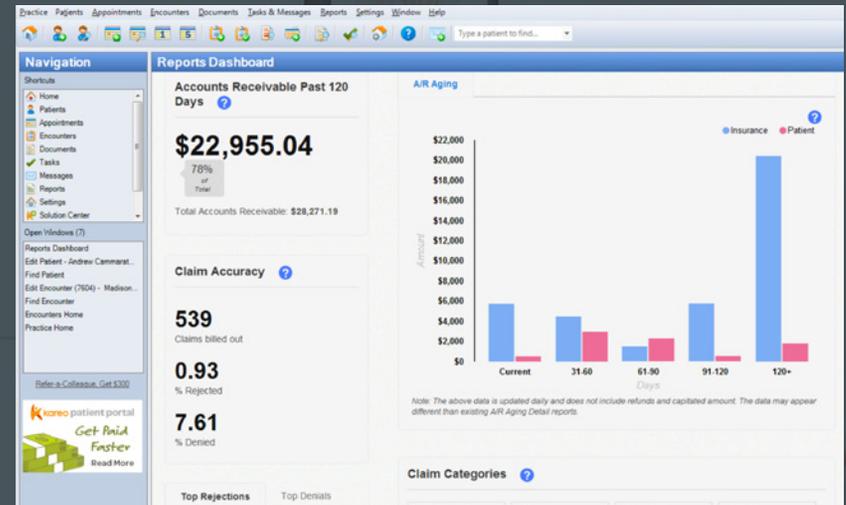
- Charge Capture
- A/R Management
- Patient Collections
- Billing Analytics
- Calendar and Scheduling
- Secure Messaging
- Billing Task Management



➔ For a complete list of functions and features, see page 28

“I need to help billers effectively manage their work flow and tasks.”

Kareo provides a comprehensive dashboard that shows billers exactly what tasks need to be completed. Staff can set alerts for things like no-response claims to ensure nothing slips through, and you can collect every dollar.

“Patient A/R is growing, and we need a better way to collect that money.”

Kareo offers end-to-end patient collections. The software includes the ability to verify eligibility at no extra cost, process credit cards and post those payments within Kareo, send electronic statements, and save credit cards on file.

“I don’t really know if my collections are good or bad.”

With Kareo, all of your billing is processed electronically, and you can see how you’re doing in real time with the reporting dashboard. As a result, you get paid faster and more accurately.



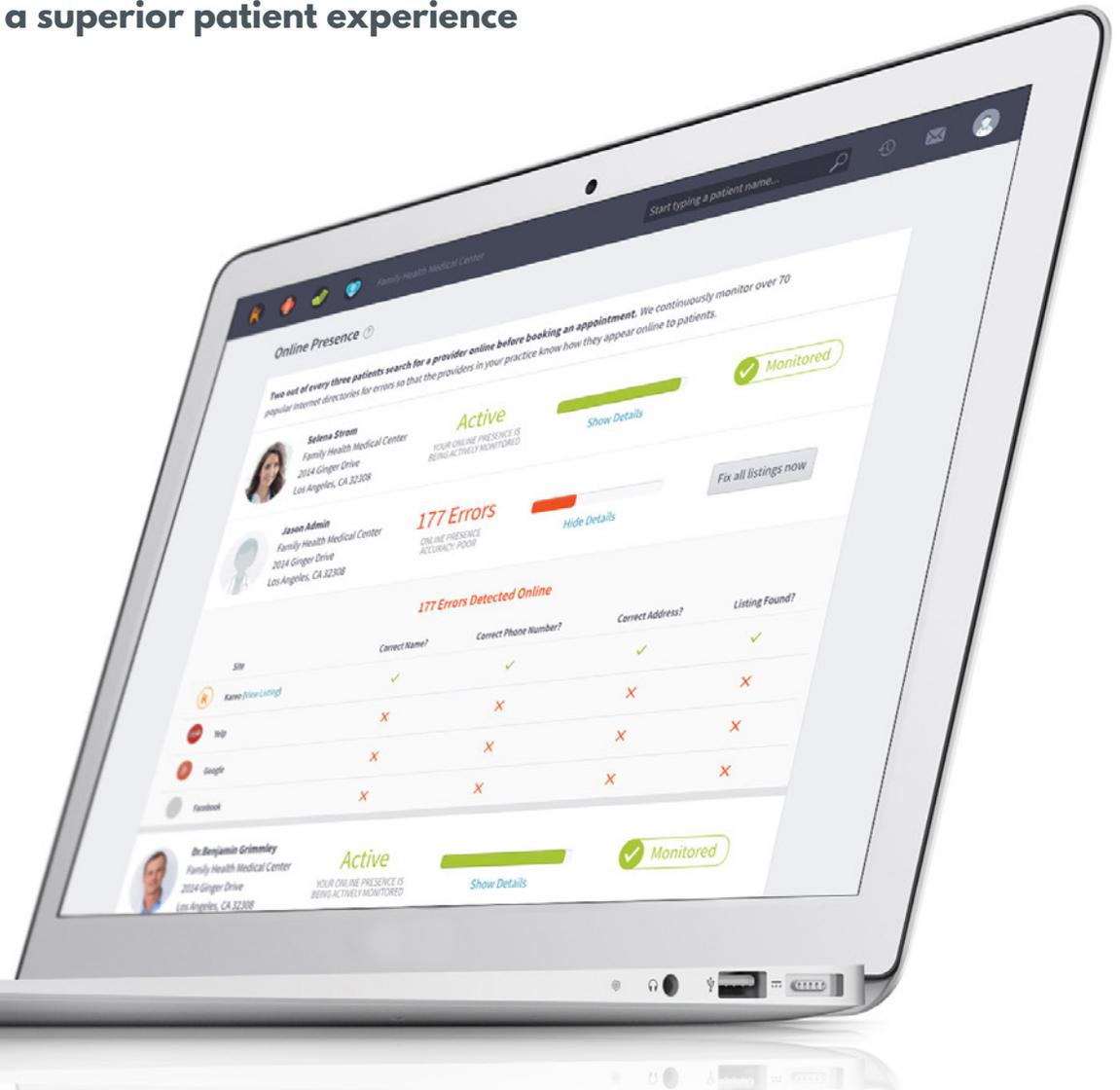
Kareo Engage

Grow your practice and create a superior patient experience

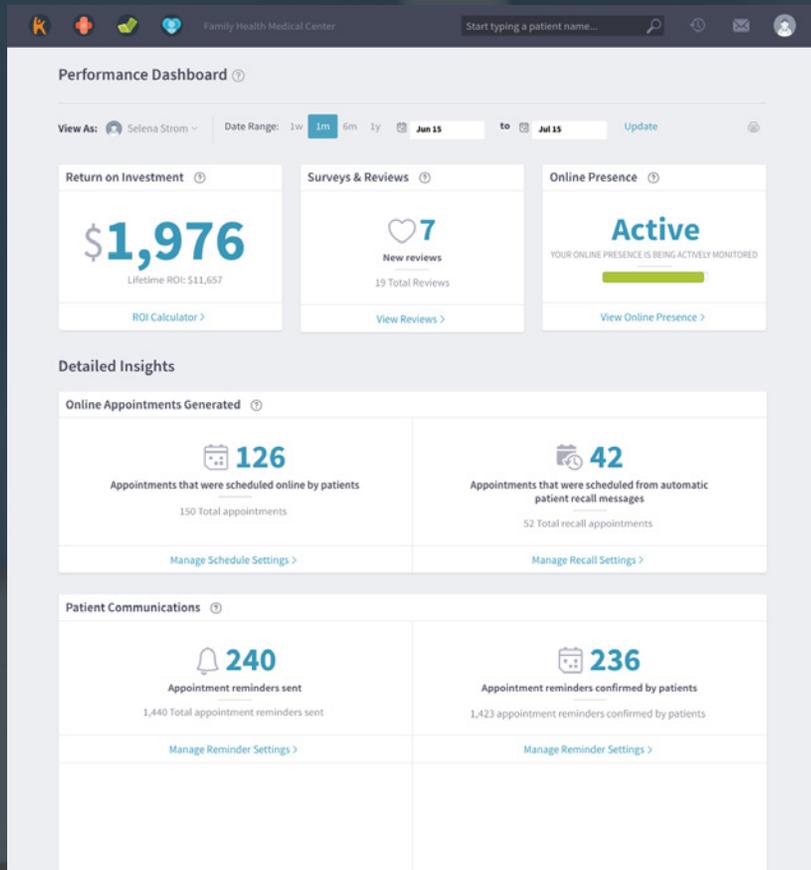
Patients are the lifeblood of your practice. To thrive in today's patient-centered market, you need a holistic approach to how you deliver patient experience alongside patient care. Kareo Engage helps you create a superior end-to-end patient experience, get found online, communicate with patients, and send re-care reminders. The results are better care delivery, increased collections and happier, healthier patients.

Included functions:

- Online Patient Intake
- Automated Appointment Reminders
- Online Scheduling
- Reputation Management + Patient Reviews
- Recall Messages for Follow-Ups
- Online Provider Profile
- Practice Analytics

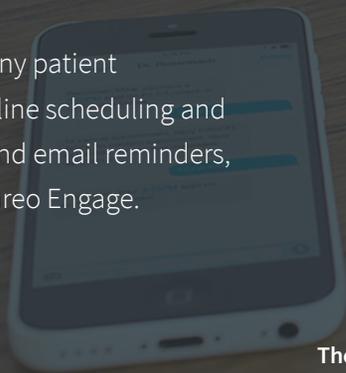


➔ For a complete list of functions and features, see page 28



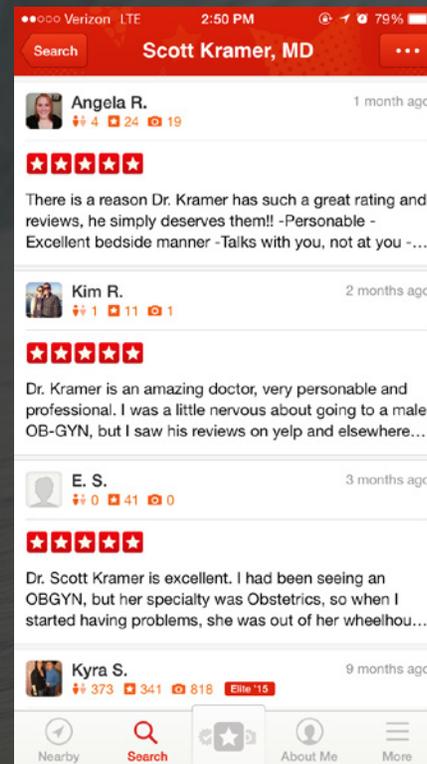
“I want to save time on communicating with my patients.”

You can simplify and automate many patient communications with tools like online scheduling and patient intake, bi-directional text and email reminders, and patient follow up surveys in Kareo Engage.



“I want our practice to look good online.”

Kareo can help you update and manage online listings, increase search rankings with a free online provider profile, and drive positive patient reviews to multiple social media sites.



Dr. Benjamin Grimmley REQUEST APPOINTMENT

Dr. Benjamin Grimmley
Family Medicine
 Grimmley Family Practice

A healthy body and mind will give you a healthy life. I'll help you get there...

★★★★★ 5 Total Reviews (Average rating of 5 / 5)

📍 2014 Ginger Drive
 Suite 100
 Los Angeles, CA 32308

🕒 View office hours

📞 (850) 555-1111

“I want to find more patients and keep the ones I have, happy.”

Improve your online reputation and presence so more patients can find you. Then, use Kareo to keep them engaged with regular patient communications like re-care messages and satisfaction surveys. Plus, with online patient intake, your patients will thank you for a stress-free check in process.



Managed Billing

Focus on patients and leave the billing to a Kareo Expert Billing Partner

With a Kareo billing partner, you can run a more successful practice while focusing on the health and experience of your patients. Collect faster payments with the expert help you need to maintain the financial health of your practice. Our team of experts and helpful, guiding technology enables easier intake, more accurate coding, and faster turnaround time on collections.

A Kareo Billing Partner Using Our Software Can Offer Your Practice:

- Real-Time Claims Tracking
- Patient Relations
- Billing Analytics
- Calendar and Scheduling
- Billing Task Management
- Secure Messaging

➔ For a complete list of functions and features, see page 28

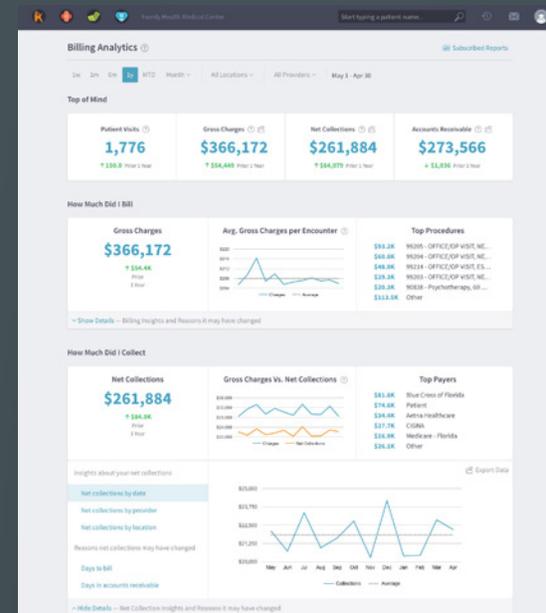


“I need a billing partner who has deep expertise to help me get paid quickly.”

Kareo’s network of billing experts and technology are designed to put your practice on a path to success and ensure you get paid. They will help you establish clear best practices to maximize reimbursement.

“I don’t have time or the expertise to do in-house billing anymore.”

Kareo works with partners who are specially trained billers, with years of experience in your specialty. They can start billing right away using best practices learned from working with practices just like yours.



Billing Tasks

Task	Due	Status	Assigned To
General Document Scan Issue	06/13/2016	Completed	Andrew Cammarata
Missing Insurance Information	06/13/2016	In-Progress	Charles Tark - Dr. Balazs Kocsi
CPT Code Not Marked	06/11/2016	Completed	Beverly Saleh - Dr. Balazs Kocsi
General Document Scan Issue	05/12/2016	Completed	Terence Reyes - Dr. Balazs Kocsi
Handwriting Not Clear	03/10/2016	Completed	Mohammad O'Brien - Dr. Balazs Kocsi
Additional INFO	02/25/2016	Completed	Joseph Idono - Dr. Balazs Kocsi
Handwriting Not Clear	02/21/2016	Completed	Jeannette Garceau - Dr. Balazs Kocsi

TASK DETAILS - #140592

Due: 06/13/2016

Missing Insurance Information

In-Progress

Charles Tark

Dr. Balazs Kocsi

Date of Service 5/24/2016

Task instructions

Insurance information is missing or incomplete. Enter the valid insurance information. To correct, select 'Start Task,' and then, select 'Edit Charge' and enter the information in the 'Notes to Biller' section. Once complete, select 'Send to Biller' and then, select 'Save and Complete.' If you have questions, use the 'Notes to Biller' section in 'Edit Charge.'

[Continue Task](#)

Charges

Charge	Due	Status
Charles Tark	7/5	Approved By Biller
Beverly Saleh	7/5	Approved By Biller
Terence Reyes	7/5/16	Approved By Biller
Tom Paisley	7/5	Approved By Biller
Mohammad O'Brien	7/5	Approved By Biller
Joseph Idono	7/5	Approved By Biller

Details

Terence Reyes
Male, 7/14
Seen on 7/5 by Benjamin Grimmley at Family Health Medical Ce...

DIAGNOSES

1 836.59 Other closed dislocation of knee

PROCEDURES

1 97110 Therapeutic proc, 1+ areas, each 15 min; therapeutic exercises \$55.70 836.59

2 97035 Application, modality to 1+ areas; ultrasound, each 15 min \$22.52 836.59

NOTE TO BILLER

No comments

Kareo Platform Extensions

In addition to Kareo's award-winning modules, Kareo offers integrated products to further optimize your clinical, billing and patient engagement workflows.





Kareo Telehealth

Kareo Telehealth makes it easy to offer your patients secure video visits. Patients get added convenience and increased access to care. Practices receive full reimbursement through insurance at the same rate as an office visit.



Kareo Analytics

Kareo Analytics is a powerful business analytics engine that helps you improve your billing operations. With Kareo Analytics as part of your daily revenue cycle management workflow, you can move forward with confidence knowing that your time and resources are being fully optimized.



Kareo Patient Collect

Kareo Patient Collect streamlines the patient collection workflow by leveraging text, email and mailed statements. Optimum communication combined with multiple payment options ensures you collect more, faster.



Kareo Patient Statements

As patient collections continues to increase as a portion of your practice's A/R, it's important to have the right tools to collect what you are owed. Accelerate your patient collections and save staff time with Kareo's patient statement mailing service.



Kareo Telehealth

Make every moment matter using HIPAA-compliant video visits

Kareo Telehealth makes it easy to offer your patients secure video visits. Patients get added convenience and increased access to care. Practices receive full reimbursement through insurance at the same rate as an office visit. Patients get added convenience and increased access to care. Practices receive full reimbursement through insurance at the same rate as an office visit.

Included Functions:

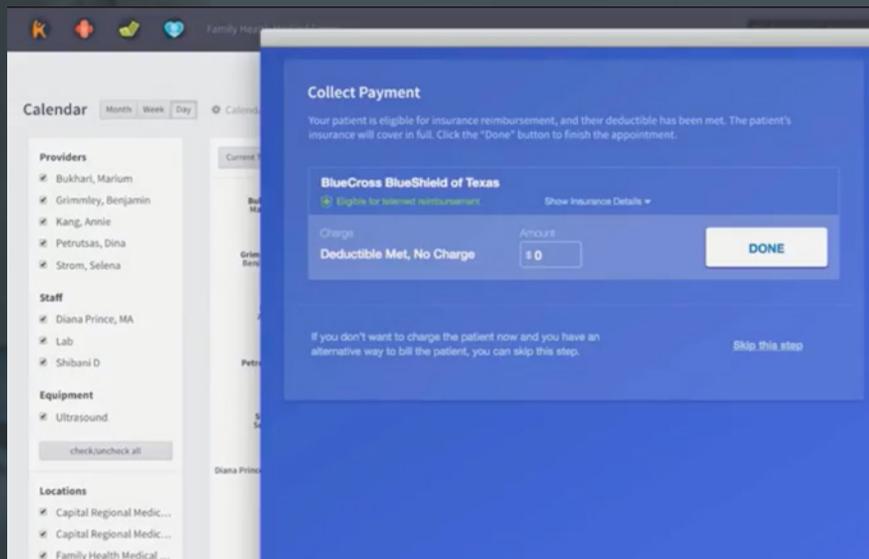
- **Easy scheduling.** Seamlessly schedule telehealth appointments directly in your practice management system via easy and efficient one-click scheduling.
- **Streamlined workflow.** Maintain current office workflow for scheduling, charting and billing. No additional staff work required, allowing you and your practice to focus more on patient care.
- **Satisfying patient experience.** This includes no activation or on-boarding time. Just flip a switch within the Kareo platform and get more time back.
- **Helpful patient communications.** From a scheduled appointment until the actual visit, we provide patients what they need to know, for a smooth experience with their video visit.
- **Online appointment requests.** The integrated Kareo platform allows patients to request a video visit online at their earliest convenience, notifying the office staff.

➔ For a complete list of functions and features, see page 28





Kareo Telehealth allows you to connect with your patients anytime, anywhere. It's simple, secure and streamlined—and fully reimbursed by private payers.



With seamless integration to the Kareo EHR and practice management software, you can bill like a regular office visit and get fully reimbursed by private payers.



Kareo Analytics

Insights that transform data into revenue generating opportunities

Efficiently accessing and interpreting revenue data can be frustrating. All too often, this involves manual data processing that's time consuming and error prone.

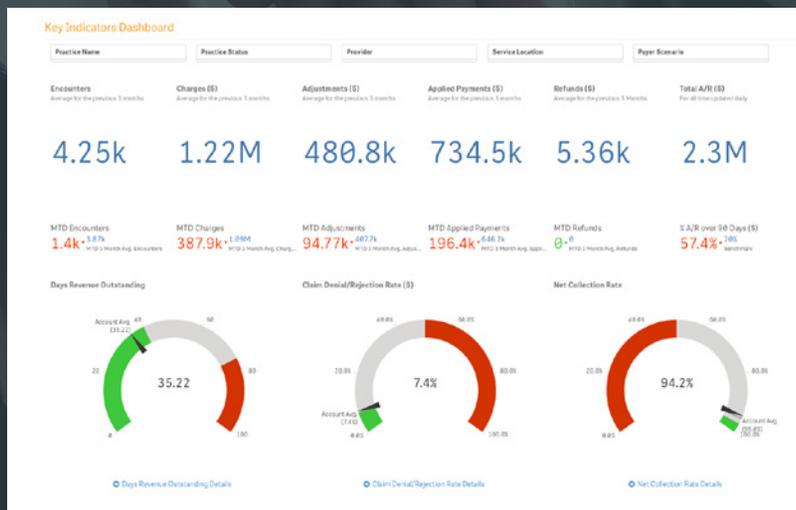
To effectively manage your bottom line, you need a powerful business analytics engine that aligns with your billing operations. Kareo Analytics helps you uncover the revenue opportunities that will provide the greatest contribution to your bottom line. With Kareo Analytics as part of your daily revenue cycle management workflow, you can move forward with confidence knowing that your time and resources are being fully optimized.

Included functions:

- Advanced Reporting and Dashboards
- Integrated View of all your Practices and Providers
- Customize Any Reports or Dashboard
- Quick and Responsive user experience
- In-App Definitions of formulas used
- In-App Data Dictionary for quick and confident changes
- Curate data stories for further conversations



➔ For a complete list of functions and features, see page 28



Display current performance of key indicators with benchmarks and averages built in for a seamless overview of business metrics.

Practice Name	MTD Encou...	Prev. 3 Month Avg. Encounte...	MTD Char...	Prev. 3 Month Avg. Charges	MTD Adjust...	Prev. 3 Month Avg. Adjustmen...
Practice #1	0	0.0	\$0.00	\$0.00	\$0.00	\$0.00
Practice #2	0	0.0	\$0.00	\$0.00	\$0.00	\$0.00
Practice #3	0	0.0	\$0.00	\$0.00	\$0.00	\$0.00
Practice #4	0	0.0	\$0.00	\$0.00	\$0.00	\$0.00
Practice #5	0	0.0	\$0.00	\$0.00	\$0.00	\$0.00
Practice #6	0	413.7	\$6,55...	\$103,447.00	\$335.00	\$56,961.44
Practice #7	0	213.7	\$0.00	\$58,453.33	\$7,544.89	\$48,226.05
Practice #8	0	463.7	\$0.00	\$331,571.00	\$3,673.88	\$183,653.46
Practice #9	0	239.3	\$80,9...	\$123,950.33	\$1,535.02	\$63,258.38

View all claim lines for the account, or by any of your selections from any other report for a detailed look behind the scenes.

Claim ID	Encounter ID	Encounter Status	Encounter Service Date	Procedure Code
49250	27273	Approved	5/9/2003	PRP
16773	8981	Approved	3/5/2007	1
11635	6172	Approved	4/16/2007	1
15003	7955	Approved	4/23/2007	1
16772	8980	Approved	9/21/2007	1
12496	6655	Approved	7/9/2008	1
27073	14742	Approved	8/18/2009	64413
13771	7311	Approved	10/20/2009	1
14653	7773	Approved	12/21/2009	Q9966
14652	7773	Approved	12/21/2009	99213

Pull up average encounters for the previous 3 months, MTD encounters, and a chart of encounters over time. Have data at your fingertips when and where you need it.



Kareo Patient Collect

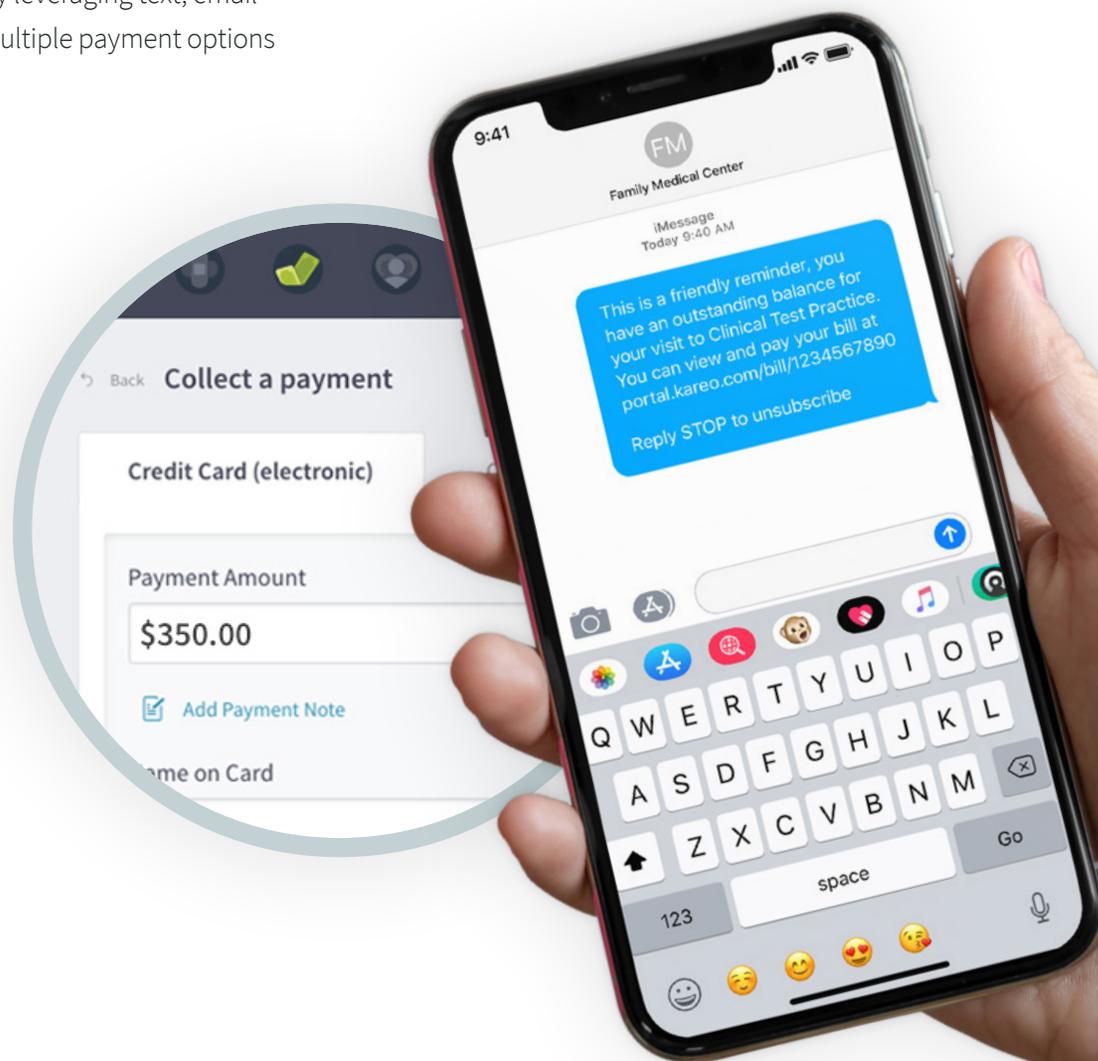
Maximize patient collections using our omnichannel messaging and payment solution

Kareo Patient Collect streamlines the patient collection workflow by leveraging text, email and mailed statements. Optimal communication combined with multiple payment options ensures you collect more, faster.

Easy – It's simple to set up and start processing credit cards. Activate patient payments right through your Kareo account. Keep costs low with no setup or monthly fees. Stay in control with no contracts and the ability to cancel at any time.

Fast – Text and email options enable you to speed collections and reduce your A/R. Drive online payments by sending unlimited text and email balance due alerts automatically to patients.

Efficient – Our delivery dashboard quickly shows you what communication was delivered, and when. Reduce phone calls and time wasted on collecting patient balances by automating statement batches and processing credit cards through Kareo.



 For a complete list of functions and features, see page 28



The robust, cost-efficient, reliable and easy-to-use swiper technology enables medical groups to process patient payments more efficiently, provide enhanced payment flexibility to patients, and improve overall patient collections.

Included functions:

- Simple, secure and integrated point-of-sale payments using the credit card swiper
- Seamless integration with Kareo Billing using your regular billing workflow
- Shorten your revenue cycle – just click and swipe to post a payment and record transactions immediately
- Store credit cards on file and easily capture patient balances for future visits
- Take payments anywhere and easily take payments in person, over the phone, and online

You can simplify your patient billing workflow by storing credit cards on file and easily capturing patient balances for future visits. This feature also helps minimize data entry, free up valuable front office staff and streamline future patient collections.



Test Practice

Back Collect a payment

Credit Card (electronic) Credit Card (manual) Cash Check

Payment Amount
\$350.00 Prepare Swiper

Add Payment Note

Name on Card
Jane Doe

Card Number
4242-4242-4242-4242

Expiration Date CVV
01 / 2020 000

Save this card on file

Finalize Payment of \$10.00

You will be able to review the payment before you submit. You can generate a standard or itemized receipt on the next screen.



Kareo Patient Statements

Spend less time billing and increase patient collections

As the patient payments portion of your practice's collections continues to grow, it is crucial to collect what you're owed by patients. Accelerate your patient collections, save staff time and cut processing costs by using Kareo's patient statement mailing service.

Included functions:

- Automatic patient statement delivery and reduced time spent managing patient statements
- The ability to batch process the mailing of patient statements with a few mouse clicks
- Patient statements designed to reduce confusion and improve your collections

Eastern Pain Medicine PC
66 MIDDLEBUSH RD STE G 101
WAPPINGERS FALLS, NY 12950-4047

Owed by you **\$135.00**
Payment Due immediately

William Fox
A message from your practice:
This bill is for laboratory service requested by your physician. Payment in full is expected upon receipt of this invoice. This dunning message has a maximum limit of 200 characters (about 3 lines) and we don't truncate it.

Pay by phone 1.800.726.9120
Pay by mail use coupon below

For Patient	William Fox
Statment Date	08/07/2016
Account No.	125 8392 9238
Account Status	PAYMENT DUE

Explanation of your bill

Cost of services	Insurance paid	Previously paid	Adjusted Amount	Owed by you
\$2,500.00	\$1,000.00	\$40.00	\$45.00	\$135.00
	Amount insurance paid after deductibles and Co-pay	Co-pay or previous payments by you	Reduction in your balance due to billing agreements between your doctor and your insurance	

Detailed summary of services on back

➔ For a complete list of functions and features, see page 28

The Anatomy of an Intuitive Patient Statement

Move to a more effective patient statement designed to reduce confusion and improve your collections.

1. Clear amount owed

Patient total is derived from the sum of all encounters included in the current statement.

2. Friendly instructional message

Configure your custom message in Kareo Billing.

3. Convenient payment options

Set up online payments to have the Pay Online option prominently featured in your statements.

4. Intuitive explanation of bill at-a-glance

Patients can see cost of services, insurance paid, previously paid (by patient) and adjusted amount.

5. Quickly get questions answered

Set up custom practice contact methods.

6. Clear credit card options

Set credit cards accepted for pay by mail.

Eastern Pain Medicine PC
66 MIDDLEBUSH RD STE G 101
WAPPINGERS FALLS, NY 12950-4047

1 **Owed by you \$135.00**
Payment Due immediately

William Fox
A message from your practice:
This bill is for laboratory service requested by your physician. Payment in full is expected upon receipt of this invoice. This dunning message has a maximum limit of 200 characters (about 3 lines) and we don't truncate it.

2 **3** **4**

Pay Online
portal.kareo.com/code
Use code: 123-2324-1245

Pay by phone
1.800.726.9120

Pay by mail
use coupon below

For Patient: William Fox
Statement Date: 08/07/2016
Account No.: 125 8392 9238
Account Status: **PAYMENT DUE**

5 **Explanation of your bill**

Cost of services	Insurance paid	Previously paid	Adjusted Amount	Owed by you \$135.00
\$2,500.00	\$1,000.00	\$40.00	\$45.00	
	Amount insurance paid after deductibles and Co-pay	Co-pay or previous payments by you	Reduction in your balance due to billing agreements between your doctor and your insurance	

Detailed summary of services on back

6 **Questions about your bill?**
Call (123) 123-1234 ext. 1234 Office Hours: M-F, 9AM-5PM PST • Email: contact@easternpain.com

Detach this coupon and return with your payment.

Eastern Pain Medicine PC
66 MIDDLEBUSH RD STE G 101
WAPPINGERS FALLS, NY 12950-4047

Check if address/insurance changes are on back

IF PAYING BY CREDIT/DEBIT CARD

VISA MASTERCARD AMERICAN EXPRESS

CARD NUMBER SECURITY CODE EXP DATE

SIGNATURE

STATEMENT DATE	ACCOUNT NO.	DUE DATE
08/07/2016	125 8392 9238	Immediately

PAY THIS AMOUNT SHOW AMOUNT PAID HERE

\$135.00

PLEASE MAKE CHECKS PAYABLE TO:

WILLIAM FOX
123 MAIN STREET
ANYTOWN, NY 12345-1234

EASTERN PAIN MEDICINE PC
66 MIDDLEBUSH RD STE G101
WAPPINGERS FALLS, NY 129504047



Kareo Marketplace

Extending the value of the Kareo platform experience.

Kareo Marketplace allows your practice to add valuable technology to complement and extend the functions already available in Kareo. We partner with some of the most innovative companies in the world and integrate these functions into your Kareo platform experience. These include functions such as clinical, billing and business management.

Included functions:

- Clinical
- Billing
- Business Management



 For a complete list of functions and features, see page 28

Our Marketplace Partners

Kareo partners with innovative companies to extend the value of our platform.

The result is a seamless and fully integrated system to help you succeed.

Clinical

- Specialized note types
- Telehealth
- Digital imaging

Clinical partners include:



Billing

- Credit card payments
- Claim acceptance
- Workers compensation

Billing partners include:



Business Management

- Improve interoperability
- Manage practice inventory
- Back-up and store data

Business Management partners include:



[Visit the Kareo Marketplace](#) for a complete list of all of our available partners.

The Results: A Positive Experience for Patients and Staff

FIND THE RIGHT PROVIDER ONLINE

While patients still ask for referrals from family and friends, 94% now use online reviews to evaluate physicians.

SEND VISIT REMINDERS

Patients want reminders, and your practice needs them. They can cut no shows by 30-50%. Options like text, email, and phone increase your success.

PARTICIPATE IN CARE

9/10 patients want shared decision-making with doctors. A mobile EHR allows heads-up medicine to engage your patients during the visit.

THE KAREO JOURNEY

APPOINTMENTS ANYTIME

Patients may not have time to call your office during business hours. Give patients the option to schedule online at a convenient time for them.

KNOW WHAT'S OWED

Confirm your patient's eligibility to ensure that you can collect co-pays and inform patients about what they will likely owe and their options for paying their bill.

STRESS-FREE CHECK IN

Use online patient intake to reduce clutter and confusion due to manual data entry errors, eliminate redundant steps and get paid faster. Plus, patients love that they can fill out forms whenever, wherever!

GET PAID MORE, QUICKER

Don't lose money from co-pays and deductibles not being collected at the time of service. Kareo Patient Collect, allows you to collect credit card info up front and ensure you get paid!

KAREO PRODUCT LEGEND:



Kareo Clinical



Kareo Engage



Kareo Billing



Managed Billing



Kareo Marketplace

READY-TO-GO PRESCRIPTIONS

Electronic prescriptions reduce errors and ensure that medications are ready to pick up. No wonder 92% of patients like the use of ePrescribing.



PAY BILLS ONLINE

Make it easy for patients to pay their bills by sending an electronic statement as soon as possible and offering a link to pay bills online.



STAY IN TOUCH

Patients want regular communication from you via email, text, and social media. You can also send a newsletter, blog, and share posts on social.



EASY ACCESS TO TEST RESULTS

Two-thirds of patients say a patient portal makes them more loyal to their provider. This offers easy access to lab results, medical records, and secure communications.

ASK FOR FEEDBACK

Patients want follow-up communications from providers and, as a result, rate their satisfaction significantly higher. Send a follow-up survey to patients asking for feedback.

SEND HELPFUL RE-CARE MESSAGES

Patients want to stay healthy and now you can help make that easier. Use re-care messages to remind patients to come in for timely care and follow ups.

Platform Functions

Purchase Kareo Billing or Kareo Clinical EHR and receive the following platform features at no additional charge:



ONLINE PROVIDER PROFILE

Establish a strong online presence with your Kareo provider profile. The profile is the easiest way to improve your Google search results and will help funnel patients to your practice.



PATIENT REGISTRATION

Make it easy for new patients to find and deliver completed registration paperwork. You can provide patients with immediate access to these forms, claiming back time for your front office staff.



SCHEDULING AND CALENDAR

Office staff can now schedule smarter. Set up and personalize your schedule, create scheduling rules, and track productivity. You can manage across the web, iPhone, iPad and Apple Watch.



APPOINTMENT REMINDERS

Reduce lost revenue from open schedule slots and costly patient no-shows using text, email and voice reminders. With Kareo, you can avoid reduced revenue, wasted front office resources while delivering better patient care and outcomes.



PATIENT PAYMENTS

With Kareo Patient Collect, patients can pay bills online with secure charge processing. Collect patient balances and co-pays in the office at the time of service by capturing credit card info up front with convenient and reliable swiper technology.* Unlimited text balance reminders and email options increase patient collections and reduce time in A/R.

*Additional fee for swiper hardware and credit card processing



CRITICAL TASKS FOR STAFF

Get full visibility and streamline your day by managing your tasks in one, easy-to-use inbox. It couldn't be simpler! And with Kareo Mobile you can also complete tasks while on the go.



SECURE MESSAGING

Save time and track secure messages within your practice. Our built-in messaging allows you to communicate with your biller, patients and staff. Plus, HIPAA-compliance gives you additional peace of mind.



REPORTS AND DASHBOARDS

Know where your practice stands and get a clear picture of your performance through built-in reporting. Kareo also offers easy-to-read dashboards, providing updates at a glance.

Module Features

Below are the core functions and features for each module.



Online Scheduling

- Book appointments online
- Send automated reminders
- Fill “open” or “canceled” appointment slots
- Free up front office staff

Reputation Management

- Send patient surveys
- Post reviews on social media
- Increase search engine traffic
- Monitor online reviews

Patient Communications

- Send appointment reminders
- Send re-care reminders
- Share important news with patients

Practice Analytics

- Calculate activity value
- Track patient reviews
- Know your online reputation
- Track key statistics

Online Patient Intake

- Reduce manual data errors
- Improve office efficiency
- Reduce paper usage
- Increase patient satisfaction



Patient Charting

- Easy note creation for over a dozen note types
- Use templates and text shortcuts
- Customize to your specialty

Certified ePrescribing

- Improve prescription accuracy
- Easily create drug favorites
- Look up pharmacies
- Create right from your patient’s chart

Comprehensive Labs and

Imaging Workflow

- Assign lab and study orders
- Submit labs electronically
- Save frequently used tests
- Share results with patients

Electronic Superbills

- See your frequent codes
- Drag and drop
- Make notes and comments
- Track status and easily send superbills

Custom Mobile Apps

- See your calendar
- Easily write prescriptions
- Access labs and test results
- Send secure messages



Charge Capture

- Enter charges
- Capture charges
- Set up common codes
- Improve claim accuracy

A/R Management

- Submit insurance claims online
- Scrub claims
- Receive electronic payments
- Resolve billing issues

Billing and Patient Collections

- Track collection status
- Use credit card on file
- Process batch patient statements
- View collection summaries
- Collect payment at point of service

Billing Analytics and Performance Reporting

- Understand practice financials
- Measure performance
- Customize reports
- Maintain steady cash flow



Kareo Expert Billing Partners

- Uses best practice approach
- Has specialty training
- Automates claims w/ billing rules
- Tracks claims in real time
- Handles denials and rejections
- Manages patient collections
- Communicate via secure messaging

Charge Entry

- Save favorite codes
- Use charge capture
- Access through web
- Use built-in rules engine

Patient Relations

- Customize schedule
- Send appointment reminders
- Use patient portal
- Enable patient payments

Billing Analytics

- Filter billing metrics and graphs
- Scan your top level financials
- Drill into collection details
- Get real-time insights



Clinical

- Get a broad set of specialized note types
- Adopt telehealth
- Digital imaging
- Get lab Integrations

Billing

- Process credit card payments
- Improve acceptance of claims
- Handle workers comp needs
- Better access to payer networks
- Automate billing process

Business Management

- Improve interoperability
- Manage practice inventory
- Attract new patients
- Connect with new patients
- Back-up and store data

Platform Extension Features

Check out the features and benefits for Kareo's platform extensions to further optimize your existing clinical, billing and patient engagement workflows.

KAREO TELEHEALTH

Why Offer Video Visits?

- Increase staff efficiency
- Improve patient outcomes
- Increase patient satisfaction and retention
- Keep schedules full without increasing practice overhead
- Reduce patient no-shows
- Generate incremental revenue
- Drive mental health adoption
- Secure, HIPAA-compliant and HITRUST certified
- Cost competitive

Seamless Integration with Kareo Platform

- Easy and efficient "one-click" scheduling
- Telehealth eligibility verification
- Screen share capabilities
- Streamlined workflow

Satisfying Patient Experience

- Convenient mobile app
- Helpful patient communications
- Online appointment requests

KAREO ANALYTICS

Advanced Reporting and Dashboards

- Robust out of the box reports and dashboards
- Customize standard reports or create new reports and dashboards
- Key Indicator Analysis
- Procedure Code Analysis
- Year-Over-Year Analysis

Integrated View of All Your Practices and Providers

- All KIDs, practices, and providers at your fingertips for discovery and analysis
- User experience is quick and responsive
- Easy to uncover revenue opportunities

In-App Data Dictionary

- Built in dimensions, measures, and charts
- Drag-and-drop capability
- Transparency into formulas

Curate Data Stories

- Snapshot any chart or table
- Drop live reports into in-app presentations
- Facilitate the sharing of information

KAREO PATIENT COLLECT

Streamline Your Workflow

- Simple, secure and integrated point of sale payments
- Streamline the patient self-pay process
- Settle bills quickly and accurately
- Electronically verify insurance eligibility

Collect More, Faster

- Maximize up-front collections
- Reduce collection costs
- Drive online payments
- Speed up time-to-pay with text and email balance reminders.
- \$25 monthly mailed statement credit
- Have patients pay on time and in-full
- Take payments in person, over the phone, and online

Future Proof Your Patient Collections

- Upload and save credit cards
- Capture billing contact information
- Confirm delivery of patient statements
- Reduce time spent managing patient statements through automation

KAREO PATIENT STATEMENTS

Improve Productivity

- Reduce time spent managing patient statements
- Automate patient statements delivery
- Easily batch process patient statements with a few mouse clicks

Get Paid More, Faster

- Increase patient collections
- Reduce patient confusion
- Clearly present payment options
- Show amounts paid and outstanding

Reduce Customer Confusion

- Clearly present patient totals
- Configure your custom instructional messages
- Prominently featured "Pay Online" option
- Clear presentation of cost of services, insurance paid, previously paid (by patient) and adjusted amount



