



It's Time to Switch to a Software Platform You Can Trust

Adopt an all-in-one, integrated technology platform that streamlines patient and business management workflows.



More Time With Patients, Less Busy Work

One of the most important factors in determining the ongoing success of today's independent medical practice is **operational efficiency**. You don't have time to log into multiple solutions and double-enter data. You need one solution to meet all your practice needs, from billing, electronic health records, patient intake, telemedicine, eRx and more.

Improving efficiency in all areas of patient care and business management has become an imperative, especially in independent practices with big goals and limited staff. Unfortunately, the barrage of one-off, disconnected solutions over the past decade has left practices juggling multiple tools. It's no wonder doctors report spending 43% of their time entering data, and only 28% with patients.

The Doctor's **Workload:**

43%

Time spent entering data



28%

Time spent with patients



How's Your Patient Experience?

Patients have become savvy and vocal consumers, expecting technology-enabled conveniences and a high level of service. Patient experience can now make or break your practice. Do you offer a patient portal for lab results and access to medical records? Do you have secure two-way communication for patients and staff?

With the increase in high-deductible healthcare plans, patient payments can represent 30% or more of your practice revenue. Practices are focused on new policies, procedures and workflows to ensure efficient and reliable patient collections. Do you offer easy and convenient ways for patients to pay their balances?



Patient Payments \geq 30% of Revenue

Are You Keeping Up With MACRA and CMS Regulations?

It's reported that 87% of solo practitioners and 69% of 2-9 provider practices will face MIPS penalties in 2019, accounting for \$300 million in penalties for over 700,000 providers. This staggering statistic shows the need for improvement in incentive program reporting.

With the onset of the Quality Payment Program (QPP), EHRs have become even more vital to delivering quality care, avoiding costly penalties and getting paid. But not all software vendors have the right technology solutions to scale into the future. Many EHRs are poorly funded, have not met MACRA requirements or are going out of business. Do you have a reliable software partner that provides solutions and guidance in avoiding costly penalties?



\$300 Million

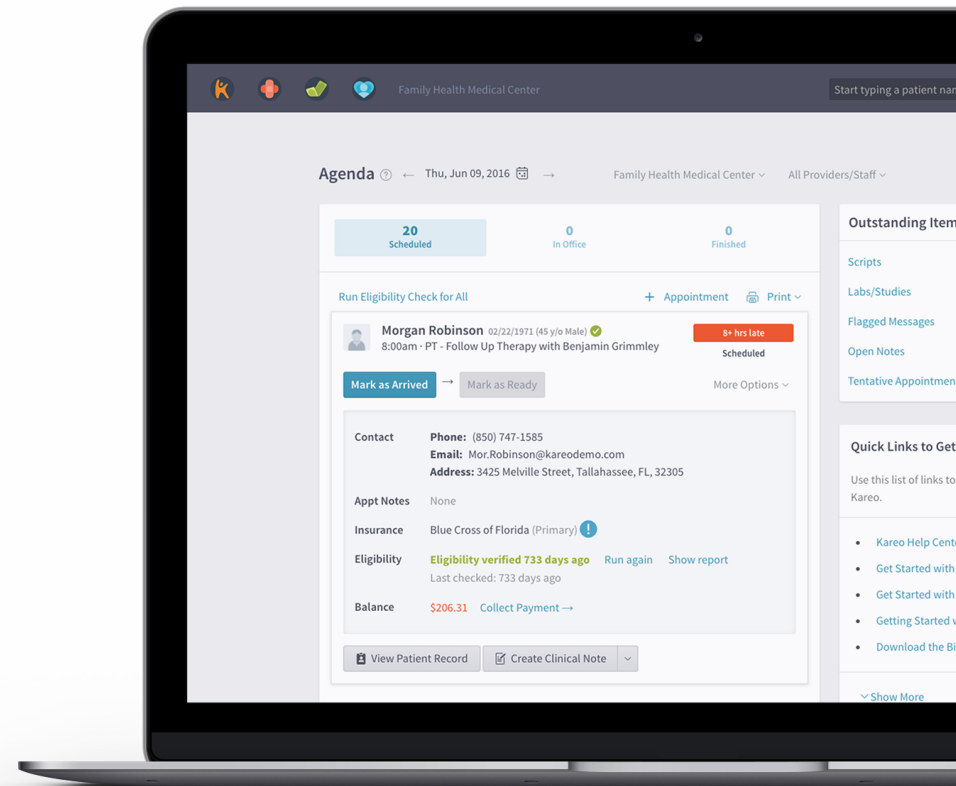
Estimated MIPS penalties in 2019

Medical Billing Has Changed, Has Your Software?

Gone are the days when coding and billing were rote functions, with payments coming in like clockwork. Antiquated billing systems aren't equipped to help you avoid rejections and denials that put a halt to your payments. You need a technology platform that offers features to streamline your revenue flow.

The bottom line is this: You need a complete solution for efficient billing, patient care and practice growth from a software partner you can trust.

Few companies offer an easy-to-use, complete solution in one integrated platform, and only one company is devoted solely to the success of independent medical practices. Kareo's integrated clinical, billing and patient engagement platform drives end-to-end efficiency, resulting in better patient care and higher revenue.



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“With Kareo, what you see is what you get. They are upfront about their practices and their staff is so friendly and helpful. I've had an excellent experience with Kareo so far. Their EHR interface is intuitive and easy-to-use. With live one-on-one trainings, you will be set for success.”

Monica Fauble, Owner
Acupuncture with Monica

The Kareo Advantage

Kareo is the only cloud-based, clinical and business management platform designed specifically for the independent practice. Our integrated modules work together as part of a seamless platform, so you have helpful tools to tackle your toughest administrative challenges.

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“Kareo has provided my small private practice with an easy-to-use, reliable, cost-effective practice management system. I am in the process of converting from my previous system to Kareo's EHR, which will make the link between patient records and billing virtually seamless. The customer support with this company has been phenomenal.”

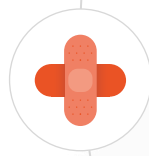
Ashley Wagner, Owner
A L Wagner Family Chiropractic PC



Kareo's Integrated Platform

KAREO CLINICAL (EHR)

Our MACRA-enabled, certified EHR received the Frost & Sullivan Enabling Technology Award for supporting best practice efficiency.



KAREO BILLING (PM)

Easily manage patient payments, insurance billing, A/R, reporting and analytics.



KAREO ENGAGE (PATIENT ENGAGEMENT)

Boost patient communication, simplify patient intake, build your online presence and provide a superior patient experience.



Additional Offerings



MARKETPLACE PARTNERS

Complement and extend the value of Kareo with popular third party integrations.



PLATFORM EXTENSIONS

Add telemedicine, point of service credit card payments, patient statement mailing services and more.

A Partner You Can Trust

At Kareo, we share the vision that independent practices are the best place for building relationships with patients and providing the most meaningful care.



Trusted since **2004**



50,000 providers



45+ specialties
served



60M secure
patient records



75,000 active users,
including doctors & billers



\$18B annual claim
revenue processed

Secure

HIPAA, HITRUST, PCI DSS and FIPS-140-2 compliant.

MACRA Certified

Easily track your performance on quality measures and earn positive performance-based payment adjustments on Medicare reimbursements

Award Winning

Recognized technology leader for ambulatory practices.



It's Easy to Switch to Kareo



No Setup Fees or Contracts

Kareo provides complete transparency with pricing—no contracts,*no set-up fees, no surprises.



Flexible Implementation

Adjust your subscription without penalty so growing your practice is easy and affordable.



Free Support & Training

With a dedicated Customer Success Coach and ongoing expert training, get best-in-class support at no additional cost.



Fast

Start as soon as 10 days from receipt of accurate data from practice, depending on size and complexity of the transfer.



Secure

Our team has the experience and expertise to import data securely and quickly from most EHR and billing software systems.

* No-contract subscription is based on eligibility.



Meet Your Kareo Success Team

Our team of experts are on your side to ensure your transition to Kareo is smooth, seamless and successful.

Customer Success Coach

Your Customer Success Coach is your main point of contact. They assist you with set up, direct you to key resources, coordinate other teams and answer any questions that come up along the way. Think of them as your quarterback.



Enrollments Specialists

This team takes care of all your paperwork, including electronic data integration (EDI) setup and plugging in the electronic infrastructure for any third party integrations—insurance companies, prescriptions, lab providers, etc. The enrollments team also works with the end vendors to help set up the software and enable workflow on the clinical side.



Data Services

This team is in charge of importing your existing billing and/or clinical data into Kareo, including appointments and insurance providers, but not claims. Our data specialists work closely with a key contact in your practice—we recommend an office manager or similar position—to drive the process and letting you know exactly what we need from you to successfully integrate your data into your new Kareo systems.



Training Specialist

Our expert training team offers the comprehensive, easy-to-follow Kareo University training program designed to help you make the most of our integrated platform. They'll show you all the tips and tricks to save time, boost efficiency and get paid!

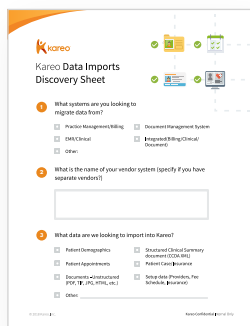
Kareo's Game Plan for Success

Switching to Kareo is easier than you think. The keys to a successful software change are sound planning and solid execution. Here's a step-by-step guide of what to expect and how the Kareo team will support you through it all!

STEP 1

Welcome to Kareo!

Expect a call from your dedicated Customer Success Coach to start setting up your account. Your coach will also help you register for training courses and talk about data import milestones, including data requirements.



The image shows a 'Kareo Data Imports Discovery Sheet'. It is a form with three main sections, each with a numbered orange circle icon. Section 1: 'What systems are you looking to migrate data from?' with checkboxes for 'Practice Management/Billing', 'EMR/CRM', 'Other', 'Document Management System', and 'Integrated Billing/Clinical Document'. Section 2: 'What is the name of your vendor system (specify if you have separate versions)?' with a text input field. Section 3: 'What data are you looking to import into Kareo?' with checkboxes for 'Patient Demographics', 'Patient Appointments', 'Document(s) - Structured (PDF, XML, HTML, etc.)', 'Other', 'Structured Clinical/Inventory Document (CDA, HL7)', 'Patient Care Resources', and 'Other Data (Procedures, Per Schedule, Resources)'. The Kareo logo is in the top left corner.

Data Import Discovery

During this step, we'll learn about your current systems and the data you're looking to import, and prepare the way for a smooth transition to Kareo.

STEP 2

Account setup

Your Success Coach will help you configure critical platform settings including setup wizards, locations, calendar settings, patient engagement features and enrolling for payer e-claim submission. Our enrollment and data teams will prepare your customized system and begin migrating all of your existing data into it.

Clinical Data Import

- ePrescriptions
- eLabs
- Referrals
- Immunizations
- C-CDA Exchange
- Patient Portal API Access Key
- Patient Notes (scanned)

Billing Data Import

- Patient Demographics
- Policy Information
- Insurance Companies & Plans
- Appointments
- Patient Balances
- Fee Schedules
- Referring Physicians
- Service Locations
- Documents: pdf, jpg, etc.

STEP 3:

Training

While we're busy moving your data over, you and your staff can start learning the ins and outs of your new software with free training courses from Kareo University. We offer webinars, eLearning and resource guides for specific roles and solutions. If you want to turbocharge your onboarding process we can provide customized on-site training for an additional fee.

STEP 4:

Launch (Day 10*)

Now that all your data has been imported, you're ready to start using Kareo—and we're here to help. Your Success Coach will make sure you've completed the training sessions you'll need to take full advantage of our robust system. Start scheduling appointments, entering patient notes, sending prescriptions, submitting claims, and more.

Note: Kareo can scan and upload patient notes into for an additional fee. For claims, close out previous claims in your legacy software, and enter only new claims into Kareo.

**Estimated 10 days to launch after Kareo receives correct and complete data from the practice. Time to usage will vary.*

STEP 5:

Become a Power User!

Once you've completed a full month in Kareo, we'll check back in to make sure everything's set up correctly and running smoothly, and that you're getting the training you need to be a Kareo Power User! Move on to more advanced functions such as posting payments, ordering labs and more.

Congratulations! You're ready to rock—but remember, Kareo provides ongoing, industry-leading customer support and training, so you're never really on your own.



Happy Customers, Happy Patients

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"Our no-show rate has decreased by over 50%. ... I wish I had known how easy this transition to Kareo was going to be because I would have done it much sooner."



Amber Jensen, Practice Manager
Greener Healing Ways

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"After six months, our revenue realization was up 95.6%. ... I have a lot of faith in Kareo, which makes it so much easier for us to keep practicing independently."



Dr. Scott Mayer, Clinical Director
Today Clinic

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"We have very low A/R with an average of 24 days... Kareo is well established, reliable, has great partnerships, is integrated with specialty EHRs, and offers strengths for our practice that other systems could not."



Daniel Soteldo, Practice Manager
Westgate Skin & Cancer

New Customer FAQs

Will there be a delay in my insurance claims?

During onboarding, you can continue claims processing in your previous system. When your data import is complete, you can start submitting all new claims into Kareo. Finish off all existing claims in your previous system, so there will be no interruption to payments.

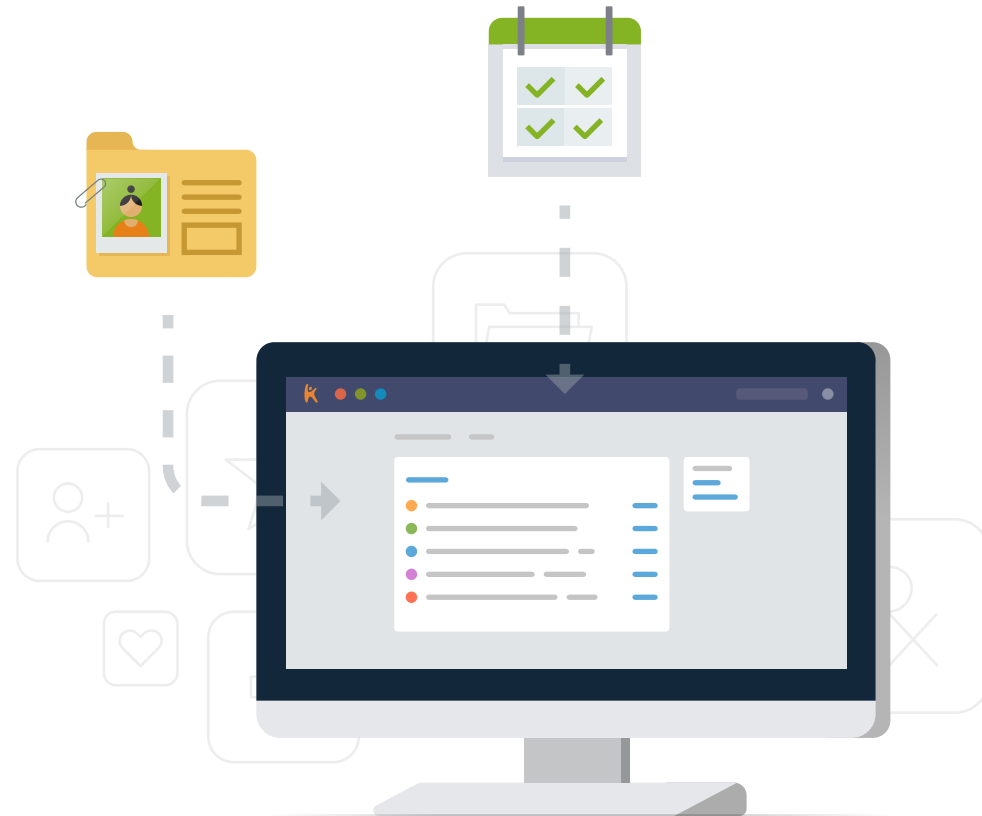
What are the different types of Data Portability services offered by Kareo?

Kareo offers 3 different types of Data Portability services: Data Import, Data Migration and Data Export

- **Data Import:** Data Import is the process through which the Kareo Data Services team imports practice data from legacy Billing and/or EHR systems into the Kareo platform. Other vendors also refer to this as Data Migration, Data Transfer, etc.
- **Data Migration:** Copy data from one Kareo Account (source) to another Kareo Account (target)
- **Data Export:** Copy data from current Kareo Account to be used for import with a new software vendor.

What are common data sets imported into Kareo?

The most common data sets that practices like to import are Patient Demographics, Appointments, Patient Case (Insurance Policy), Payer List, Provider List, Scanned Documents (Clinical and non-Clinical), Fee Schedule, Care Summary Document (C-CDA).





What is the timeline for the Data Import Process?

Once all the data is made available to Kareo Data Services team, in the correct format and with no critical issues, it takes about 10 business days to complete the import process.

Timelines may vary depending on data size, complexity of work, or if custom scripting is needed.

1. Data Imports kickoff call (1-2 weeks from initial welcome call)
2. Signed Scope and Service quote (1-2 weeks)
3. Customer provides data from legacy system (1-2 weeks)
4. Data Import and customer validation (1-2 weeks)
5. Go Live/Final move to Production (1 week)

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“We are extremely happy with Kareo. My favorite part is the customer service. When I don't know how to do something, Kareo's service is amazing.”

What are my options to extract data?

Data extraction from the legacy system varies based on the vendor. Some vendors provide practices with the option to export data from within the application itself. These are typically available as reports that can be downloaded or extracted in a CSV format. In other cases, practices have to request data from the vendor.

Kareo has experience extracting data from several legacy vendors and can provide guidance to the practice in some instances via written instruction or screen share. However, if clients are interested in importing documents, they must be requested from the vendor.

Fernanda Rivera, Office Manager
Physical Therapy and Wellness Center, Inc

