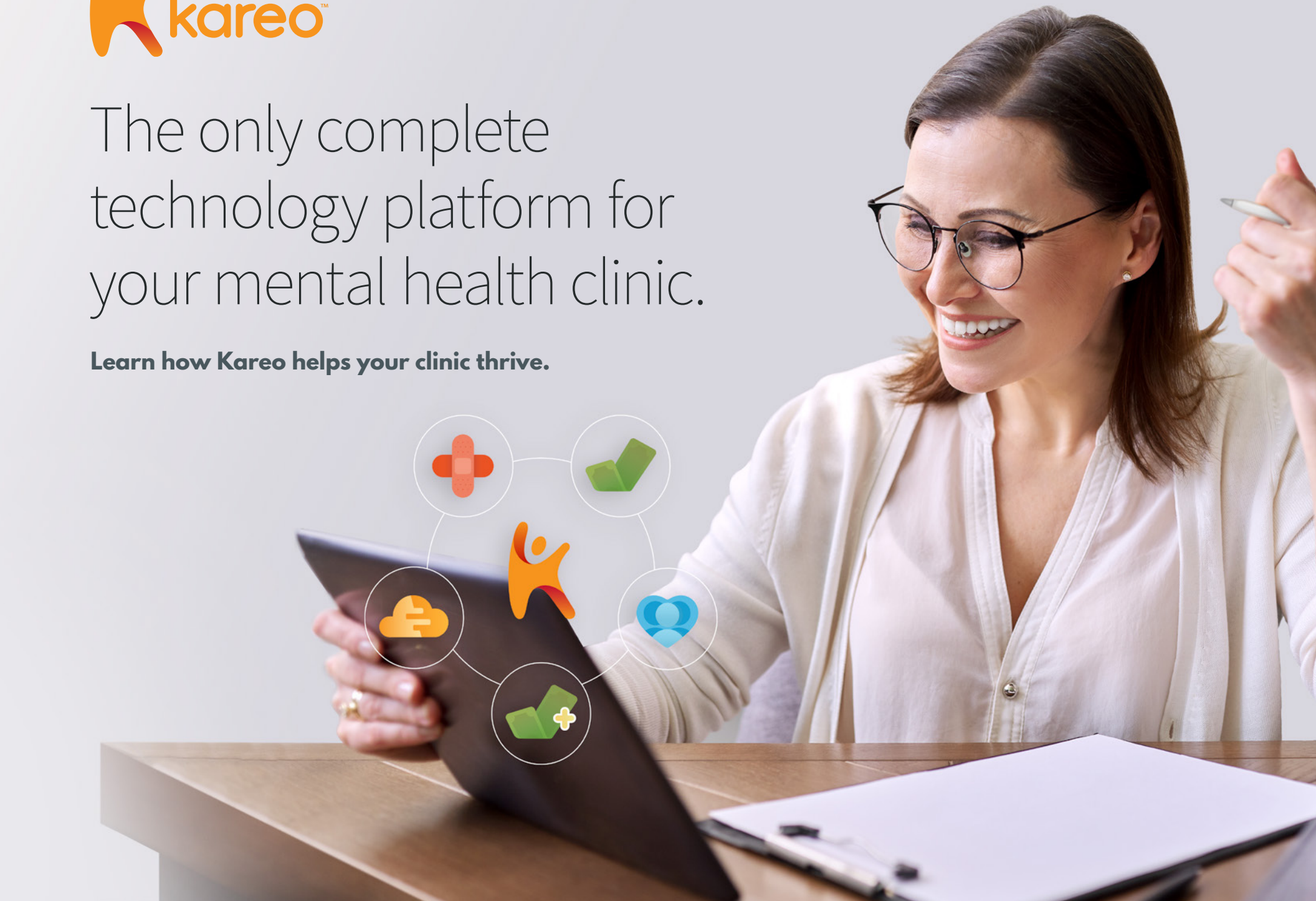
kareo™

The only complete technology platform for your mental health clinic.

Learn how Kareo helps your clinic thrive.



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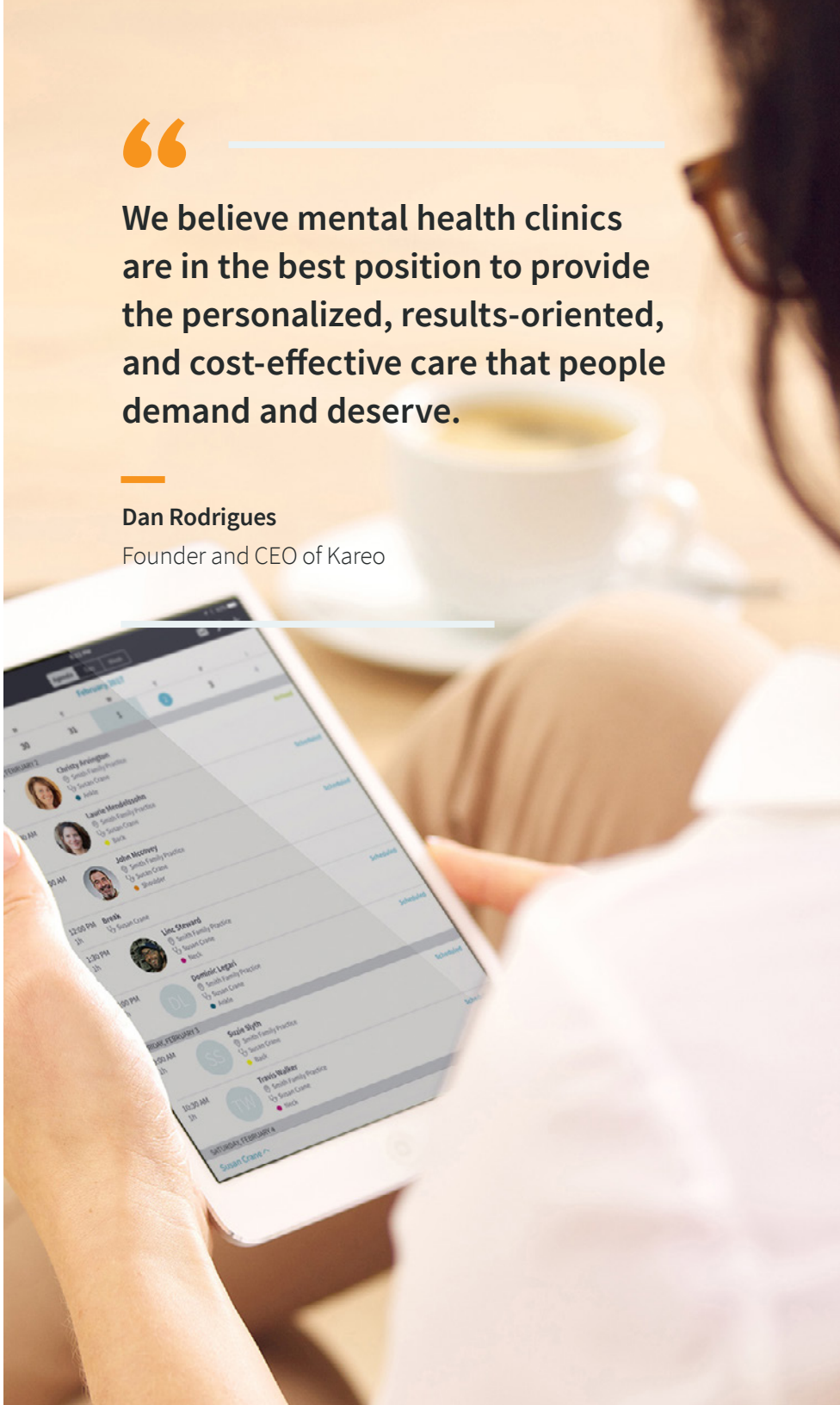


We believe mental health clinics are in the best position to provide the personalized, results-oriented, and cost-effective care that people demand and deserve.

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 a mental health clinic. We offer the only cloud-based, clinical and business management technology platform dedicated to serving the unique needs of mental health providers. Our software helps you engage your patients, run a smarter clinic, provide better care, and get paid faster. Over 75,000 healthcare providers of a variety of specialties 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 mental health providers. The result is an affordably priced platform that is tailored specifically for behavioral health care.

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

including psychiatry, psychology, and family and marriage therapy.

$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 mental health clinics. It reduced complexity in some areas and added complexity in others. Kareo will help you succeed with intuitive technology that aligns with your existing clinic workflow.

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

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.

BEST IN KLAS
SMALL PRACTICE AMBULATORY EMR/PM (<10 PHYSICIANS)
2021

FROST & SULLIVAN
BEST 2020 PRACTICES AWARD
NORTH AMERICAN AMBULATORY ELECTRONIC HEALTH RECORDS CUSTOMER VALUE LEADERSHIP AWARD

Software Advice
FRONT RUNNERS
2020

USERS LOVE US
G CROWD

Meet the Kareo Platform Modules

Purpose built for a people-centric practice model

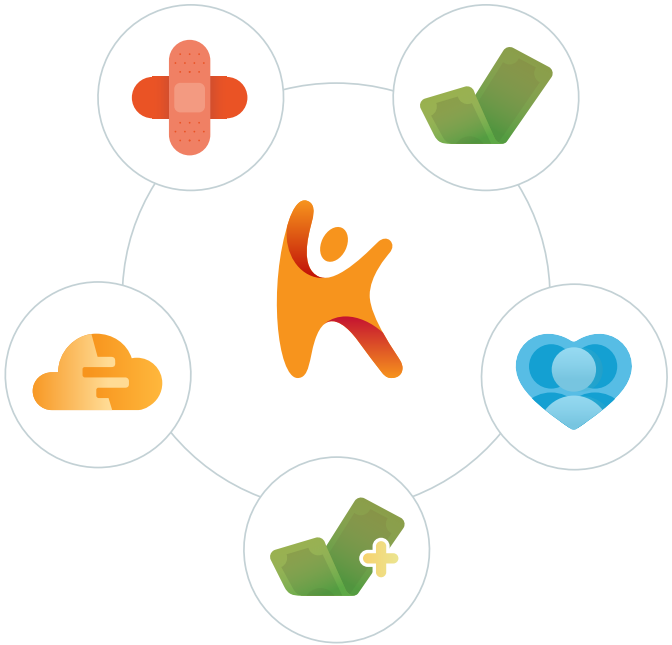
Kareo offers a unique yet fully integrated complete solution suite, designed to meet the needs of each independent healthcare practice or mental health practice. It offers a single, scalable, cloud-based software that streamlines your end-to-end workflows that you utilize every day.

KAREO CLINICAL (EHR)

Kareo Clinical makes your life and job easier. We know you're a mental health 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 clinic.



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, 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—problem codes, patient notes and patient education. Superbills can be created and sent in a few clicks!

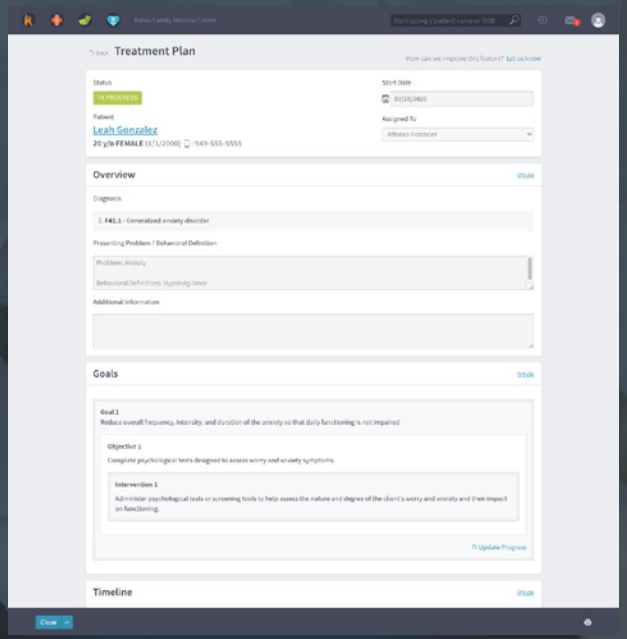
Included functions:

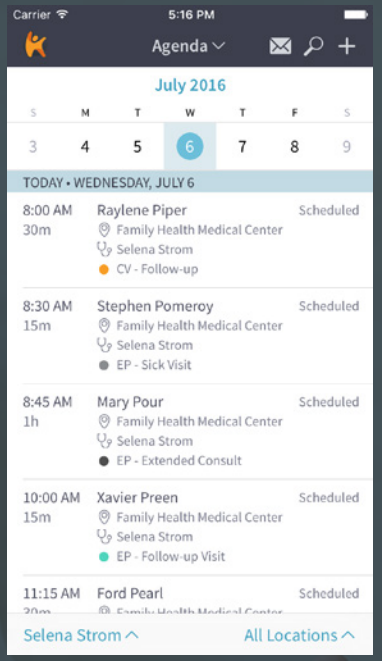
- Patient Charting and Screenings
- Flowsheets
- Customized Treatment Plans
- ePrescribing (including EPCS)
- Customized Security and Privacy
- Electronic Superbills
- Patient Statements
- Secure Messaging
- Registration
- Recurring Appointment Reminders
- Calendar and Scheduling
- Custom Mobile Apps

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 mental health 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!



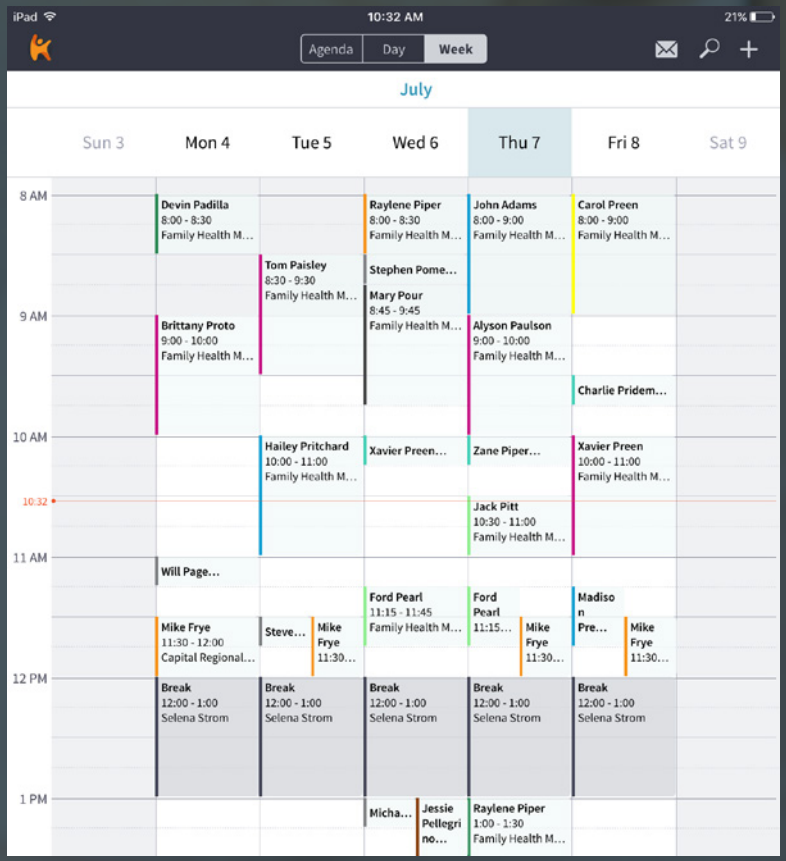


“I want a system that I can customize to fit the needs of my practice.”

The flexibility of Kareo means you can use the device and documentation style of your choice. Spend more time providing patient care and less time worrying about technology.

“I really like the ability to tailor the user interface to meet my needs as a psychiatrist”

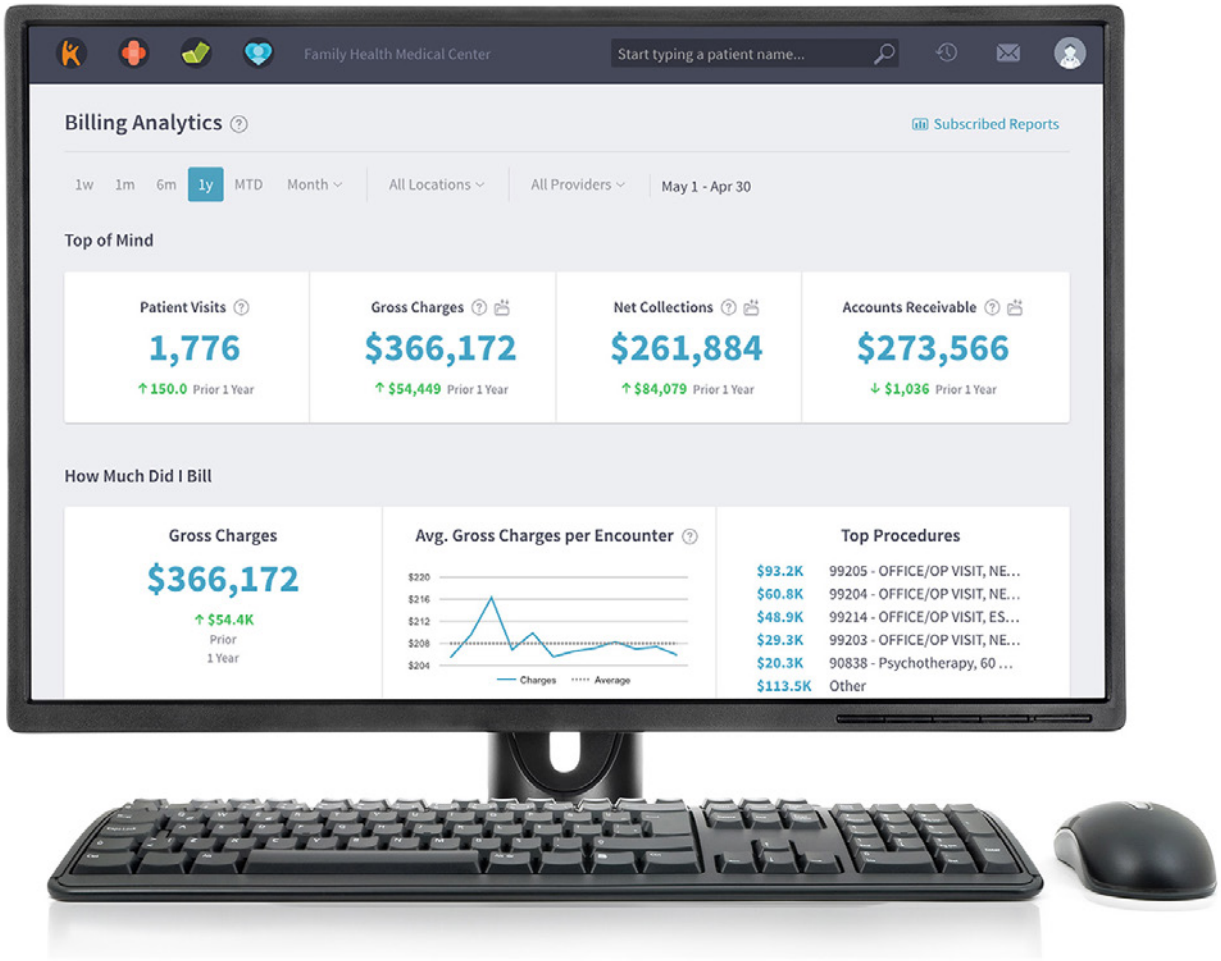
Not only is Kareo intuitive but it can easily be customized to your needs. With one-click access to commonly used codes and procedures, you can practice heads-up medicine while providing better care to your patients.



Kareo Billing

Trusted, proven practice management technology

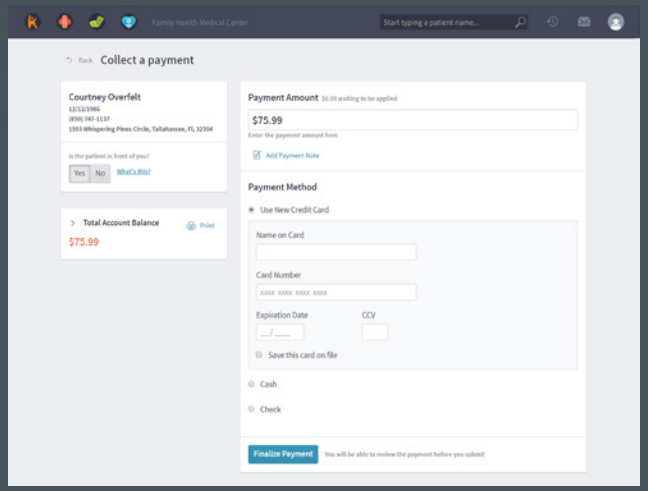
There's no better software to support your billing process. Our web and mobile applications help you easily manage patients and the complications that come with billing insurance. It allows mental health billers to use a robust desktop application that supports flexible workflows, A/R management, reporting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

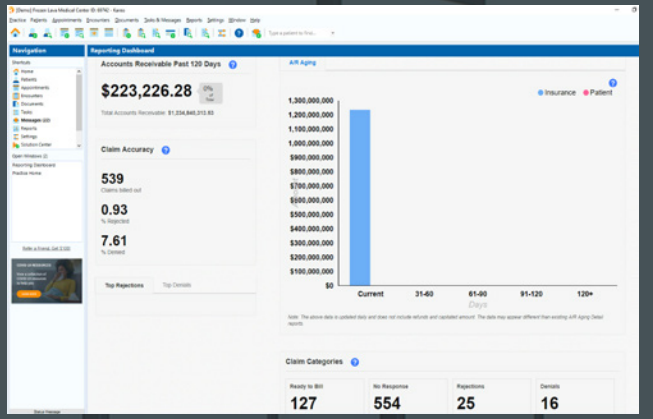


"Patient A/R is growing, and we need a better way to collect that money."

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.

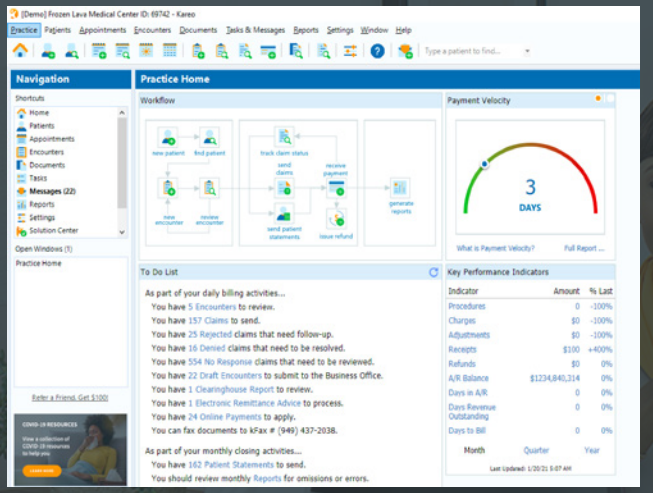
"I don't really know if my collections are good or bad."

With Kareo, all 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.



"I need to help billers effectively manage their workflow and tasks."

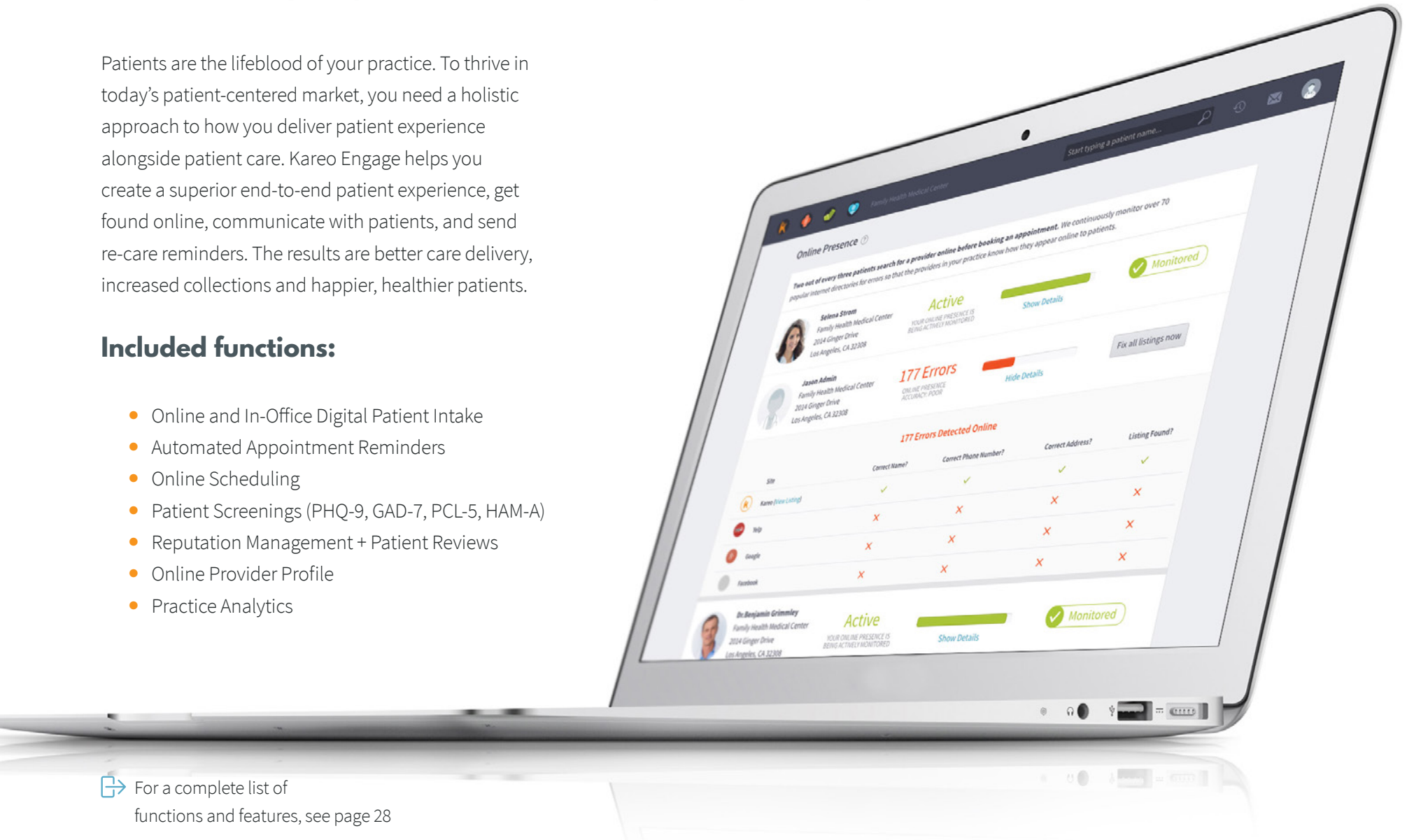
Kareo provides a comprehensive dashboard that shows billers exactly what needs to be completed. Staff can set alerts for things like no response claims to ensure nothing slips through, so you collect every dollar.



Kareo Engage

Grow your practice and create a superior patient experience

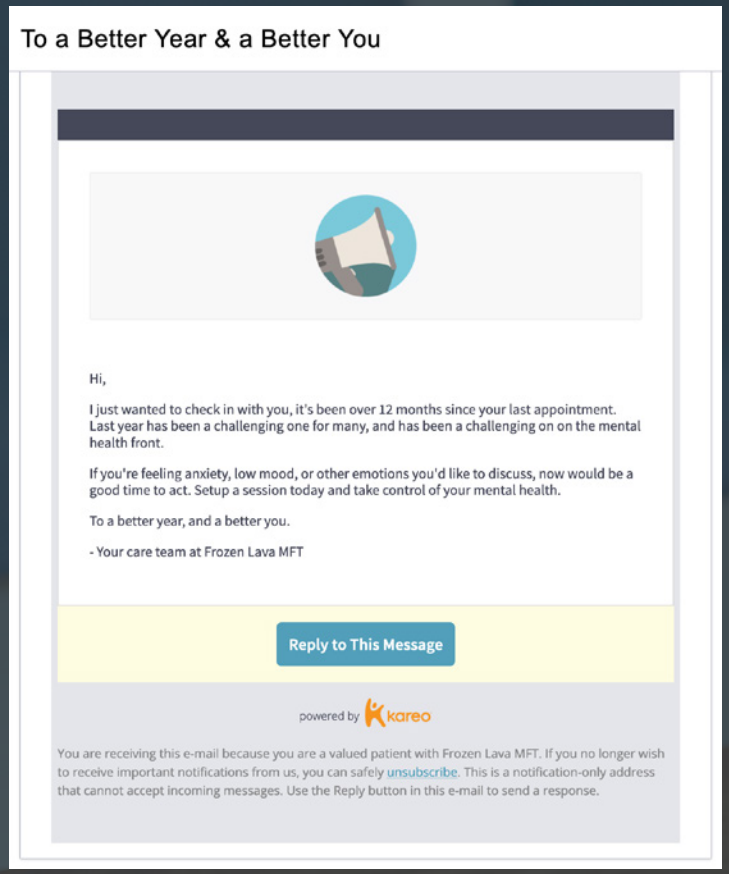
Patients are the lifeblood of your practice. To thrive in today's patient-centered market, you need a holistic approach to how you deliver patient experience alongside patient care. Kareo Engage helps you create a superior end-to-end patient experience, get found online, communicate with patients, and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



Included functions:

- Online and In-Office Digital Patient Intake
- Automated Appointment Reminders
- Online Scheduling
- Patient Screenings (PHQ-9, GAD-7, PCL-5, HAM-A)
- Reputation Management + Patient Reviews
- Online Provider Profile
- Practice Analytics

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

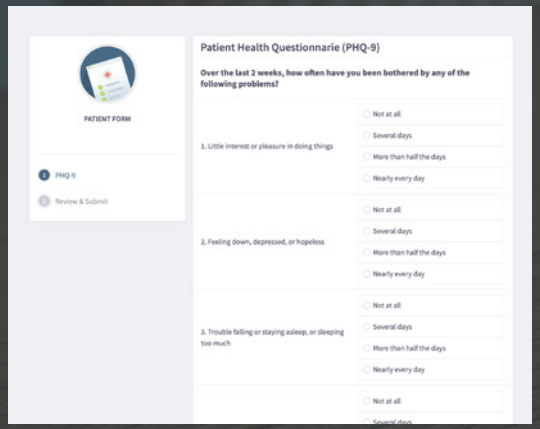


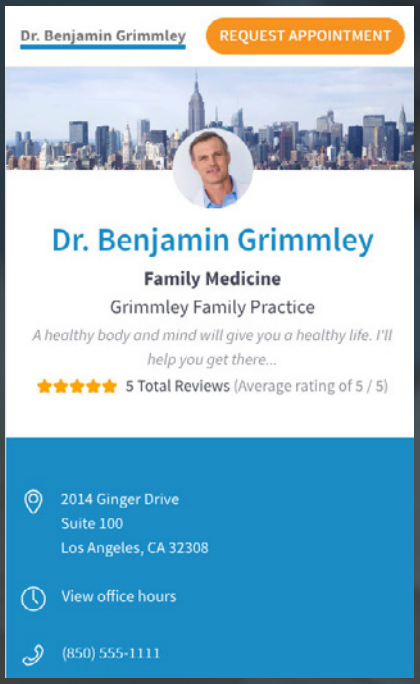
"Keep your patients top of mind."

Mental health patients are balancing a lot. Keep their care plan and your practice's services top of mind with Kareo's automated recare messages, giving you more time to focus on their treatment plan and less on visit reminders.

"Kareo gives me the flexibility I need."

You have the option to complete screening tools during patient visits or prior to their visits digitally, giving you the power to complete assessments as you see best for your patients.





"I want to find more patients and keep the ones I have."

Improve your online reputation and presence so more patients can find you. Then, use Kareo to keep them engaged with regular patient communications like recare 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 for your mental health clinic, you can run a more successful clinic 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 clinic. 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 Clinic:

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

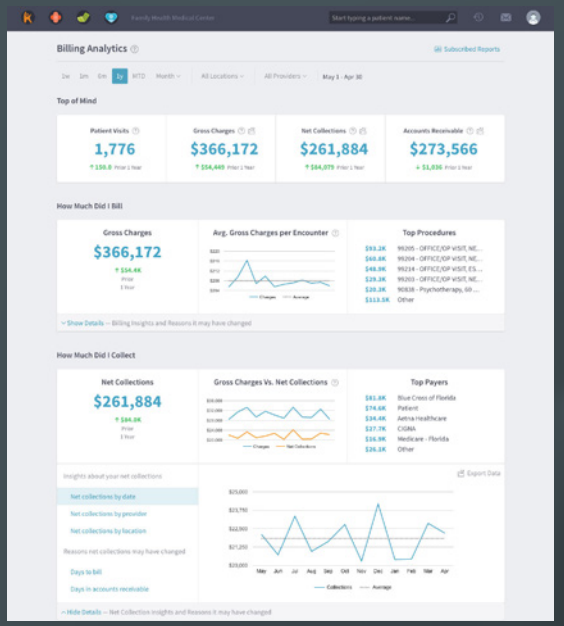
For a complete list of functions and features, see page 28

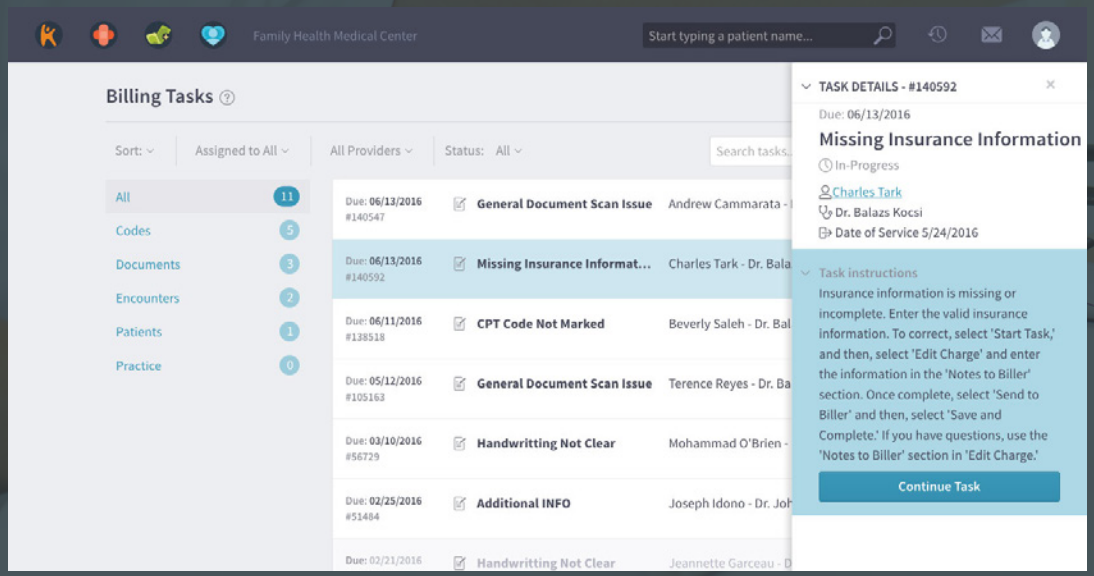
“I need a billing partner who has deep expertise to help me get paid quickly.”

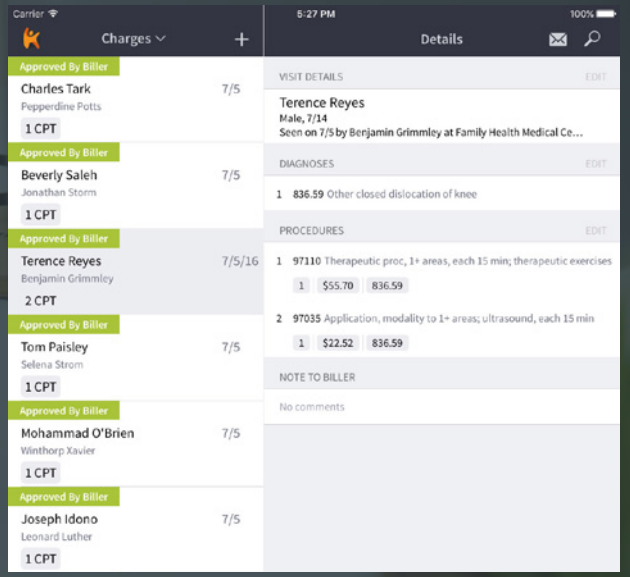
Kareo’s network of billing partners and technology are designed to put your clinic on a path to success and ensure you get paid. They will help you establish clear best practices to maximize reimbursement.

“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 clinics just like yours.







Kareo Platform Extensions

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

Kareo Telehealth

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

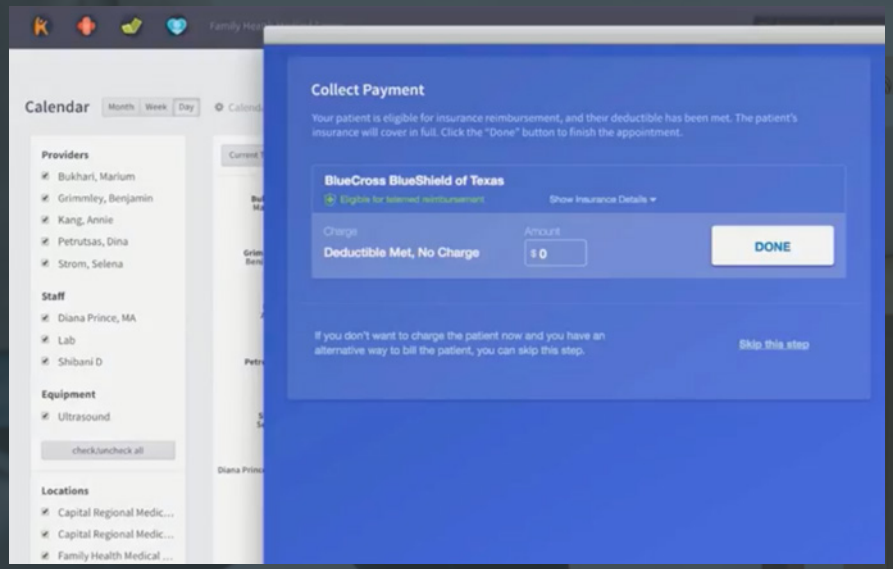
Included Functions:

- **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 clinic 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’s Telehealth service gives us very clear connections, for a superior client interaction. Our no-show rate has dropped dramatically, by about 35%. We attribute this to both the Kareo patient reminders, and to the flexibility and convenience of telehealth.

Zara Wanlass, co-founder and CEO of Alli Center



“I have many patients dealing with various types of mental illnesses. This includes agoraphobia and paranoia, disorders that can often cause individuals to feel uncomfortable commuting to a doctor’s office, let alone sit in a waiting room. I found Kareo Telehealth to be a perfect solution to solve this prominent patient issue.”

Dr. Huling Xu, Wholehealth, PLLC

Kareo Analytics

Insights that transform data into revenue generating opportunities

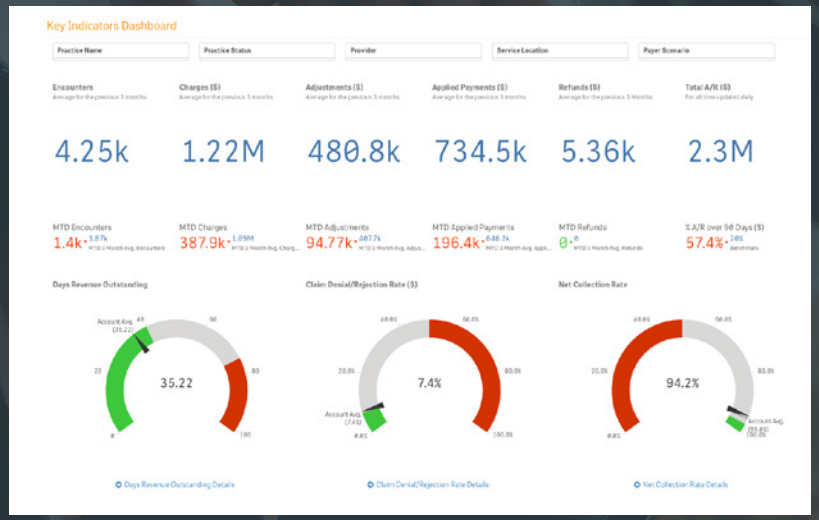
Efficiently accessing and interpreting revenue data can be frustrating. All too often, this involves manual data processing that's time consuming and error prone.

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 Clinics 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.

Practi... 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

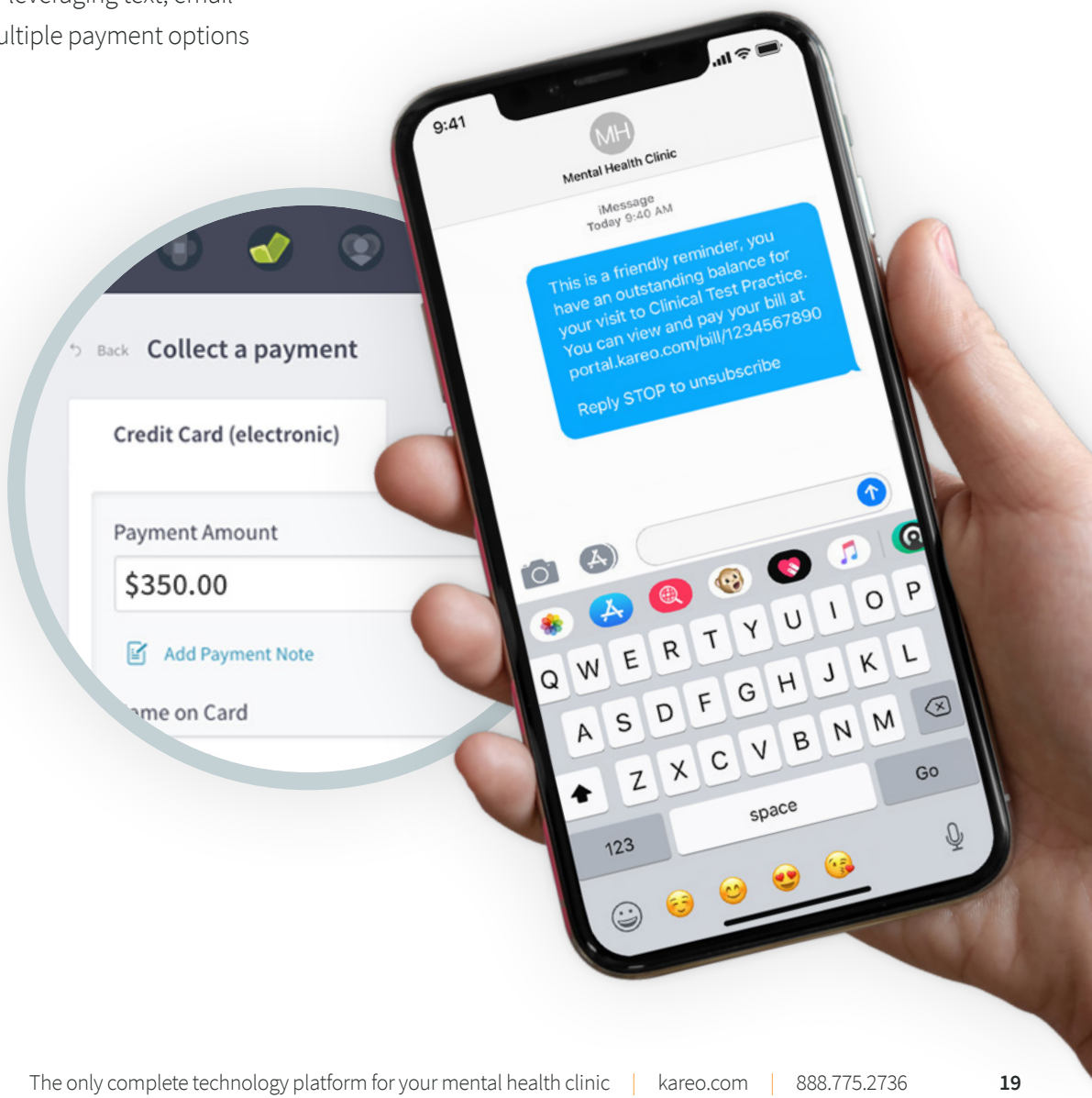
Maximize patient collections using our omnichannel messaging and payment solution

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

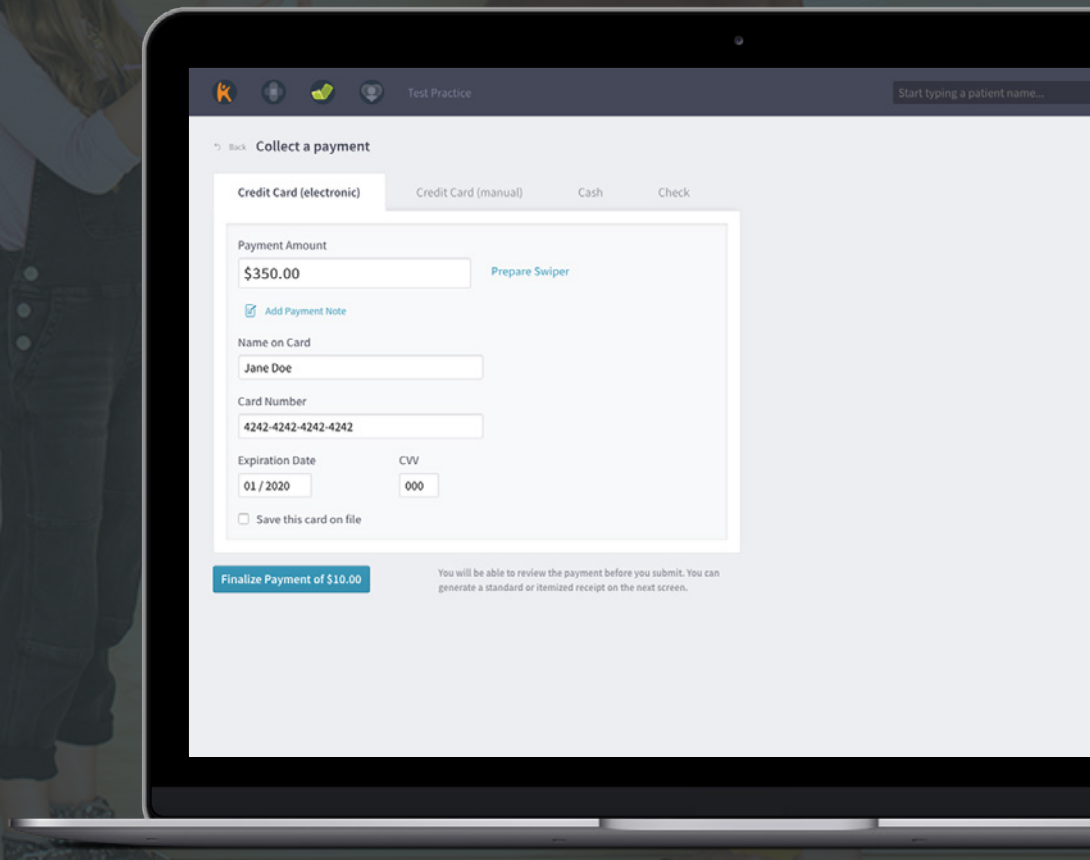
Kareo Patient Collect offers a robust payment collection solution that brings more revenue into your practice and a faster rate of collection. Communicating to your patients in the right way, at the right time, along with offering multiple payment options, ensures you collect more, faster.

Included functions:

- Seamless integration with Kareo Billing
- Process payments in-person, online or over the phone
- Provide a convenient patient payment experience with Apple Pay & Google Pay
- Store credit cards on file and easily capture patient balances for future visits balances for future visits
- Automatically deliver unlimited text and email balance alerts to patients
- Review what was delivered to patients through our statement delivery dashboard
- Ensure secure transactions using industry-certified, PCI-compliant card readers with end-to-end encryption

Simplify patient collections and reduce the time and stress associated with discussing patient balances.

Simplified Billing. Happier Patients. Greater Revenue.



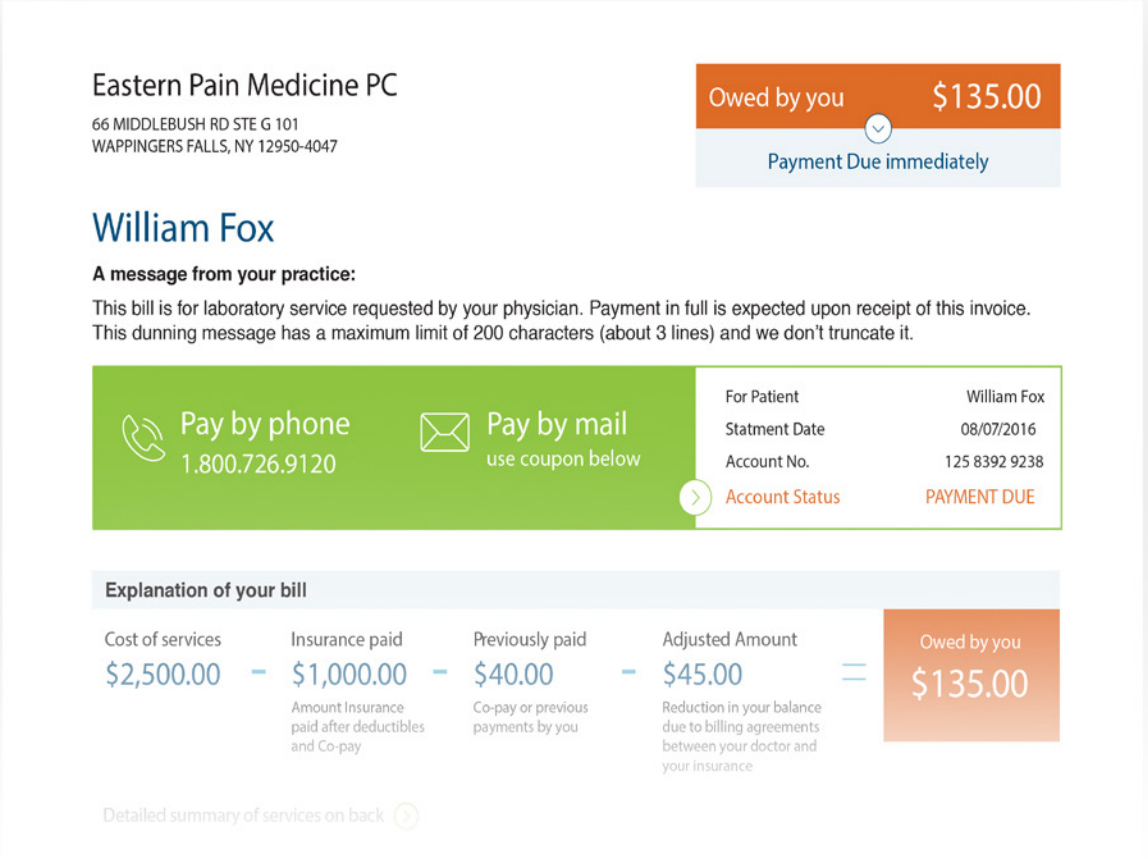
Kareo Patient Statements

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



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

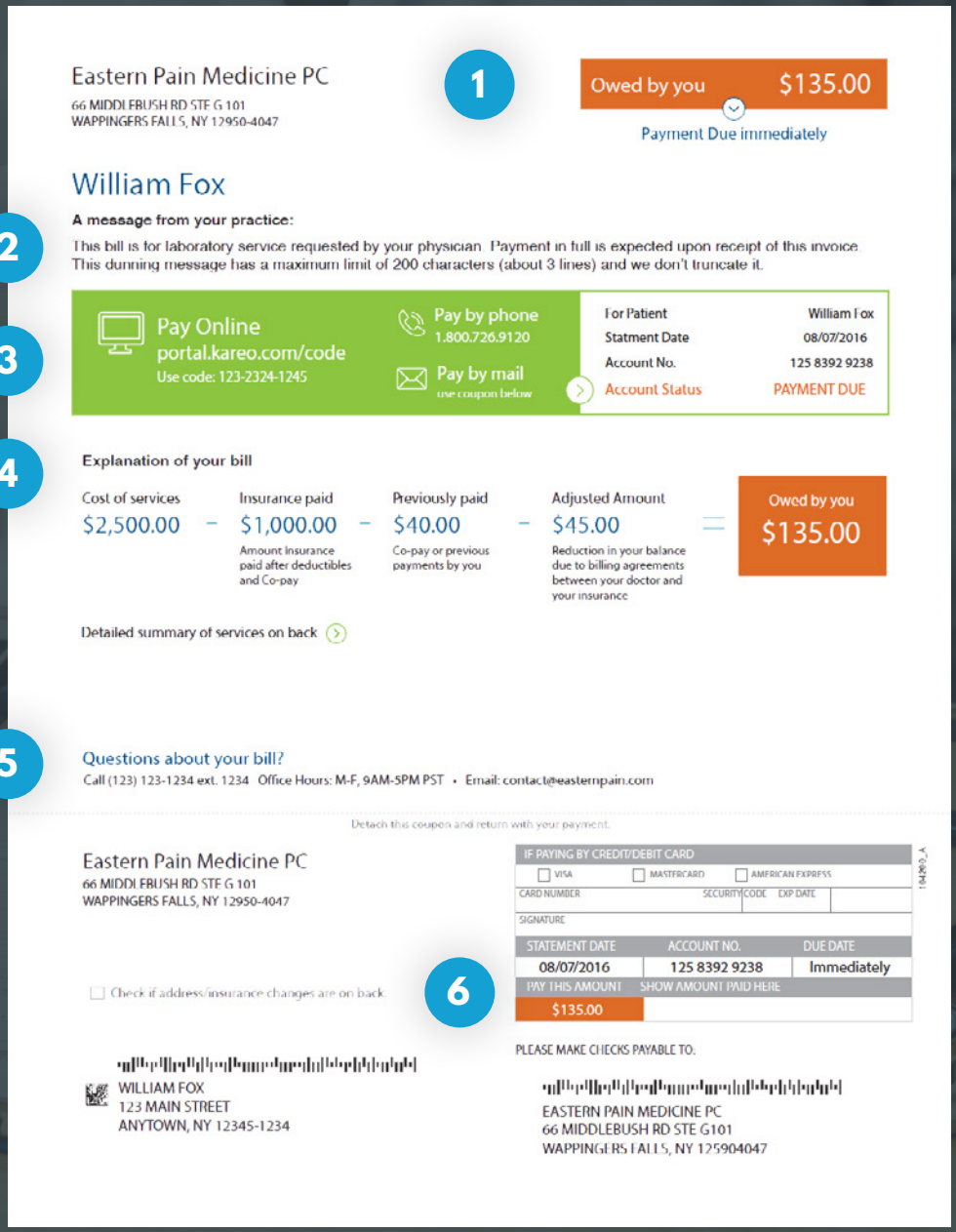
Patients can see cost of services, insurance paid, previously paid (by patient) and adjusted amount.

5. Quickly get questions answered

Set up custom practice contact methods.

6. Clear credit card options

Set credit cards accepted for pay by mail.



Kareo Marketplace

Extending the value of the Kareo platform experience.

Kareo Marketplace allows your clinic 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:

practicefusion

medici

nexus Clinical

Medicfusion Electronic Health Records

ElationHealth

Billing

- Credit card payments
- Claim acceptance
- Workers compensation

Billing partners include:

CHANGE HEALTHCARE

MDTech

JOPARI SOLUTIONS, INC.

TRIZETTO Provider Solutions A Cognizant Company

stripe

Business Management

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

Business Management partners include:

FLEXSCANMD

Zocdoc

Demandforce

IRON MOUNTAIN

Visit the Kareo Marketplace for a complete list of all of our available partners.

The Results: A Positive Experience for Your Staff and Mental Health Patients

FIND THE RIGHT PROVIDER ONLINE

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

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.

RECURRING VISIT REMINDERS

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

THE KAREO JOURNEY

BE WHERE YOUR PATIENTS ARE

Kareo telehealth solution is great for mental health clinics by seamlessly integrating video visits into existing practice workflows. It boosts your clinic efficiency, safety and patient satisfaction.

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!

SEND HELPFUL RECARE MESSAGES

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

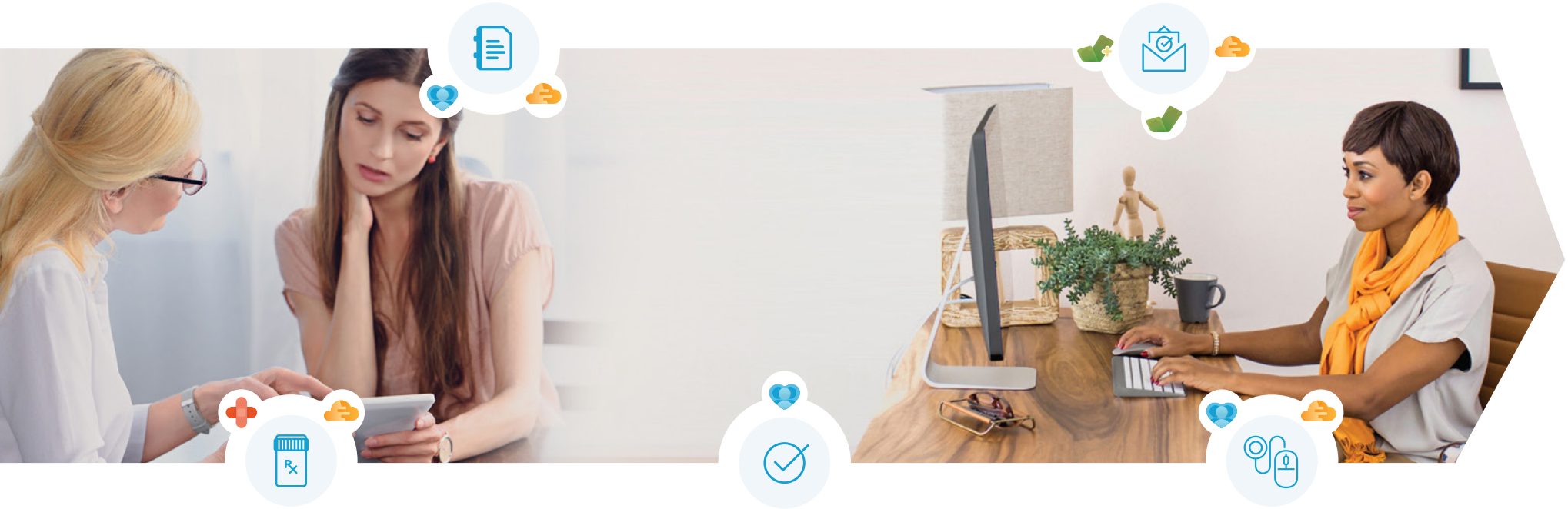
KAREO PRODUCT LEGEND: Kareo Clinical | Kareo Engage | Kareo Billing | Managed Billing | Kareo Marketplace

HANDY MENTAL HEALTH TOOLS

Gain access to customizable mental health specific psychiatry templates, clinical notes, patient screenings and treatment plans that not only streamline your operations but improve your care coordination to get your patients on the right track.

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.



SAFE PRESCRIPTIONS

Access 24 months of patient medication history to help detect possible substance abuse so your teams can take corrective actions and prescribe safely online for improved clinical outcomes. Plus, 92% of patients like the use of ePrescribing.

SECURE YOUR PATIENTS

Your data is 100% secure, guaranteed. It is securely encrypted, stored and backed-up in the cloud. With Kareo's 2015-Certified EHR, eligible providers can participate in MACRA/MIPS for an even greater return.

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.

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 clinic.

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, being HIPAA-compliant gives you additional peace of mind.

REPORTS AND DASHBOARDS

Know where your clinic 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.

KAREO ENGAGE

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

KAREO CLINICAL (EHR)

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

KAREO BILLING (PM)

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

MANAGED BILLING (RCM)

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

KAREO MARKETPLACE

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 clinic 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 Clinics and Providers

- All KIDs, clinics, 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

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