

Term, Termination and Return of Data FAQ

The following FAQ outlines Kareo's policies for term, termination and return of data regarding Kareo services as referenced in the Kareo Terms of Service Agreements, Section 8.

This FAQ will be updated on a regular basis to ensure regulatory compliance, allow adjustments for various changes in workflow, updated product features and operational efficiency.

Kareo Billing (Practice Management), Kareo Clinical (EHR), and Kareo Engage

1. Q: If I terminate my contract with Kareo, will I have an opportunity to download my data?

A: Kareo recommends that the Customer initiate or perform their data export prior to the actual termination date. The Customer data will only be provided in Microsoft Excel (.XLS) or Comma Separated Values (.CSV) file format and only includes patient records (including patient demographics and insurance coverage information) and claim records (including encounter and claim information).

2. Q: What happens to my data after the actual termination date?

A: Kareo will continue to retain the Customer's data for an additional minimum 60 days (Data Retention Period) as a safeguard in the event that the client requires additional data.

3. Q: If I discover that I need additional information during the Data Retention Period, how can I obtain the additional data?

A: Please contact the Kareo Accounting Department at accounting@kareo.com for assistance.

4. Q: During the Data Retention Period, will Kareo continue to maintain privacy, security and integrity of my data as defined by HIPAA?

A: As noted on the Kareo Business Associate Agreement (BAA), Kareo will continue to extend the protections of the BAA agreement during the Data Retention Period.

5. Q: What data can I download from the system?

A: Kareo recommends contacting Support for assistance in identifying data to export from Kareo – prior to the actual termination date. If Customer contacts Support for assistance after the support coverage has terminated, Kareo may charge the Customer the standard rate of \$100 an hour (minimum 30 minutes).

6. Q: Will Kareo maintain a copy of my data to comply with local, state, federal and/or HIPAA Medical Records retention mandate (6-10 years depending on the state)?

A: After the Data Retention Period is completed, Kareo will properly dispose of customer data containing PHI as noted on Kareo's BAA. Customer will solely be responsible for complying with all state and HIPAA records retention requirements.

7. Q: What does Kareo consider an "Abandoned Account"?

A: An abandoned account means a Customer has discontinued service (but has failed to formally terminate its account with the service) by a combination of non-payment of the current or previous month fees and 30 consecutive days of no Customer logins to the service. At the 31st day, the account is deemed "Abandoned" and the account is terminated. In addition, an account will also be deemed "Abandoned" and terminated if the user fails to confirm their account via e-mail within 30 days of sign-up.

8. Q: What happens to my data if my account is deemed “Abandoned” and terminated?

A: After the account is deemed terminated, the data is held for an additional minimum 60 days (Data Retention Period). Kareo will then properly dispose of customer data containing PHI as noted on Kareo’s BAA. Customer will solely be responsible for complying with all state and HIPAA records retention requirements.

9. Q: Can I get a refund or credit if I cancel the Services?

A: No. As stated in the [Pricing Policy](#), Kareo does not refund or credit subscription fees for partial months or for any portion of a prepaid plan upon a deactivation of a Provider or account cancellation.

Last Updated: This policy was last updated on February 29, 2020

For FAQ applicable to Kareo Managed Billing customers, click [here](#) .