

# Kareo Appointment Scheduler



**Time:** 60 Minutes

**Audience:** Front Office using calendar in Kareo Desktop Application

**Pre-requisite:** Setting Up Kareo and Entering Patients & Insurances

## Here's What You'll Learn

### Overview

*Appointment Scheduler* will demonstrate how to successfully utilize your office and provider calendar. Upon completion you will be able to set up the scheduler along with appointment reasons, resources and time blocks. You will also be able to schedule appointments, receive copays and check your patient eligibility.

### Objectives

- [Set up Scheduler](#)
- [Find and Schedule Appointments](#)
- [Check Patient eligibility](#)
- [Collect patient copays](#)
- Generate Appointment detail report

### Outline

#### Introduction

- Training Overview
- Review Login Instructions

#### Appointments

- [Navigating the scheduler](#)

#### Setting up Scheduler

- [Appointment Options](#)
- [Scheduling Resources & Appointment Reasons](#)
- [Timeblocks](#)

#### Scheduling Patient Appointment

- [Add Patient Case](#)
- [Add Authorization](#)
- [Appointment Confirmation Status](#)
- [Create Reoccurring appointment](#)
- [Notes](#)
- Schedule Non-Patient Appointment
- [Find Appointment](#)
- Generate Appointment Detail Report

#### Eligibility

- [Batch eligibility checks](#)
- [Individual patient eligibility checks](#)

#### Patient Payment

- [Collect Patient copayment](#)

#### Additional Resources

- Discover Solution Center
- Explore Help Center