



Clinical Practice Checklist

Below is a list of tasks we highly recommend you complete in order to get the most out of your Kareo software.

General		
Complete	Task	Purpose & how to start this
	Enroll for eRx (or EPCS)	<p>Submitting prescriptions electronically allows a prescription to be sent directly to the pharmacy without writing it on a prescription pad. It also allows the pharmacy to send refill requests to the Provider. These refills can be easily approved and sent back to the pharmacy.</p> <p>To get enrolled for eRx you must be the Provider. Log into Kareo, hover over the Platform icon, and click on Patients. On the Patients window above the list of patients click on the Enroll Now button and follow the wizard to enroll for eRx. You must answer questions to validate the Provider. This enrollment must be done by the Provider requesting the service.</p>
	Enroll in eLabs	<p>Electronic Lab submission allows the Provider/Clinical Staff to send lab requests electronically to their lab(s). Kareo connects with most major labs countrywide. Results will also be sent electronically back into your Kareo Clinical account.</p> <p>Contact your Success Coach to get enrolled for eLabs.</p>
	Meaningful Use	<p>Meaningful Use is a program with the Centers for Medicare and Medicaid Services. Attesting can prevent a 1-3% penalty/reduction of your Medicare and Medicaid payments.</p> <p>Please see our Kareo Meaningful Use Resource Center for more information. We also offer Meaningful Use Custom Services for a fee, where you will be able to work with a Kareo MU Expert to assist you in your Certification. Email MUExpertTeam@kareo.com to get more information.</p>



Working with Success Coach		
Complete	Task	Purpose
	Complete Account Setup in Setup Wizard	Enter basic practice and provider information to create your Kareo account.
	Review Account Settings	Your success coach will go over your account settings once you complete the Setup wizard, and review/assist you in editing additional practice and provider settings, other administrative configurations.
	Complete Training	Complete recommended trainings specific to your persona (front office, administrator, provider, etc.) to learn best practices and how to use Kareo to its fullest capabilities.
	Launch	Begin using Kareo daily within your practice.
	Launch Follow-up	A follow-up call with your Success Coach to go over any questions you may have once you have started using Kareo.