Training 14: EHR Provider

Time: 90 minutes
Audience: Provider
Pre-requisite: Practice setup (Training 10 must be completed by the Administrator and Provider role assigned).

Training Policy: Due to the limited number of live sessions, if you are unable to attend, please cancel your registration at least 24 hours in advance. Registration for all sessions closes 8 hours before the start-time. If no one shows up 5 minutes after the session starts, the class will be canceled and will need to be re-scheduled.

EHR Provider training is a one-on-one class tailored to a provider's specific workflow. Upon completion of this class, the Provider will be able to effectively utilize Kareo EHR to access patient charts, compose meticulous visit notes, present care plan for patients, and generate superbills.

Objectives

- Locate Functions, Tasks, and Menu Applications on Kareo EHR Home Page
- Comprehend Patient Chart Layout
- Initiate and Complete a Visit Note
- Access and Apply Information from Pre-Installed Templates
- Document Charges on Superbill
- Send Referrals

Outline

Introduction
- Discuss Practice Workflow
- Training Overview
- Review Login Instructions

Home
- Describe User Settings
- Identify Support Options
- Demonstrate Log Out
- Review Daily Schedule
- Create Messages
- Review Menu Applications
- Locate Patient

Patient Chart
- Locate Patient Banner
- Create Patient Messages
- Review Clinical Recommendations
- Explore Chart Tabs
- Identify Face Sheet

Notes
- Initiate/Assign a Note
- Types of Notes/SALT notes
- Customize Note Sections

- Explore Face Sheet Tab

Complete Note
- Define CC (Caries Over from Appointment "Reason for Visit")
- Complete Note Sections (Templates Accessible in the Following Sections of a SOAP or H&P Note: HPI/ Subjective, Exam/ Objective, Plan, ROS and Minor Procedures)
- Review History, Medications, & Vitals

Superbill
- Generate Superbill
- Send/Print Superbill

Finalize a Note
- Review Care Checklist (Meaningful Use Requirement)
- Explain Summary of Care
- Sign a Note
- Add Addendum

Referrals
- Send Referral
- Receive Referral