



ADMIN SETUP GUIDE – BILLING COMPANY

# Part 1: Web Platform

**Updated: June 2024**

# Introduction

The Admin Setup Guide Part 1 – Billing Company is designed to instruct billing company System Administrators how to configure their client's practice settings in Practice Operations Web Platform. You will learn how to create providers and users, add service locations, activate patient collect, and set security policies.

Then, continue to [Admin Setup Guide Part 2 – Billing Company](#) for instructions to configure additional practice settings and provider billing settings in the Desktop Application (PM). You will learn how to set up insurance companies/plans, payer connections, fee schedules, and more.

After the Web Platform and Desktop Application (PM) setup is complete, refer your clients to the Practice Admin Setup Guide for instructions to manage their users, service locations, provider profiles, calendar settings, patient communications, and more.

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# Practice Operations Web Platform

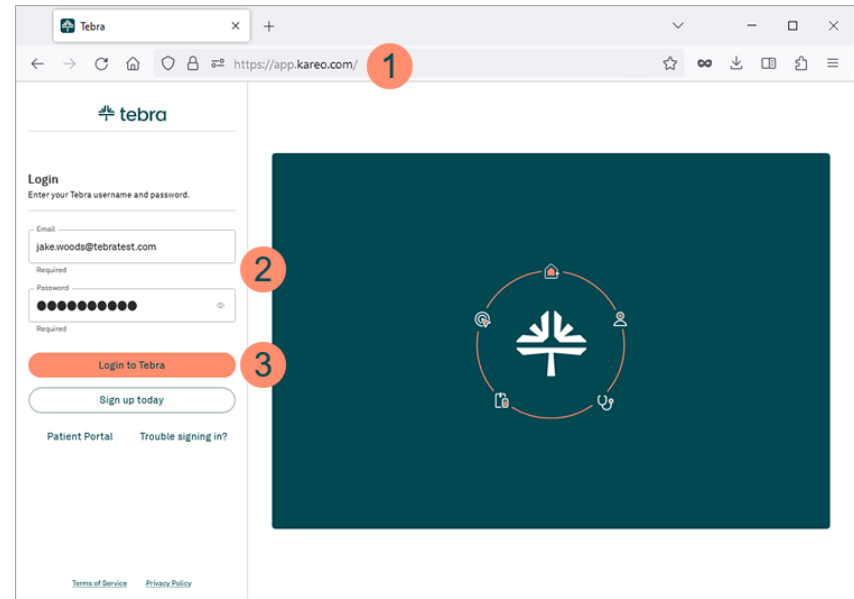
Log into the web platform to access your home page also known as the Dashboard.

## Access Practice Operations






1. Open an internet browser, such as Google Chrome and Firefox. Then, type [app.kareo.com](https://app.kareo.com) in the top address bar and press **Enter** on your keyboard. The *Tebra* login page opens.

 Tip: Bookmark the URL for easy access.

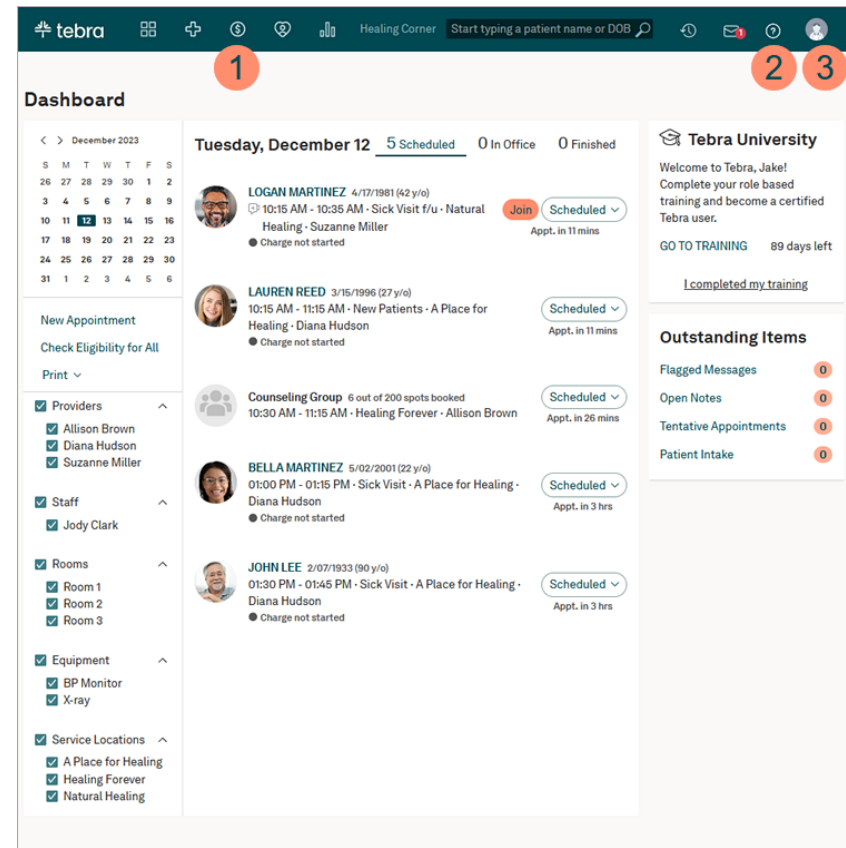
2. Enter the email address associated with your Tebra username and your password.
3. Click **Login to Tebra**. The *Dashboard* page opens.



# Navigate Dashboard

1. **Module Icons:** When the icons are lit up, it indicates that at least one provider in the practice has activated the module. Available modules:
  -  **Platform:** Managing patients, scheduling, provider profiles, and more.
  -  **Clinical:** Notes, charting, ePrescribing, custom templates, and more.
  -  **Billing:** Insurance and patient billing, insurance eligibility, electronic claims, and more.
  -  **Engage:** Patient communications, online visibility, front office automation, and more.
  -  **Reporting:** Unsigned notes, appointments, and more.
2. **Help Icon:** Click the icon to access the [Help Center](#) in-app to search and view help articles. When available, the help article related to the current page displays.
3. **User Icon:** Under the user icon, you will find your account ID number, *My Settings*, *Practice Settings*, *Customer Care*, and *Sign Out*. Be sure to sign out when you conclude your session or Tebra will log you out after 15 minutes of inactivity.

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## Navigate Dashboard, cont.

4. **Appointment Buckets:** Appointments are filtered into three buckets.
  - *Scheduled:* Displays patients scheduled who have not yet arrived.
  - *In Office:* Displays patients with an appointment status of *Arrived*, *Checked In*, or *Roomed*.
  - *Finished:* Displays patients with an appointment status of *Checked Out*, *No Show*, *Rescheduled*, or *Cancelled*.
5. **Tebra University:** Click **GO TO TRAINING** to access courses designed for your user role(s) and register for live trainings. Review the [Tebra University](#) help article to learn more.
6. **Outstanding Items:** Various outstanding items display based on your user role(s).

The screenshot shows the Tebra Dashboard interface. At the top, there's a navigation bar with the Tebra logo and various icons. Below the navigation bar, the dashboard is divided into several sections. On the left, there's a sidebar with a calendar view for December 2023 and a list of filters for Providers, Staff, Rooms, Equipment, and Service Locations. The main content area displays a list of appointments for Tuesday, December 12. Each appointment entry includes a patient's name, date of birth, appointment time, location, and status. Callout 4 points to the 'Appointment Buckets' section at the top of the main content area, which shows '5 Scheduled', '0 In Office', and '0 Finished' appointments. Callout 5 points to the 'Tebra University' section on the right, which includes a welcome message and a 'GO TO TRAINING' button. Callout 6 points to the 'Outstanding Items' section on the right, which lists items like 'Flagged Messages', 'Open Notes', 'Tentative Appointments', and 'Patient Intake'.

# Practice Information

Practice Information stores the practice's name, address, contact information, basic billing information, and the practice logo.


1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Edit**. The *Edit Practice* page opens.
3. **Practice Name:** Verify the practice name entered during the setup wizard. To prevent billing rejections, the practice name should not exceed 60 characters, including spaces.
4. **Address:** To prevent billing rejections, the practice address must be a physical address with a valid 9-digit zip code. Go to the [USPS website](https://www.usps.com/zip-code-lookup) to find the valid 9-digit zip code.
5. **EIN:** If the practice is credentialed to bill using an Employer Identification Number (EIN) or Tax ID, verify the correct number is entered. If a provider is credentialed to bill using their social security number (SSN), enter the SSN in the provider's user settings. Review the [Verify Provider User](#) section for instructions to enter the SSN.

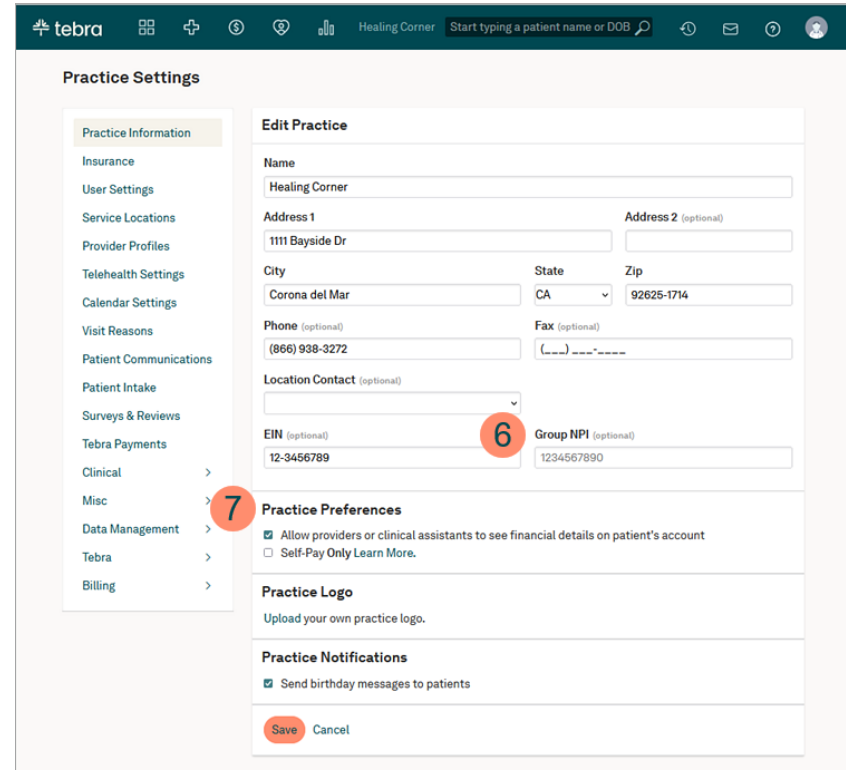
The screenshot shows the 'Practice Settings' page in the Tebra system. The sidebar on the left lists various settings categories: Practice Information, Insurance, User Settings, Service Locations, Provider Profiles, Telehealth Settings, Calendar Settings, Visit Reasons, Patient Communications, Patient Intake, Surveys & Reviews, Tebra Payments, Clinical, Misc, Data Management, Tebra, and Billing. The main content area is titled 'Edit Practice' and contains several sections. The 'Practice Information' section includes fields for Name (Healing Corner), Address 1 (1111 Bayside Dr), Address 2 (optional), City (Corona del Mar), State (CA), Zip (92625-1714), Phone (optional) ((866) 938-3272), Fax (optional), Location Contact (optional), EIN (optional) (12-3456789), and Group NPI (optional) (1234567890). The 'Practice Preferences' section has two checkboxes: 'Allow providers or clinical assistants to see financial details on patient's account' (checked) and 'Self-Pay Only Learn More.' (unchecked). The 'Practice Logo' section has an 'Upload your own practice logo.' button. The 'Practice Notifications' section has a checkbox 'Send birthday messages to patients' (checked). At the bottom are 'Save' and 'Cancel' buttons. Red circles with numbers 3, 4, and 5 are overlaid on the form: circle 3 is on the Name field, circle 4 is on the Address 1 field, and circle 5 is on the EIN field.

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## Practice Information, cont.

6. **Group NPI:** To prevent billing rejections, verify the National Provider Identifier (NPI) entered in this field is a group NPI and not an individual NPI. Individual NPI numbers are entered in the provider's user settings. Review the [Verify Provider User](#) section for instructions to enter an Individual NPI.
7. **Practice Preferences:**
  - *Financial Details:* By default, this option is selected. Click to clear the option to restrict providers and clinical assistants from viewing patient transaction history and finance.  
 Note: The feature is not available for the mobile application. The patient transaction history and finance are visible to users using Tebra's mobile application.
  - *Self-Pay Only:* By default, this option is deselected. Click to select this option to enable a streamlined self-pay only billing workflow for practices to create charges and collect money from patients or guarantors that are 100% responsible for the cost of their care. Then, click **Enable** to confirm.



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## Practice Information, cont.


8. **Practice Logo:** Upload a practice logo to display on the practice online scheduler (Engage Subscriber). Review the [Upload Practice Logo](#) help article for instructions to upload with image size specification. Review the Online Scheduling section for instructions to enable to the scheduler.
9. **Practice Notifications:** By default, this option is selected to send automated birthday emails to patients. To disable the birthday messages, click to clear “Send birthday messages to patients”.
10. Click **Save** when finished.

The screenshot shows the Tebra Practice Settings interface. On the left is a sidebar menu with options: Practice Information, Insurance, User Settings, Service Locations, Provider Profiles, Telehealth Settings, Calendar Settings, Visit Reasons, Patient Communications, Patient Intake, Surveys & Reviews, Tebra Payments, Clinical, Misc, Data Management, Tebra, and Billing. The main area is titled 'Practice Settings' and contains an 'Edit Practice' form. The form includes fields for Name (Healing Corner), Address 1 (1111 Bayside Dr), Address 2 (optional), City (Corona del Mar), State (CA), Zip (92625-1714), Phone (optional) (866) 938-3272, Fax (optional), Location Contact (optional), EIN (optional) 12-3456789, and Group NPI (optional) 1234567890. Below the form is a 'Practice Preferences' section with two checkboxes: 'Allow providers or clinical assistants to see financial details on patient's account' (checked) and 'Self-Pay Only Learn More.' (unchecked). At the bottom, there are three numbered callouts: 8 points to the 'Practice Logo' section with the text 'Upload your own practice logo.'; 9 points to the 'Practice Notifications' section with the checked checkbox 'Send birthday messages to patients'; and 10 points to the 'Save' button.

# Insurance

Insurance companies represent an insurance carrier or network (e.g., Blue Cross Blue Shield, Cigna, Medicare). Once an insurance company record is created, you can add insurance plans and enroll for available electronic data interchange (EDI) services to submit claims, check patient eligibility, and receive ERAs.

You will learn how to add insurance companies/plans, enroll for EDI services, and configure insurance company billing settings (e.g., electronic claims submission settings) in the Desktop Application (PM) during [Admin Setup Guide Part 2 - Billing Company](#). If the practice is responsible for managing their insurances, refer the practice to the [Practice Admin Setup Guide](#) for instructions.

 Note: For Self-Pay Only enabled practices, complete the insurance section, if applicable.

## User Settings

Each staff member in the billing company and practice who uses Tebra needs their own unique user with a valid login email and password. Be sure to have the person's full name and email address on hand before proceeding. For billing company staff members, you will learn how to set up users with permissions specific to billing tasks and workflows in the Desktop Application (PM) during [Admin Setup Guide Part 2 - Billing Company](#).

For practice staff members, create users based on their role: Provider or Non-Provider. Create at least one user with the System Admin role to allow them to manage practice specific settings. This user is referred to as the Practice Administrator and has full control to practice wide functionality in the Web Platform and Desktop Application (PM), including managing users (e.g., create users, reset passwords, lock users). Refer the Practice Administrator to the [Practice Admin Setup Guide](#) to learn how to configure their practice and user settings.

Once a new user is created, the new user receives an email with login details and is instructed to reach out to the System Administrator for their temporary password. If necessary, advise the practice staff member to reach out to the Practice Administrator for assistance. Upon first login, new users are promoted to create a new password. Review the [Security Policy](#) section for password requirements. Users can then complete their role-based trainings in [Tebra University](#).

## Verify Provider User

Verify the provider details entered during setup wizard are correct and edit, as necessary. If the provider's user account was not completed, enter the provider's details. Be sure to have the provider's email address and individual NPI on hand before proceeding.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **User Settings**. The *User Settings* page opens.
3. Click **Edit** next to the provider's name. The *Edit Provider* page opens.
4. **Products:** Provider has access to the selected product(s).
5. **Account Information:** Verify the provider's 10-digit NPI number, Taxonomy, Specialty, Full Name, Credentials, SSN (if applicable), email address is valid, and phone number. Provider billing settings are configured in [Admin Setup Guide Part 2 - Billing Company](#).

The screenshot shows the 'Edit Provider' page in the Tebra system. The page is divided into several sections. At the top, there's a header with the Tebra logo and navigation icons. Below the header, the page title is 'Edit Provider'. The first section is 'Add Products for this Provider', which contains a table with checkboxes for 'Telehealth', 'Clinical', 'Engage', and 'Billing'. A red circle with the number '4' is placed over this section. The second section is 'Account Information', which contains fields for 'Individual NPI', 'Taxonomy Code', 'Provider Type', 'Specialty', 'First Name', 'Middle Name', 'Last Name', 'Credentials', 'Social Security Number', 'E-Mail', 'Phone', 'Password', and 'Repeat Password'. A red circle with the number '5' is placed over this section. At the bottom, there's a 'Roles' section with checkboxes for 'System Admin', 'Office Staff', 'Provider', 'Biller', 'Clinical Assistant', and 'Business Manager'. There's also an 'Additional Options' section with a checkbox for 'Allow emergency access for Healing Corner'.

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### Verify Provider User, cont.

6. **Roles:** Selected role(s) were assigned to the provider. If necessary, click to select additional role(s). To designate the provider as a Practice Administrator, select “System Admin”.
7. **Additional Options:** Optionally, click to allow the provider to give themselves administrator permissions in the event of an emergency.
8. **Practice Access:** If applicable, click to assign the provider access to additional practice(s) in the account.
9. **Profile Photo:** Optionally, upload a photo of the provider.
10. Click **Save Provider** when finished.

The screenshot shows a web form for verifying a provider user. At the top, there are tabs for 'Clinical' and 'Billing'. The form is titled 'Account Information' and contains several sections:

- Individual NPI:** A text input field with the value '0000000014' and a 'Look Up' button.
- Taxonomy Code:** A dropdown menu with the value '207000000X'.
- Provider Type:** A dropdown menu with the value 'Physician Provider'.
- Specialty:** A dropdown menu with the value 'Psychiatry & Neurology'.
- First Name:** A text input field with the value 'Allison'.
- Middle Name:** A text input field.
- Last Name:** A text input field with the value 'Brown'.
- Credentials:** A text input field.
- Social Security Number:** A text input field with the value '111-22-3333'.
- E-Mail:** A text input field with the value 'a.brown@tebratest.com'.
- Phone:** A text input field with the value '(866) 938-3272'.
- Password:** A text input field.
- Repeat Password:** A text input field.

Below the form, there are three sections with numbered callouts:

- 6 Roles:** A section with a 'Learn more' link and several checkboxes: 'System Admin' (checked), 'Office Staff', 'Provider' (checked), 'Biller', 'Clinical Assistant', and 'Business Manager'.
- 7 Additional Options:** A section with two checkboxes: 'Allow emergency access for Healing Corner' (checked) and 'Enable Supervising Provider for Prescribing' (checked).
- 9 Profile Photo:** A section with a placeholder image and a text input field with the value 'Drop image here or browse for a photo'.

At the bottom of the form, there are three buttons: 'Save Provider' (highlighted with a red circle), 'Cancel', and 'Lock User'.

## Create Non-Provider User

Create users for each practice staff member based on their role in the office.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **User Settings**. The *User Settings* page opens.
3. Click **+ New User**. The *Add User* page opens.
4. **Account Information:** Enter the user's full name, a valid email, phone number, and temporary password.
5. **Roles:** Click to select one or more Roles. To designate the user as a Practice Administrator, select "System Admin".
6. **Emergency Access:** Optionally, click to allow the user to give themselves or other staff members administrator permissions in the event of an emergency.
7. **Practice Access:** If applicable, click to assign the user access to additional practice(s) in the account.
8. Click **Save User** when finished.

tebra

Healing Corner Start typing a patient name or DOB

User Settings **Add User**

Be sure to select the appropriate user type so that the account is configured correctly.

User Type ☐ Provider ☒ Non-Provider

**4** Account Information

First Name Middle Name Last Name

Olivia Cox

E-Mail Phone

olivia.cox@tebratest.com (866) 938-3272

Password Repeat Password

**5** Roles (at least one required) [Learn more](#)

☐ System Admin ☐ Provider ☐ Clinical Assistant

☒ Office Staff ☐ Biller ☐ Business Manager

**6** Additional Options

☒ Allow emergency access for Healing Corner

**8** Save User Cancel Lock User Unassign User

## Create Provider User

If applicable, create additional user accounts for each provider in the practice. Be sure to have the provider's email address and individual NPI on hand before proceeding.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **User Settings**. The *User Settings* page opens.
3. Click **+ New User**. The *Add User* page opens.
4. Click **Provider**.
5. **Products:** Click to select product(s) for the provider.
6. **Account Information:** Enter the provider's 10-digit NPI number and click **Look up** to auto-populate available details. Then, enter the provider's SSN (if applicable), a valid email address, phone number, and temporary password. Provider billing settings are configured in [Admin Setup Guide Part 2 - Billing Company](#).

The screenshot shows the 'Add Provider' form in the Tebra system. The form is titled 'Add Provider' and includes a blue header bar with the text 'Be sure to select the appropriate user type so that the account is configured correctly.' and a red circle with the number 4. Below the header, the 'User Type' is set to 'Provider' (indicated by a green checkmark and a red circle with the number 4). The 'Add Products for this Provider' section includes checkboxes for 'Telehealth', 'Clinical', 'Engage', and 'Billing', all of which are checked (indicated by a red circle with the number 5). The 'Account Information' section (indicated by a red circle with the number 6) includes fields for 'Individual NPI', 'Taxonomy Code', 'Provider Type', 'Specialty', 'First Name', 'Middle Name', 'Last Name', 'Credentials', 'Social Security Number', 'E-Mail', 'Phone', 'Password', and 'Repeat Password'. The 'Individual NPI' field has a 'Look Up' button. The 'Taxonomy Code' field contains '103T00000X'. The 'Provider Type' dropdown is set to 'Non-Physician Provider'. The 'Specialty' dropdown is set to 'Psychologist'. The 'First Name' field contains 'Peggy', the 'Middle Name' field is empty, and the 'Last Name' field contains 'Hanson'. The 'Credentials' field contains 'MD'. The 'Social Security Number' field contains '123456789'. The 'E-Mail' field contains 'p.hanson@tebratest.com'. The 'Phone' field contains '(866) 938-3272'. The 'Password' and 'Repeat Password' fields are masked with dots.

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## Create Provider User, cont.

7. **Roles:** Click to select additional Roles. To designate the user as a Practice Administrator, select “System Admin”.
8. **Additional Options:** These options are optional.
  - To allow the provider to give themselves administrator permissions in the event of an emergency, click to select “Allow emergency access to (Practice)”.
  - By default, “Enable Supervising Provider for Prescribing” is disabled until the provider completed eRx enrollment. When available and selected, this option allows prescribers to select this provider as a supervising provider on ePrescriptions.
9. **Practice Access:** If applicable, click to assign the user access to additional practice(s) in the account.
10. **Profile Photo:** Optionally, upload a photo of the provider.
11. Click **Create Provider**. The *Confirm Adding Provider License* pop-up window opens.
12. Review Tebra’s Terms of Service. To accept the terms, click to select “I agree with Tebra’s Terms of Service and authorize this addition to my invoice.”.
13. Click **Submit**. The provider user account displays in the active user account list under *User Settings*.

This screenshot shows the 'Create Provider User' form. At the top, the name 'Peggy Hanson' is entered. Below this, there are fields for 'Credentials' (MD), 'Social Security Number' (123456789), 'E-Mail' (p.hanson@tebratest.com), and 'Phone' ((866) 938-3272). There are also fields for 'Password' and 'Repeat Password', both masked with dots. Below the password fields, there are two sections: 'Roles' and 'Additional Options'. The 'Roles' section has checkboxes for 'System Admin', 'Office Staff', 'Provider', 'Billor', 'Clinical Assistant', and 'Business Manager'. The 'Additional Options' section has checkboxes for 'Allow emergency access for Healing Corner' and 'Enable Supervising Provider for Prescribing'. Below these sections is a 'Profile Photo' section with a placeholder image and a button to 'Drop image here or browse for a photo'. At the bottom of the form, there are buttons for 'Save Provider', 'Cancel', 'Lock User', and 'Unassign User'. Numbered callouts 7, 8, 10, and 11 point to the 'Roles' section, 'Additional Options' section, 'Profile Photo' section, and the 'Save Provider' button respectively.


This screenshot shows the 'Confirm Adding Provider License' pop-up window. The window has a title bar and a main content area. The main content area contains the text: 'Please review and accept Tebra's Terms of Service to confirm the following addition. This will result in immediate product activation for this provider and the update of your invoice.' Below this text, there is a section titled 'Peggy Hanson will now have access to:' with four icons: a plus sign for 'Clinical', a dollar sign for 'Billing', a speech bubble for 'Engage', and a person icon for 'Telehealth'. Below these icons, there is a checkbox labeled 'I agree with Tebra's Terms of Service and authorize this addition to my invoice.' which is checked. At the bottom of the pop-up, there are buttons for 'Submit' and 'Cancel'. Numbered callouts 12 and 13 point to the checkbox and the 'Submit' button respectively.

## Frozen Users

Users who exceed the set amount of failed login attempts set in Security Policy will not be able to access Tebra. Review the [Security Policy](#) section for login attempt settings. Advise frozen users to click [Trouble signing in?](#) on the login page and follow the prompts to reset their password. An email is sent with instructions to reset their password to access Tebra.

## Lock Users

If a user should no longer access the practice, lock the user's account to make Tebra inaccessible. The user account should not be repurposed for a new user. Locked users remain in the system and can be unlocked when necessary. Review the [Edit, Lock, or Unassign User Account](#) help article for instructions.

 Note: Before a provider user can be locked, all product subscriptions must be deactivated. Review the [Deactivate Provider Account](#) help article for more information.

## Unlock Users

Users that have been locked can be unlocked at any time. Review the [Unlock User Account](#) help article for instructions to unlock a locked provider or non-provider user. If the user does not remember their password after reactivation, to click [Trouble signing in?](#) on the login page and follow the prompts to reset their password.

## Service Locations

Service locations are places where providers render medical services to patients. This includes locations not at the same address as the main practice (e.g., local hospitals, outpatient clinics, rehabilitation centers). Create one or more service locations for the practice to schedule appointments, create encounters, and send claims. Service location billing settings (e.g., CLIA Number, UB-04 claim settings, Legacy Number Type) are configured in [Admin Setup Guide Part 2 - Billing Company](#).

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Service Location**. The *Service Location* page opens.
3. Click **New Service Location**. The *New Service Location* pop-up window opens.
4. **Service Location:** Enter location *Name* and the Address with a valid 9-digit zip code, select the Place of Service Code, and enter the service location Phone and Fax number. Go to the [USPS website](#) to find the valid 9-digit zip code.
5. **Allow Appointment Reminders:** By default, this option is selected to send reminders for patient appointments associated to this service location. To disable, click to clear the selection. This setting is only available on the Web Platform. Review the [Patient Communications](#) section for more details about appointment reminders.


The screenshot shows the Tebra Practice Settings page with a sidebar menu on the left. The 'Service Locations' menu item is highlighted. A 'New Service Location' pop-up window is open, displaying the following fields and options:

- Name:** A Place for Healing
- Address 1:** 1111 Bayside Dr
- Address 2 (optional):**
- City:** Corona del Mar
- State:** CA
- Zip:** 92625-1714
- Country:** United States of America
- Place of Service Code:** Office
- Phone:** (866) 938-3272
- Fax (optional):**
- ☒ Allow appointment reminders for this location
- ☒ Include address in appointment reminder notifications
- ☒ Display location on practice scheduling page
- Buttons:** Save, Cancel

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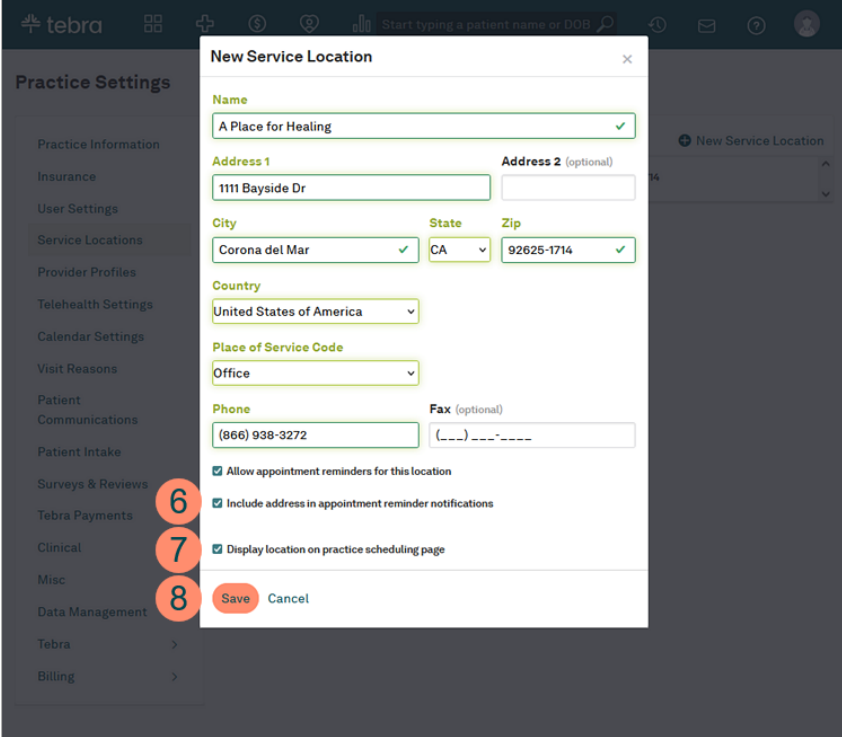
## Service Locations, cont.

6. **Include Address:** By default, this option is selected to include the service location address in appointment reminders. To exclude the service location address, click to clear the selection.

 Note: [Telehealth](#) appointment reminders will automatically exclude the service location address.

7. **Display Location:** By default, this option is selected to include the service location in the practice online scheduler (Engage Subscriber). This setting is only available on the Web Platform. Review the [Online Scheduling](#) section for instructions to enable the scheduler.

8. Click **Save** when finished.



**Practice Settings**

**New Service Location**

Name: A Place for Healing ✓

Address 1: 1111 Bayside Dr Address 2 (optional):

City: Corona del Mar ✓ State: CA Zip: 92625-1714 ✓

Country: United States of America

Place of Service Code: Office

Phone: (866) 938-3272 Fax (optional):

☒ Allow appointment reminders for this location

☒ Include address in appointment reminder notifications

☒ Display location on practice scheduling page


Save Cancel

# Tebra Payments

Tebra Payments gives practices the ability to collect patient balances faster and reduce time in accounts receivable. Unlike traditional payment options, Tebra Payments offers a robust messaging and payment solution that leverages text, email and mailed statements to ensure patients are communicated to in the right way, at the right time. Review the [Apply for Tebra Payments](#) help article to learn how to get started.

Benefits include:

- Unlimited text and email statements
- Secure credit card payments processed directly through Tebra
- Automatic payment deposits into the practice's bank account
- Enables patients to make online payments
- QR code and pay online payment options on mailed statements
- Automated Patient Billing feature

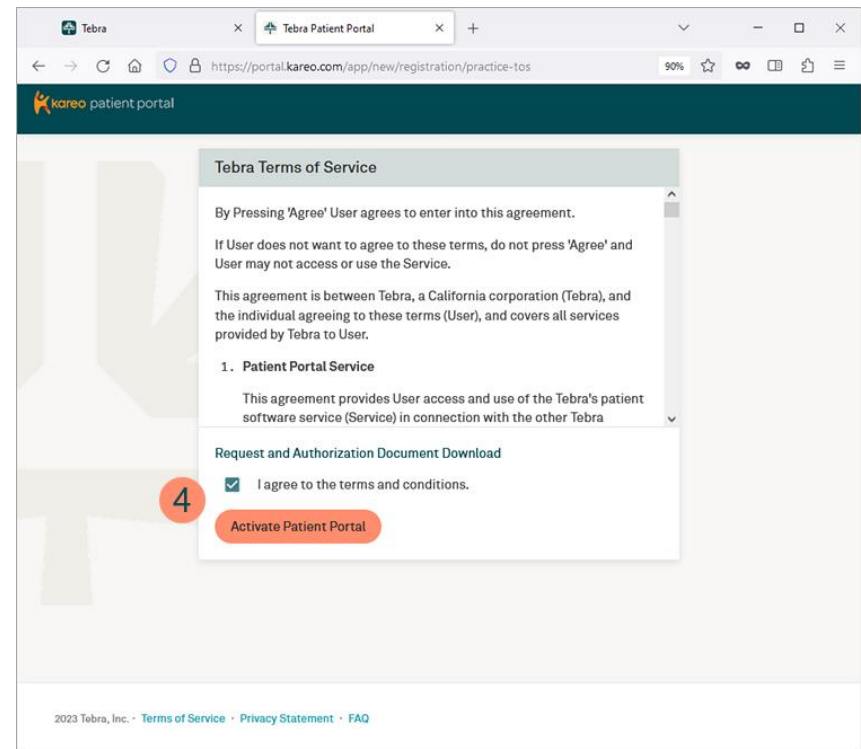
 Important Note: There are specific categories such as online pharmacies, prescription-only products including card-not-present pharmaceuticals, cannabis related practices/consultations, and products and services with varying legal status on a state-by-state basis that may be restricted. For further questions, contact [Customer Care](#).

For more information, review [Tebra Payments FAQs](#).

## Portal Settings

The Patient Portal integrates with Tebra and lets the practice securely communicate with patients, share eLab results, health information, and provide patients access to online statements. With [Tebra Payments](#) enabled, patients can pay outstanding balance online through the Patient Portal and optionally receive automatic patient statement emails when a balance is moved to the patient's responsibility in the Desktop Application (PM). To control when and how a patient statement is sent to the patient, disable the automatic sent statements settings. Review the [Admin Setup Guide Part 2 - Billing Company](#) to learn more about patient statement options in the Desktop Application (PM).

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Misc**, then click **Portal Settings**. The *Patient Portal* page opens in a new browser.
3. Click **Get Started**. The *Tebra Terms of Service* page opens.
4. Read the terms and click to select "I agree to the terms and conditions" to agree. Then, click **Activate Patient Portal**. The *Payment Setup* pop-up window opens.
  - If [Tebra Payments](#) is not in progress, click **Activate** to open the Tebra Payments page. Review [Apply for Tebra Payments](#) to learn how to get started.
  - To skip setting up payments, click **Do this later**. The *Patient Portal Dashboard* opens. Review [Navigate Patient Portal](#) to learn more about the Patient Portal.



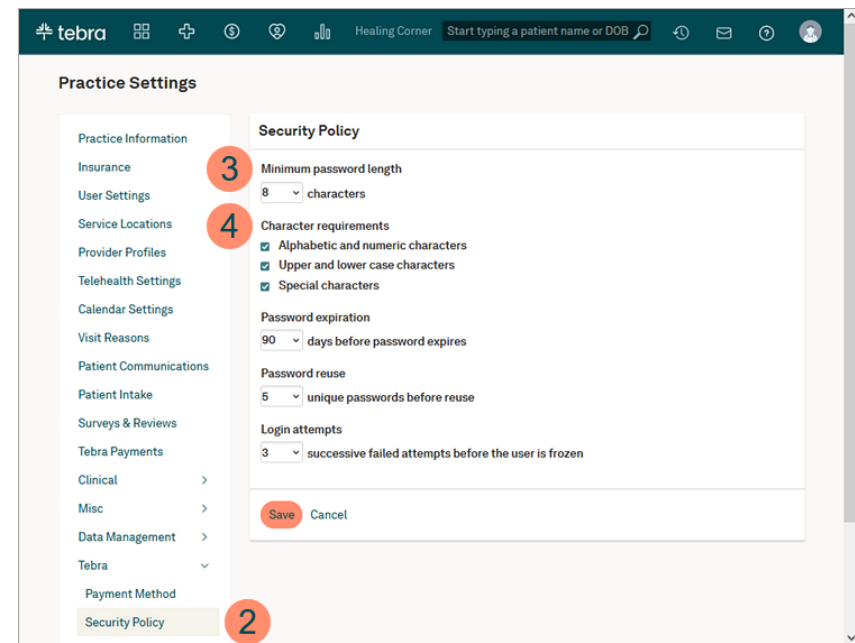
# Tebra Security and Legal

Set up the practice's security policy, enable two-factor authentication for all users in the account, and view Tebra's legal agreements. If applicable, you can also update your payment method. Review the [Payment Method](#) help article to learn more.

## Set Security Policy

The Security Policy section lets you set various password and login rules that apply to all users in the practice. These settings are important for proper compliance with the patient privacy regulations of the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Tebra automatically applies a basic set of defaults that meet the needs of most companies. Change the settings to fit the needs of the practice.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Tebra**, then click **Security Policy**. The *Security Policy* page opens.
3. **Minimum password length:** By default, the minimum is set to 8 characters. Click the drop-down to select a new minimum number of characters (from 8 – 15) required for a password.
4. **Character Requirements:** By default, all character requirements are selected. To disable a requirement, click to clear the selection.



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## Set Security Policy, cont.

5. **Password expiration:** By default, passwords are set to expire in 90 days. Click the drop-down to select a new number of days (30, 60, 90, or 120) a password will be valid. Upon expiration, the user will be prompted to set a new password.
6. **Password reuse:** By default, 5 unique passwords must be created before a password can be reused. Click the drop-down to select a new number of unique passwords (5, 10, or 15) that must be created before a password can be reused.
7. **Login attempts:** By default, users are frozen after 3 successive fails. Click the drop-down to select a new number of times (3, 4, 5, or 6) a user can fail to log in before they are prompted to reset their password.
8. Click **Save** when finished.

The screenshot shows the 'Practice Settings' interface for 'Security Policy'. The left sidebar lists various settings categories, with 'Security Policy' highlighted. The main content area displays the following settings:

- Minimum password length:** 8 characters (dropdown)
- Character requirements:**
  - ☒ Alphabetic and numeric characters
  - ☒ Upper and lower case characters
  - ☒ Special characters
- Password expiration:** 90 days before password expires (dropdown)
- Password reuse:** 5 unique passwords before reuse (dropdown)
- Login attempts:** 3 successive failed attempts before the user is frozen (dropdown)
- Buttons:** Save, Cancel

Red circles with numbers 5 through 8 are overlaid on the image to indicate the sequence of steps for configuration:

- 5: Points to the 'Password expiration' dropdown.
- 6: Points to the 'Password reuse' dropdown.
- 7: Points to the 'Login attempts' dropdown.
- 8: Points to the 'Save' button.



## Two-Factor Authentication

Two-Factor Authentication is a security enhancement that allows users to present two pieces of evidence – their credentials – when logging in to an account. In an age where data breaches are becoming increasingly common, it's important to do everything you can to protect your patients' and practice information including implementing additional security layers. Enabling Two-Factor Authentication for the account is highly recommended to decrease the likelihood of a data breach.

Two-Factor Authentication is enabled at the account level and is enabled for all users for all practices under the account. Any System Administrator or Practice Administrator in the account can enable this feature. Review the [Two-Factor Authentication FAQs](#) help article to learn more. To preview how users will login after Two-Factor Authentication is enabled, review the [Two-Factor Authentication for Login](#) help article.



**Important Note:** As a System Administrator, you need to complete a few steps to prepare your account for Two-Factor Authentication. Before enabling Two-Factor Authentication:

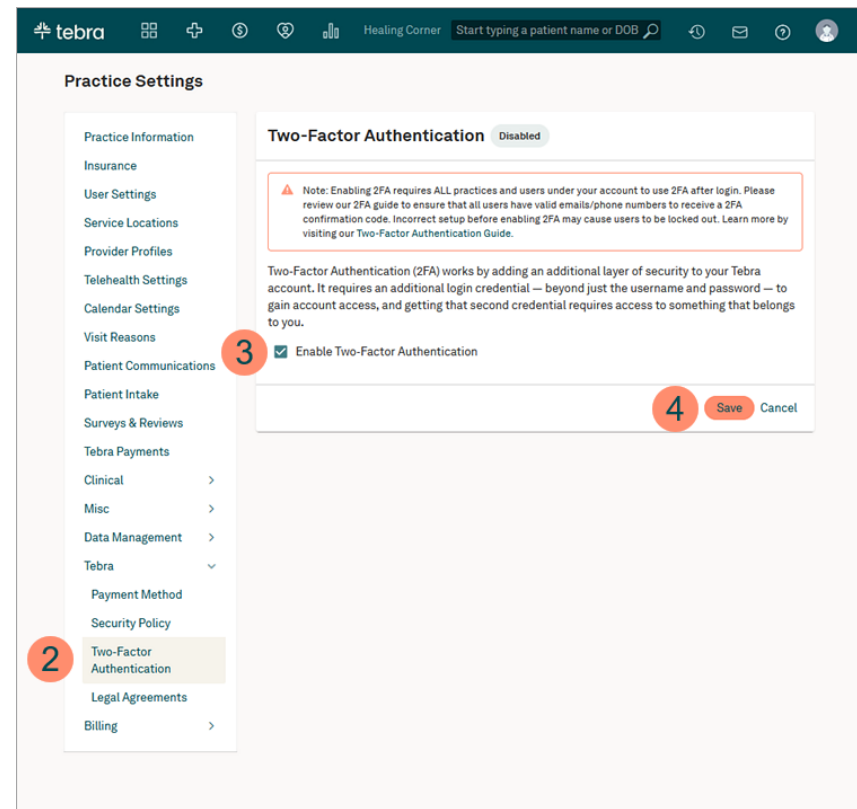
1. Verify the email and phone number for all user accounts.
  - *E-Mail:* The user must have a valid unique up-to-date email address to which they can only access to receive a confirmation code
  - *Phone:* The user must have a mobile phone number to which they can receive a confirmation code via text message
2. Authorize a few users in the account to request Emergency Access if you or another System Administrator is unavailable to unlock a user. Review the [Request Emergency Access](#) help article to preview how a user would request access.

Review the [Edit, Lock, or Unassign User Account](#) and [Edit Provider User Account](#) help articles to learn how to update the user's information and/or assign Emergency access. If the user's information is not entered correctly, they will not be able to access Tebra. System Administrators are responsible for unlocking the user accounts. To protect the security of the account, the Customer Care team is prohibited from unlocking user accounts.

*(Continued next page...)*



## Two-Factor Authentication, cont.

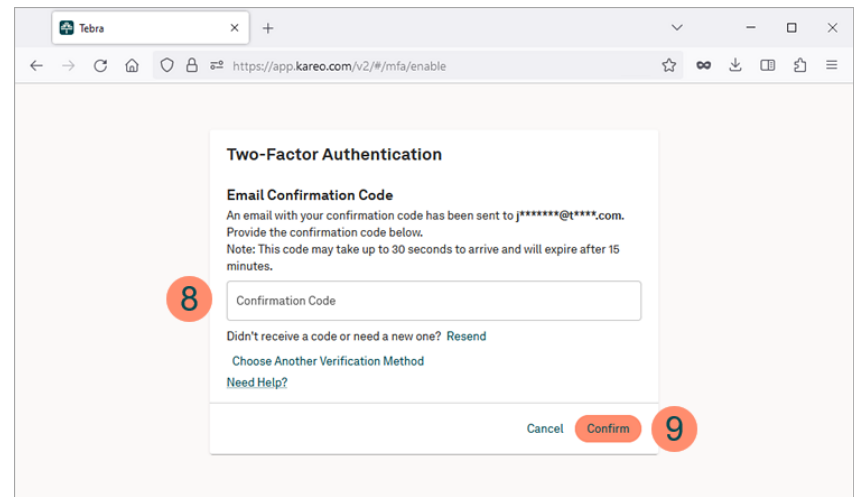
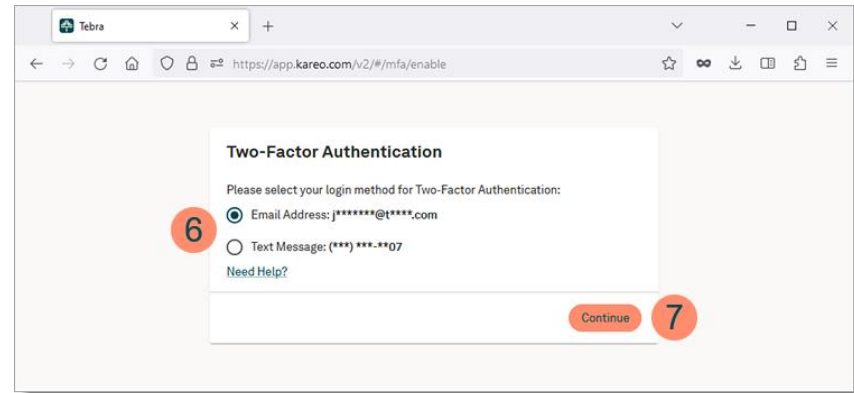
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click Tebra, then click **Two-Factor Authentication**. The *Two-Factor Authentication* page opens.
3. Click to select "Enable Two-Factor Authentication".
4. Click **Save**. The *Enabling Two-Factor Authentication* pop-up window opens.
5. Click **Continue** to complete authentication. The *Login MFA* page opens.



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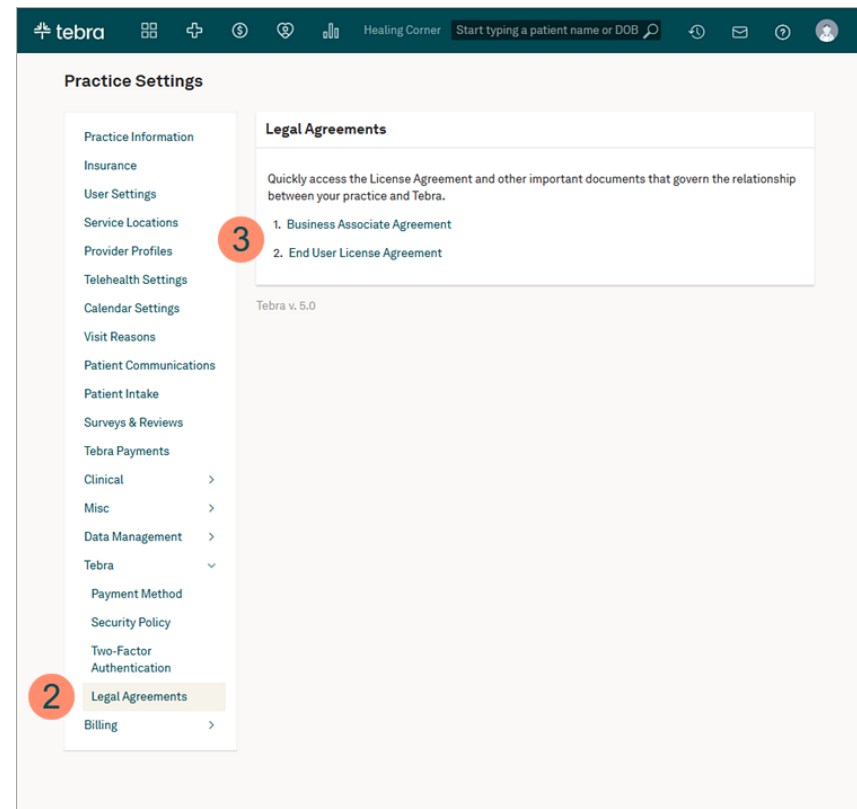
## Two-Factor Authentication, cont.

6. Click to select "Email Address" or "Text Message".
7. Click **Continue**. A 6-digit code is sent to your email or phone number based on the selected method.  
 Note: The confirmation code expires after 15 minutes.
8. Once the code is received via email or text message, enter the 6-digit code in the *Confirmation Code* field.  
 Note: You have 7 attempts to enter the correct 6-digit code. If you fail all attempts, your user account will be locked and will require another System Administrator to reactivate the user account.
9. Click **Confirm**. The *Two-Factor Authentication* page opens and the status updates to *Enabled*. All users in the account will be required to verify their identity using Two-Factor Authentication to access Tebra.



## Legal Agreements


1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Tebra**, then click **Legal Agreements**. The *Legal Agreements* page opens.
3. Click **Business Associate Agreement** or **End User License Agreement** to download the corresponding document.




# Message Center

The Message Center allows billing company staff members and users within a practice to communicate with each other. This includes messaging between the Web Platform, Desktop Application (PM), and mobile applications. Review the [Admin Setup Guide Part 2 - Billing Company](#) to learn how to navigate the *Message Center* and send staff messages in the Desktop Application (PM).

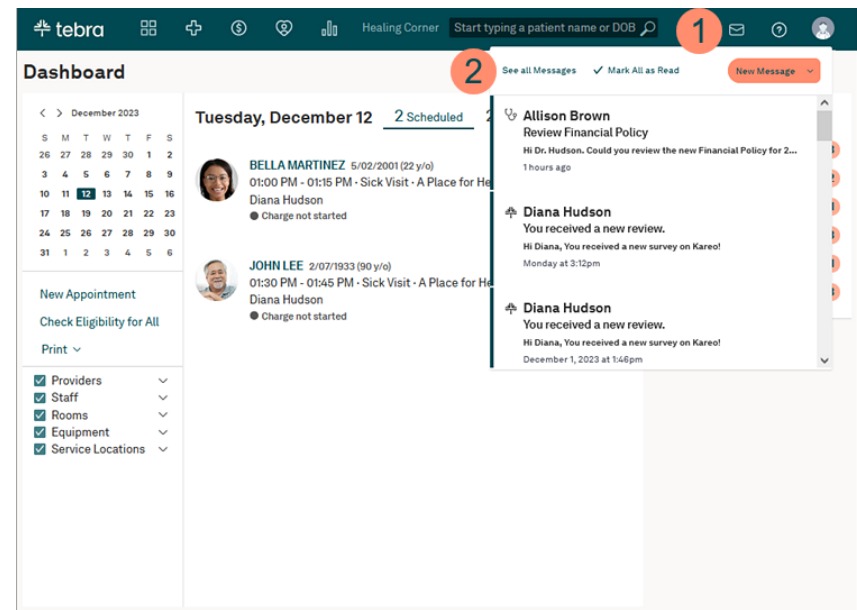
The practice can also communicate with patients by creating timely and targeted messages with custom email templates and patient groups, schedule batch email messages to be delivered on a future date or communicate freely by sending personalized on-demand messages. This interactive system let's patients reply directly to any communication they receive and delivers responses right to the practice's inbox.

 Note: Do not send protected health information (PHI) to patients through the Message Center as this method is non-secure for external messaging. To include sensitive information, use the *Patient Portal* to send messages. Review the [Send Patient Portal Message](#) help article for more details.

1. Click the **envelope** icon. The messaging summary window opens.

 Note: A red notification badge displays when new messages are waiting in your inbox.

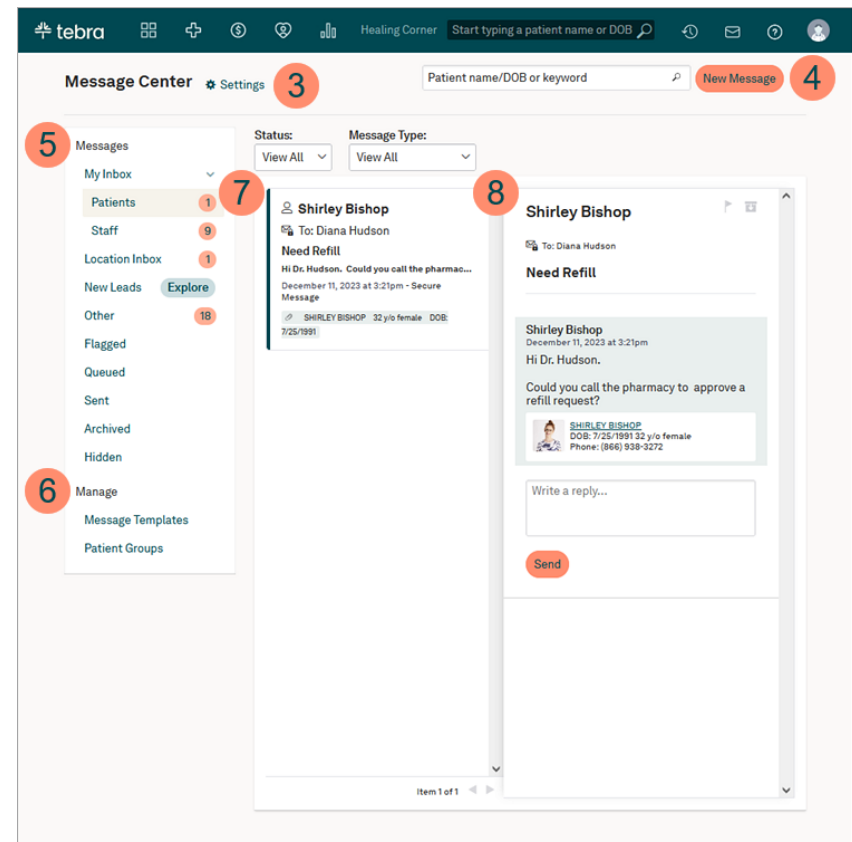
2. Click **See All Messages**. The *Message Center* opens.



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## Message Center, cont.

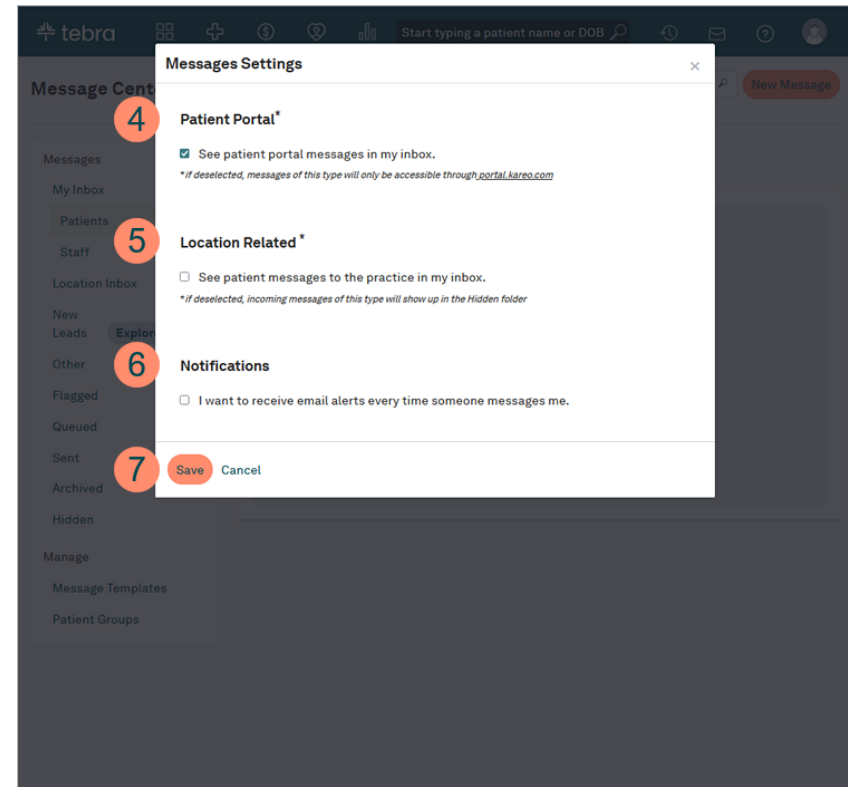
3. **Settings:** Set up user specific message preferences. Review the [Message Settings](#) section for instructions.
4. **New Message:** Create new messages for staff or send patient(s) an email or text. Review the [Send Staff Message](#) section for instructions to message staff member(s).
5. **Messages:** View messages in My Inbox, Location Inbox, New Leads (Practice Growth subscribers), Other, Flagged, Queued, Sent, Archived, or Hidden. Review the [Navigate Message Center](#) help article to learn more.
6. **Manage:** Create message templates to send messages that are used on a regular basis or create patient groups to bulk email specific groups. Review the [Message Center](#) help articles for instructions.
7. **View Message:** Click on a message to read more or to send a reply. A blue bar displays when the message is unread.
8. **Message Actions:** To flag the message as important, click the **flag** icon. To move the message from the inbox to the *Archived* folder, click the **file box** icon. If applicable, click on a referenced **document** or **patient's name** to view additional details.



## Message Settings

Set up your preference for Patient Portal messages, location related messages, and email notifications. You can choose whether you want to be notified via email every time a new message is received. Review the [Configure Message Settings](#) help article to learn more.

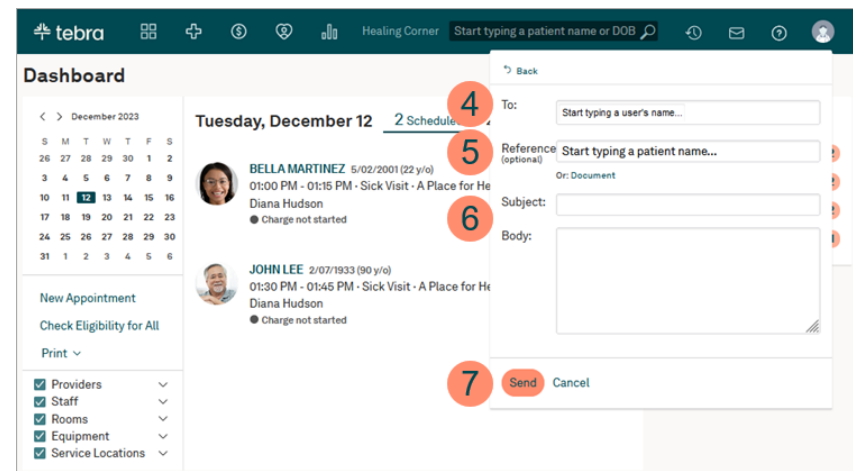
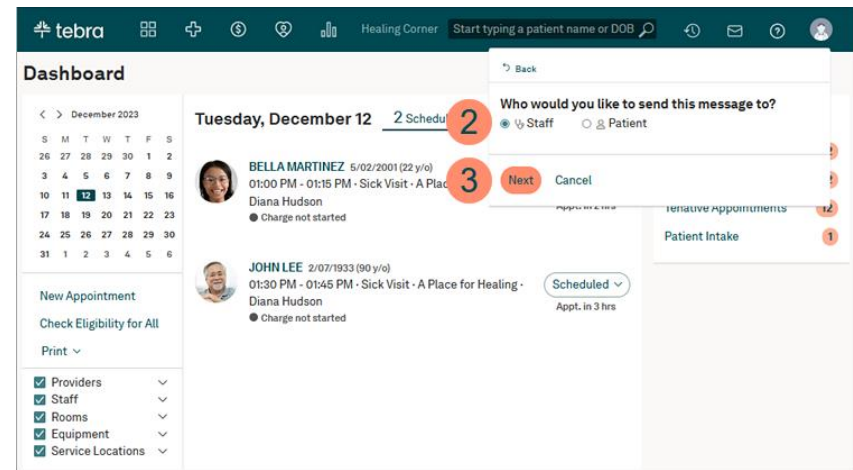
1. Click the **envelope** icon. The messaging summary window opens.
2. Click **See All Messages**. The *Message Center* opens.
3. Click **Settings**. The *Messages Settings* pop-up window opens.
4. **Patient Portal:** By default, this option is selected and allows *Patient Portal* messages to appear in the user's *Inbox*. To disable this option, click to clear the selection.
5. **Location Related:** By default, this option is deselected for providers and clinical assistants to view patient messages to the practice in the *Location Inbox*. To enable this option, click to select this option.
6. **Notifications:** By default, this option is deselected. Click to select this option to be notified via email every time you receive a new message.
7. Click **Save** when finished.



## Send Staff Messages

You can securely send messages to other billing company staff or users within the practice. If applicable, reference a patient or document.

1. Click the **envelope** icon. The messaging summary window opens.
2. Click **New Message**. Then, click to select “Staff”.
3. Click **Next**. The *New Message to Staff* pop-up window opens.
4. **To:** Begin typing the staff member's name and select it when displayed.
5. **Reference:** If applicable, reference a patient or a previously uploaded document. To reference a patient, begin typing the patient's name and select it when displayed. To reference a document, click **Document** to browse previously uploaded documents or attach an image or document (not to exceed 10MB per document) from your computer.
6. **Message:** Enter the *Subject* and a message in the *Body*.
7. Click **Send** when finished.





## Additional Settings

If the billing company is responsible for configuring additional settings for the practice, review the corresponding help articles for instructions. Otherwise, refer the practice to the [Practice Admin Setup Guide](#) for instructions to configure their settings.

## Provider Profiles

Tebra's Provider Profile is an online tool that helps the practice highlight key information about the providers and promote services to the public. Provider profiles are activated by default for all providers with an active provider user. Tebra recommends completing at least the basic section for each provider in the practice. Review the [Provider Profiles](#) help articles to set up the provider profile.

## Calendar Settings

Configure calendar settings to manage appointments easily and efficiently for the provider or staff in the practice.

Review the [Calendar Settings](#) help articles to configure the practice's calendar:

- [Set Time Zone and Appointment Increment](#) – Learn how to select the practice's time zone and set up appointment increments
- [Enable or Disable Group Appointments](#) – Learn how to enable group appointments
- [Add, Edit, or Delete Rooms](#) – Learn how to set up exam rooms to incorporate into the patient appointment workflow
- [Add, Edit, or Delete Equipment](#) – Learn how to set up equipment to incorporate into the patient appointment workflow
- [Edit Provider Office Hours](#) – Learn how to set individualized office hours and breaks for providers
- [Add or Edit Staff Office Hours](#) – Learn how to create individual appointment schedules and breaks for non-provider members of the staff who see patients
- [Add, Edit, or Delete Staff Time Off Event](#) – Learn how to schedule time off for providers and staff
- [Set Practice Holidays](#) – Learn how to select holidays observed by the practice
- [Enable Practice Online Scheduling](#) – Learn how to allow practices with multiple service locations and providers to enhance their online scheduling options (Engage Subscribers), and online telehealth scheduling options (Telehealth Subscribers)

## Visit Reasons

Configure an existing visit reason or add new reasons to apply when scheduling an appointment. Additionally, configure default procedure codes for the visit reason to auto-populate in a charge capture.

Review the [Visit Reasons](#) help articles to learn how to configure the practice's visit reasons.

- [Add, Edit, or Delete Visit Reasons](#) – Learn how to configure visit reasons for common types of
- [Enable or Disable Online Scheduling Visit Reasons](#) – Learn how to enable or disable visit reasons in the provider's Tebra Care Connect profile or practice online scheduler.

## Patient Communications

Tebra's Patient Communications saves time and increases the practice's income by sending automated appointment reminders and survey requests to patients via email, text message, or phone. For Engage subscribers, customize the appointment reminder office email (e.g., add parking instructions) and add an additional text message (when applicable) to help tailor the patient's experience. Additionally, for Telehealth subscribers, customize the Telehealth email or Telehealth text appointment reminder, where applicable.

Review the [Patient Communications](#) help articles to learn how to configure appointment reminders and customize the email and/or text messages.

- [Navigate Patient Communications](#) – Learn how to navigate the patient communications page
- [Pre-Visit Messages](#) – Learn how to enable and configure reminders before the scheduled appointment
- [Post-Visit Messages](#) – Learn how to enable and configure patient recall messages and surveys (Engage Subscribers)

## Patient Intake

For Engage subscribers, send electronic intake forms, including screening tools (e.g., GAD- 7, PCL-5, and PHQ-9), to patients and receive them prior to the appointment. Patients can fill out these forms anytime, anywhere--saving time at check-in and increasing office efficiency.

Review the following help articles to learn how to configure [Patient Intake](#):

- [Navigate Patient Intake Settings](#) – Learn how to print intake forms, manage custom forms, and optionally attach additional intake forms
- [New Custom Form](#) – Learn how to create forms for the practice that are customized for patients to complete electronically
- [New Telehealth Consent Form](#) – Learn how to create a custom telehealth consent form for patients to complete electronically (Telehealth Subscribers)

## Clinical Settings

For Clinical subscribers, configure prescription preferences, clinical decision support, flowsheets, and lab list.

Review the following help articles to learn how to configure [Clinical Settings](#):

- [Configure Prescription Preferences](#) – Learn how to set up prescription alerts and security measures
- [Configure Clinical Decision Support Settings](#) – Learn how to define which user roles can access Clinical Decision Support Interventions and Therapeutic/Diagnostic resources
- [Navigate Flowsheets Settings](#) – Learn how to manage standard and build flowsheets
- [Create Flowsheet](#) – Learn how to build flowsheets using vitals and commonly ordered lab tests in a layout specific for the practice
- [Add Lab Tests to Lab List](#) – Learn how to manage the defaulted lab list and add additional lab
- [Chart View Settings](#) – Learn how to manage the chart view specific to the practice's specialty
- [Chart Access Settings](#) – Learn how to enable chart access to allow staff the option and control to restrict sensitive areas of a patient's charts.

## Misc Settings

Miscellaneous settings allow the practice to access the *Patient Portal*, manage referring providers, and referral sources.

Review the [Misc Settings](#) help article to manage the practice's referring providers and referral sources:

- [Add, Edit, or Delete Referring Provider](#) – Learn how to create a database of referring providers
- [Add, Edit, or Delete Referral Source](#) – Learn how to add additional referral sources to the standard list provided by Tebra

## Billing Settings

The billing settings allow the practice to configure receipt settings, manage services (procedures), manage fees, and configure charge capture settings, as applicable. The receipt settings allow you to enable itemized charge receipts for patients to access and securely download through the Patient Portal.

For Self-Pay Only is enabled practices, manage Services (Procedures) and Fees. Services (Procedures) allow you to easily find and manage services used by the account. Fees allow you to create a standard fee schedule to help increase collections by setting the right fees for services.

Review the [Billing Settings](#) help articles to configure receipt settings:

- [Enable Receipt on Patient Portal](#) – Learn how to enable itemized charge receipts for patients to access in the Patient Portal
- [Navigate Services \(Procedures\)](#) – Learn how to navigate the services (procedures) page
- [Manage Services \(Procedures\)](#) – Learn how to find, add, edit, or deactivate services for the practice
- [Navigate Fees](#) – Learn how to navigate the fees page
- [Manage Fees](#) – Learn how to find, add, duplicate, edit, deactivate, or delete fees for the practice
- [Charge Capture Settings](#) – Learn how to enable permissions for Office Staff users to submit charge captures to the billing

## Additional Admin Setup Guides

### Admin Setup Guide Part 2

Once the Web Platform configuration is complete, continue to [Admin Setup Guide Part 2 – Billing Company](#) for instructions to configure additional practice settings and provider billing settings in the Desktop Application (PM).

### Practice Admin Setup Guide

After completing Admin Setup Guide Part 1 and Part 2, refer the Practice Administrator to the [Practice Admin Setup Guide](#) to configure their practice specific settings. They will learn how to manage their users, service locations, provider profiles, calendar settings, patient communications, and more.

## Learn More

### Help Center

Access [helpme.tebra.com](https://helpme.tebra.com) to view additional help resources, monthly product release notes, help articles, guides, training videos, [contact Customer Care](#), and more.

### Tebra University

Log into [app.kareo.com](https://app.kareo.com) to access Tebra University and register for live trainings, view pre-designed courses and eLearnings. Review the [Tebra University](#) help article to learn more.

### Clinical Enrollments

For Clinical Subscribers, complete enrollments for electronic prescribing (eRx), electronic prescribing for controlled substances (EPCS), eLabs, and Direct Messaging. Review the Clinical Enrollments section of the [Getting Started](#) page for more information.



## Your Partner for a New Era of Healthcare

The world of healthcare is forever evolving. At Tebra, our passion for improving healthcare, obsession with customer success, and entrepreneurial spirit have led us to raise the bar for healthcare management. We're always looking for new ways to put the patient experience first, simplify the complex, and drive practice transformation.

Our mission is to unlock better healthcare — by helping billers and their clients bring modernized care to patients everywhere. Think of us as your complete operating system for a successful business. Your partner for a stronger future. The digital backbone for practice well-being.