ADMIN SETUP GUIDE

Part 1: Web Platform

Updated: January 2024

Introduction

The Admin Setup Guide Part 1 is designed to instruct System Administrators how to configure practice settings in Practice Operations Web Platform.

You will learn how to add insurances, set up users, add service locations, manage provider profiles, configure calendar settings, activate patient communications, and more.

For Billing subscribers, continue to Admin Setup Guide Part 2 for instructions to configure 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.

Table of Contents

Practice Operations Web Platform 7
Access Practice Operations 7
Navigate Dashboard 8
Practice Information 10
Insurance 13
Navigate Enrollment Dashboard 13
Add Insurance 15
Submit EDI Enrollment Request 17
Upload Transfer of Authorization Form 22
Enrollment Status 23
Add Insurance Plans 24
User Settings 25
Verify Provider User 25
Create Non-Provider User 27
Create Provider User 28
Frozen Users 30
Lock Users 30
Unlock Users 30
Service Locations 31
Provider Profiles 33

tebra

Provider Profile with Engage 35
Telehealth Settings 36
Calendar Settings 37
General 37
Rooms and Equipment 38
Office Hours 39
Add Provider Office Hours 40
Time Off & Holidays 41
Online Scheduling 42
Visit Reasons 43
Add New Visit Reason 43
Edit or Delete Visit Reason 44
Patient Communications 45
Activate Patient Communication 45
Configure Patient Communications 46
Patient Communication Customization 48
Patient Intake Settings 52
Create Custom Forms 53
Survey and Reviews 56
Tebra Payments 58
Clinical Settings 59
Prescription Preferences 59

Clinical Decision Support 60
Flowsheets Settings 61
Create Flowsheet 62
Lab List 63
Add New Lab 64
Chart Access 65
Chart View 67
eRx Enrollment 67
Misc Settings 68
Portal Settings 68
Referring Provider 69
Referral Sources 70
Data Management 71
Import Patient Demographics 71
Prepare Import File 71
Import File 72
Review Import 73
Import Clinical Data 75
Export Summary of Care Files 75
Submit Data Import Request to Tebra 75
Tebra Security and Legal 76
Set Security Policy 76

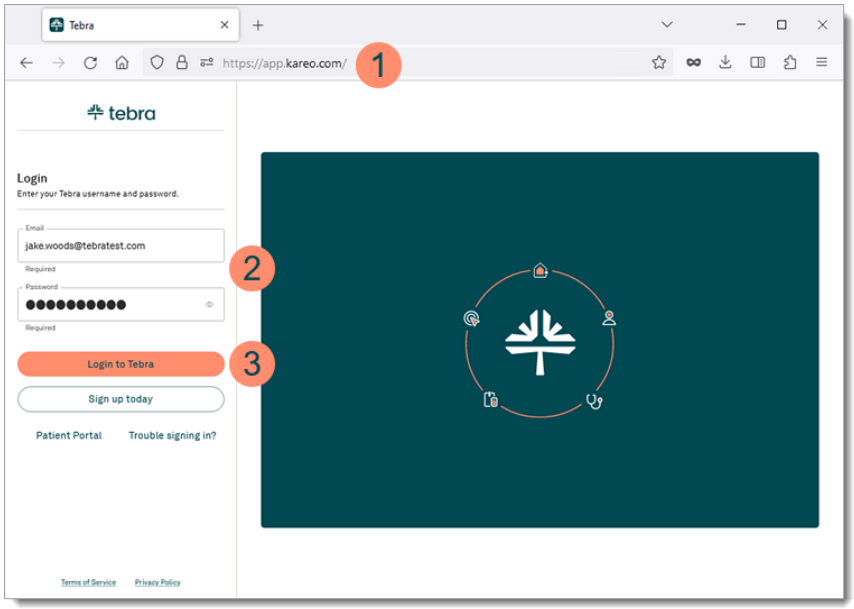
Two-Factor Authentication 78
Legal Agreements 81
Billing 82
Receipts 82
Services (Procedures) 83
Fees 83
Charge Capture Settings 83
My Settings 84
Message Center 86
Message Settings 88
Send Staff Messages 89
Learn More 90
Help Center 90
Tebra University 90
Admin Setup Guide Part 2 90
Clinical Enrollments 90

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 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.



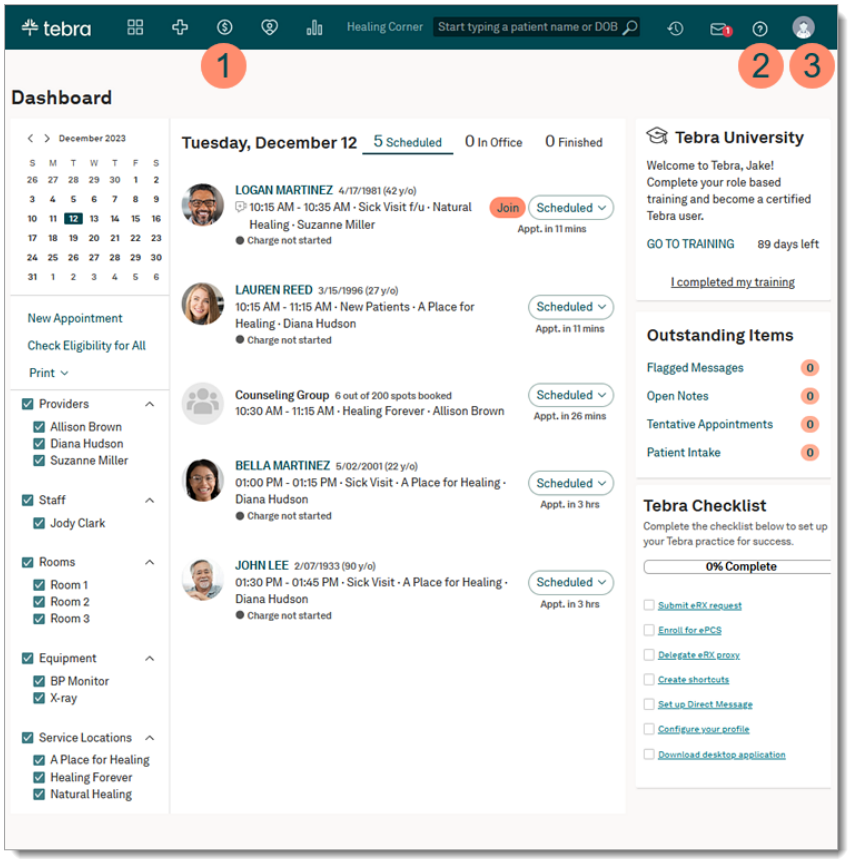
Navigate Dashboard

1. **Module Icons:** When the icons are lit up, it indicates that at least one provider in your 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.



(Continued next page...)

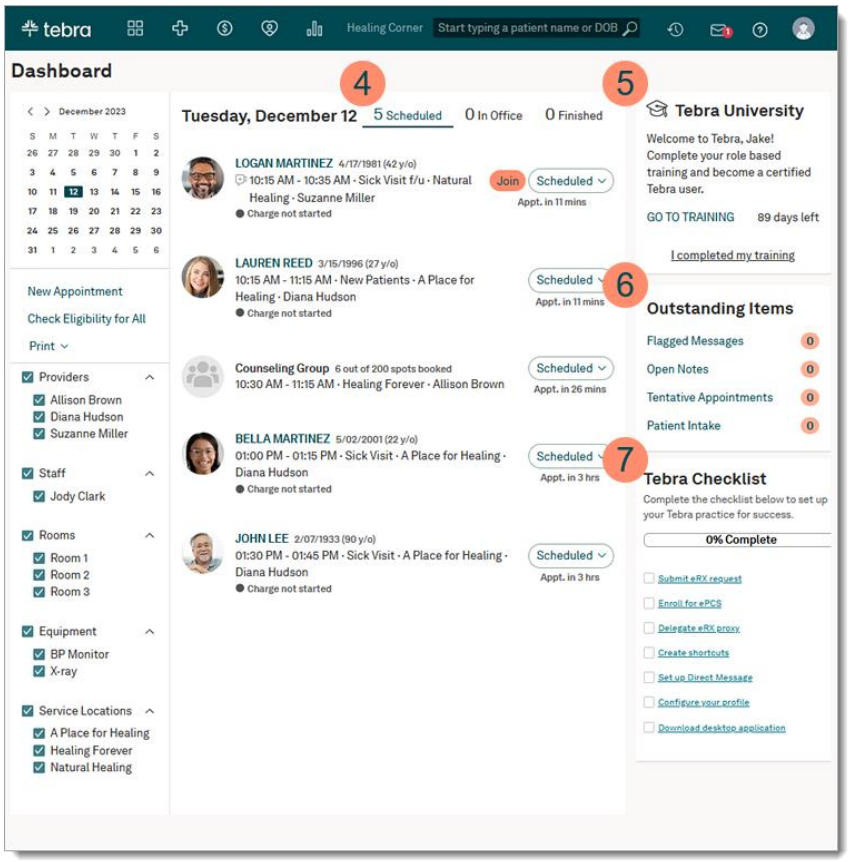
Navigate Dashboard, cont.

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).

7. **Checklist:** Track your Tebra set up progress based on your user role(s). Click to select the completed task(s).
   Tip: To remove tasks that do not apply to you, hover over the task and click **Dismiss**. Then, click **Dismiss** on the confirmation window.



Practice Information

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

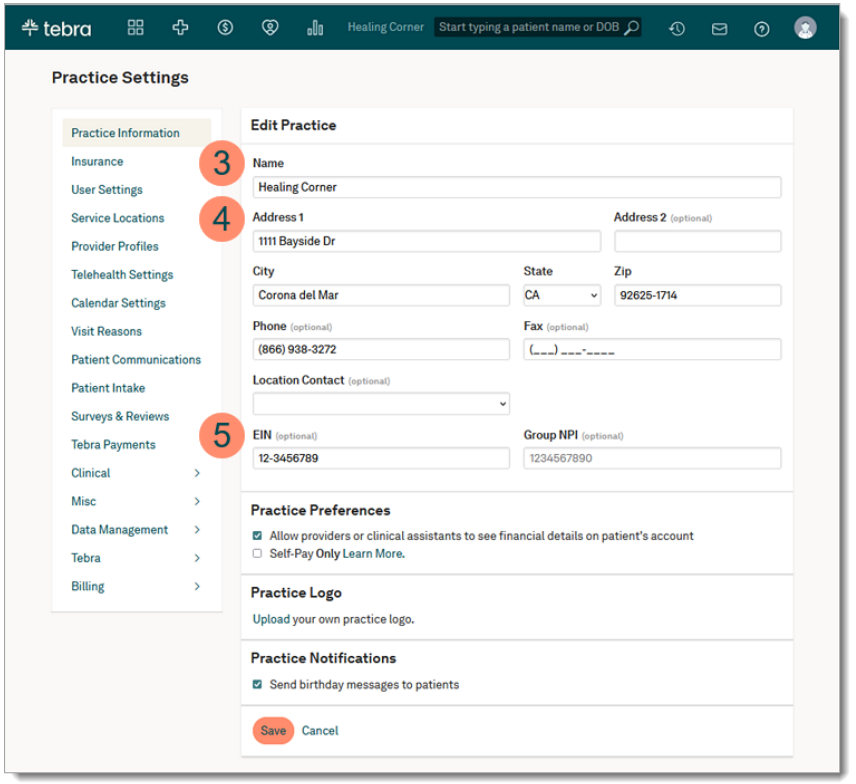
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

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, your practice address must be a physical address with a valid 9-digit zip code. Go to the USPS website to find the valid 9-digit zip code.

5. **EIN:** If your 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.



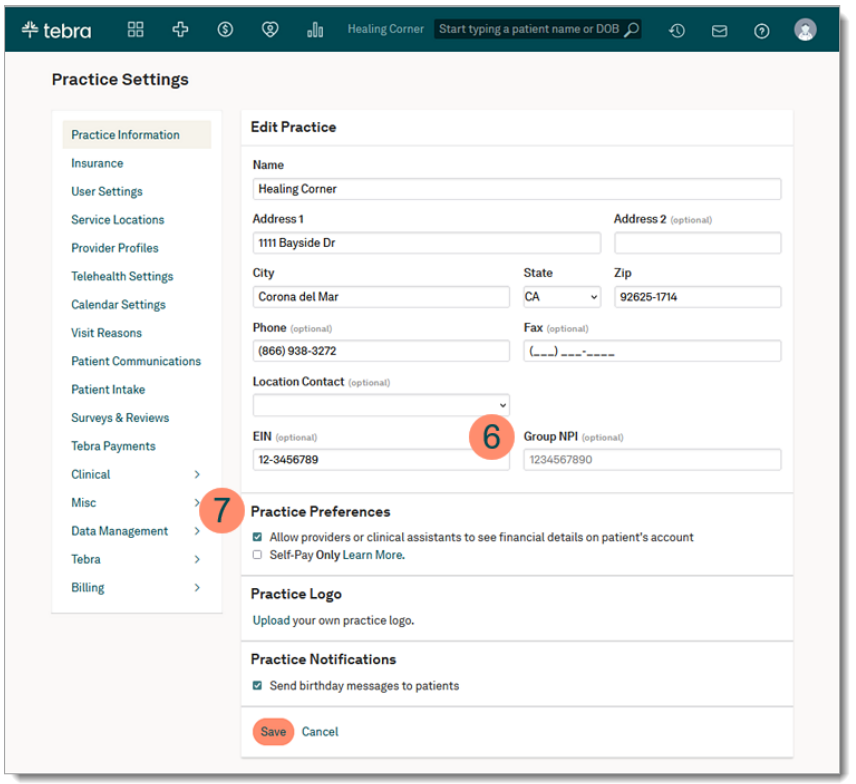
(Continued next page...)

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.



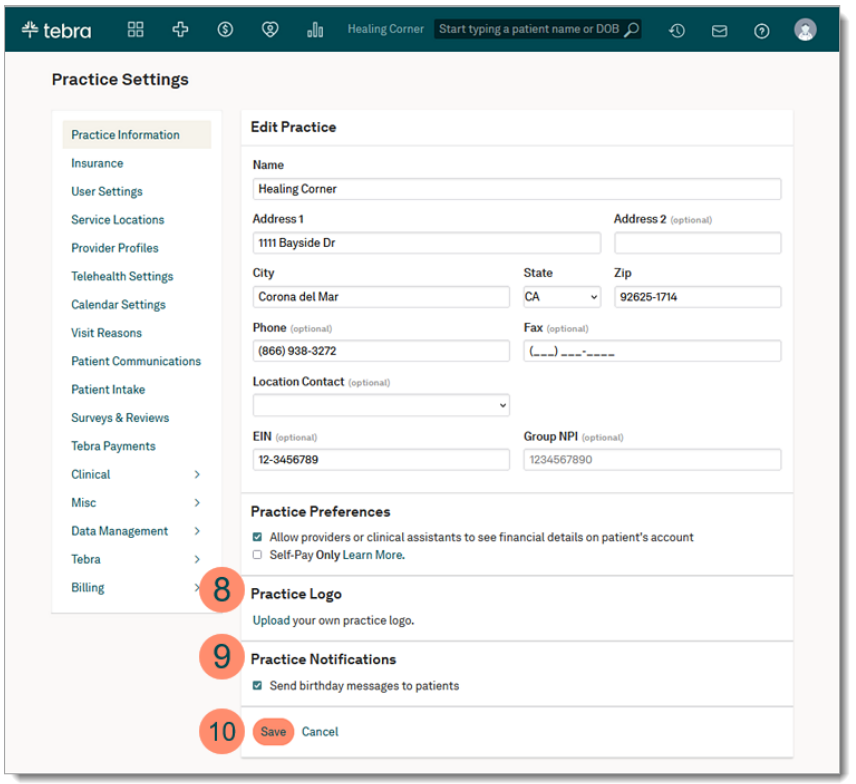
(Continued next page...)

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.



Insurance

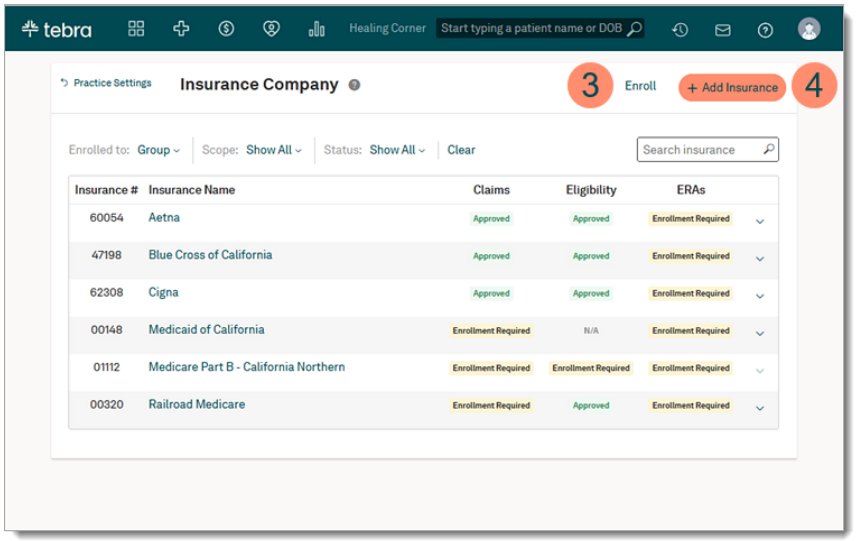
Insurance companies represent an insurance carrier or network (e.g., Blue Cross Blue Shield, Cigna, Medicare). Once an insurance company record is created, you can add insurance plans and enroll for available electronic data interchange (EDI) services to submit claims, check patient eligibility, and receive ERAs. For Self-Pay Only enabled practices, complete the insurance section, if applicable.

Note: A subscription to Tebra Billing is required to electronically submit claims, check patient eligibility, and receive ERAs.

Navigate Enrollment Dashboard

The Insurance Company page, also known as the Enrollments Dashboard, displays the insurance companies that you have created and the enrollment status of each company.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Insurance**. The *Insurance Company* page opens.
3. **Enroll:** Click to enroll for available electronic services with one or more insurance companies.
4. **+Add Insurance:** Click to add one or more insurance companies to the account.



(Continued next page...)

tebra

Navigate Enrollment Dashboard, cont.

5. **Filters:** Click the drop-down arrows to filter insurance companies by *Group* or *Individual* enrollment, *Scope*, or *Status*. Click **Clear** to remove the selected filters.

6. **Search:** Quickly find an insurance company by name, payer ID, or show all results.

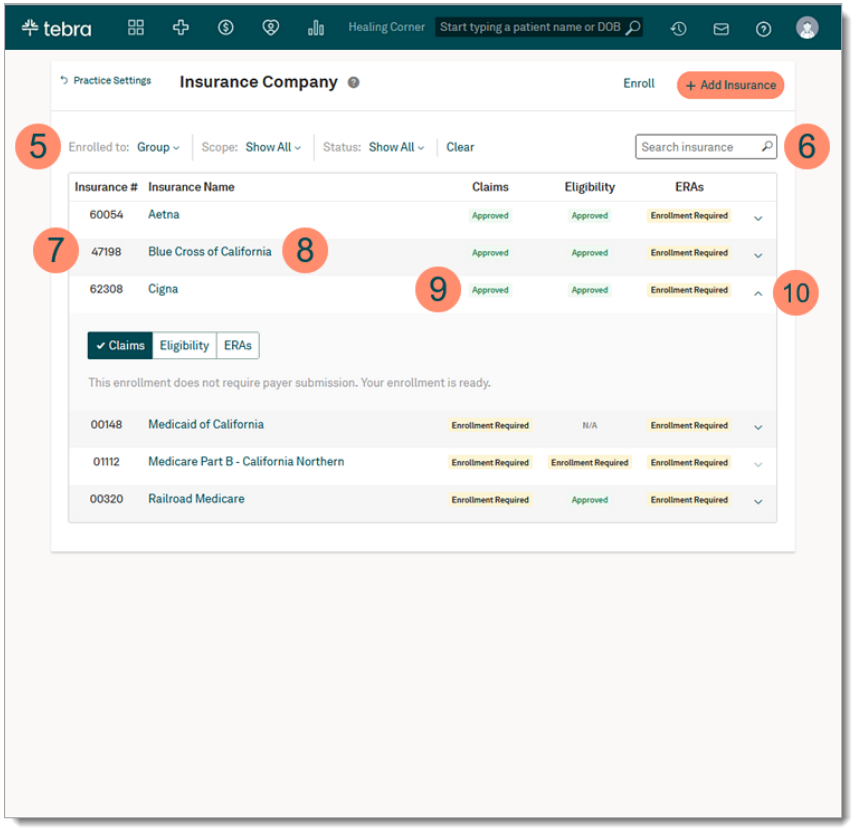
7. **Insurance #:** The ID number used by the clearinghouse to route electronic claims to the insurance company.

8. **Insurance Name:** Alphabetically displays the names of insurance companies added to the account.

9. **Claims, Eligibility, ERAs:** Displays the status of electronic services offered by the insurance company. Review the Enrollment Status section for more information.

10. **Track Enrollment:** Click the arrow to expand or collapse additional details.

11. **Pagination:** If applicable, click the arrows to navigate forward or back. Each page displays up to 15 insurance companies.



Add Insurance

For Billing subscribers, review Admin Setup Guide Part 2 for insurance company billing settings (e.g., electronic claims submission settings).

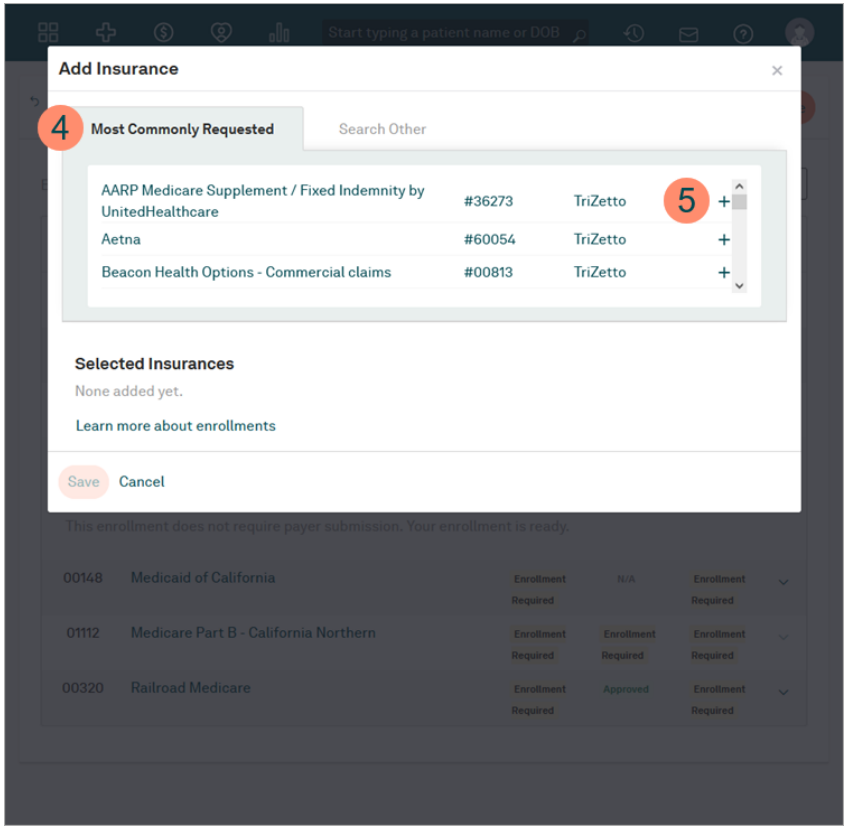
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Insurance**. The *Insurance Companies* dashboard opens.

3. Click **+Add Insurance**. The *Most Commonly Requested* tab of the *Add Insurance* pop-up window opens.

4. **Most Commonly Requested:** List of common insurances in the state where the practice is located.

5. **Add Insurance:** Click **+** or anywhere on the line item to add the insurance company to the *Selected Insurances* list.



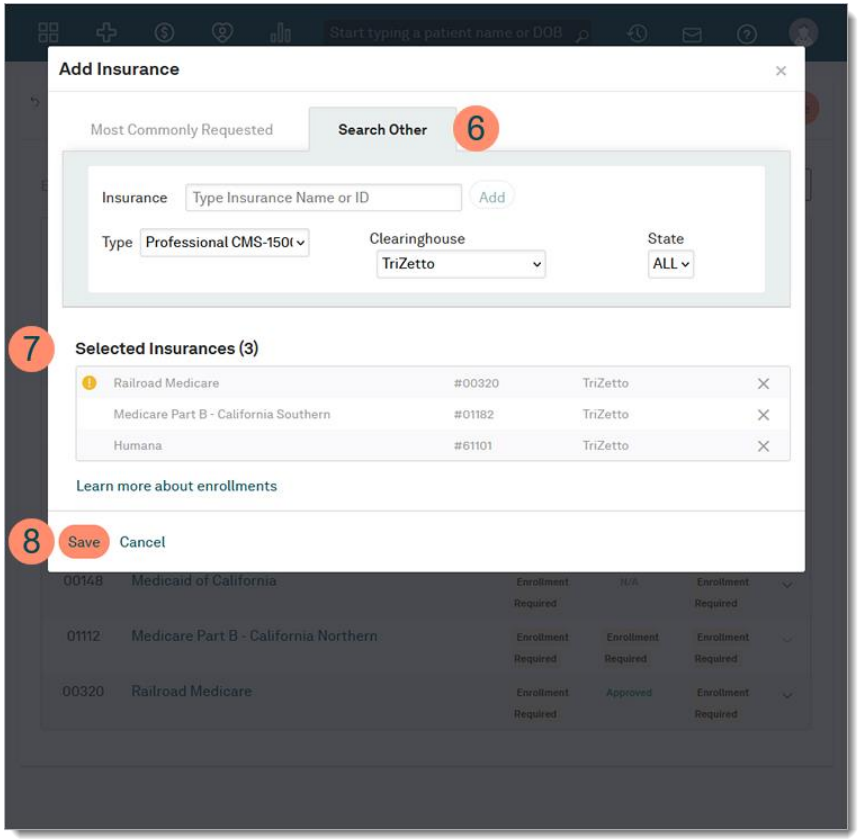
(Continued next page...)

Add Insurance, cont.

6. **Search Other:** Search for other insurance companies by entering the *Insurance Name* or *ID number* and select it from the auto-populated results list. Then, click **Add** to add the insurance company to the *Selected Insurances* list. If necessary, filter by *Type*, *Clearinghouse*, or *State*.
   Note: For worker's comp and auto accident, select *Jopari* as the clearinghouse to send claims at no additional cost.

7. **Selected Insurance:** List of selected insurance companies to add to your Tebra account. To remove an insurance company from the list, click **X**. An orange icon displays if the insurance company is a duplicate or already exists in the account.

8. Click **Save** when finished.



Submit EDI Enrollment Request

Once an insurance company is added, submit EDI enrollment requests for electronic service connections through the Enrollment wizard. Enrollments are completed with the billing Tax ID and NPI used for submitting claims per the practice's or provider's agreement with the insurance companies. Even if you have used electronic services in the past, a user with System Administrator, Provider, or Biller permissions must complete the EDI enrollment process in Tebra.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Insurance**. The *Insurance Companies* dashboard opens.

3. Click **ENROLL**. The *Enrollment Type* page opens.

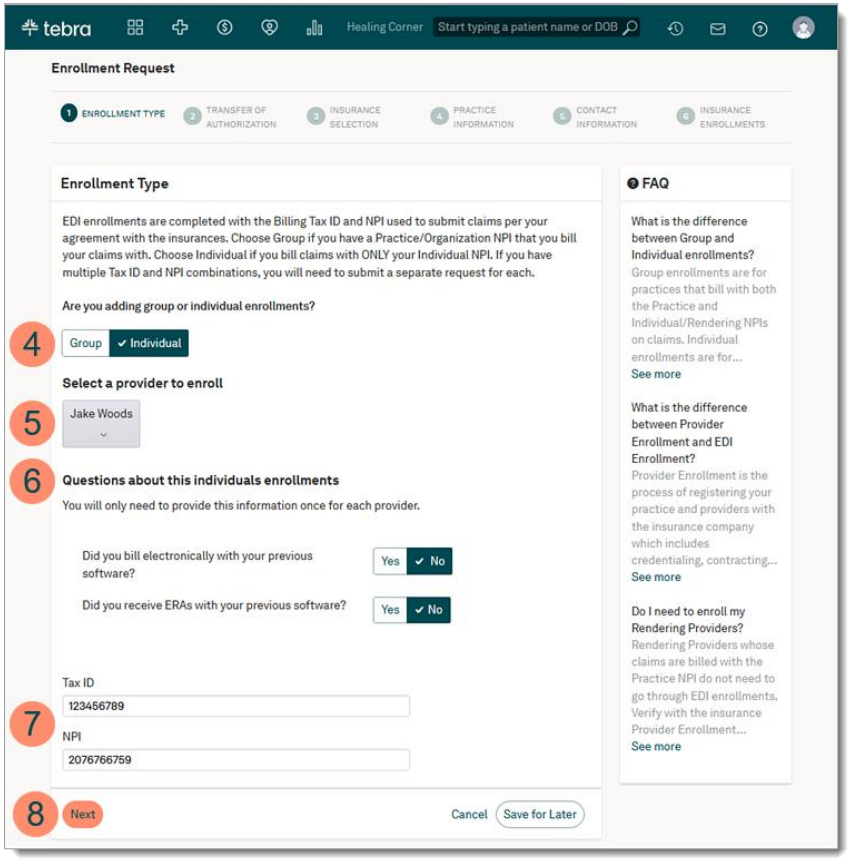
4. **Enrollments:** Choose whether you are credentialed with your insurances as a member of a group or an individual.

5. **Provider:** For individual enrollments, select a provider.

6. **Questions about enrollments:** Answer questions about the enrollments for the group or individual.

7. **Tax ID and NPI:** The fields are auto populated based on the data entered during the *New Practice Setup Wizard*.

8. Click **Next**. The *Transfer of Authorization* page opens.



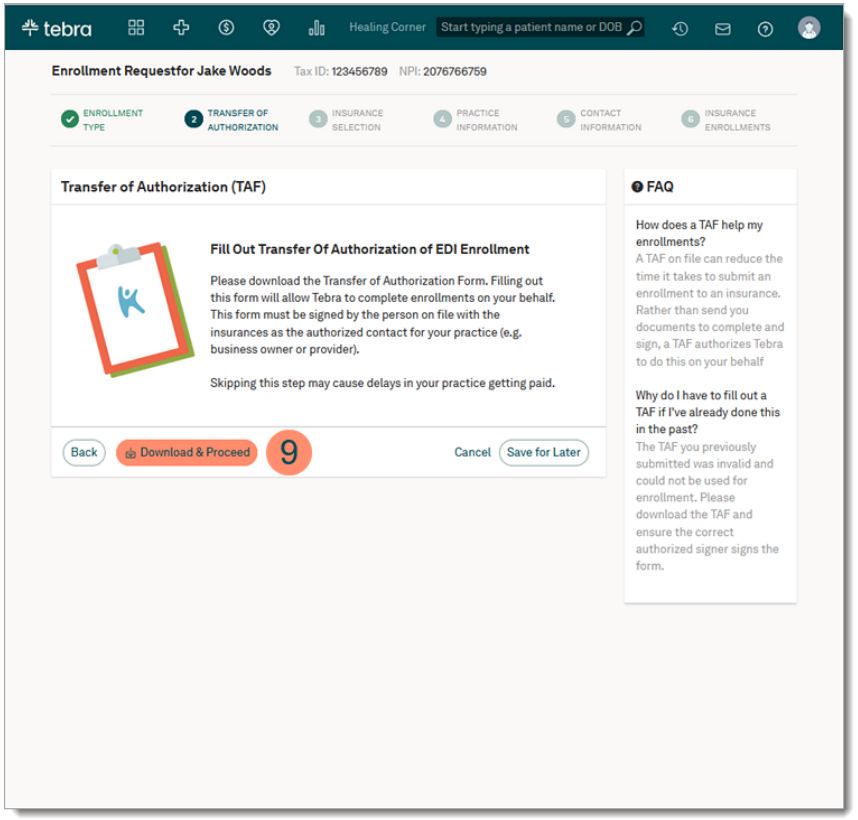
(Continued next page...)

tebra

Submit EDI Enrollment Request, cont.

9. Click **Download & Proceed**. The Transfer of Authorization Form (TAF) helps expedite the enrollment process by authorizing Tebra to sign insurance company EDI agreements on your behalf. The TAF must be signed by the person on file as the authorized contact for your practice.

10. Save the downloaded TAF .pdf file. The *Insurance Selection* page opens.



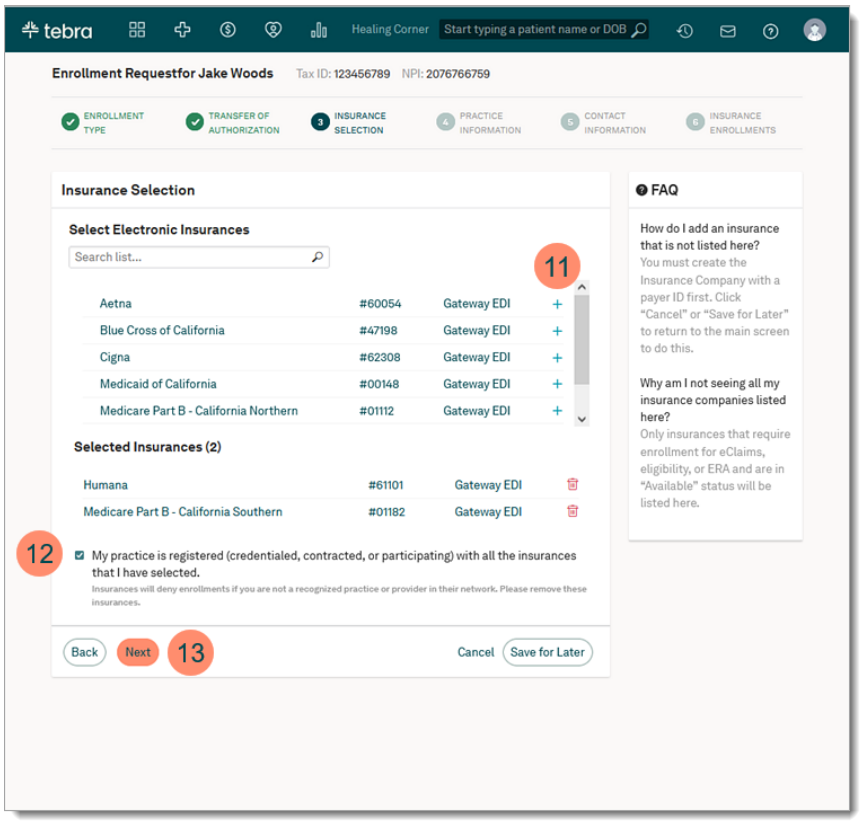
(Continued next page...)

Submit EDI Enrollment Request, cont.

11. Click **+** to add the insurance to the *Selected Insurances* section.

12. Verify the practice is credentialed, contracted, or participating with all selected insurances then click to acknowledge.

13. Click **Next**. The *Practice Information* page opens.



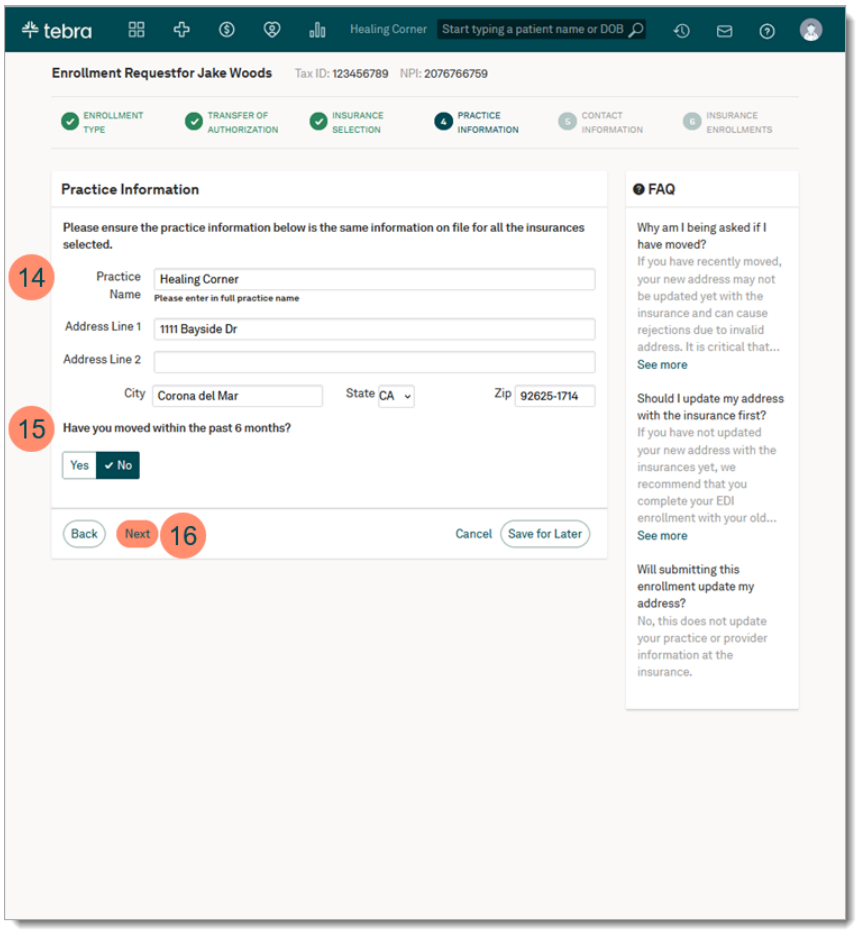
(Continued next page...)

Submit EDI Enrollment Request, cont.

14. Verify the *Practice Information* is current and the same for all selected insurances.

15. Click **Yes** or **No** to indicate whether the practice or provider has moved in the past 6 months.
    Tip: If your practice has recently moved and you have not updated the address with all insurances, Tebra recommends you complete the enrollment using your old address. Review the *FAQ* for more details.

16. Click **Next**. The *Contact Information* page opens.



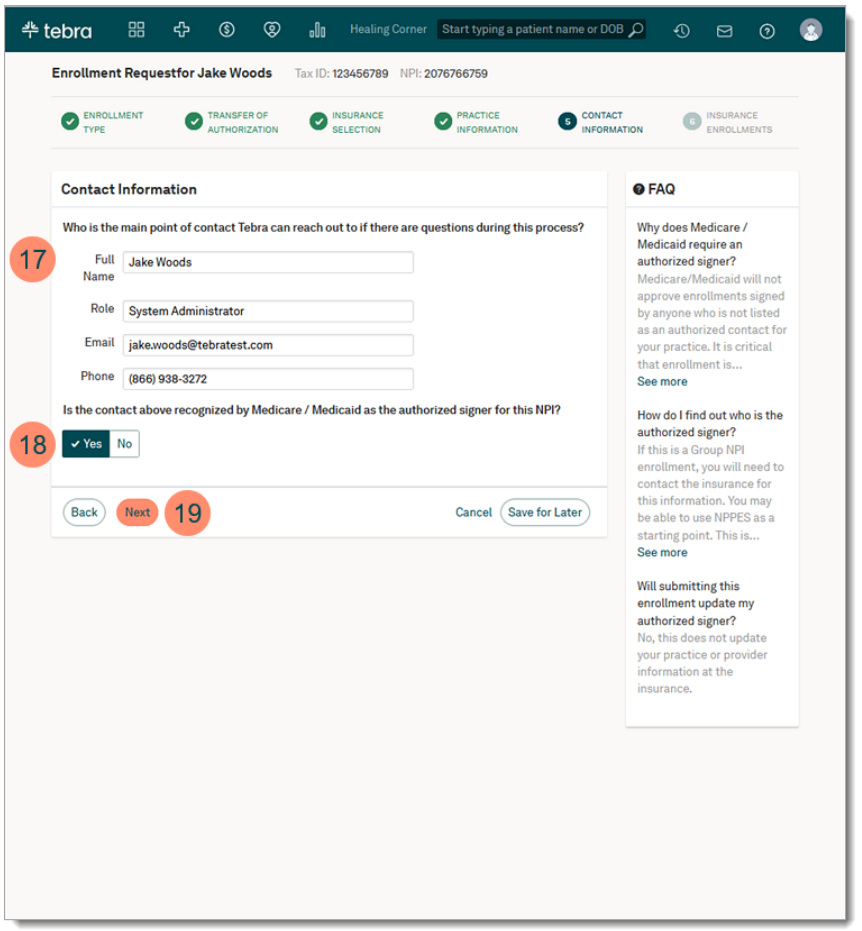
(Continued next page...)

Submit EDI Enrollment Request, cont.

17. Verify the practice's main point of contact is up to date. This contact is who Tebra can reach out to if there are any questions during the enrollments process.

18. If Medicare / Medicaid was a selected insurance, click **Yes** or **No** to indicate whether the main point of contact is recognized as the authorized signer for this NPI. If no, enter the contact.

19. Click **Next**. The *Electronic Enrollments* page opens.



(Continued next page...)

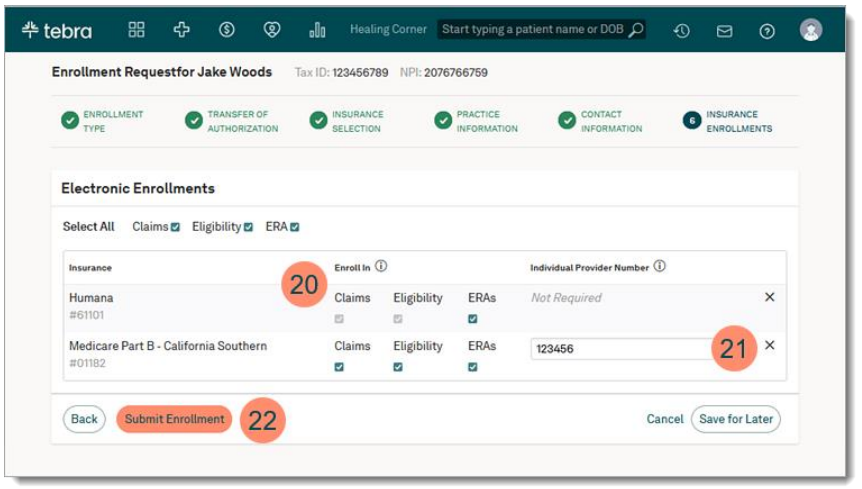
tebra

Submit EDI Enrollment Request, cont.

20. Click to select the available electronic service(s): "Claims", "Eligibility", and/or "ERAs" to enroll in for each insurance.
    Tip: To enroll in a service for all insurances listed, use the *Select All* options.

21. If required for enrollment, enter additional information (e.g., Provider Number).

22. Click **Submit Enrollment** when finished. The enrollment request is submitted.



Upload Transfer of Authorization Form

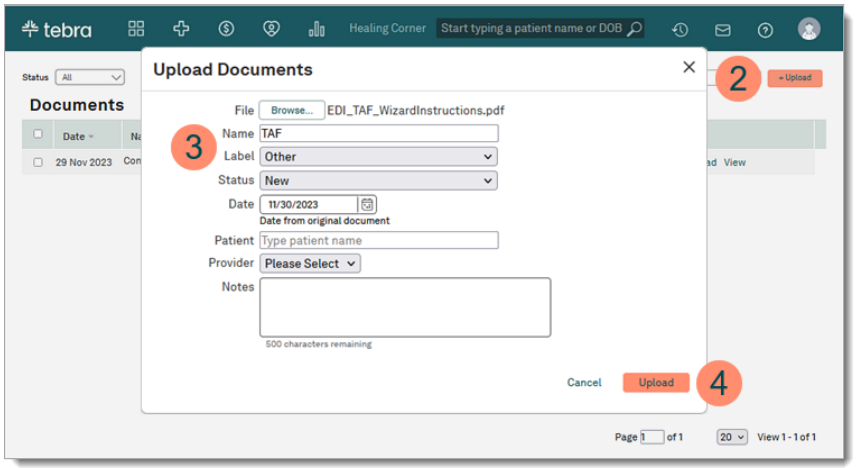
Follow the instructions in the saved TAF to complete the form. Then, upload the scanned file.

1. Hover over the *Platform* icon and click on **Documents**. The *Documents* page opens.

2. Click **+Upload**. The computer's document library opens. Find and select the scanned TAF to attach. The *Upload Documents* pop-up window opens.

3. Enter "TAF" as the *Name* and select *Other* as the *Label*.

4. Click **Upload** when finished.



Enrollment Status

Review the Enrollment Status Indicator help article to learn more about the complete list of status and action items.

STATUS	DESCRIPTION
Enrollment Required	Enrollment is required for the payer but has not yet been submitted.
Approved	The payer has either approved the enrollment request or enrollment is not required.
Request Received	The enrollment request has been submitted but not yet triaged.
Work in Progress	The enrollment request is being triaged.
Pending Insurance	All forms have been submitted to the payer.
Pending First ERA	The ERA enrollment has been approved by the payer and the practice is waiting for an ERA to be received in Tebra.
ERA Received	At least one ERA has been received from the payer and the payment has been posted in Tebra.
Action Required	Action is required by the practice to complete enrollment.
N/A	The electronic service is not supported by the payer, clearinghouse, or Tebra.
Cancelled	The enrollment request has been canceled. Reasons for cancelation may include customer request, duplicate submission, or the payer is no longer active.
Denied	The enrollment request has been denied by the payer.
On Hold	Enrollment cannot continue for an undetermined length of time due to a processing issue with the insurance company, clearinghouse, or Tebra.
Expired	The action items have not been completed within 45 business days.

Add Insurance Plans

Insurance plans represent a specific policy, group, or program (e.g., PPO, POS, HMO) governed by the insurance company. In Tebra, the Insurance Plan record stores the claims billing address required for sending claims. For Tebra Billing subscribers, review Admin Setup Guide Part 2 for insurance plan billing settings.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

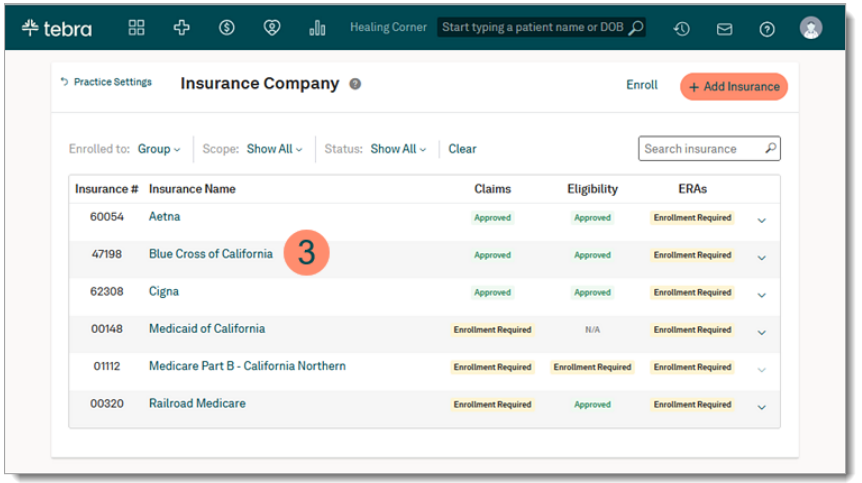
2. Click **Insurance**. The *Insurance Companies* dashboard opens.

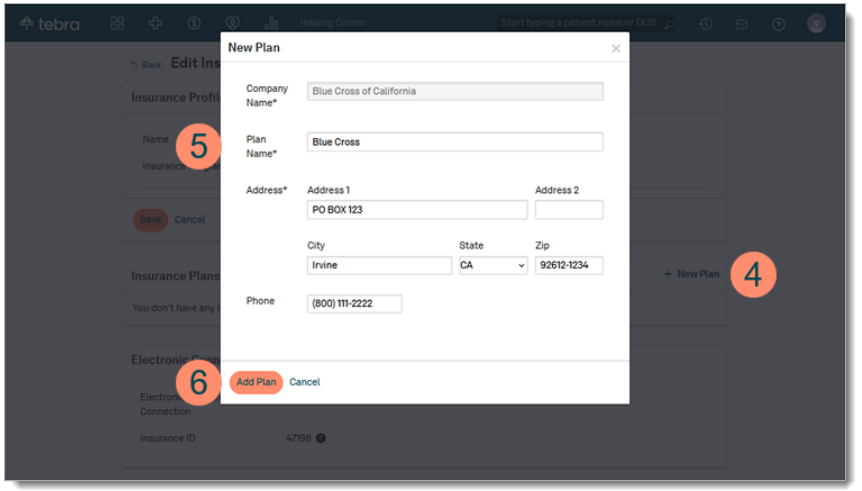
3. Click on an **insurance company**. The *Edit Insurance Company* page opens.

4. Click **+New Plan** under the *Insurance Plans* section. The *New Plan* pop-up window opens.

5. Enter the *Plan Name*, *Address* with a valid 9-digit zip code, and *Phone Number*.

6. Click **Add Plan** to save.





tebra

User Settings

Each staff member in the practice who uses Tebra needs their own user account with a valid login email and password. Be sure to have the person's full name and email address on hand before proceeding. Then, create users based on the staff member's roles: Non-Provider or Provider. New users will be prompted to create a new password upon the first login. Review the Security Policy section for password requirements. After users are created, they can 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.

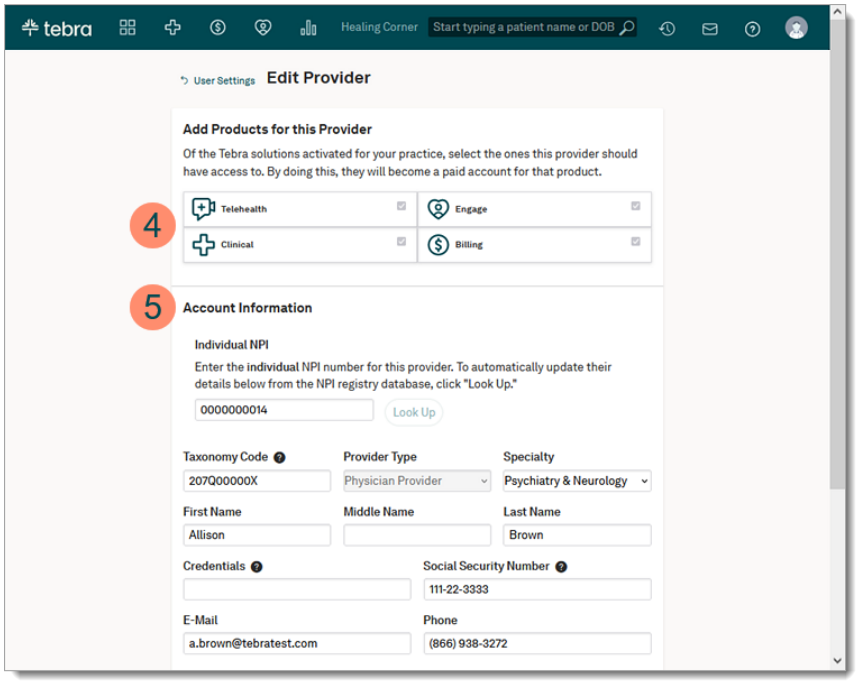
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

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.



(Continued next page...)

Verify Provider User, cont.

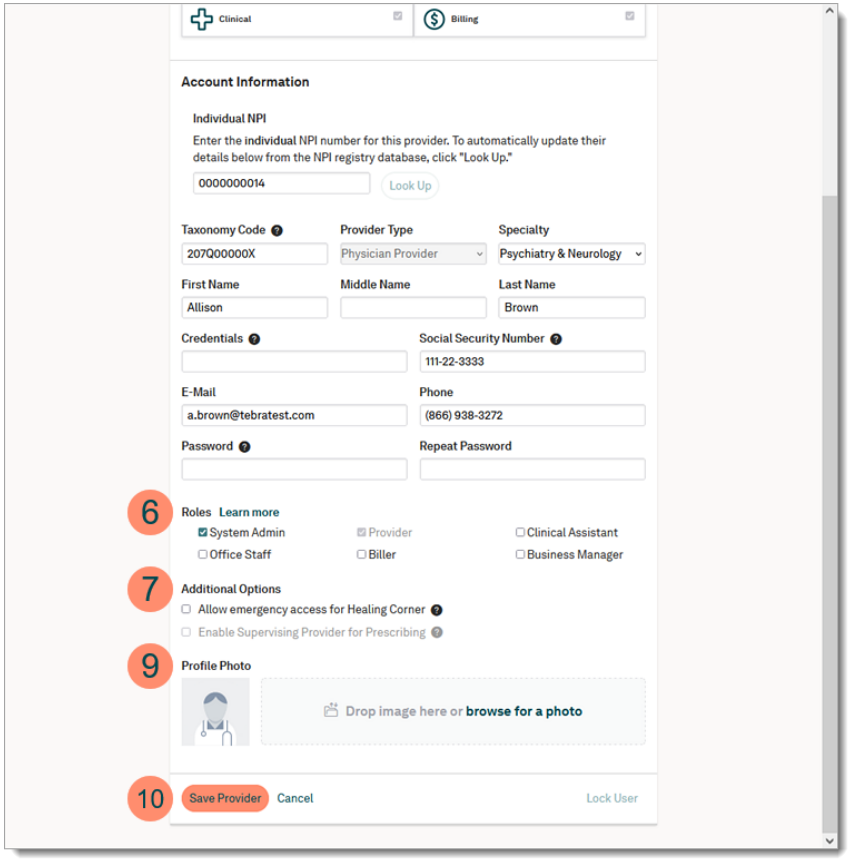
6. **Roles:** Selected role(s) were assigned to the provider. If necessary, click to select additional role(s). To designate the provider as a Practice Administrator, select “System Admin”.

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.

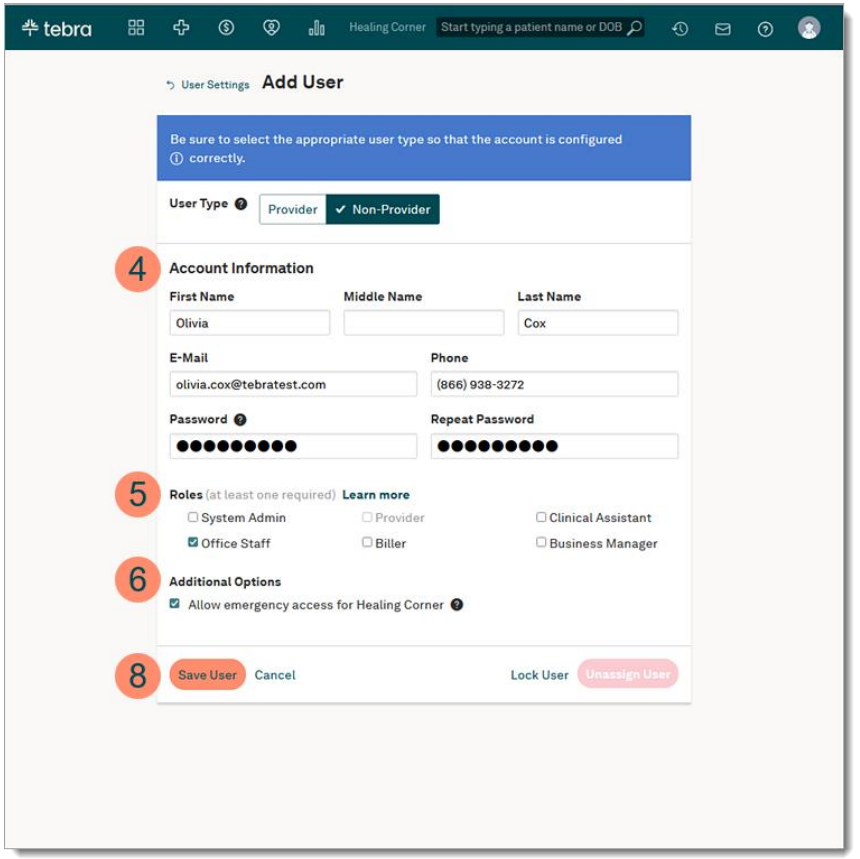
10. Click **Save Provider** when finished.



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.
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

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.

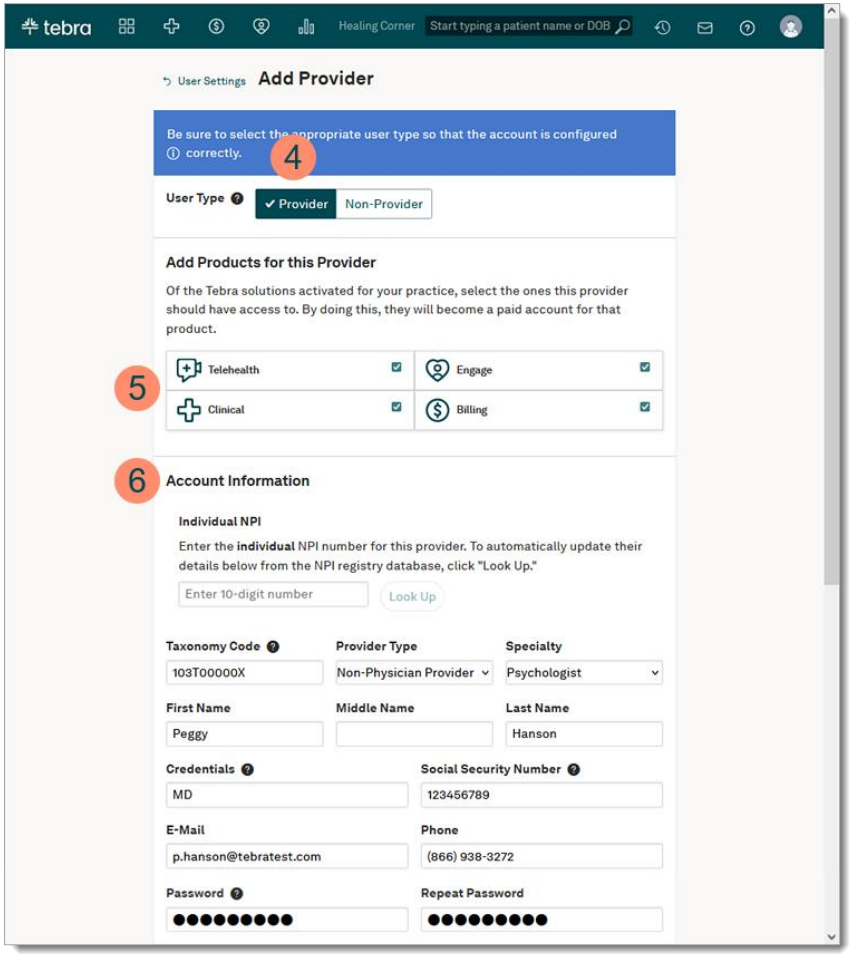
2. Click **User Settings**. The *User Settings* page opens.

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.



(Continued next page...)

Create Provider User, cont.

7. **Roles:** Click to select additional Roles.

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.

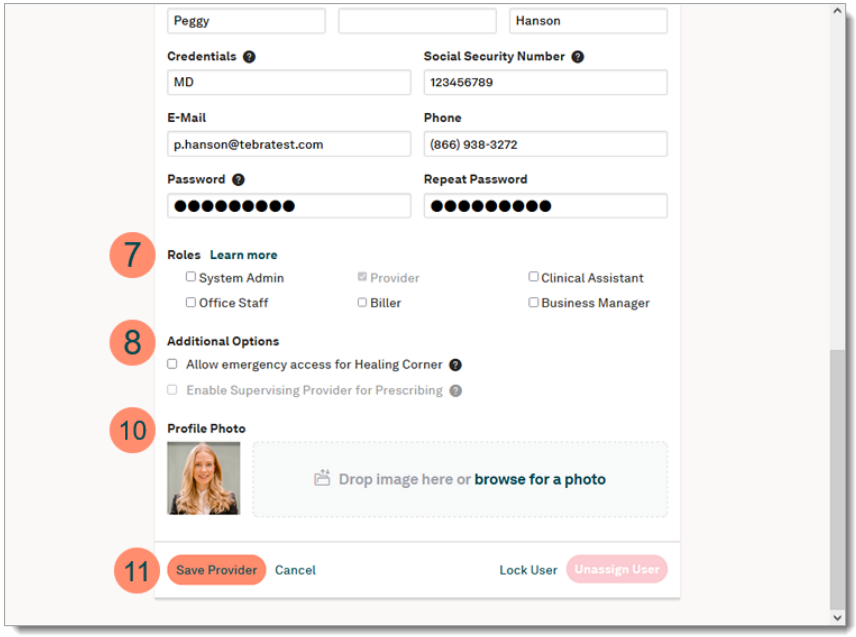
9. **Practice Access:** If applicable, click to assign the user access to additional practice(s) in the account.

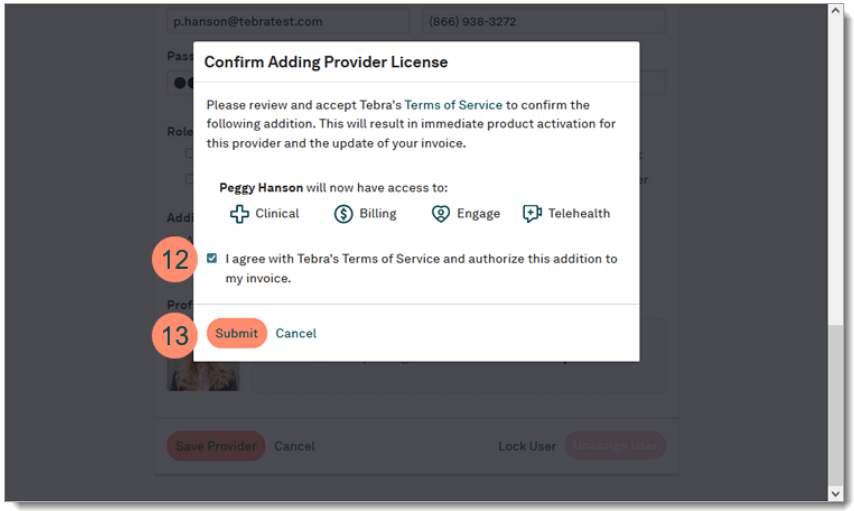
10. **Profile Photo:** Optionally, upload a photo of the provider.

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*.





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 to schedule appointments, create encounters, and send claims. For Tebra Billing subscribers, review Admin Setup Guide Part 2 for service location billing settings (e.g., CLIA Number, UB-04 claim settings, Legacy Number Type).

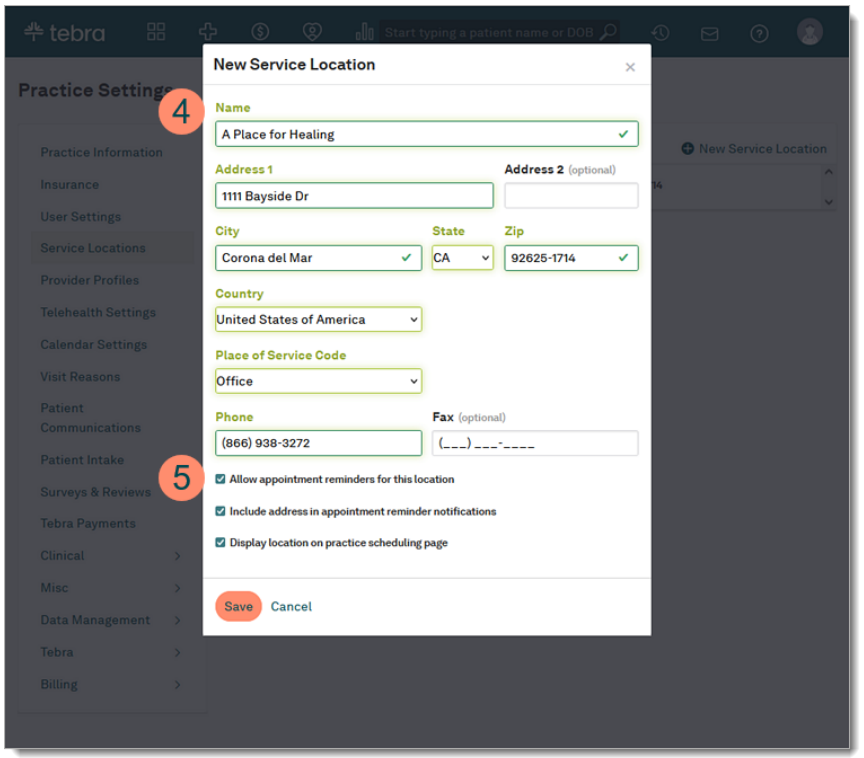
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

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. Review the Patient Communications section for more details about appointment reminders.



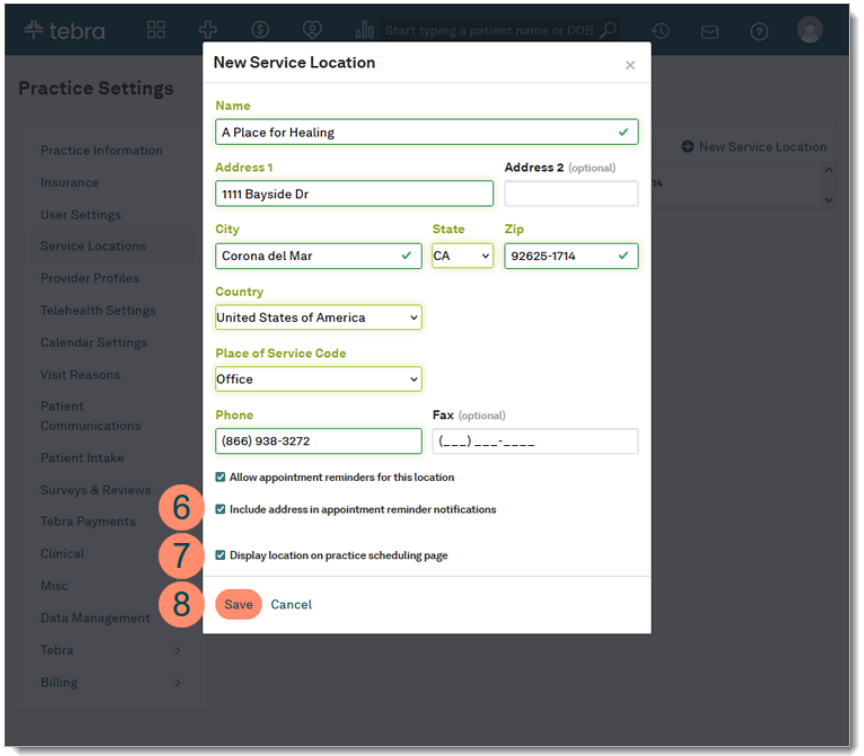
(Continued next page...)

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). Review the Online Scheduling section for instructions to enable the scheduler.

8. Click **Save** when finished.



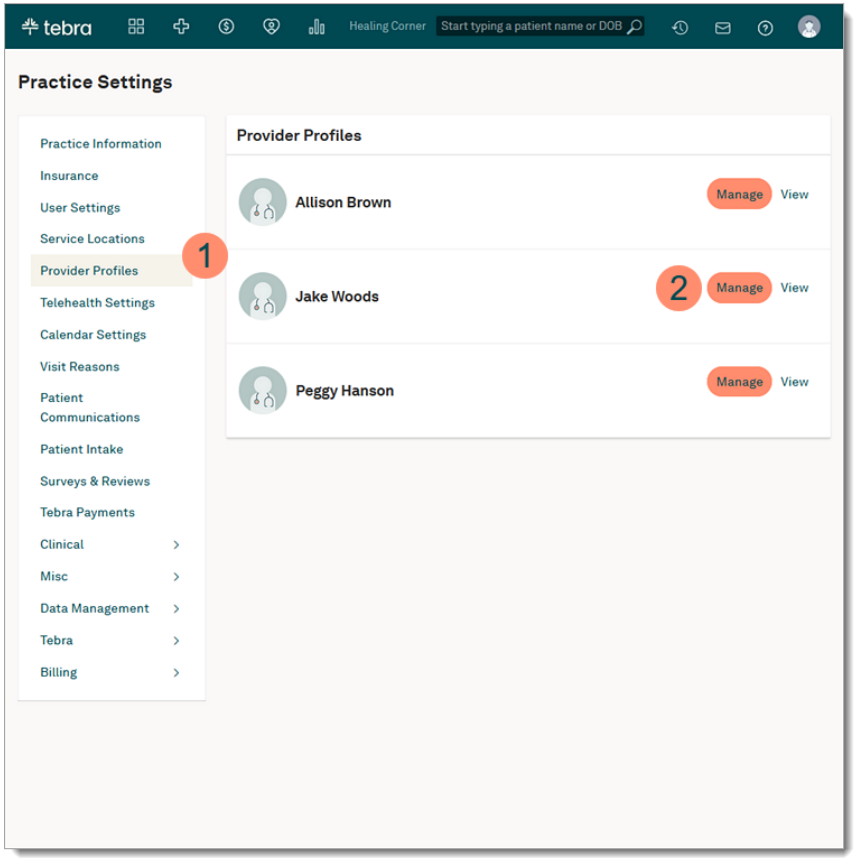
Provider Profiles

Tebra's Provider Profile is an online tool that helps you highlight key information about your practice and promote your services to the public. Provider profiles are activated by default for all providers with an active provider user account. Tebra recommends completing all sections for each provider in the practice. Review the Provider Profiles help articles to learn more.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Provider Profiles**. The *Provider Profiles* page opens.

3. Click **Manage** next to the provider's name. The *Provider's Profile* page opens.
   Note: Providers can manage their own profile and System Administrators can manage all providers in the practice.



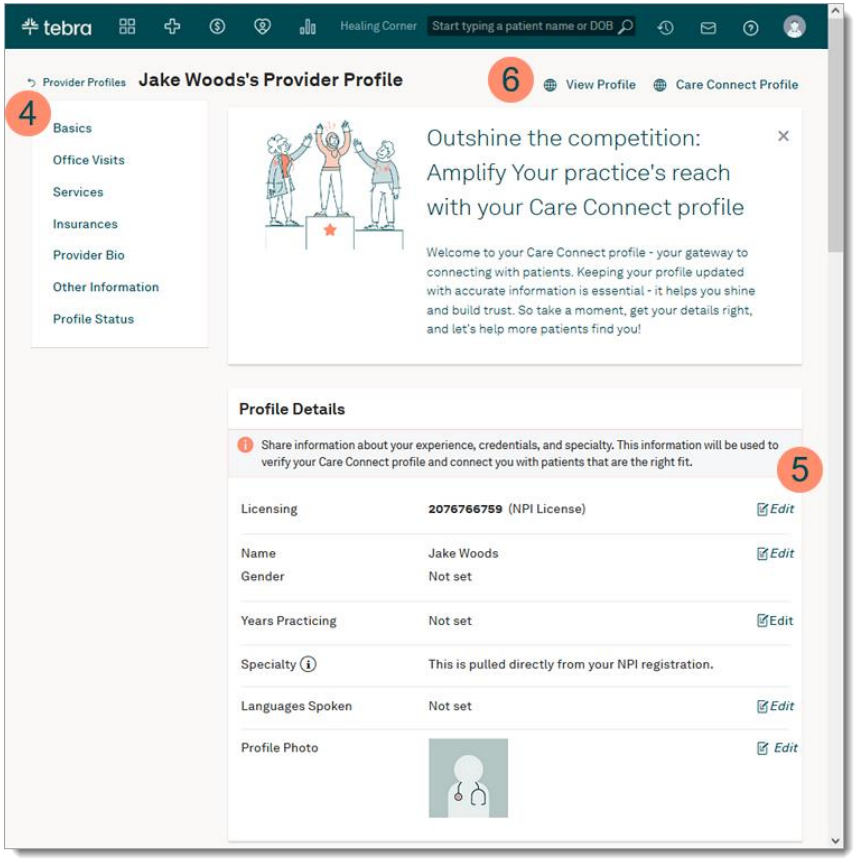
(Continued next page...)

Provider Profiles, cont.

4. Click on a section to edit:
   - *Basics:* Add provider credentials, experience, and profile photo
   - *Office Visits:* Configure service locations, Online Appointment Booking (Engage Subscribers) and Online Telehealth Appointment Booking (Telehealth Subscribers)
   - *Services:* Add services and procedures
   - *Insurances:* Add accepted insurances
   - *Provider Bio:* Add a biography about the provider and practice
   - *Other Information:* Add affiliations, achievements, and education
   - *Profile Status:* Disable or Publish Profile

5. Click **Edit** to add or edit details of each section. Then, click **Save Changes** when finished. Continue to populate sections until complete.

6. Click **View Profile** or **Care Connect Profile** when finished to see how the profile appears online.



Provider Profile with Engage

For Engage subscribers, your Provider Profile also includes an online scheduler that allows new and existing patients to request an in-office and telehealth (Telehealth subscribers) appointments. Review the Configure Online Appointment Booking help article to learn how to enable and set up the provider's office hours.

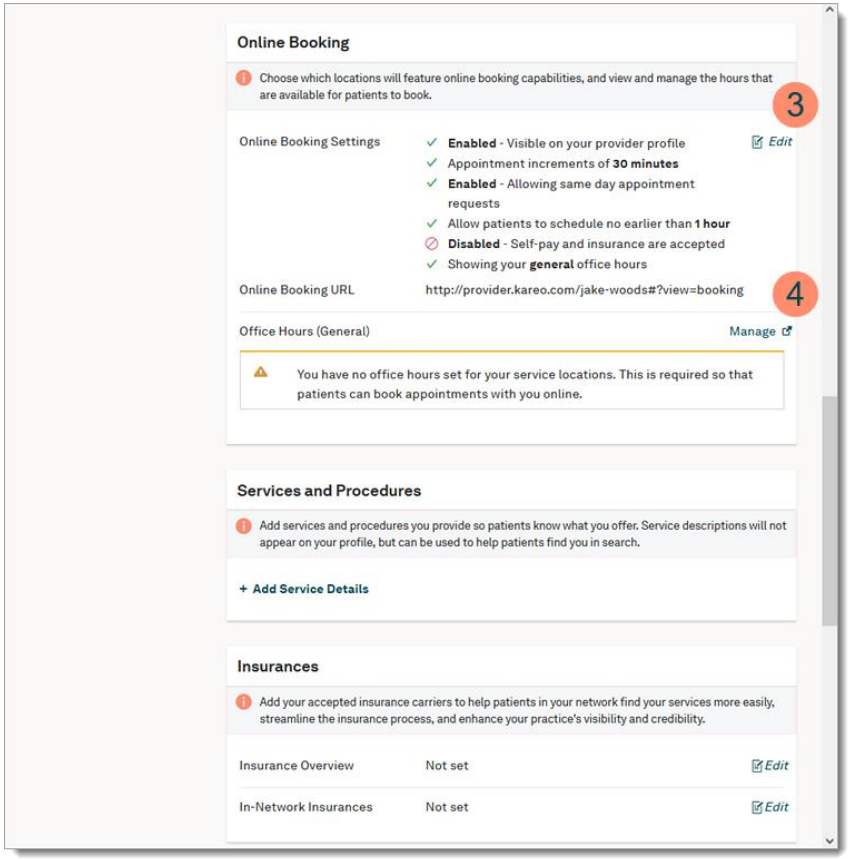
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Provider Profiles**. The *Provider Profiles* page opens.

3. Click **Manage** next to the provider's name. The *Provider's Profile* page opens.

4. **Online Booking:** Scroll to the Online Booking section. Click **Edit** to enable online booking, set appointment increments, enable same day appointment requests, set a minimum notice time (if applicable), indicate if the practice only accepts self-pay patients, and indicate if the online appointment hours should be the same as the provider's office hours. Click **Save Changes** when finished.

5. **Office Hours:** Click **Manage** to set booking hours. Set hours from *Quick Pre-sets* or enter custom hours for each day of the week and service location. Then, click **Save & Finish**.



Telehealth Settings

For Telehealth subscribers, Tebra generates a unique URL for every Telehealth subscribed provider to simplify how the patient joins the visit room. Providers can post their Telehealth URL on their website, email signature, or social media for patients to quickly access their appointment. Patients who have recurring appointments with the provider can bookmark the Telehealth URL and quickly join when their appointment starts.

If necessary, you or a provider can edit the provider's Telehealth URL to further customize the Tebra generated unique URL.

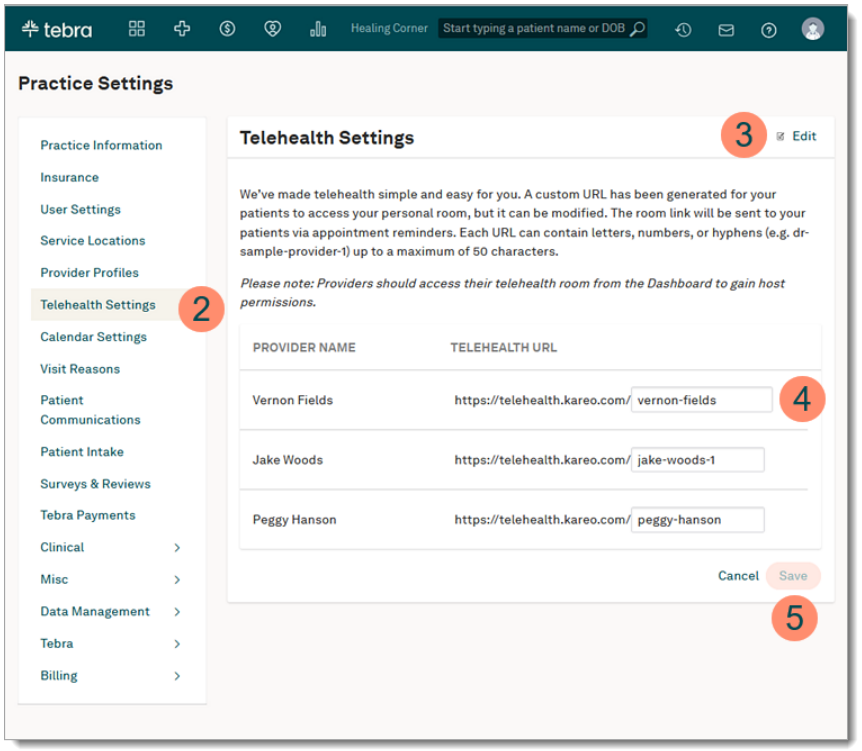
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Telehealth Settings**. The *Telehealth Settings* page opens.

3. Click **Edit**. The *Telehealth URL* editor opens.

4. Enter the *Telehealth URL* without spaces to create a unique URL that does not exceed 50 characters.
   Tip: Use numbers or a hyphen (-) as separators.

5. Click **Save** when finished.



Calendar Settings

Configure calendar settings so you can easily and efficiently manage appointments for the provider or staff in your practice. System administrators can manage the time zone, appointment time increments, rooms and equipment, office hours, time off schedule for the practice, and set up a practice level online scheduler.

General

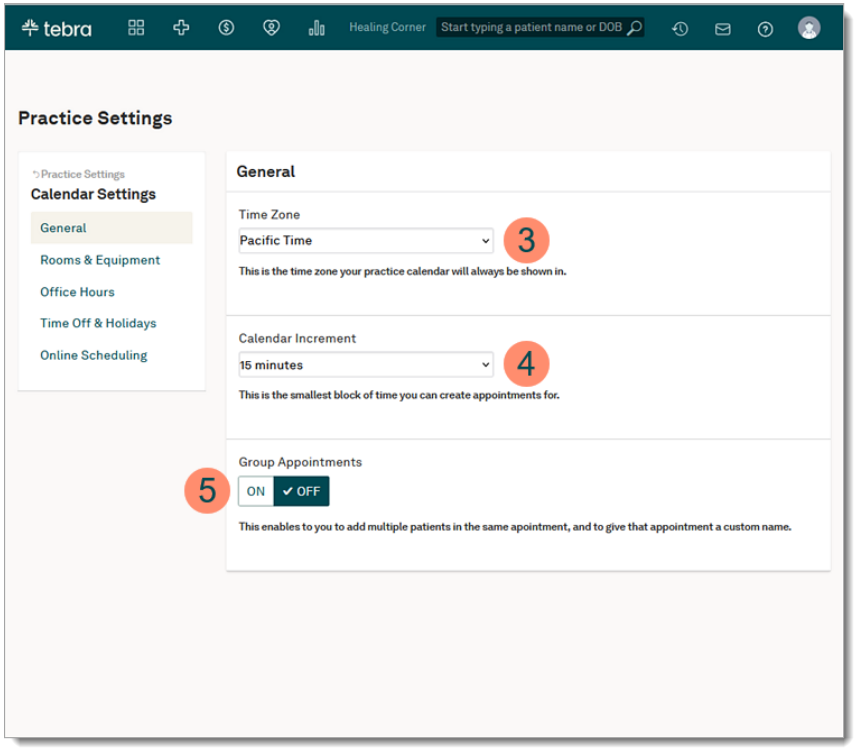
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Calendar Settings**. The *General* page opens.

3. **Time Zone:** Select the time zone for your practice's calendar.

4. **Calendar Increment:** Select the smallest duration of time an appointment can be created for.
   Note: The appointment duration can be changed when scheduling the appointment.

5. **Group Appointment:** Allows the practice to schedule multiple patients in the same appointment with a custom appointment name (e.g., Counseling). Click **ON** to enable the option to schedule group appointments.



Rooms and Equipment

Add exam rooms and equipment into your patient appointment workflow. You can create, view, or filter appointments with the newly created rooms and equipment.

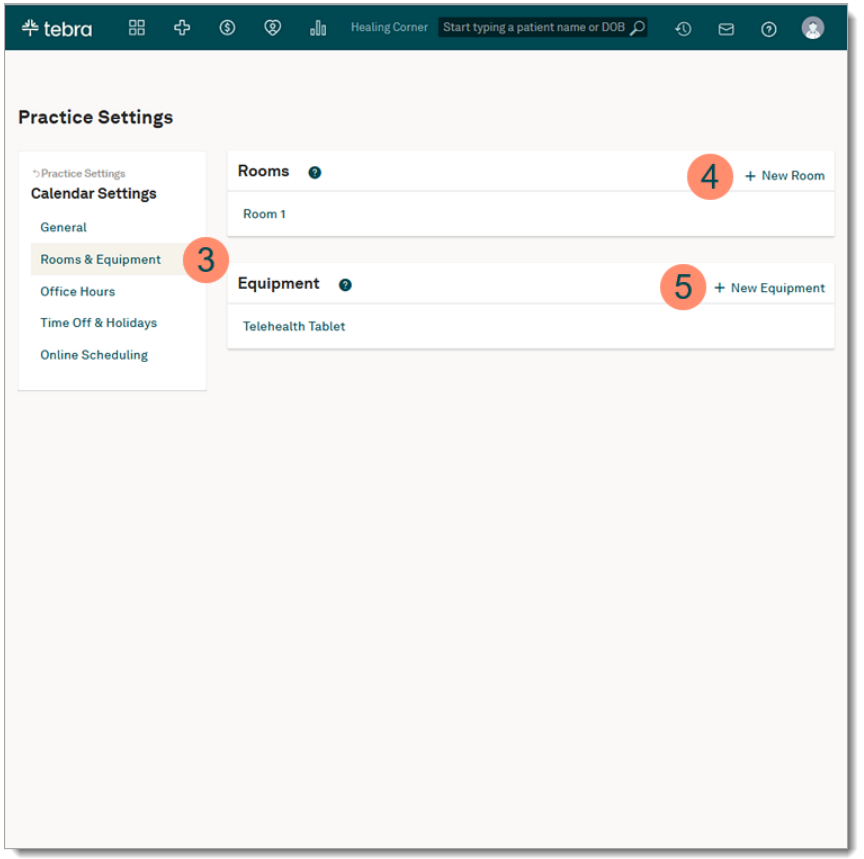
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Calendar Settings**. The *General* page opens.

3. Click **Rooms & Equipment**. The *Rooms and Equipment* page opens.

4. **Rooms:** Click **+New Room** to create a new room to assign to patient appointments. Enter the room name, then click **Save**.

5. **Equipment:** Click **+New Equipment** to add equipment to assign to patient appointments. Enter the equipment name, then click **Save**.



tebra

Office Hours

Set individualized office hours and breaks for providers and staff that automatically appear in the calendar. You can also create individual appointment schedules for non-provider members of your staff who see patients. As schedules and hours change for your staff, update the hours so that they are accurately reflected in the calendar.

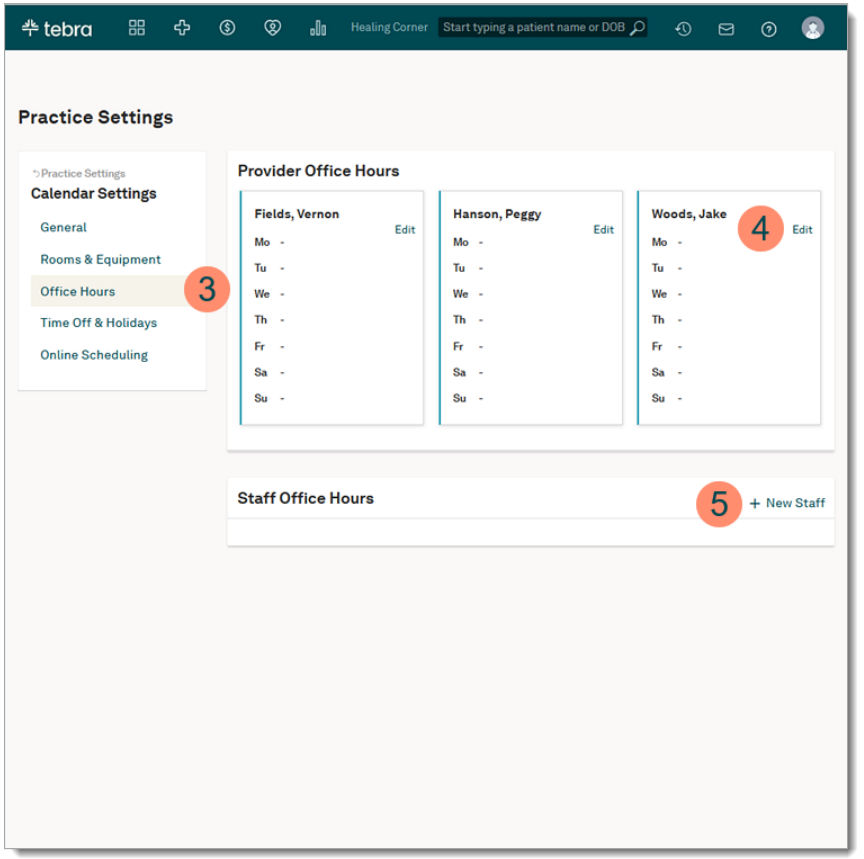
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Calendar Settings**. The *General* page opens.

3. Click **Office Hours**. The *Office Hours* page opens.

4. **Provider Office Hours:** Click **Edit** to add the provider's office hours. Review the Add Provider Office Hours section for instructions.

5. **Staff:** Click **+New Staff** to create a new staff member and add their office hours.
   Note: Once created, staff cannot be deleted.



Add Provider Office Hours

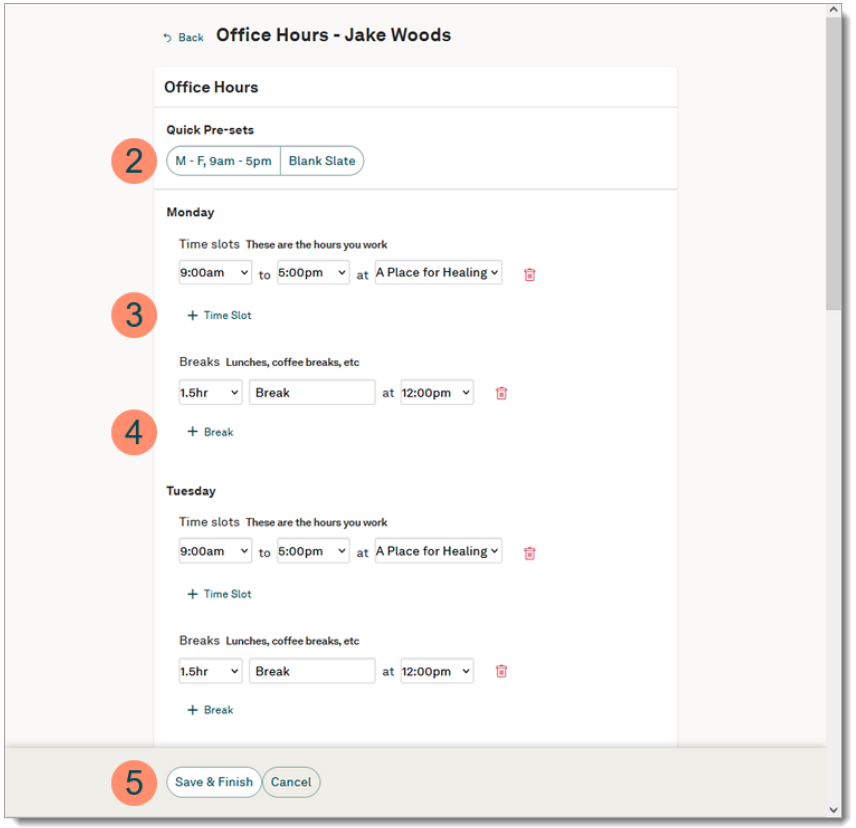
1. Click **Edit** to the right of the provider's name. *The Office Hours* for provider page opens.

2. **Quick Pre-Set:** Click **M-F, 9am-5pm** to quickly create pre-set office hours for each day of the week with an hour break at noon. Then, select a service location for each day.

3. **Custom Office Hours:** Click **+Time Slot** to enter custom hours and select a service location for each day. Add multiple time slots, as necessary.

4. **Breaks:** Click **+Break** to add break time slot(s).

5. Click **Save & Finish** when finished.



Time Off & Holidays

Time off for providers and staff are added as events, and patient appointments can be efficiently scheduled around them. By default, Tebra includes a pre-set list of commonly observed U.S. holidays on the calendar. You can select the holidays observed by your practice. If your practice observes holidays not currently on the Tebra pre-set list, add a custom holiday.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

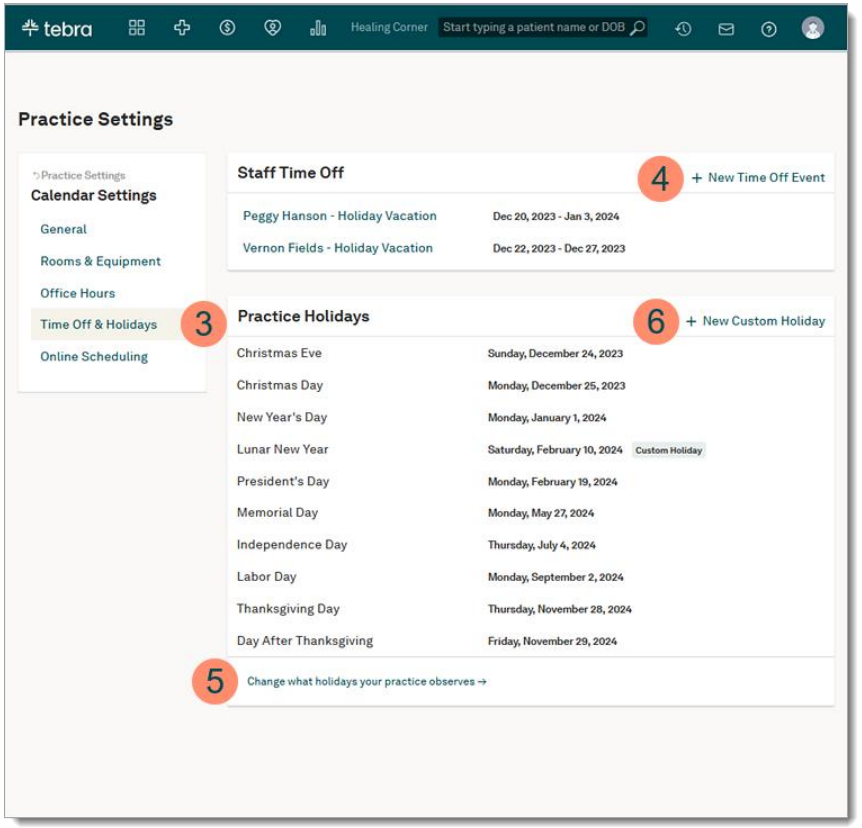
2. Click **Calendar Settings**. The *General* page opens.

3. Click **Time Off & Holidays**. The *Time Off & Holiday* page opens.

4. **Staff Time Off:** Click **+New Time Off Event** to select a staff, enter a reason, and enter a start and end date/time. Click **Create Time Off Event** when finished.

5. **Select Holidays:** Click **Change what holidays your practice observes** and select which holiday(s) are applicable to your practice. Click **Save** when finished.

6. **Custom Holiday:** Click **+ New Custom Holiday** to enter the custom holiday name and date. Click **Save** when finished.



Online Scheduling

For Engage subscribers, enable the practice level online scheduler to enhance your scheduling options. This gives new and existing patients the ability to request appointments online from the practice page or the Provider Profile page. For providers who subscribe to Engage and Telehealth, their patients will automatically have the option to request an in-office or telehealth appointment.

For a provider to be included in the practice level online scheduler, they must be an Engage subscriber and set up the Online Appointment Booking section of their Provider Profile. The practice online schedule displays appointment times based on the set up of the provider(s) online schedule. Review the Navigate Practice Online Scheduling help article to learn more.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Calendar Settings**. The *General* page opens.

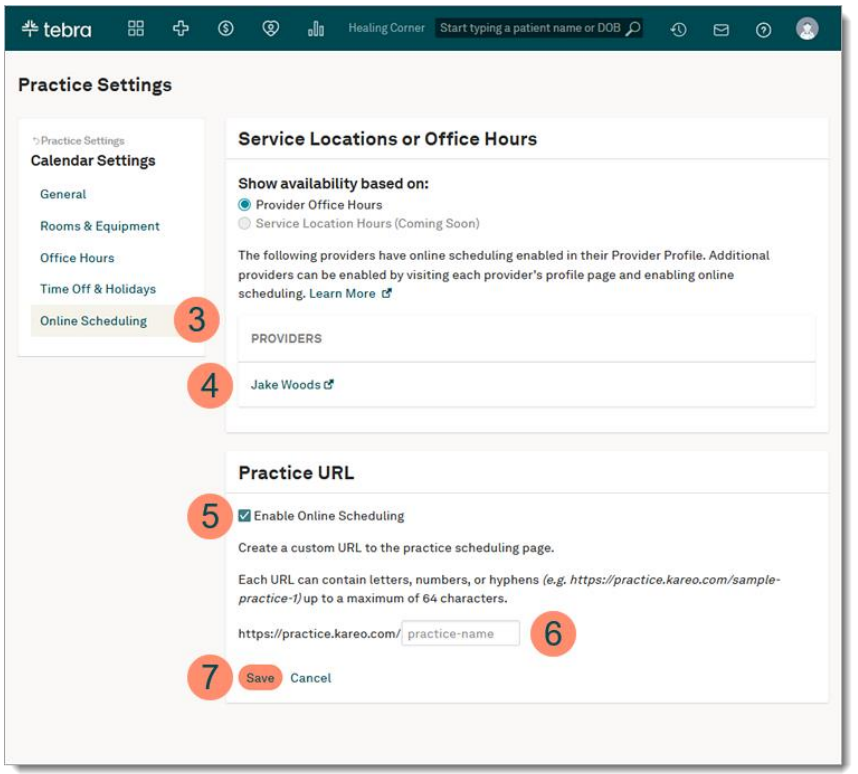
3. Click **Online Scheduling**. The *Online Scheduling* settings page opens.

4. **Providers:** Click on the **provider** to edit or review the provider's set office hours and locations.

5. Click to select "Enable Online Scheduling".

6. Enter the *Practice Name* without spaces to create a custom URL.
   Tip: Use special characters such as a hyphen (-) or underscore (_) as separators.

7. Click **Save** when finished.



Visit Reasons

Visit reasons enable you to create templates for common types of appointments within the practice. Tebra provides a list of common visit reasons with durations to get you started. Configure an existing visit reason or add new reasons to apply when scheduling an appointment. If applicable, configure default procedure codes for the visit reason to auto-populate in a charge capture. Review the Add, Edit, or Delete Visit Reasons help article to learn more.

Add New Visit Reason

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

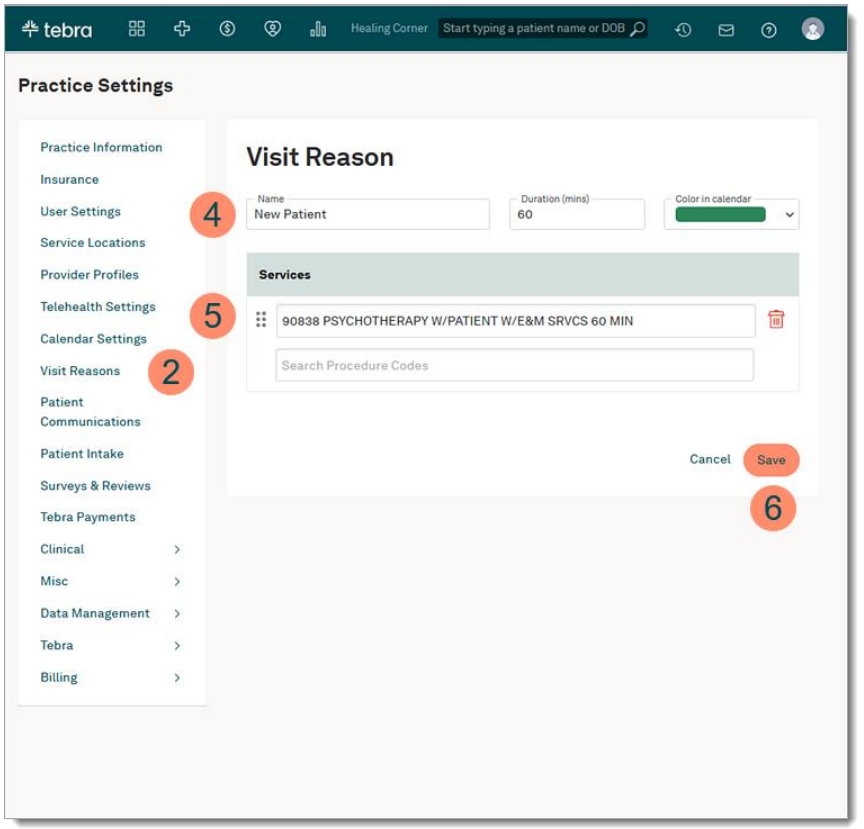
2. Click **Visit Reasons**. The *Visit Reasons* page opens.

3. Click **Add Visit Reason**. The *Visit Reason* page opens.

4. **Visit Reason:** Add a name, duration, and color for the reason.

5. **Services:** If applicable, configure procedure code(s) for the visit reason.
   - To add a procedure, enter at least three characters of the code or name. Then, select the code.
   - To reorder a procedure code, click and drag the **bar** icon up or down.
   - To delete a procedure code, click the **trash** icon.

6. Click **Save** when finished.



tebra

Edit or Delete Visit Reason

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

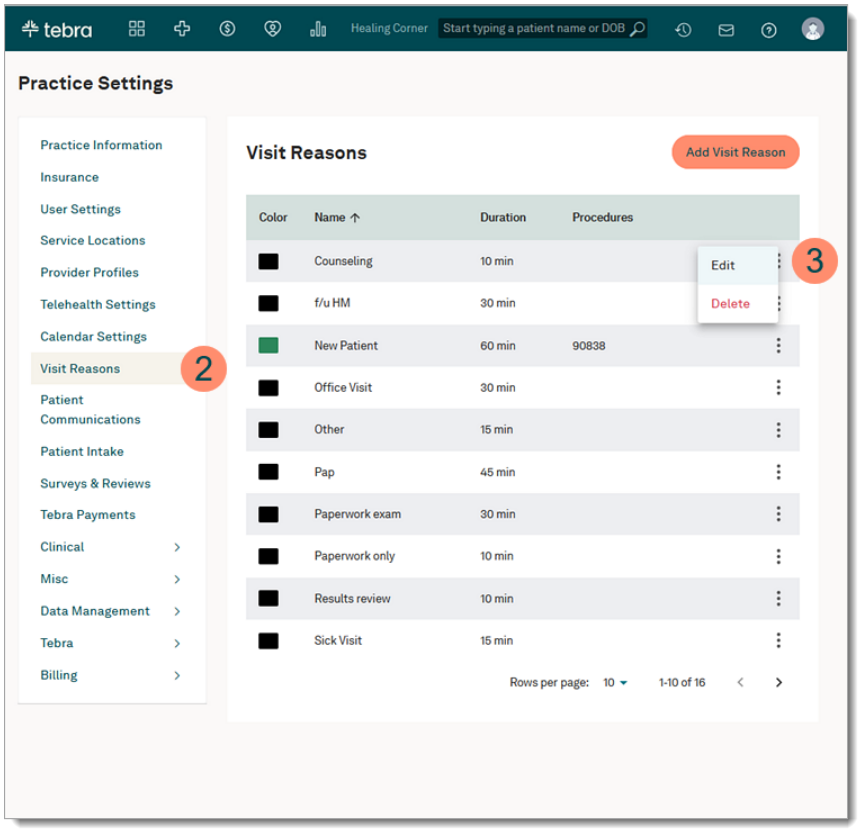
2. Click **Visit Reasons**. The *Visit Reasons* page opens.

3. Click the **more option** icon and select **Edit**. The *Visit Reason* page opens.
   - To delete the visit reason, select **Delete**. A blue successful message displays, and the visit reason is removed.

4. **Visit Reason:** Make your desired changes to the name, duration, and color.

5. **Services:** If applicable, configure procedure code(s) for the visit reason.
   - To add a procedure, enter at least three characters of the code or name. Then, select the code.
   - To reorder a procedure code, click and drag the **bar** icon up or down.
   - To delete a procedure code, click the **trash** icon.

6. Click **Save** when finished.



tebra

Patient Communications

Tebra's Patient Communications saves you time and increases your practice's income by sending automated appointment reminders and survey requests to patients via email, text message, or phone. In-Office appointment reminders include the provider's name, service location, and date with the time of the appointment. Telehealth appointment reminders include the provider's name, date and time of the appointment, and the link to join the telehealth visit room (only available in the *Appointment Confirmation* and *Day-of-Reminder* notifications). Patients can confirm their appointments through the reminder to reflect on the provider's calendar.

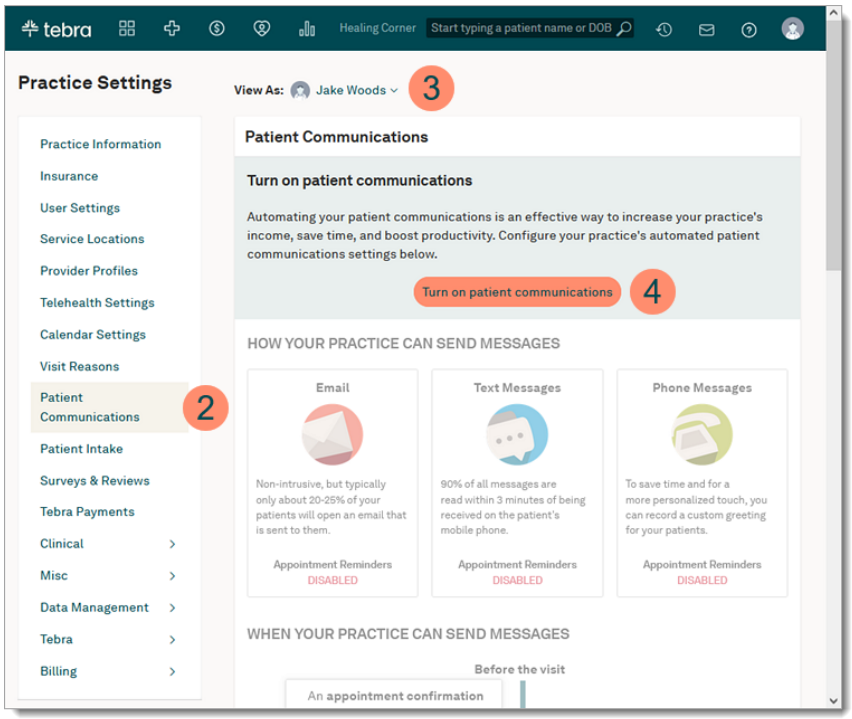
Activate Patient Communication

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Patient Communications**. The *Patient Communications* page opens.

3. Select a provider from the **drop-down arrow** to view *Patient Communications* for a specific provider.

4. Click **Turn on patient communications** to activate.



tebra

Configure Patient Communications

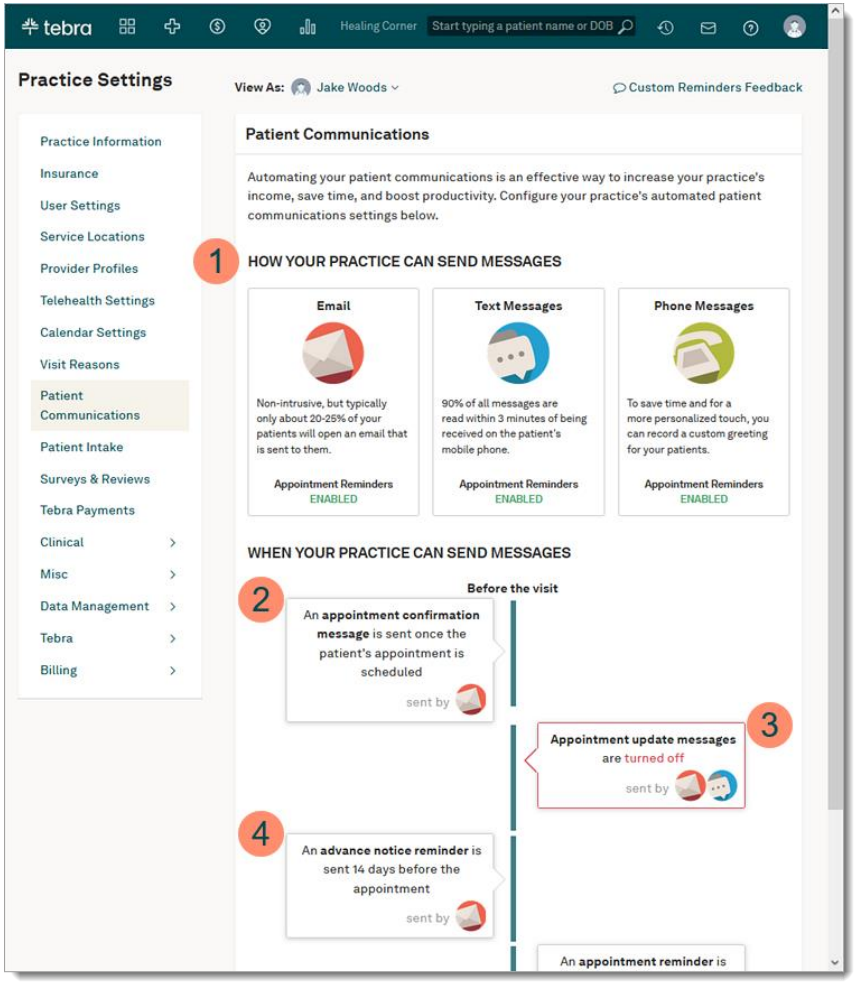
Configure Patient Communications for each provider's preference. Review the Navigate Patient Communications help article to learn more.

1. **Communication Method:** *Email*, *Text Message*, and *Phone Message* are enabled by default. Click on a card to view which patient messages can be delivered using the communication method, record a custom greeting (*Phone Messages* only), or disable/enable the communication method.

2. **Appointment Confirmation:** Patients receive an email when an appointment is scheduled. If applicable, click on the card to turn the reminder off.
   Note: The card's border turns red when turned off.

3. **Appointment Update:** Patients receive a text and email when an appointment is modified or canceled. If applicable, click on the card to turn the reminder off.

4. **Advanced Notice Reminder:** Patients receive an email reminder 7 days before the appointment. Click on the card to change the number of days (from 7 - 14) or to turn the reminder off.



(Continued next page...)

Configure Patient Communications, cont.

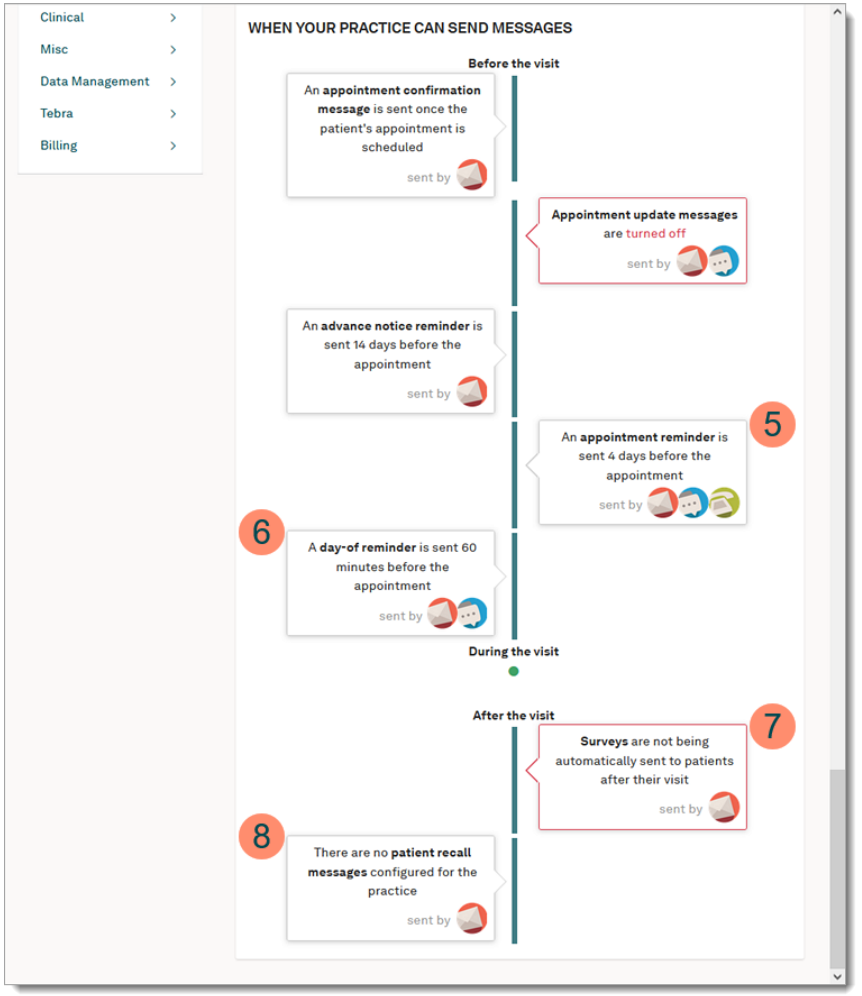
5. **Appointment Reminder:** Patients receive a text and email reminder 4 days before the appointment for confirmation. An additional notice is sent if the patient did not confirm the appointment. Click on the card to access settings, change the number of days (from 1 – 6), or to turn the reminder off.

6. **Day-of Reminder:** Patients receive a text and email reminder 60 minutes before the appointment with directions to the service location. Click on the card to change the number of minutes (from 30 - 120) or to turn the reminder off.

7. **Surveys:** Patients receive a survey via email after the appointment is checked out (Engage Subscribers). Click on the card to access previews of surveys, manage social media survey settings, or to enable the reminder. Review the Survey and Reviews section for additional survey settings.

8. **Patient Recall:** Patients receive recall messages via email as a reminder that they are due for continuing care (Engage Subscribers). Click on the card to set up recall messages.

   Note: For patients to receive patient communications, set up automated patient communication preferences, enter an email address, and phone number in the patient's demographic page.

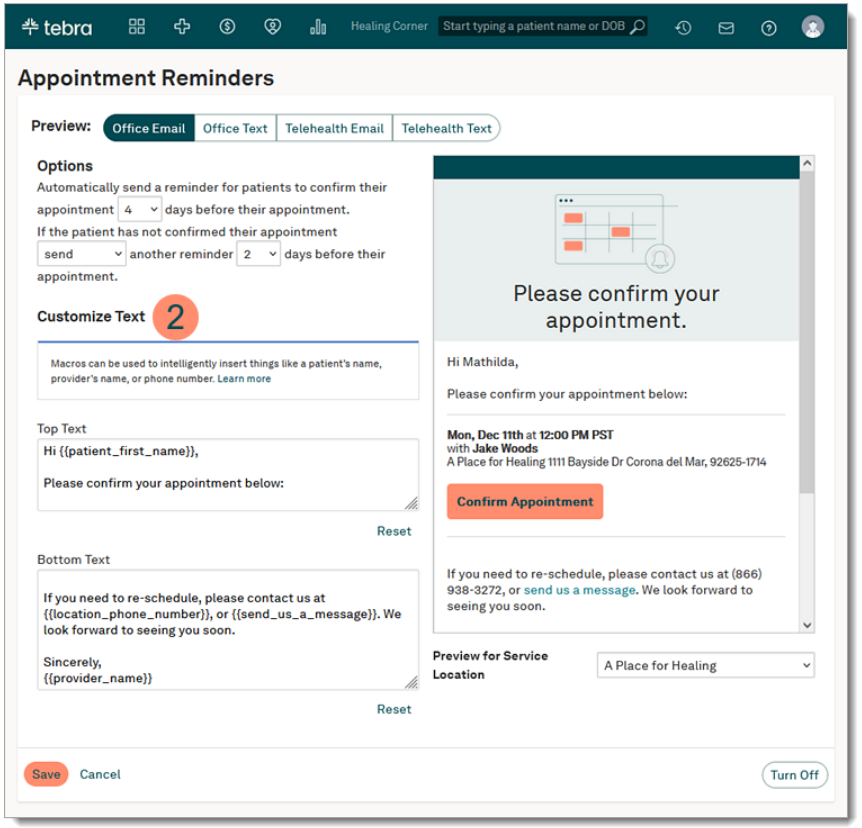


Patient Communication Customization

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 (when applicable).

1. Click on the *Appointment Confirmation*, *Appointment Update*, *Advance Notice, Appointment Reminder*, or *Day-of Reminder* card to access the reminder's customization. The reminder page opens.

2. **Customize Email Reminder:** Edit the *Top Text* and/or *Bottom Text* message. The new message is displayed in the email preview. Use a macro to insert the patient's name, provider name, service location phone number, or option to send a message in the desired place. Review the Patient Communications Customization Macros help article for more details.
   - To preview the message for a specific service location, click the *Preview for Service Location* drop-down and select the service location.
   - To restore the default message, click **Reset**. Then, click **OK** on the confirmation pop-up window.

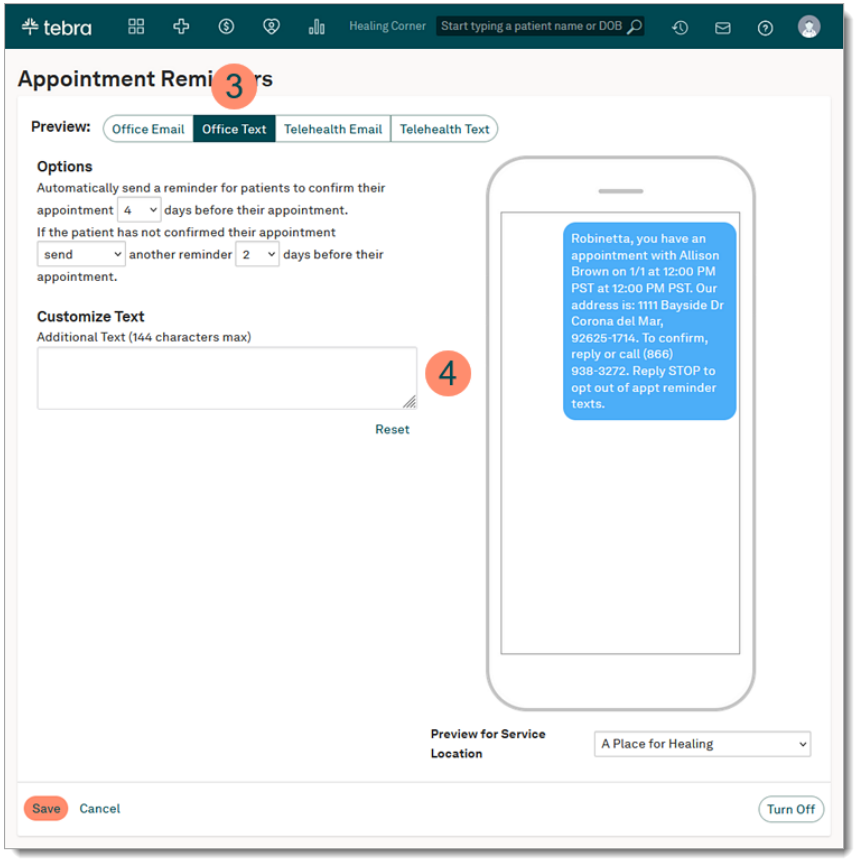


(Continued next page...)

Patient Communication Customization, cont.

3. **Customize Text Reminder:** If applicable, click **Office Text**. The *Text Customization* displays.

4. Enter an additional text message (144 characters max) to send with the appointment reminder. The message is displayed in the text preview.
   - To preview the message for a specific service location, click the *Preview for Service Location* drop-down and select the service location.
   - To remove the additional message, click **Reset**. Then, click **OK** on the confirmation pop-up window.

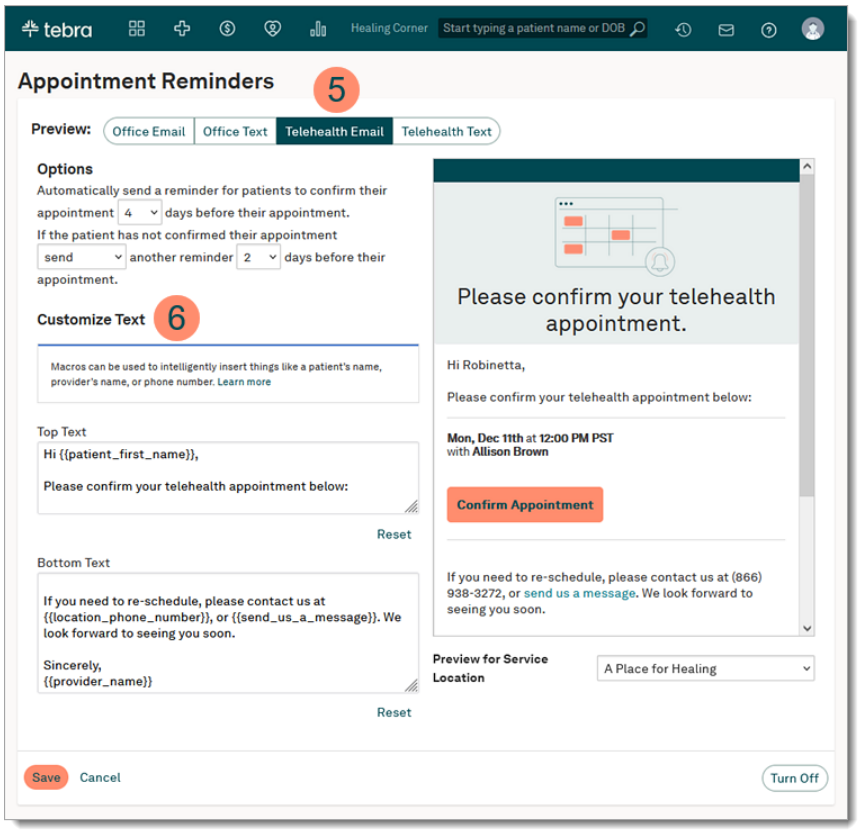


(Continued next page...)

Patient Communication Customization, cont.

5. **Customize Telehealth Email Reminder:** If applicable, click **Telehealth Email**. The *Email Customization* displays.

6. Edit the *Top Text* and/or *Bottom Text* message. The new message is displayed in the email preview. Use a macro to insert the patient's name, provider name, service location phone number, telehealth link, or option to send a message in the desired place. Review the Patient Communications Customization Macros help article for more details.
   - To preview the message for a specific service location, click the *Preview for Service Location* drop-down and select the service location.
   - To restore the default message, click **Reset**. Then, click **OK** on the confirmation pop-up window.



(Continued next page...)

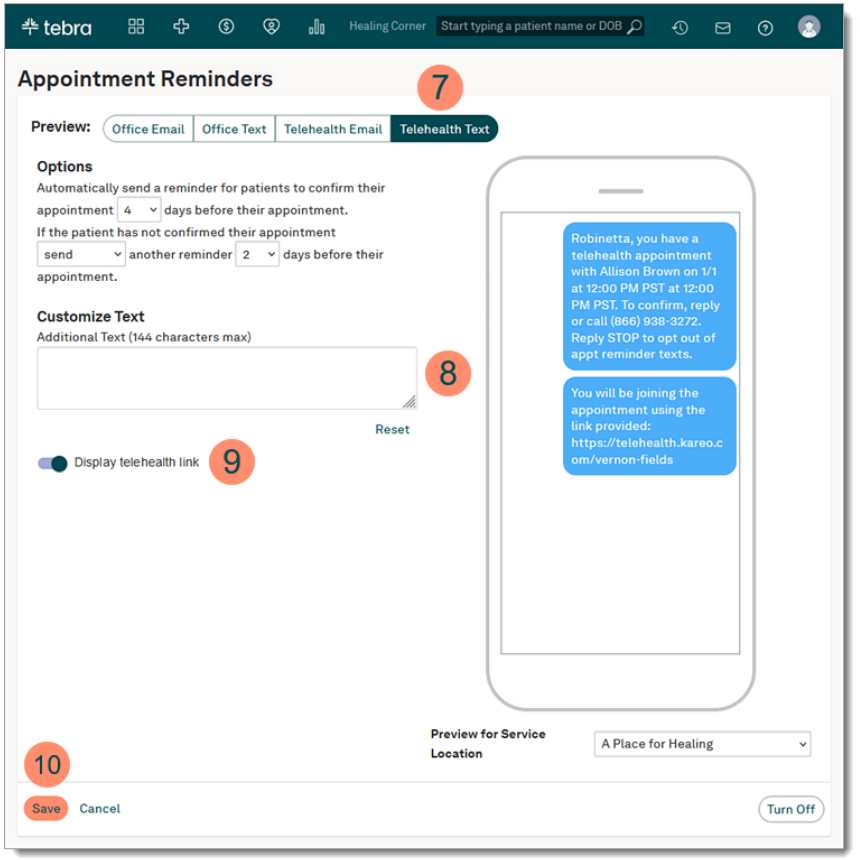
Patient Communication Customization, cont.

7. **Customize Telehealth Text Reminder:** If applicable, click **Telehealth Text**. The *Text Customization* displays.

8. Enter an additional text message (144 characters max) to send with the appointment reminder. The message is displayed in the text preview.
   - To preview the message for a specific service location, click the *Preview for Service Location* drop-down and select the service location.
   - To remove the additional message, click **Reset**. Then, click **OK** on the confirmation pop-up window.

9. To remove the telehealth room link from the text message, click the toggle off.
   Note: This option is only available for the *Appointment Update* and *Appointment Reminder* card.

10. Click **Save** when finished.



Patient Intake Settings

For Engage subscribers, you can send electronic intake forms, including screening tools (e.g., GAD- 7), to your patients and receive them prior to their appointment. Patients can fill out these forms anytime, anywhere--saving time at check-in and increasing office efficiency. From the Patient Intake settings page, print intake forms, create custom forms, and attach additional intake forms.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

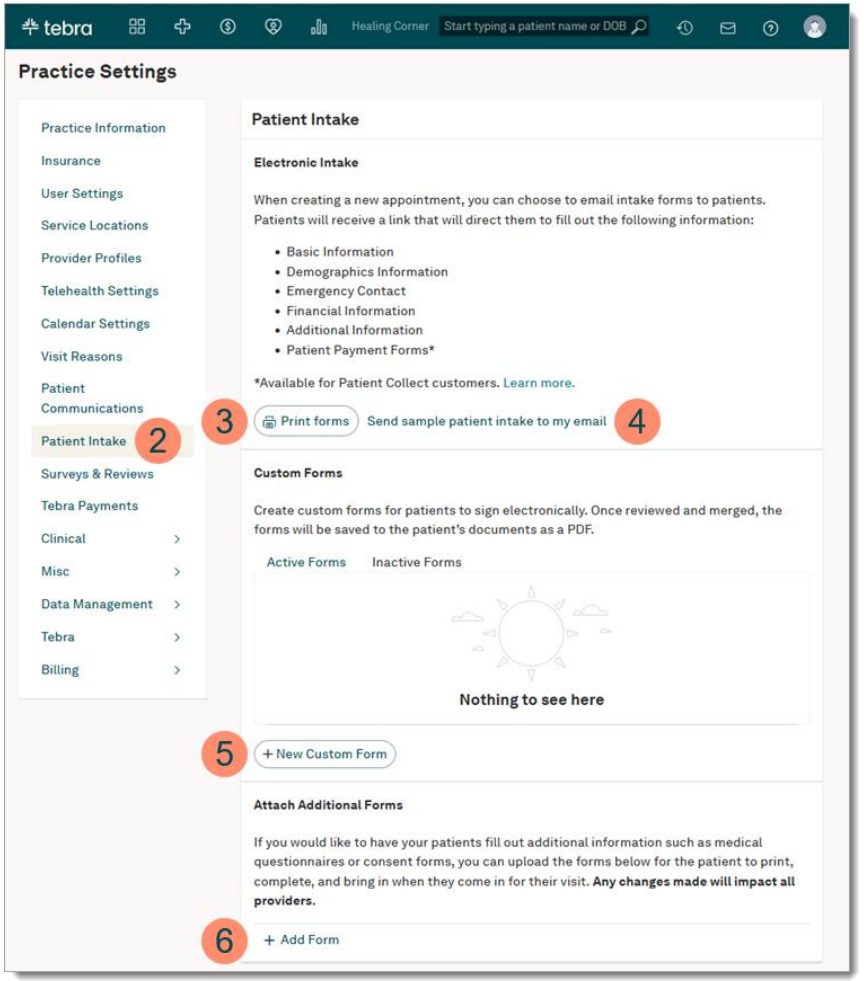
2. Click **Patient Intake**. The *Patient Intake* page opens.

3. **Print Forms:** Print a PDF version of the patient intake form. The *Specific Race* field is not included in the printed form.
   Tip: Review the Kiosk help articles to learn how patients can complete electronic intake forms in office.

4. **Sample Patient Intake:** Click to send a sample of the patient intake to the email associated with your user.

5. **Custom Forms:** Create custom forms to send electronically to patients through the Patient Intake workflow. Review the Create Custom Form section for instructions.

6. **Add Forms:** Optionally, attach additional forms for patients to download and fill out. Forms uploaded apply to all providers in your practice who have Engage.



Create Custom Forms

Create forms tailored to your practice's needs for patients to complete electronically. Enter your own formatted content, ask questions, and allow the patient to sign electronically. The completed forms are stored in the patient's documents eliminating the need to print, scan, and upload paper forms. Review the Custom Forms help articles to learn more.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Patient Intake**. The *Patient Intake* page opens.

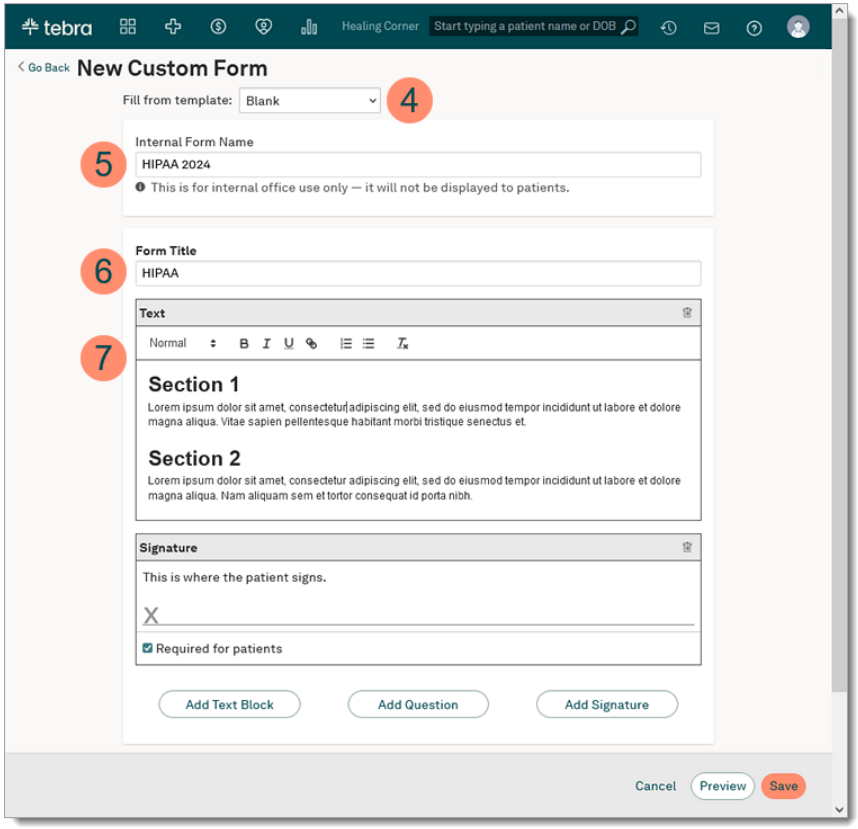
3. Click **+New Custom Form**. The *New Custom Form* page opens.

4. **Template:** Use a blank form or *Telehealth* template. To create a telehealth consent form, review the New Telehealth Consent Form help article for instructions.

5. **Internal Form Name:** Enter a unique name for the form.

6. **Form Title:** Enter a name the patient sees when completing their patient intake.

7. **Text:** By default, a text editor displays. To add content, enter content and format as desired. To remove the text section, click the **trash** icon on the section header.



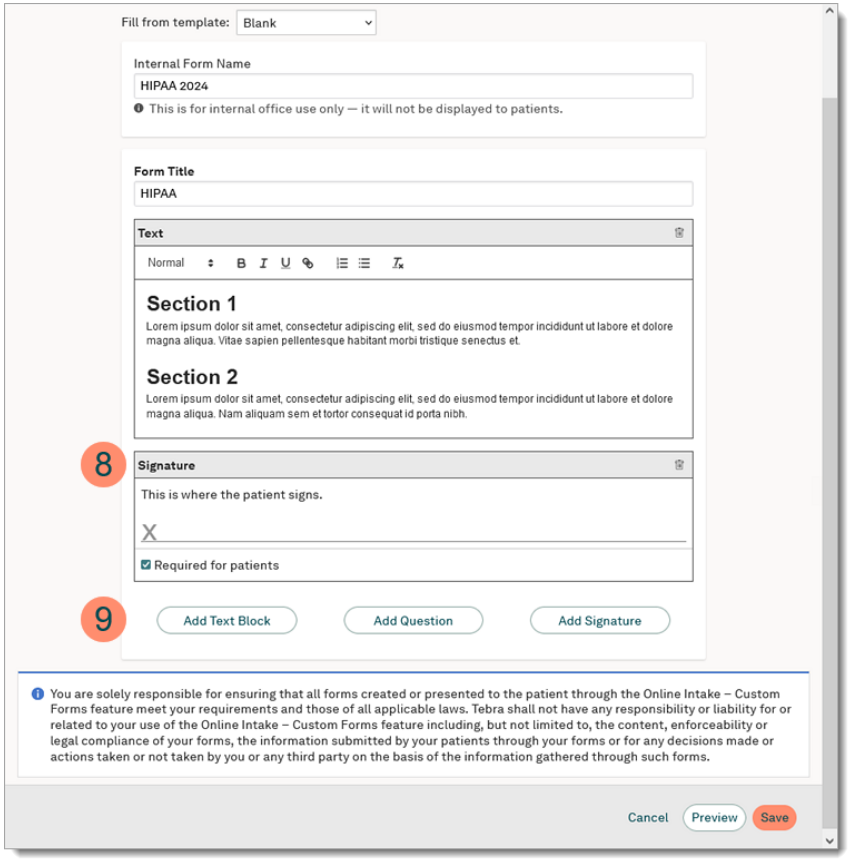
(Continued next page...)

tebra

Create Custom Form, cont.

8. **Signature:** By default, a signature is required. To make the signature optional, click to clear “Required for patients”.

9. **Add Sections:** Add additional *Text Blocks*, *Questions*, or *Signatures*.
   - Click **Add Text Block** to open a text editor to enter formatted content.
   - Click **Add Question** to enter a question or to create a multiple-choice question.
     - *Short Answer:* Select short answer from the drop-down to enter a question and allow patients to type in an answer when completing the form. To make the answer optional, click to clear "Required for patients".
     - *Checkbox*: Select checkbox from the drop-down to create a multiple-choice question or questionnaire. Add up to 100 options per question for patients to select when completing the form.
       Tip: Add multiple questions using checkbox to create a questionnaire for patients to select their answer(s).
   - Click **Add Signature** to request multiple signatures. To make the signature optional, click to clear "Required for patients".



(Continued next page...)

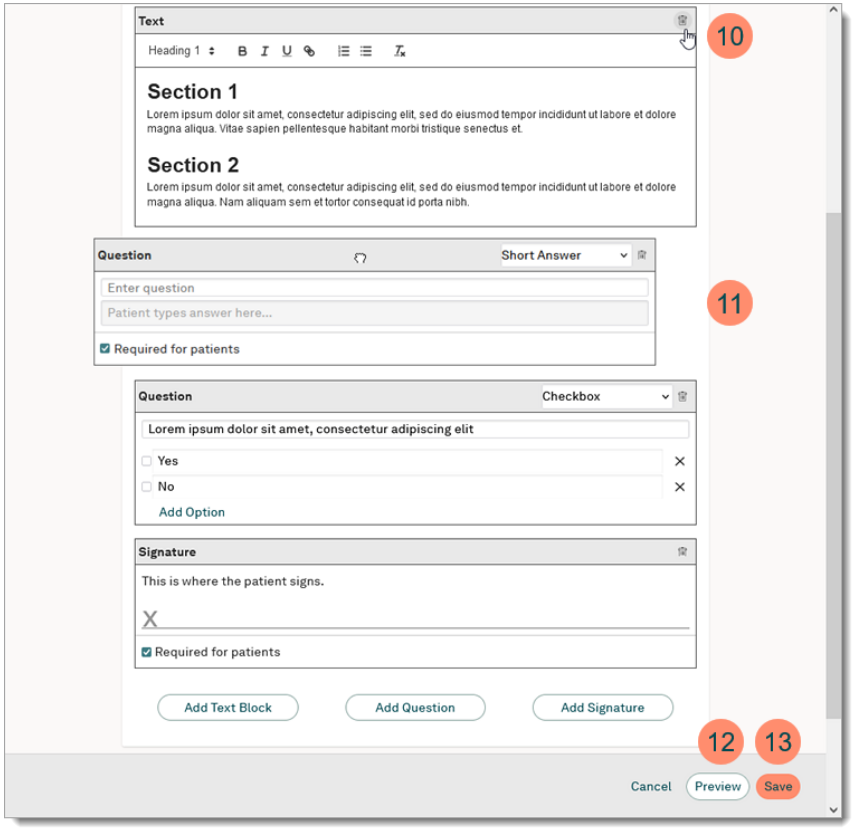
Create Custom Form, cont.

10. **Delete section:** Click the **trash** icon to remove the section.

11. **Reorder section:** Click and hold the header of the section to drag to the desired place in the form.

12. Click **Preview** to see the patient's view.

13. Click **Save** when finished.



tebra

Survey and Reviews

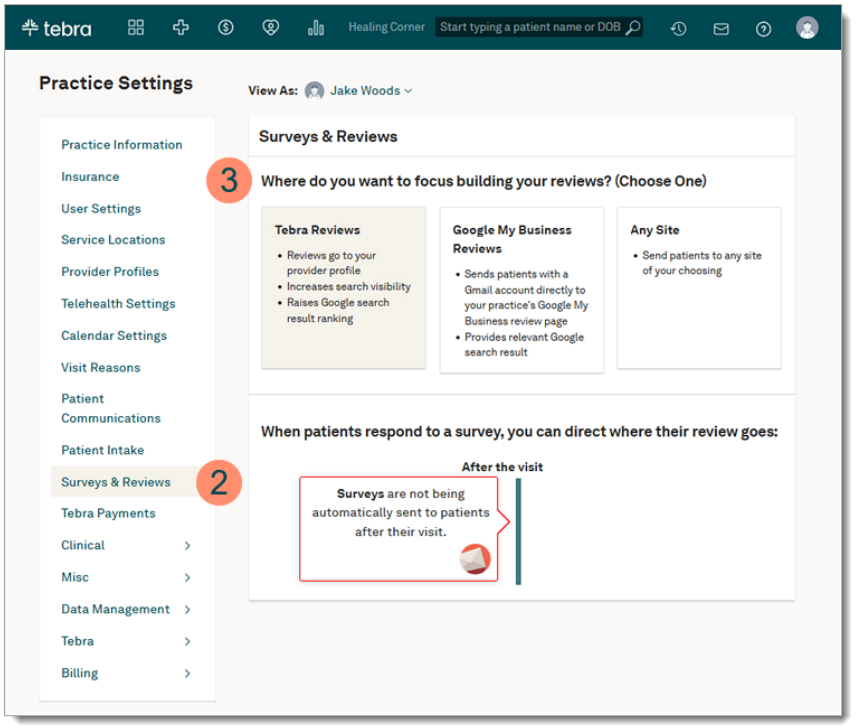
For Engage subscribers, build your online presence by setting custom options for collecting post-visit patient reviews. Begin by selecting where you would like to focus collecting patient reviews, then specify the sites where you would like to direct your patients and choose a minimum star rating that patients must give before being redirected.

Practices has the option to build review with Tebra Review, Google My Business Review, or Any Site. Configure surveys and reviews to fit your practice's needs. Review the Manage Surveys & Reviews Settings help article to learn how to configure the Google My Business Review or Any Site settings.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Surveys & Reviews**. The *Surveys & Reviews* page opens.

3. Click an option to choose where you'd like to start building up your reviews:
   - *Tebra Reviews:* Directs patients to your Tebra provider profile page. Select option to customization settings.
   - *Google My Business Reviews:* Directs patients with a Gmail account to your practice's Google Business review page. Select option to customization settings.
   - *Any Site:* Set custom options for directing patients to leave reviews on third-party review sites. Select option to customization settings.



(Continued next page...)

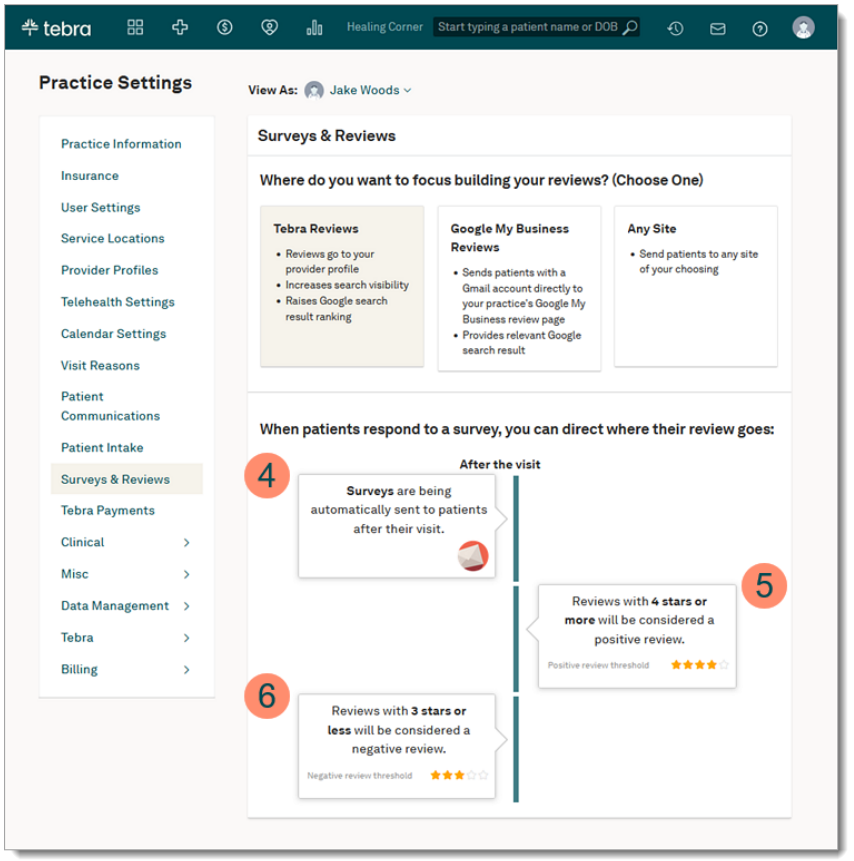
Survey and Reviews, cont.

Follow the steps to build Tebra Reviews. Review the Manage Surveys & Reviews Settings help article to learn how to configure the Google My Business Review or Any Site settings.

4. If applicable, click the **Surveys** card to turn on Surveys to automatically send to patients after their view.

5. **Positive Reviews:** By default, 4 stars are selected for the positive review threshold to encourage patients to leave a public review to automatically publish.
   - To change the threshold, click the **positive review** card to select a different star threshold. The *High Rated Reviews* pop-up window opens. Then, click on the stars to select the threshold. Click **Save** when finished.

6. **Negative Reviews:** By default, 3 stars are selected for the negative review threshold to encourage patients to leave private feedback for internal review.
   - To change the threshold, click the **negative review** card to select a different star threshold. The *Low Rated Reviews* pop-up window opens. Then, click on the stars to select the threshold. Click **Save** when finished.



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.

Clinical Settings

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

Prescription Preferences

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

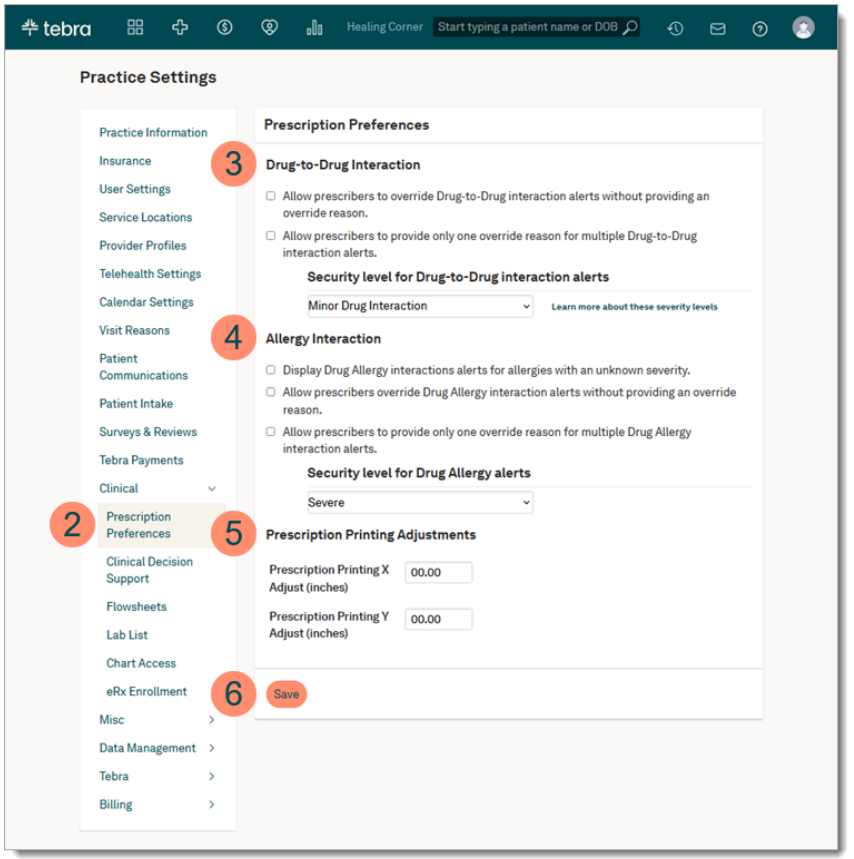
2. Click **Clinical**, then click **Prescription Preferences**. The *Prescription Preferences* page opens.

3. **Drug-to-Drug Interaction:** These alert messages appear when a prescribed drug has the potential to cause significant interactions with other drugs in the patient's active medications list. Click to select the desired options.

4. **Allergy Interaction:** These alert messages appear when a prescribed drug has the potential to trigger an allergic reaction. Click to select the desired options.

5. **Prescription Printing Adjustment:** Adjust the margins so paper prescriptions print in alignment with your printer.

6. Click **Save** when finished.



tebra

Clinical Decision Support

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

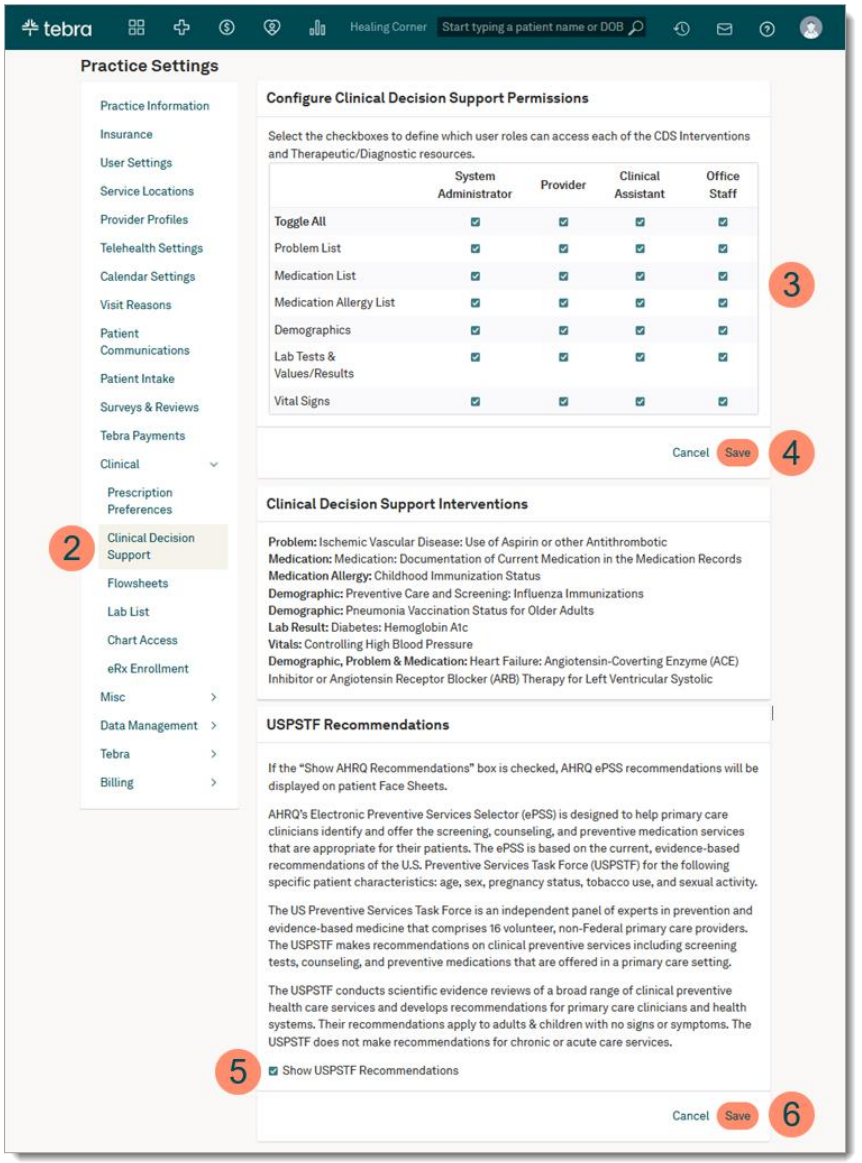
2. Click **Clinical**, then click **Clinical Decision Support**. The *Configure Clinical Decision Support Permissions* page opens.

3. By default, all user roles have access to the CDS interventions and Therapeutic/Diagnostic resources. To remove permissions for a specific user role, click to clear the selection.

4. Click **Save** when finished.

5. By default, USPSTF recommendations are turned on to display on the patient's facesheet. Click to disable the USPSTF recommendation.

6. Click **Save** when finished.



tebra

Flowsheets Settings

Flowsheets, viewable in the patient's chart or clinical note, give providers a holistic view of their patient's key data over time, allowing them to analyze progress and deliver the right type of care. Providers have the option to use standard flowsheets to track certain chronic health conditions (e.g., diabetes or hypertension) or build their own flowsheets with the type of data and layout that makes sense for the practice.

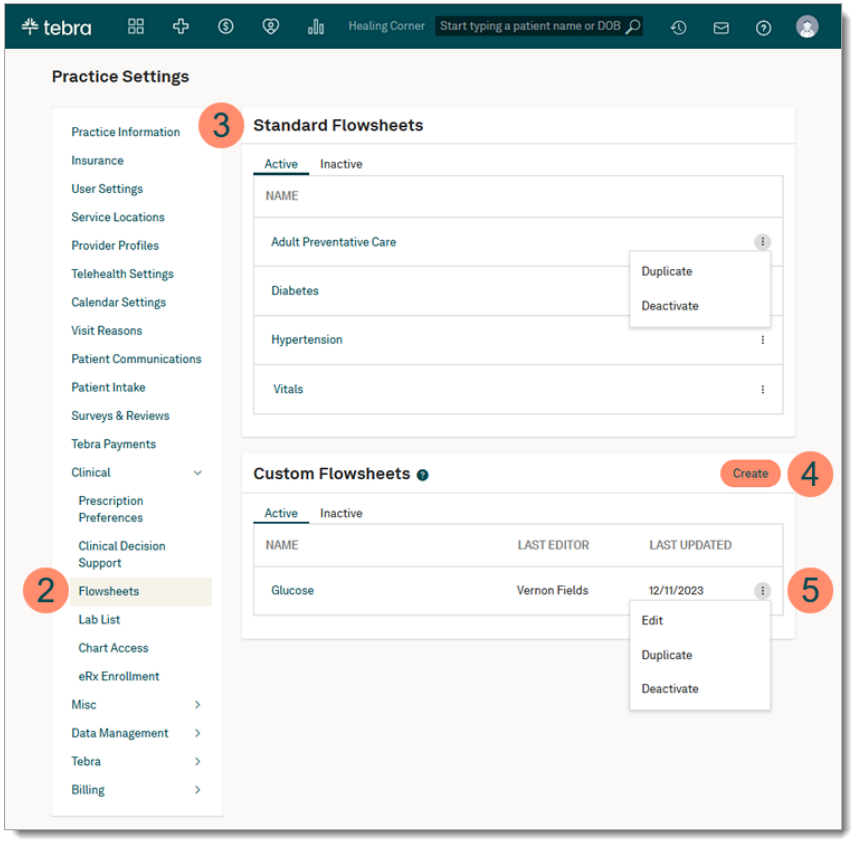
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Clinical**, then click **Flowsheets**. The *Flowsheets* page opens.

3. **Standard Flowsheets:** Displays available active standard flowsheets. Click the **more option** icon to duplicate or deactivate a flowsheet.

4. **Create Flowsheet:** Click to build your own flowsheet. Review the Create Flowsheet section for instructions.

5. **Custom Flowsheets:** Displays available flowsheets created by a System Administrator or a Provider of the practice. After a flowsheet is created, click the **more options** icon to edit, duplicate, or deactivate, as necessary.



Create Flowsheet

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Clinical**, then click **Flowsheets**. The *Flowsheets* page opens.

3. Click **Create**. The *Create Flowsheet* pop-up window opens.

4. **Name:** Enter a name for the flowsheet.

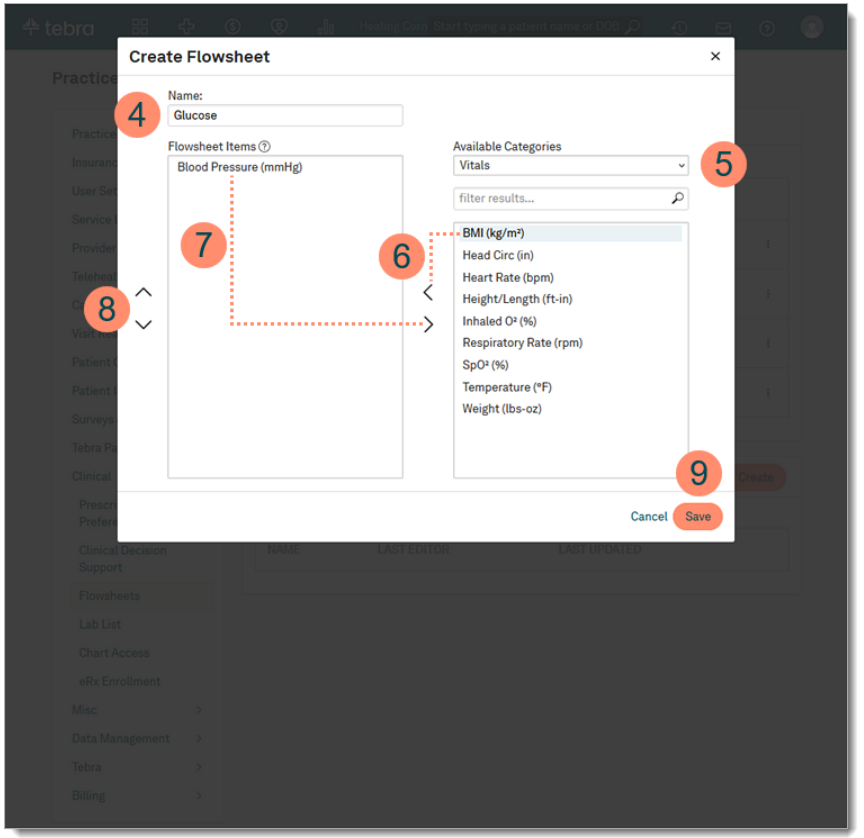
5. **Available Categories:** Click to select Labs, Screenings, or Vitals to view corresponding items.

6. **Add Items:** Select an item on the right and click the **left arrow.**

7. **Remove Items:** Select an item on the left and click the right arrow.

8. **Reorder Items:** To sort, select the item on the left and click the **up** or **down** arrow.

9. Click **Save** when finished.



Lab List

Tebra provides a default list of common labs test that clinicians can order or perform. You can customize this list to the needs of your practice by adding or removing lab tests.

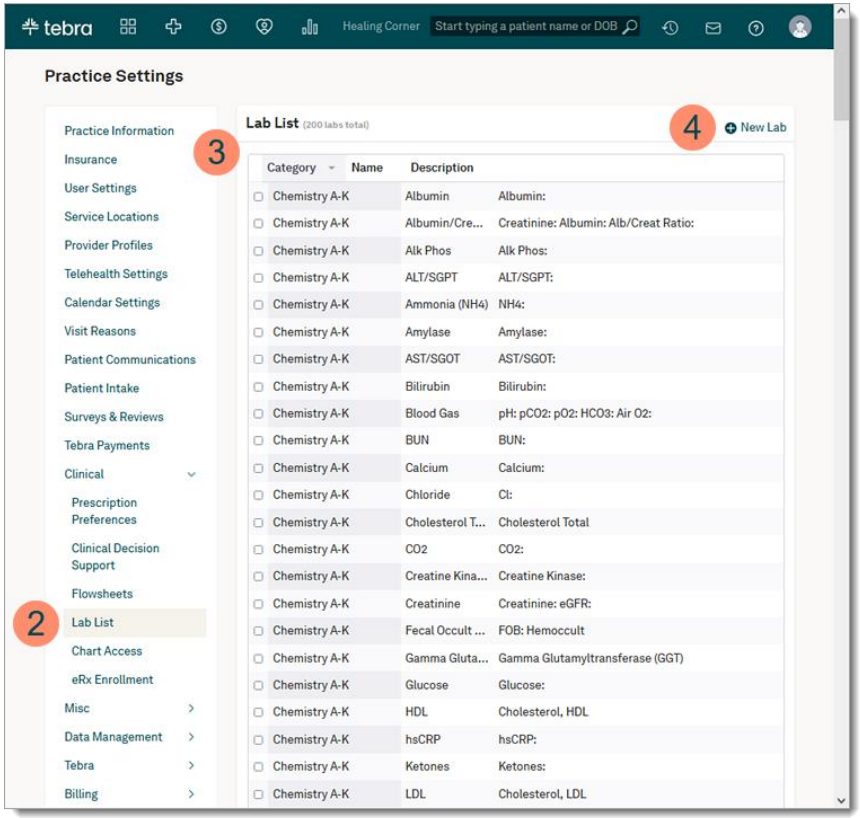
Note: This page is used to manage your lab list. Lab orders and eLabs are ordered through the *Labs/Studies* page or the patient's chart.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Clinical**, then click **Lab List**. The *Lab List* page opens.

3. **Lab List:** Displays the list of available labs. To sort, click on the header. To remove a lab, click to select the lab and click **Delete**.

4. **New Lab:** Click to create a new lab. Review the Add New Lab section for instructions.



Add New Lab

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Clinical**, then click **Lab List**. The *Lab List* page opens.

3. Click **+ New Lab**. The *Add New Lab* pop-up window opens.

4. **Category:** Select a category from the drop-down.

5. **Name:** Enter the name of the test.

6. **Description:** Optionally, add a description.

7. Click **Save** when finished.

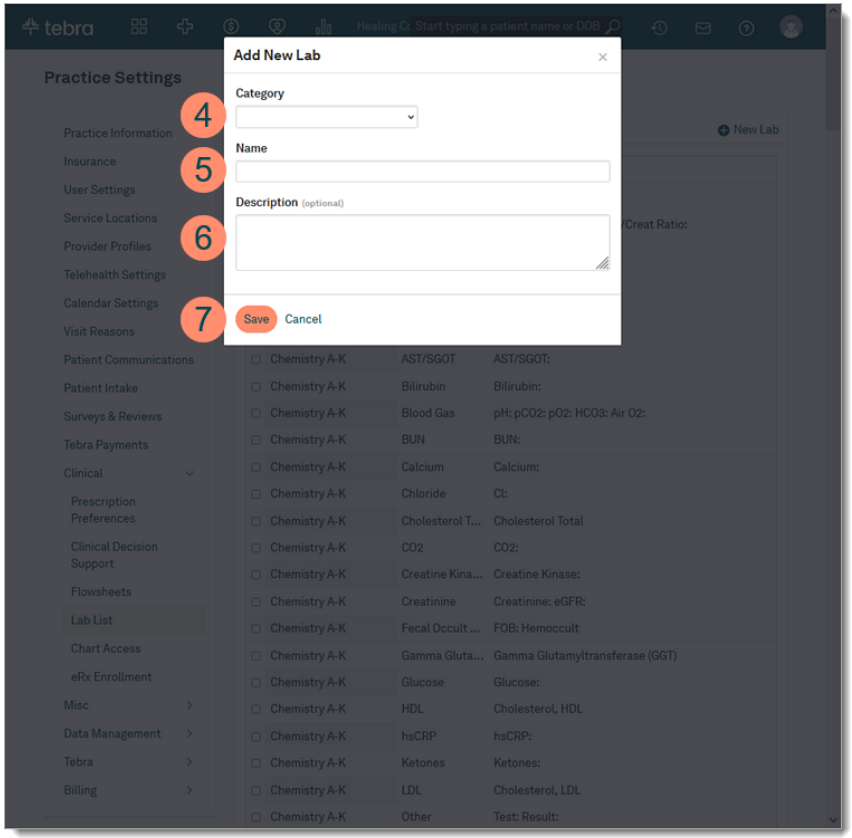


Chart Access

Chart Access allows staff the option and control to restrict sensitive areas of a patient's charts. With Chart Access enabled, the practice can protect the patient's privacy by allowing only the clinical staff member(s) involved in the patient's care to access sensitive areas of the patient's chart. Based on the needs of the practice, you can choose which level of privacy to enable:

- *Clinical Notes:* Allow staff to restrict access to the patient's clinical notes only. When access is restricted, the patient's clinical notes will only be accessible to assigned clinical staff members.
- *All Clinical Data:* Allow staff to restrict access to all the patient's clinical data (e.g., vitals, notes, medication, etc.). When access is restricted, the patient's clinical data will only be accessible to assigned clinical staff members.

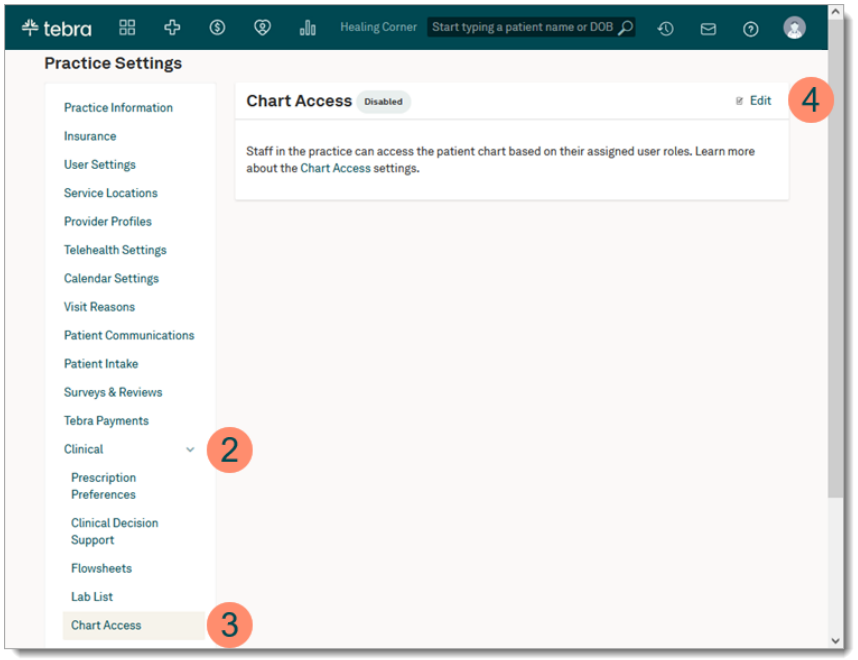
Review the Chart Access Restrictions Preview table on the Chart Access Settings help article to see how the patient displays when this feature is enabled.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Clinical**. Additional setting options expands.

3. Click **Chart Access**. The *Chart Access* page opens.

4. Click **Edit**. The *Chart Access* restrictions opens.



(Continued next page...)

Chart Access, cont.

5. Click to select "Enable chart access restrictions".

6. Click to select which restriction level to enable:
   - *Restrict access to clinical notes only:* Select this option to allow restrictions for a patient's clinical notes.
   - *Restrict access to clinical data:* Select this option to allow restrictions for all clinical data (e.g., vitals, medication, etc.) in the patient's chart.

7. To automatically assign System Administrators with a "Provider" or "Clinical Assistant" role to all restricted patient charts, click to select "Automatically add clinical admins to all restricted charts.

8. Click **Save**. The *Enable Chart Restrictions* pop-up window opens.

9. Click **Enable** to confirm. *Chart Access* is now enabled for the practice. Review the Restrict or Unrestrict Patient Chart help article to learn how a System Administrator, Provider, or Office Staff can manually restrict a patient chart and assign clinical staff member(s) to access the restricted area.

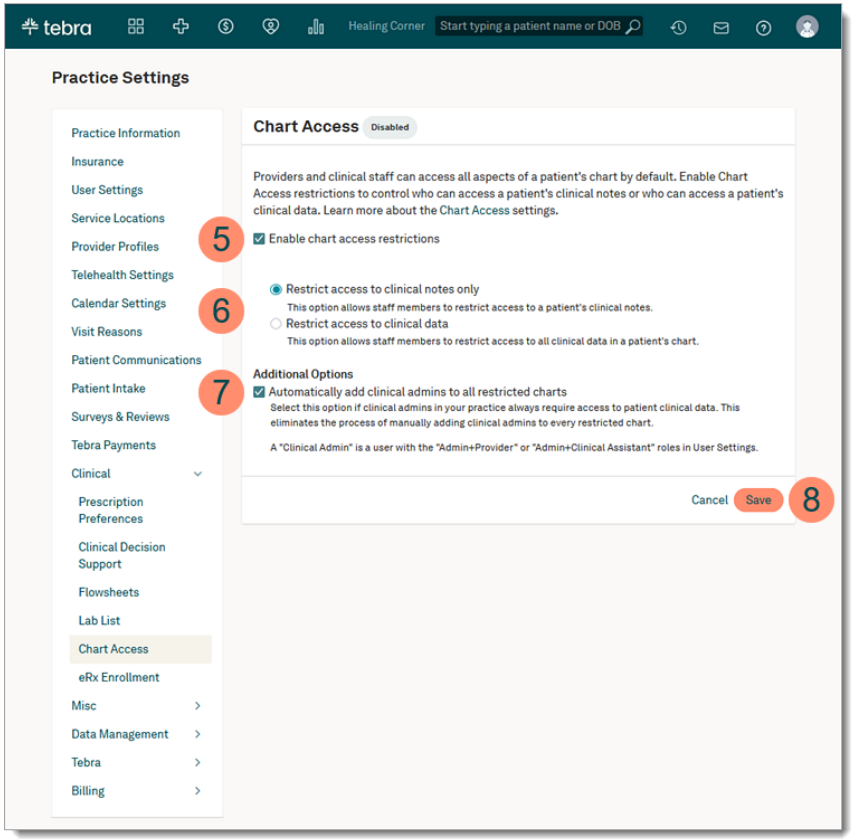


Chart View

The Chart View setting is enabled by default to automatically hide section(s) of the patient facesheet and sidebar navigation for all users to fit the practice's specialty. The specialty is based on the *Practice Specialty* selected when completing the practice setup wizard and cannot be changed. If desired, users can further customize the patient chart to override the practice's Chart View settings. Review the Customize Patient Chart View help article for instructions. To display all sections of the patient's chart by default, disable the Chart View setting for the practice. Review the Chart View help article for more details.

Note: The Chart View setting option is unavailable for certain specialties. Review the Specialty Chart Mapping table on the Chart View help article for more details.

eRx Enrollment

Electronic prescribing (ePrescribing or eRx) enables medical professionals to send prescriptions electronically to the pharmacy. ePrescribing reduces time spent on the phone, faxing pharmacies, and helps streamline renewal requests at no additional charge. The providers are required to initiate and complete an ID.me verification process themselves to enroll for eRx. Providers can review the eRx Enrollment help article to learn more.

Misc Settings

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

Portal Settings

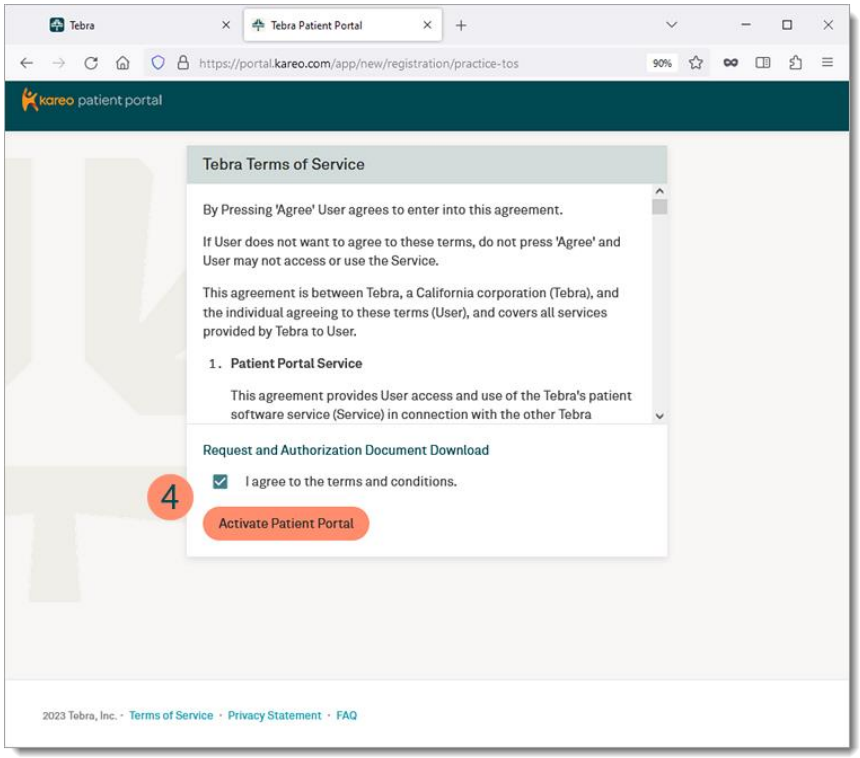
The Patient Portal integrates with Tebra and lets the practice securely communicate with patients, share eLab results, health information, and provide patients access to online statements. With Tebra Payments enabled, patients can pay outstanding balance online through the Patient Portal.

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.



Referring Provider

Create a database of referring providers that can be easily selected in the clinical notes and patient's Demographics. Provider information can be added manually or auto populated using their individual NPI Number.

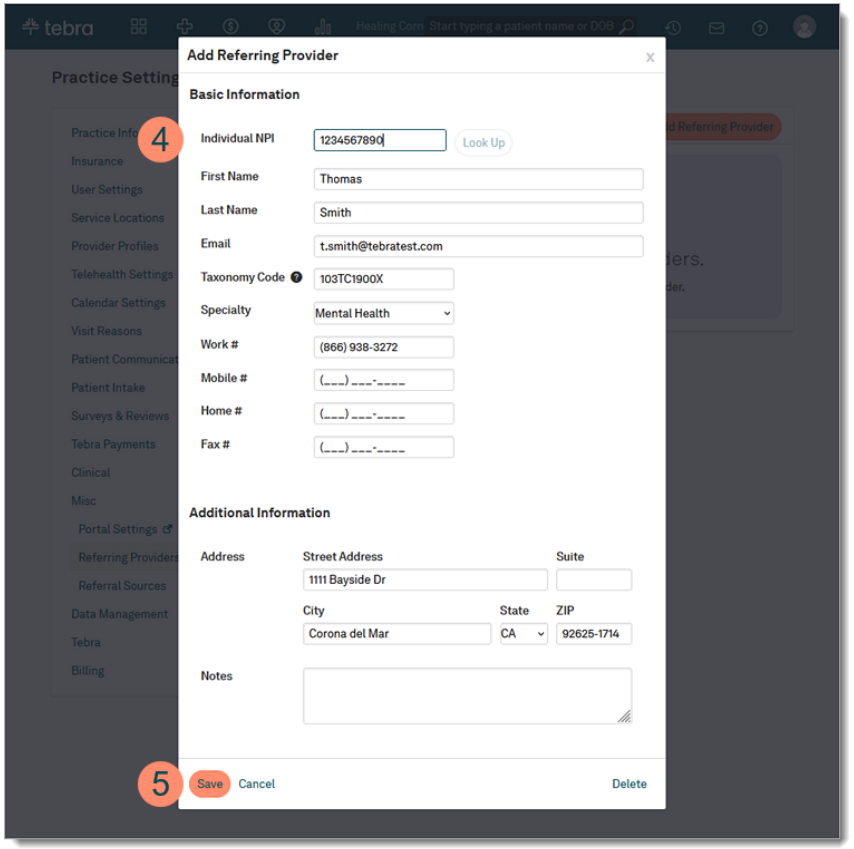
1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Misc**, then click **Referring Providers**. The *Referring Provider* page opens.

3. Click **+Add Referring Provider**. The *Add Referring Provider* pop-up window opens.

4. Enter the provider's *Individual NPI* and click **Look Up**. The provider's *First Name*, *Last Name*, *Taxonomy Code*, *Phone Number* and *Address* will auto-populate when available. Enter additional provider information, as necessary.
   - If the referring provider NPI is not available, manually enter the provider's information.

5. Click **Save** when finished.



Referral Sources

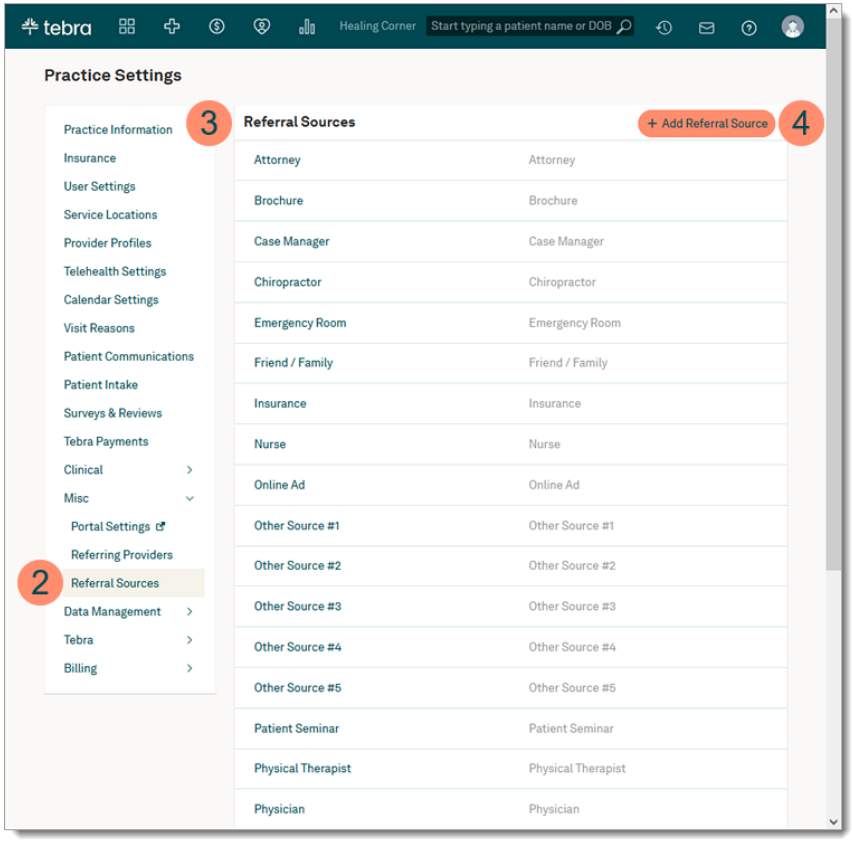
Referral source helps you track how patients were introduced to your practice. A list of standard referral sources is automatically included in your account. Add custom referral sources or edit the existing list items to meet the practice's specific needs. Associated the referral source to a patient in the Additional Info tab of the patient's Demographics.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Misc**, then click **Referring Sources**. The *Referring Sources* page opens.

3. **Referral Sources:** Displays the list of available sources. Click on the referral source to edit, if necessary. Then, click **Save** when finished. To remove, click on the referral source and click **Delete**.

4. **New Referral Source:** Click to add a custom referral source. The *Add Referral Source* pop-up window opens. Then, enter a *Name* and *Description*. Click **Save** when finished.



Data Management

Data management in Tebra allows you to import patient demographics, import patient clinical data, and export patient data.

Import Patient Demographics

Tebra provides an easy way to import your patient demographic data. The import process involves preparing a data file, uploading it, matching field labels, and validating the import results.

Prepare Import File

To upload patient demographic data, prepare your import file.

- Locate your patient demographic data or enter the data into a spreadsheet.
- If you have used an EHR in the past, you can either ask the vendor for an XLS, XLSX, or CSV file with all your patient demographic data, or you may be able to export the information yourself.
- If you're using paper charts or can't access your patient demographic data digitally, download the spreadsheet template through the *Import Demographics* page. Then, manually enter the data into the spreadsheet to create your file.
- Supported file types: XLS, XLSX, CSV
- The file size cannot exceed 50MB.
- Only 5,000 patient rows can be imported at one time. If you have more than 5,000, divide your list into multiple files of 5,000 patient rows each.
- Review the Patient Demographics table in the Import Patient Demographics help article for requirements for accepted data formats.

Import File

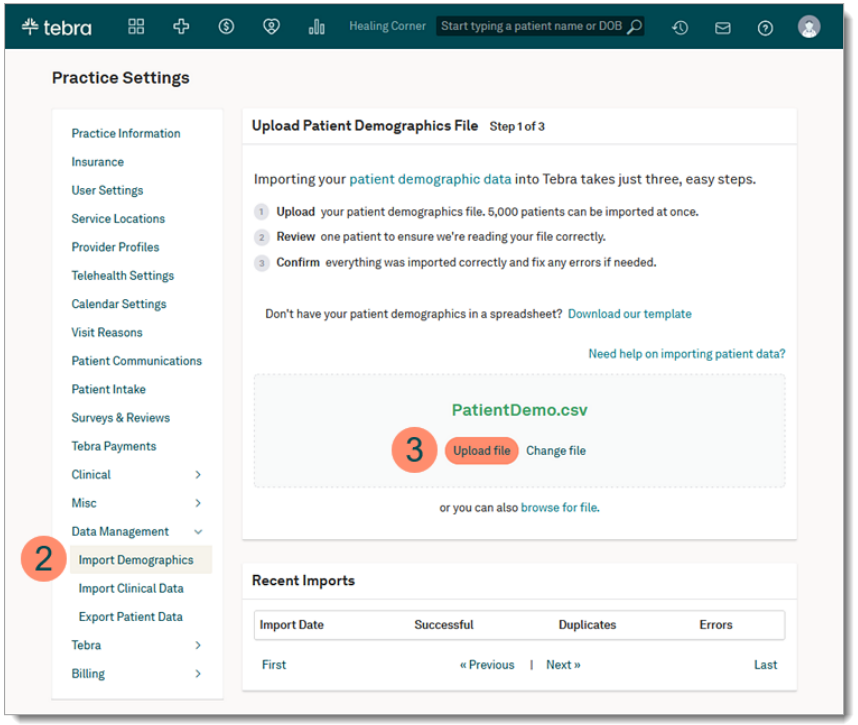
When your file is ready, import the patient demographic data into Tebra.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Data Management**, then click **Import Demographics**. The *Upload Patient Demographics* page opens.

   Tip: Click **Download our template** to download the template to manually add your data.

3. Either drag and drop your file to the upload box or browse for the file. Then, click **Upload File**.



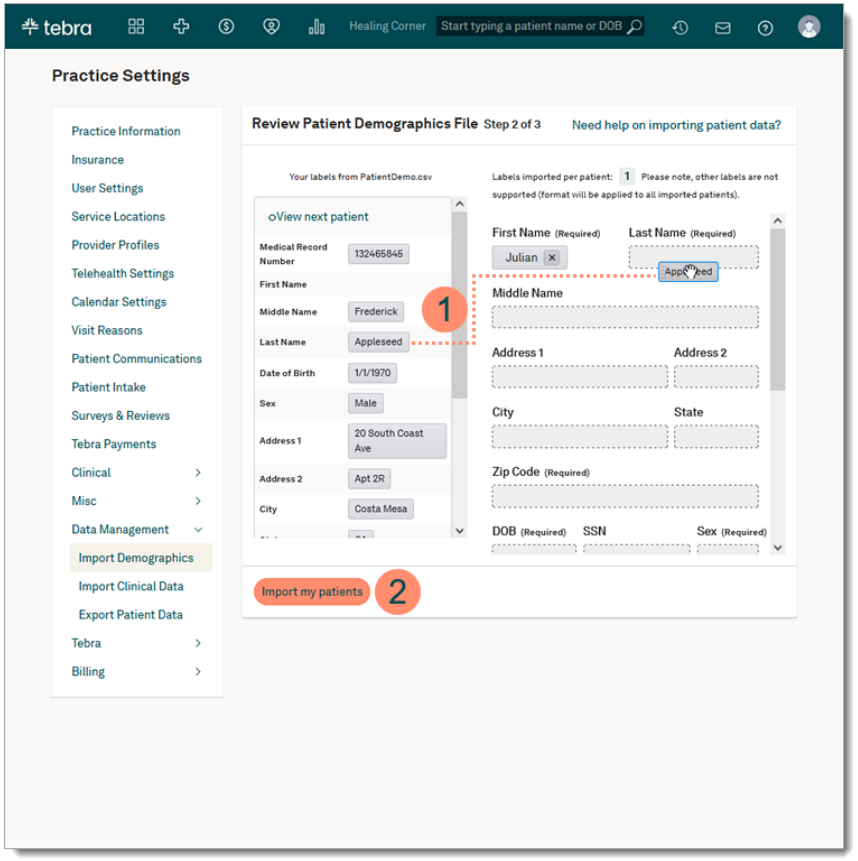
tebra

Review Import

Review the imported patient demographic file. To properly import your patient data, your data categories must match the Tebra categories. This ensures your patient data is added to the corresponding fields of the patient chart.

1. Drag these labels to the boxes on the right. This only needs to be done for one patient.

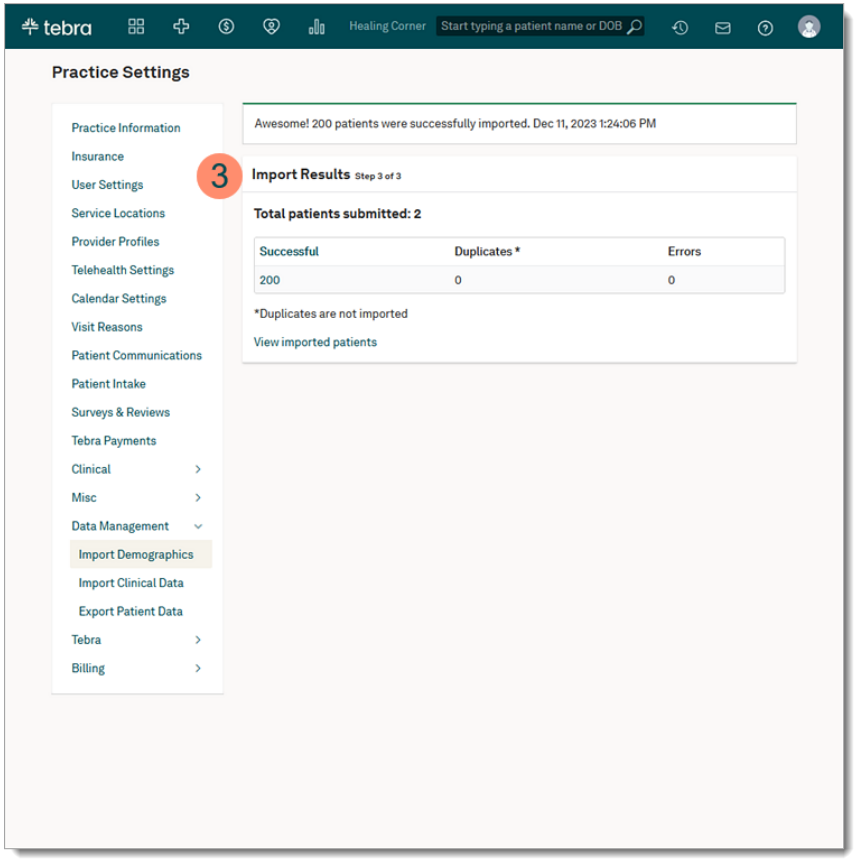
2. Click **Import my patients** when finished. The data is uploaded and the *Import Results* page displays.



(Continued next page...)

Review Import, cont.

3. The import results status displays:
   - *Successful:* The results display the total number of patients that were successfully imported.
   - *Duplicates:* The criteria used to determine a duplicate is whether a given patient has a matching Social Security Number in your Tebra account. If not, then other demographic data within your spreadsheet is compared to that within your Tebra account.
   - *Errors:* If a patient has one or more errors in their demographic data, that patient is marked as an error, and their data is not imported. Click the number under *Errors* to download a summary spreadsheet of all error patients, their original data, and a new column summarizing the errors for each. Review the Correct Patient Data with Errors section of the Import Patient Demographics help article for more details.



Import Clinical Data

Certified EHR software can export patient clinical data in bulk. Patient clinical data is exported in the form of Summary of Care files with a .ccda file extension. If you have your patient data in this format, Tebra can import your patient clinical data into Tebra for you.

Export Summary of Care Files

The first step to importing patient clinical data into Tebra is to export your Summary of Care (.ccda) files from your old EHR. The process of exporting Summary of Care files varies between each EHR. Some EHR systems allow you to download your practice's .ccda files while others require you to contact their Customer Service department.

Submit Data Import Request to Tebra

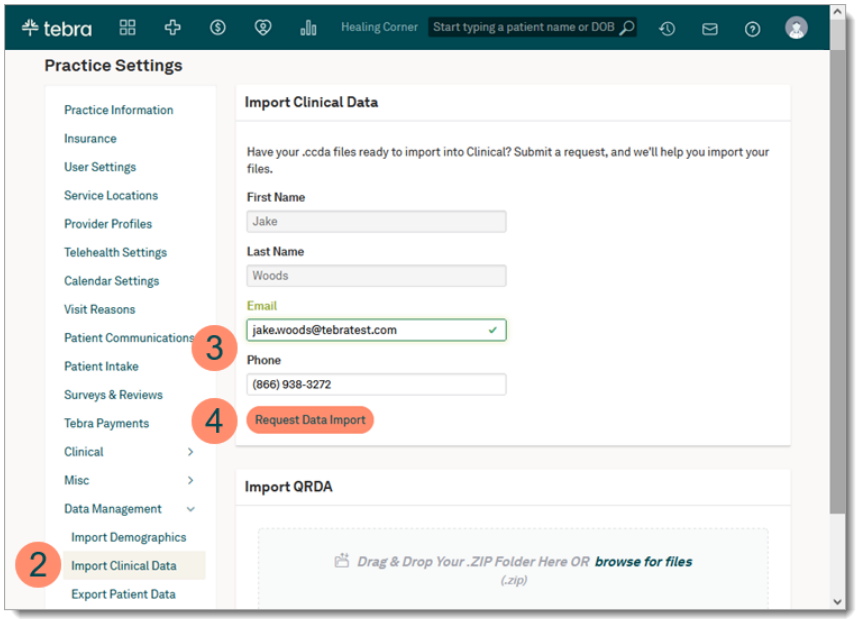
The second step is to complete a request form to initiate a data import with Tebra.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.

2. Click **Data Management**, then click **Import Clinical Data**. The *Import Clinical Data* page opens.

3. Enter the best contact *Email* and *Phone* number.

4. Click **Request Data Import**. The Customer Care team will contact you within 24 to 48 hours to initiate the data import process.



tebra

Tebra Security and Legal

Set up your 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

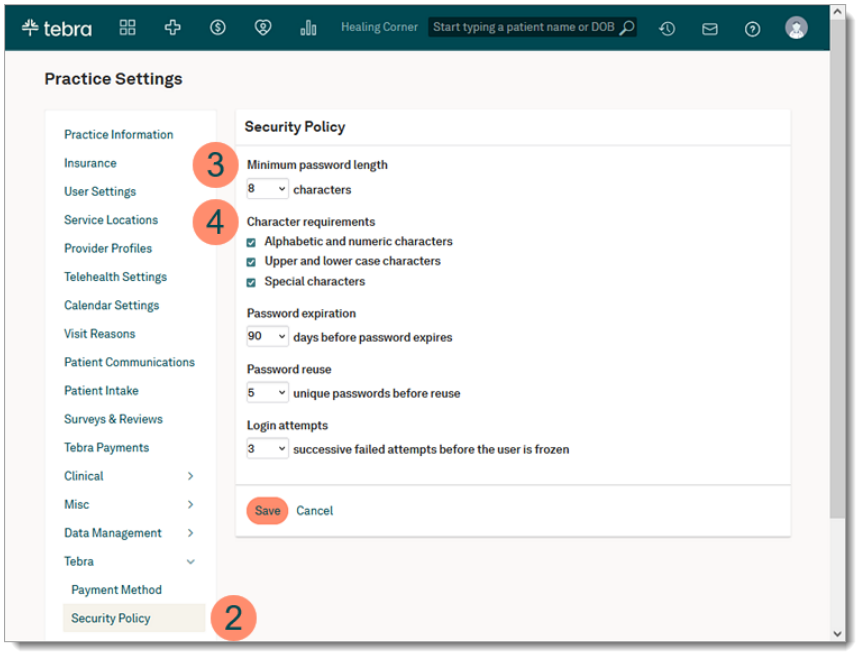
The Security Policy section lets you set various password and login rules that apply to all users in your practice. These settings are important for proper compliance with the patient privacy regulations of the Health Insurance Portability and Accountability Act of 1996 (HIPAA). Tebra automatically applies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



(Continued next page...)

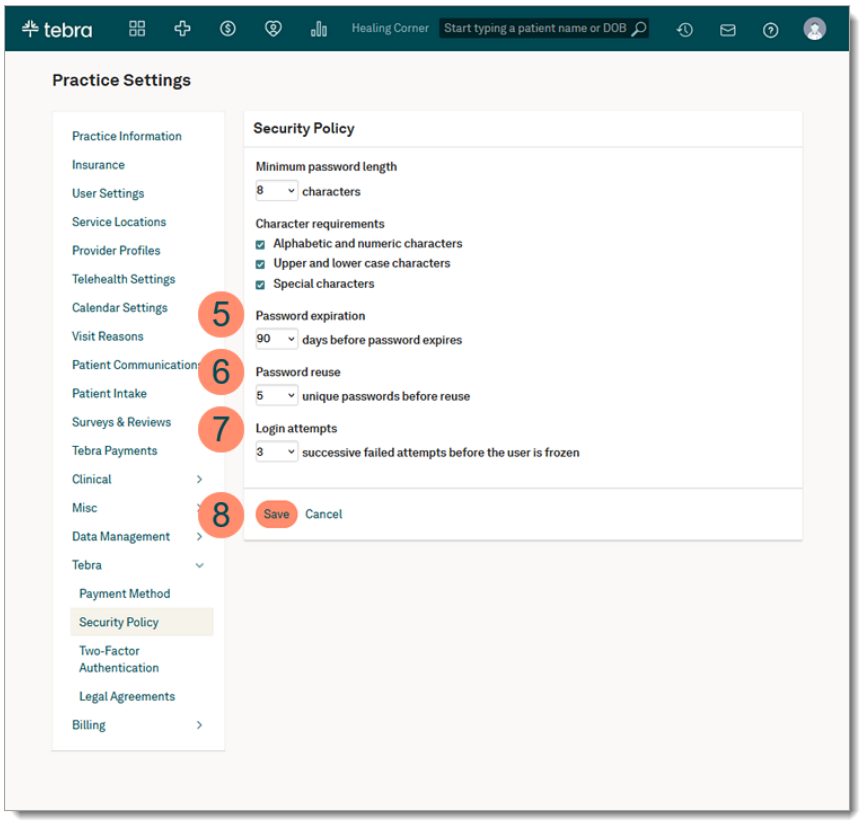
Set Security Policy, cont.

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.



tebra

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 in the account can enable or disable 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.

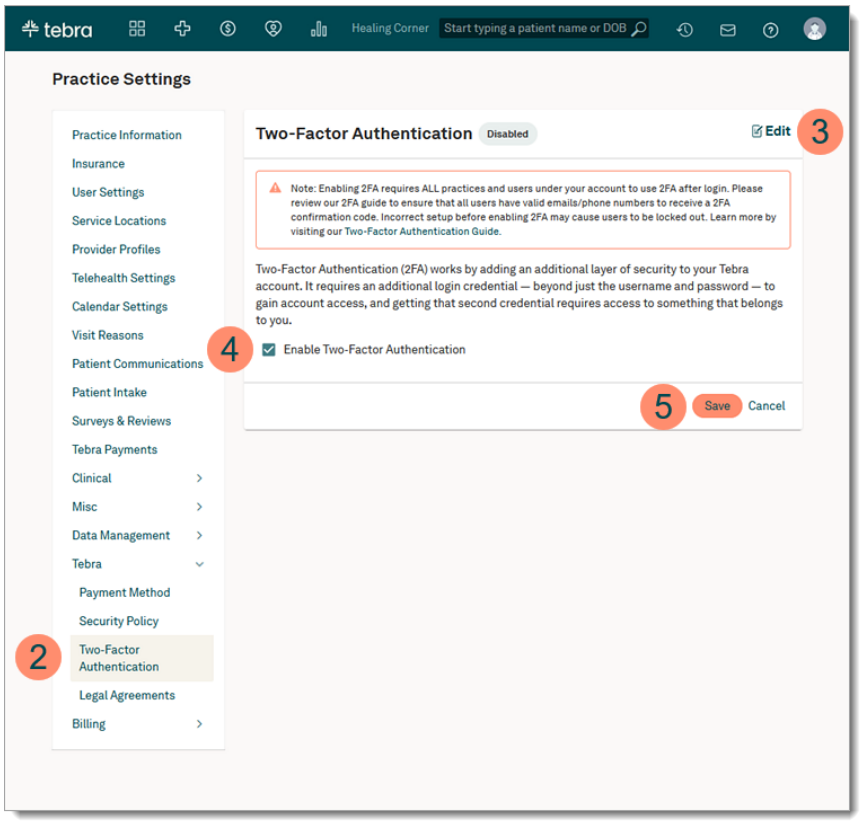
2. Click Tebra, then click **Two-Factor Authentication**. The *Two-Factor Authentication* page opens.

3. Click **Edit**. The *Two-Factor Authentication* page opens.

4. Click to select "Enable Two-Factor Authentication".

5. Click **Save**. The *Enabling Two-Factor Authentication* pop-up window opens.

6. Click **Continue** to complete authentication. The *Login MFA* page opens.



(Continued next page...)

tebra

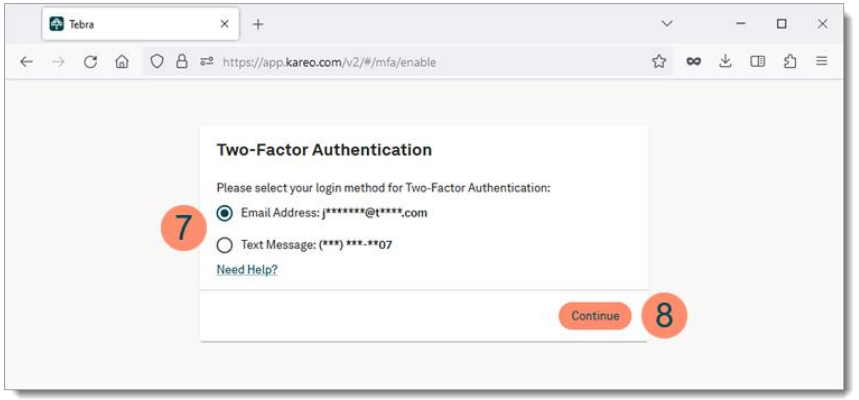
Two-Factor Authentication, cont.

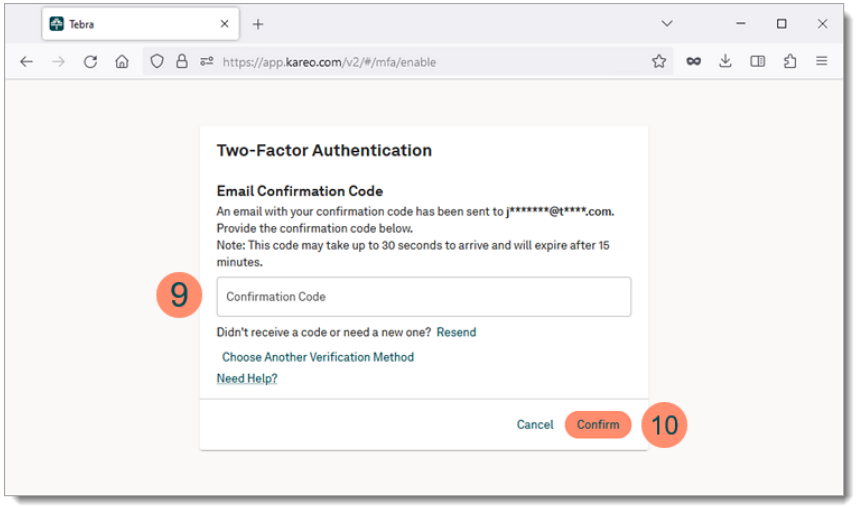
7. Click to select "Email Address" or "Text Message".

8. 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.

9. 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.

10. 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.



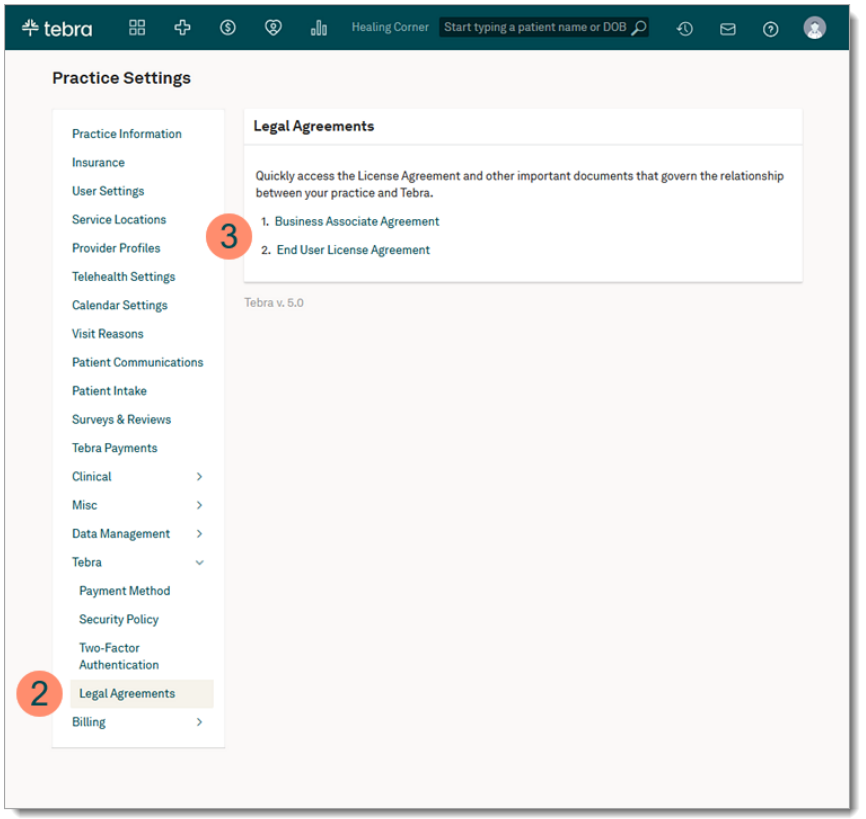


Legal Agreements

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.



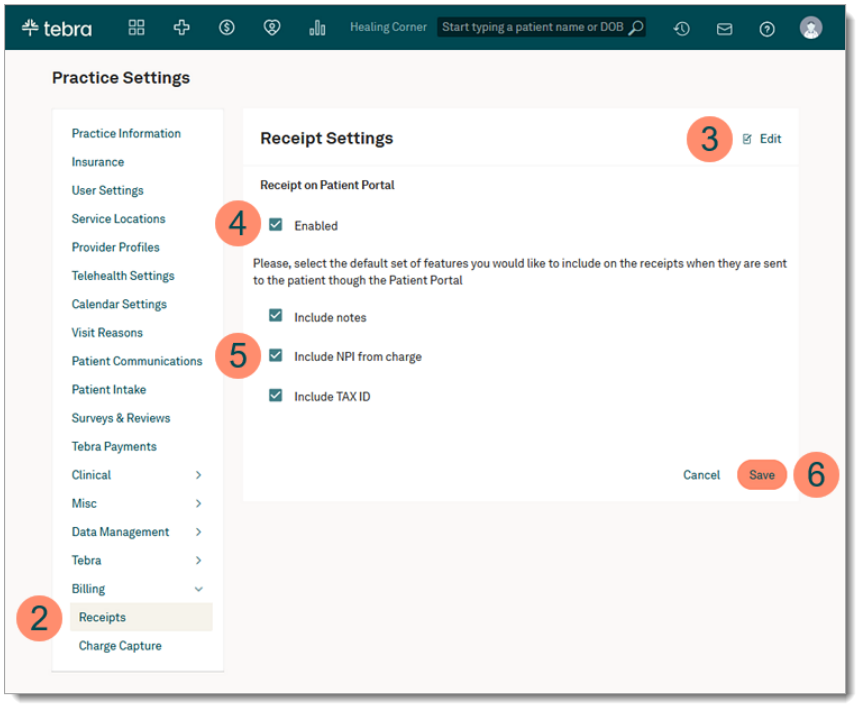
Billing

Configure receipt settings to allow patients to access and securely download their receipts. If appliable, manage the practice's services.

Receipts

The Receipt Settings section allows you to enable itemized charge receipts for patients to access and securely download through the Patient Portal. Practices must activate Patient Portal and invite patients to the Patient Portal for them to access their receipts. Review the Activate Patient Portal and Invite or Reinvite Patient to Patient Portal help articles for instructions.

1. Hover over the *User* icon and click on **Practice Settings**. The *Practice Settings* page opens.
2. Click **Billing**, then click **Receipts**. The *Receipts Setting* page opens.
3. Click **Edit**. The *Receipt Settings* editor opens.
4. Click to select "Enabled".
5. By default, all options are selected to include on the patient receipts, as necessary. To exclude the information, click to clear the selection.
6. Click **Save** when finished.



Services (Procedures)

For Self-Pay Only is enabled practices, Services (Procedures) allow you to easily find and manage services used by the account. Services can also be added to the appropriate Visit Reasons to auto-populate the code and fees on new charge captures. Review the Add, Edit, or Delete Visit Reasons help article to learn more about visit reasons.

Review the following help articles to manage services:

- 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

Fees

For Self-Pay Only is enabled practices, Fees allow you to create a standard fee schedule to help increase collections by setting the right fees for services. Standard fees are typically the default charges for the practice. You can select to add a new fee schedule either manually, by importing from a CSV file, or by duplicating an existing fee schedule (and editing as needed).

Review the following help articles to manage fees:

- 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

If applicable, enabled permissions for their Office Staff users to be to submit charge captures to billing.

Review the following help articles to learn more:

- Charge Capture Settings – Learn how to enable this option for Office Staff users
- New Charge Capture – Learn more about charge captures

My Settings

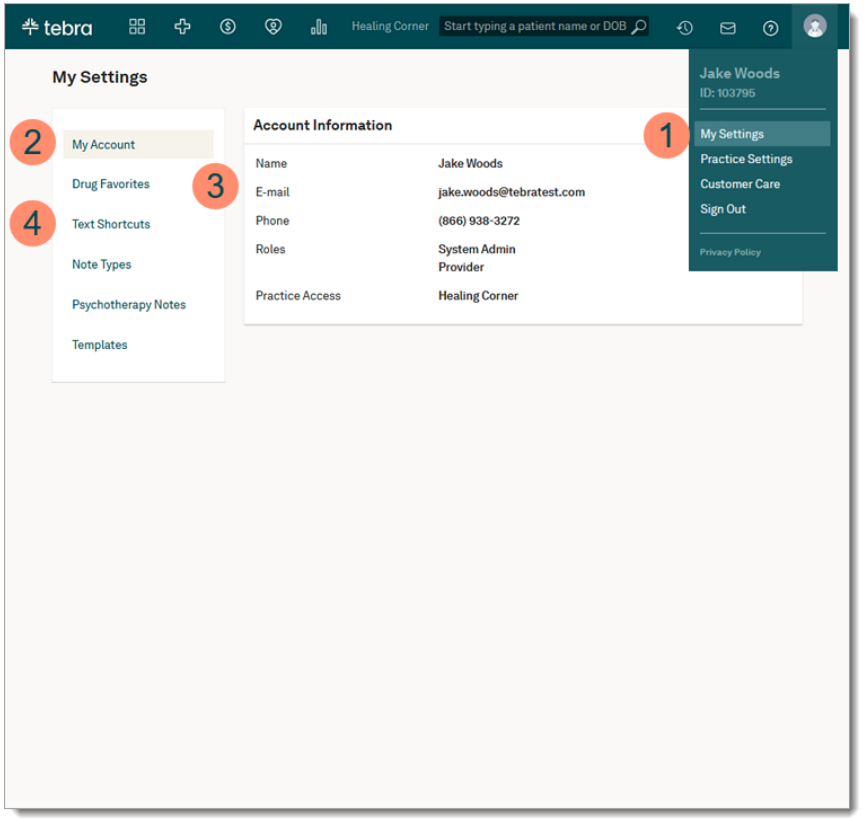
Access My Settings to view your user account information. For Clinical subscribers, configure features such as text shortcuts, note types, and more. Clinical setting options are displayed based on the user's roles.

1. Hover over the *User* icon and click on **My Settings**. The *My Settings* page opens.

2. **My Account:** Displays your account profile information including Name, Email, Phone, Role(s), and Practice Access.

3. **Drug Favorites:** If applicable, create a database of most frequently prescribed drugs that can be easily accessed when adding medications to a patient's chart or initiating a prescription. Review the Drug Favorites help articles to learn more.

4. **Text Shortcuts:** If applicable, add phrases you frequently use when charting that can be applied to any section in a note that supports text shortcuts. Review the Text Shortcuts help articles to learn more.



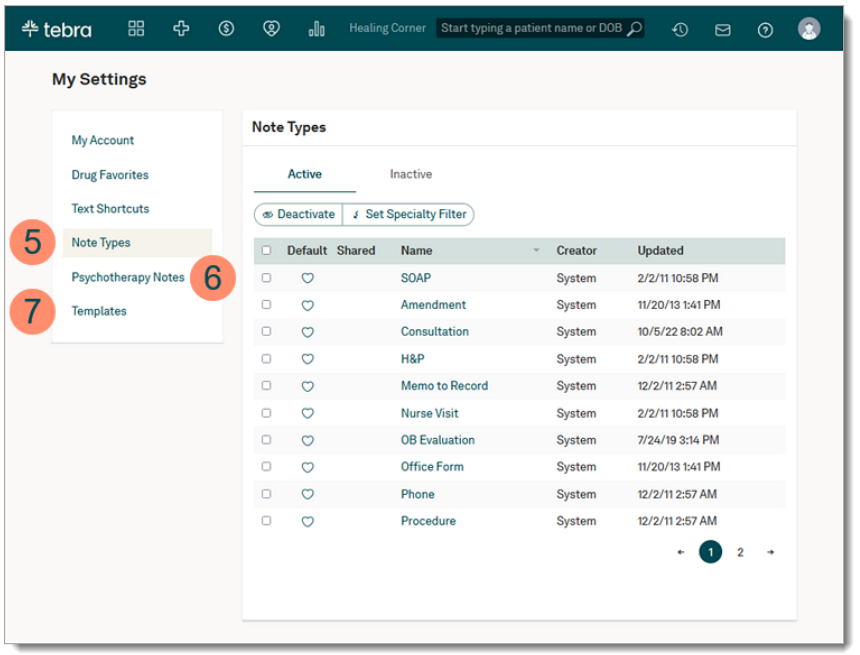
(Continued next page...)

My Settings, cont.

5. **Note Types:** Tebra provides easy access to a variety of note types to help streamline provider's daily workflow. With special customization options, modify the list of note types to include only those that are relevant to your practice's specialty, design custom note types tailored to meet your specific needs, and share note types with other users in the practice. The list of note types then displays when a new patient note is started. Review the Note Types help articles to learn more.

6. **Psychotherapy Notes:** Psychotherapy notes are automatically enabled for mental health providers to document their personal observations and insights related to the therapeutic session. To disable this option, review the Enable or Disable Psychotherapy Notes help article to learn more.

7. **Templates:** Tebra Clinical provides over 200 system templates to streamline provider documentation. Templates can only be used in specific sections (e.g., Subjective) of a Note Type (e.g., H&P) that supports templates. Manage the list of templates by deactivating the ones that are not relevant, modify system templates to the practice's need, or create new templates to share with other users in the practice. Review the Templates help articles to learn more.



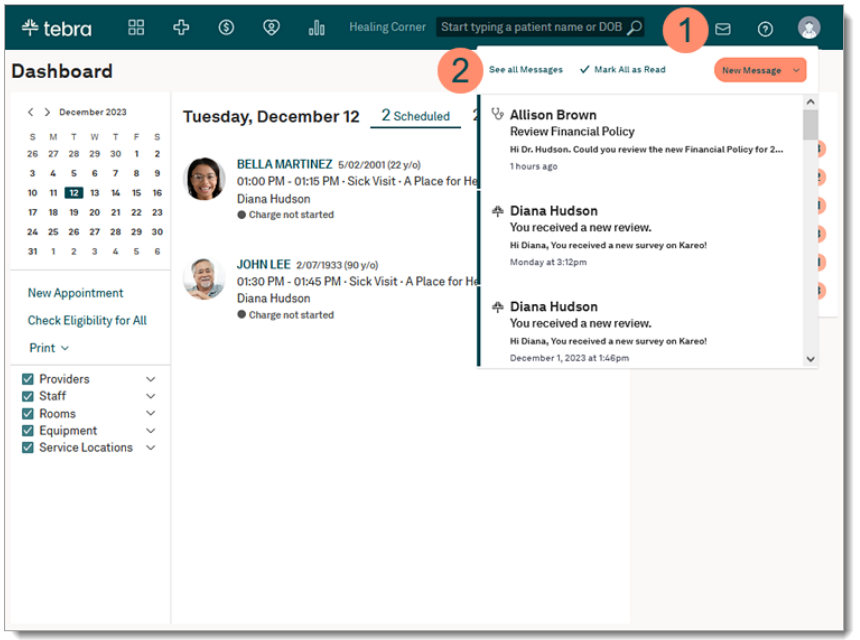
Message Center

The Message Center allows users within a practice to communicate with each other and with patients. This includes messaging between the Web Platform, Desktop Application (PM), and mobile applications. Create 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 lets patients reply directly to any communication they receive and delivers responses right to your 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.



(Continued next page...)

Message Center, cont.

3. **Settings:** Set up user specific message preferences. Review the Message Settings section for instructions.

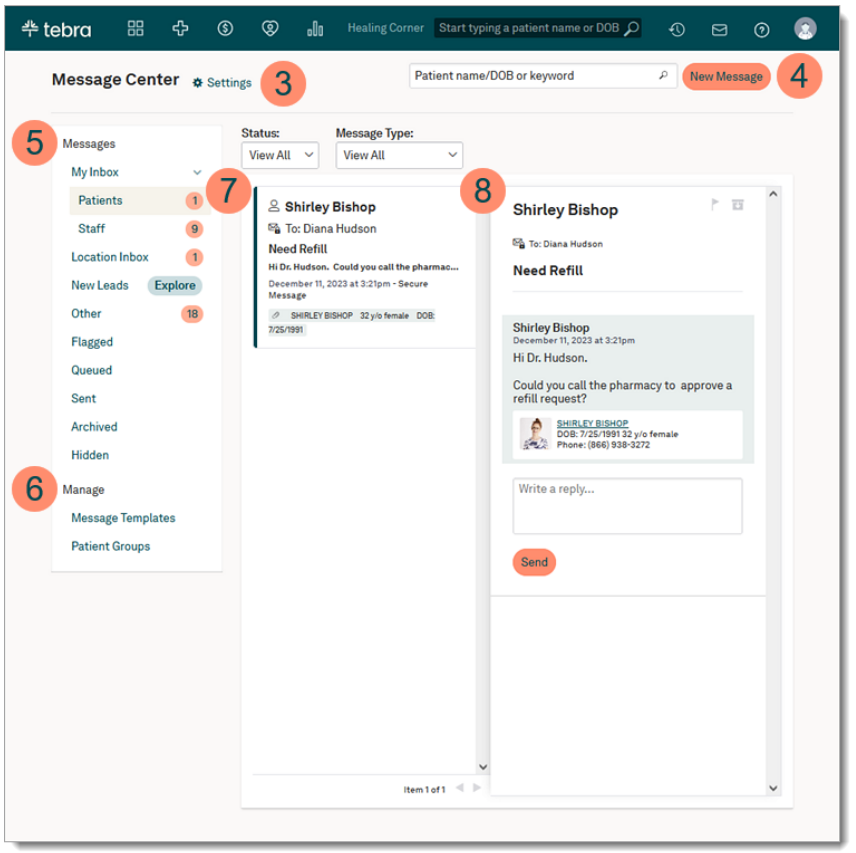
4. **New Message:** Create new messages for staff or send patient(s) an email or text. Review the Send Staff Message section for instructions to message staff member(s).

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.

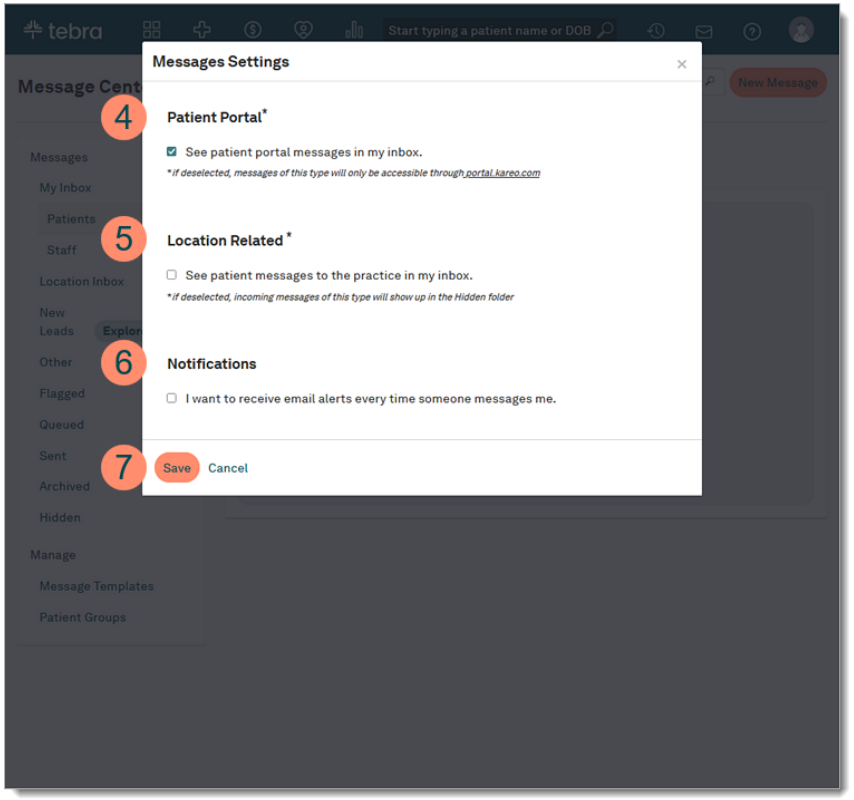


tebra

Message Settings

Set up your preference for Patient Portal messages, location related messages, and email notifications. If you are a System Administrator with a provider or clinical assistant user role, you can also choose to view patient replies to the practice. Review the Configure Message Settings help article to learn more.

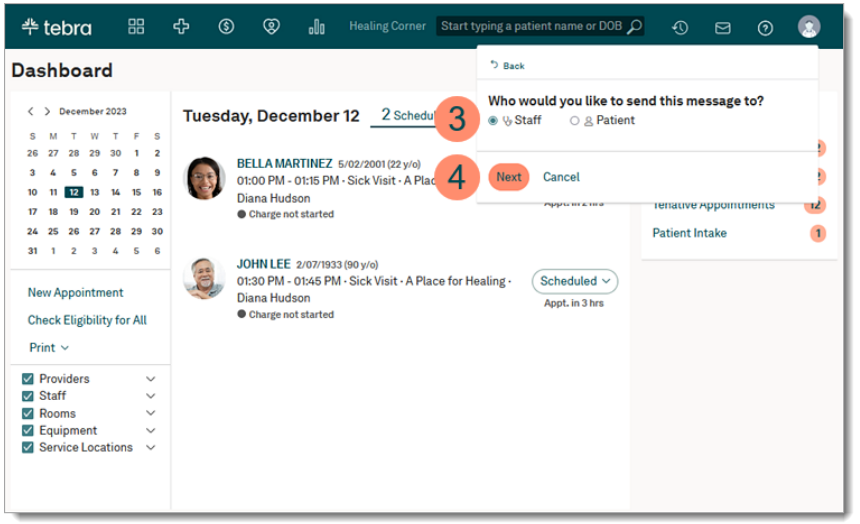
1. Click the **envelope** icon. The messaging summary window opens.
2. Click **See All Messages**. The *Message Center* opens.
3. Click **Settings**. The *Messages Settings* pop-up window opens.
4. **Patient Portal:** By default, this option is selected and allows *Patient Portal* messages to appear 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.

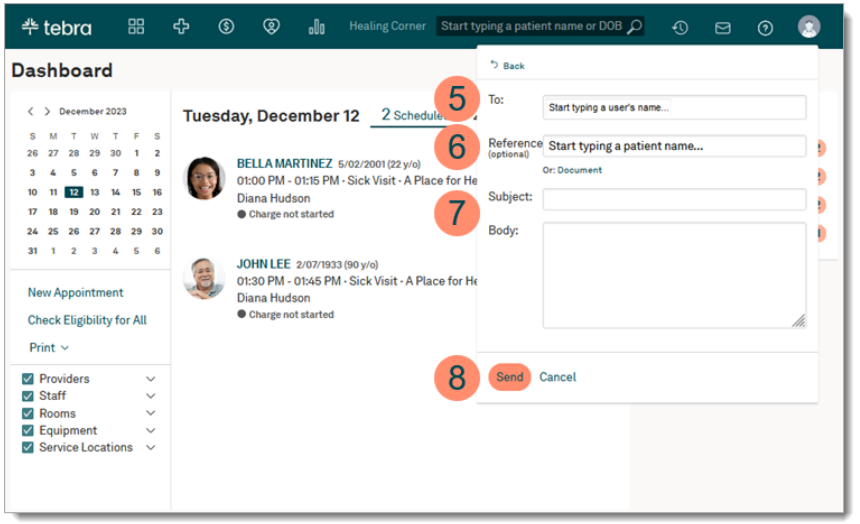


Send Staff Messages

You can securely send messages to other staff members in the practice and if applicable, reference a patient or document.

1. Click the **envelope** icon. The messaging summary window opens.
2. Click **New Message**. The *New Message* window opens.
3. Click to select "Staff".
4. Click **Next**. The *New Message to Staff* pop-up window opens.
5. **To:** Begin typing the staff member's name and select it when displayed.
6. **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.
7. **Message:** Enter the *Subject* and a message in the *Body*.
8. Click **Send** when finished.





Learn More

Help Center

Access 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 to access Tebra University and register for live trainings, view pre-designed courses and eLearnings. Review the Tebra University help article to learn more.

Admin Setup Guide Part 2

For Billing subscribers, continue to Admin Setup Guide Part 2 for instructions to configure 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.

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.

The Digital Backbone for Practice Success

Tebra is the digital backbone built for both patient and provider well-being. From practice growth technology to clinical and financial software, our complete operating system is structured to modernize every step of the patient journey and support the connected practice of the future.

© 2023 Tebra Technologies, Inc