



Your Kareo Onboarding Success Plan

It all starts with your Customer Success Coach

Your dedicated Customer Success Coach will be with you all the way from signup to submitting your first claim! They will walk you through the applicable training and setup activities for your Kareo Platform. With your Success Coach you will initiate the e-claim enrollment process, enroll in Kareo University for Live Training and e-learning courses, and prepare for any data import or migration needs.



How to Prepare

To maximize your time with your CSC, prepare the following:

- Names and emails for all users.
- Individual and Group NPIs.
- Provider's Tax ID or SSN.
- Provider's Medicare PTAN.
- Provider's Medicaid number.
- Provider BCBS number.
- Names and addresses of your insurance payers.

Time Commitment

Your time commitment will vary based on your prior industry experience:

- **Expect it to take up to 4 weeks before you can begin really billing.**
- **Provider:** Plan to spend 1-2 hours with your CSC.
- **Clinical staff:** Plan to spend 2-10 hours with your CSC.
- **Billing staff:** Plan to spend 2-10 hours with your CSC, about 6 hours of webinars and an additional 20-30 hours of online training if you're new to billing.

What to Expect

You've got your CSC's training wheels for the first 60 days if you need it, make them count!

- Your CSC will call to schedule a welcome call within 24 hours of your account creation.
- He or she will help you choose a Clearinghouse, discuss data entry options, and help you download the Kareo application.
- Next, your CSC will guide you through the 7 live trainings, or you can choose to watch the videos on your own.

Get started today.
Just visit www.kareo.com to sign up.



If at any time you decide “**do it yourself**” is not for you, the flexibility is yours to add services from Kareo or our partners, with **no charge to switch**. That's a Kareo promise.

Get started now!

- 1 Now**

 - Begin your practice setup wizard.
 - Get a call from your CSC.

Start your enrollment process.

 - Enter patients by hand if you choose.
 - Start training videos if you like.
- 2 Within the next few days**

 - Get your commercial payers approvals!
 - Start submitting your commercial claims.
 - Get scheduled for training sessions.
 - **For many, this may be all you need!!!**
- 3 Up to 2-4 weeks**

 - Medicare enrollment.
 - BCBS enrollment.
 - ERA's start to auto-post!
- 4 Up to 4-8 weeks**

 - Complete your training videos.
 - Finalize settings on your account.
 - Test CMS-1500 form printing.
 - Update any necessary patient forms.
- 5 90-120 days...GRADUATE!**

 - Depending on your pace and previous experience, you could be ready to bill with Kareo even sooner!

Your Kareo Support Team

| We can help | What we can do for you |
|---------------------------------|--|
| Customer Success Coach | <ul style="list-style-type: none"> • Your key contact during implementation period. • Assists with training registration, enrollment initiation, and any product/software inquiries throughout the implementation process. |
| Training Specialist | <ul style="list-style-type: none"> • Hosts live training sessions so you can ask all the Q&A you like! |
| Enrollment Specialist | <ul style="list-style-type: none"> • Responsible for communicating with clearinghouse and insurance payers to enroll customers for their requested services. • Assists with paperwork related to enrolling in electronic services. |
| Customer Support Representative | <ul style="list-style-type: none"> • Provides ongoing support for day-to-day product questions. • Available through Email, Live Chat, or Phone. |
| Data Integration Specialist | <ul style="list-style-type: none"> • Responsible for assisting with data imports and data migrations. • Communicate with customers regarding pricing, timeline, and logistics of importing/migrating patient and insurance data. |