

Onboarding Success Guide



Today: Sign up with Kareo

What to expect

Your Solution Consultant will send you a personal email with a customized sign up link allowing you to complete your Kareo sign up.

Action

Sign up for Kareo!

Kareo Setup



How we're helping

- Once you sign up, you will receive a welcome email from your assigned Success Coach and a follow-up welcome call within one business day.



Welcome

What to expect

Your assigned Success Coach will call and welcome you to Kareo. You will be asked a few early questions to help get your account started quickly.

Action

Complete the setup process, sharing some basics about your practice and providers.

Kareo Setup



How we're helping

- Your Success Coach will make sure your setup is complete and help you register for both required and recommended training courses based on your Kareo solution.



Account Settings

What to expect

Your Success Coach will work with you to ensure proper setup of your account .

Action

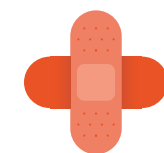
Configure your critical settings in the platform

1. Complete Provider Profile
2. Configure Calendar Settings (including Appointment Reminders)
3. Set up Patient Payments



ENGAGE

- Configure patient survey/online review settings
- Set up patient recall settings
- Run the Online Directory Manager



CLINICAL

- Customize chart notes
- Customize templates
- Enroll for electronic prescriptions
- Enroll for eLabs
- Download the mobile application



BILLING

- Set up provider overrides
- Set up fee schedule
- Complete enrollments for e-claims, ERAs, and EFT

Kareo Setup



How we're helping

- Your Success Coach will walk you through setup and confirm your critical account settings.



Training

What to expect

Our most successful practices take full advantage of the following training tools:

- Kareo University eLearning courses
- Live 1:1 or Group webinars
- Resource guides from our Help Center
- Custom and on-site training options

While there is a fee involved with custom and on-site training, this may be the best way to get up to speed quickly and successfully with Kareo

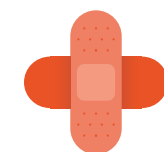
Action

Register for training sessions required by your Success Coach. These courses are a requirement for graduation. Get started on training with:



ENGAGE

helpme.kareo.com/03_DoctorBase/Getting_Started



CLINICAL

helpme.kareo.com/02_Kareo_EHR/Getting_Started



BILLING

helpme.kareo.com/01_Kareo_PM/Getting_Started

Kareo Setup



How we're helping

- Your Success Coach will work with you to develop a training plan that includes required sessions for key roles within your office (office manager, biller, provider, front desk).



Launch

What to expect

You're ready to start using Kareo! Your Success Coach will review the training sessions you completed to ensure that your account is ready for launch.

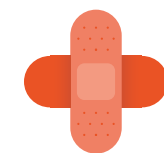
Action

Begin utilizing key functions in Kareo! Learn the popular features that help improve your workflows such as using the calendar features for appointment scheduling and reminders.



ENGAGE

1. Send patient surveys
2. Recall features
3. Online Directory Manager



CLINICAL

1. Chart notes from clinical visits
2. Electronically prescribe medications
3. Utilize mobile features (calendar, chart notes, eRx)
4. Electronically send lab information



BILLING

1. Submit claims electronically
2. Review clearinghouse reports
3. Begin posting patient payments

Kareo Setup



How we're helping

- Your Success Coach will review your account settings to make sure you're ready to launch. They'll then walk you through sending your first batch of claims electronically and reviewing your first clearinghouse reports to make sure your claims are processing successfully.



Launch Follow up

What to expect

Your Success Coach will review settings, roles/training completed, and actual usage (number of notes, A/R, claim submissions, etc.) for evidence of use within the practice.

You will be reminded about the importance of measuring your success and looking for signs of it. What did you measure and what did you see?

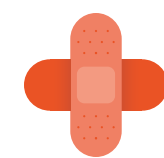
Action

Review your available resources to include the following:



ENGAGE

1. Check your progress in the Performance Dashboard. For example, how many surveys and reviews you have received as well as number of online appointments generated.



CLINICAL

1. Chart notes
2. Number of electronic prescriptions sent
3. Number of e-labs ordered
4. Use of our mobile application



BILLING

1. Review the Rejection Guide to help troubleshoot any claims that need rebilling
2. Register for your final training session to learn Payment Posting, after you begin receiving ERAs in Kareo

Kareo Setup



How we're helping

- Your Success Coach will schedule a Launch follow up call to review any items with you.

Engage: How to read and interpret your Performance Dashboard.

Clinical: Review the status of your electronic enrollments, calendar settings, and mobile access.

Billing: Assist with registering you for your final training on payment posting.



Graduation

What to expect

Your Success Coach will discuss any outstanding items with you such as remaining training sessions and reports showing your progress. They will ask you to rate yourself from 1-5 depending on your readiness. A 4 or 5 means that you are ready to graduate! A lower score (1-3) means you still have questions and are unsure about your readiness. Don't worry, we are still here to help you!

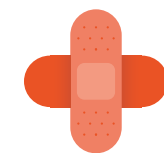
Action

If you are ready to graduate, you will be introduced to a helpful resource in the platform. The Solution Center allows you to see how you can extend Kareo to other aspects of running a successful practice. These include Kareo Clinical(EHR), Kareo Billing (PM), Kareo Engage and more! Here you can see what's currently available for your providers and what can be quickly added to your subscription.



ENGAGE

1. Managing your online reputation and building your online presence with "online directory manager" and "reviews"
2. Connecting with patients through surveys, reviews and appointment reminders



CLINICAL

1. Using all of the clinical functions to document patient visits
2. Electronically prescribing or sending lab information



BILLING

1. Reviewing reports (such as A/R and payment details)
2. Processing claims successfully

Kareo Setup



How we're helping

- Remember that Kareo wants to support your successful practice! To help, we offer ongoing training, resource guides and great "how to" articles in our [Help Center](#). If you are having any issues using Kareo that are not addressed by these resources, our Kareo Support Team is ready to assist with any technical questions. You can reach us by phone, email or live chat.

Phone number: 888-775-2736

Email: support@kareo.com

Chat: www.kareo.com/helpme

