



# Kareo University

Get Started

Updated: October 2022

# Introduction

Kareo University is a free online Learning Management System available to all customers to register for live trainings, view pre-designed courses, and eLearnings anytime, anywhere.


The Kareo University – Get Started guide is designed for new customers or users. They will learn how to log into Kareo University to access their role-based trainings, review courses assigned by role, and how to browse optional trainings.

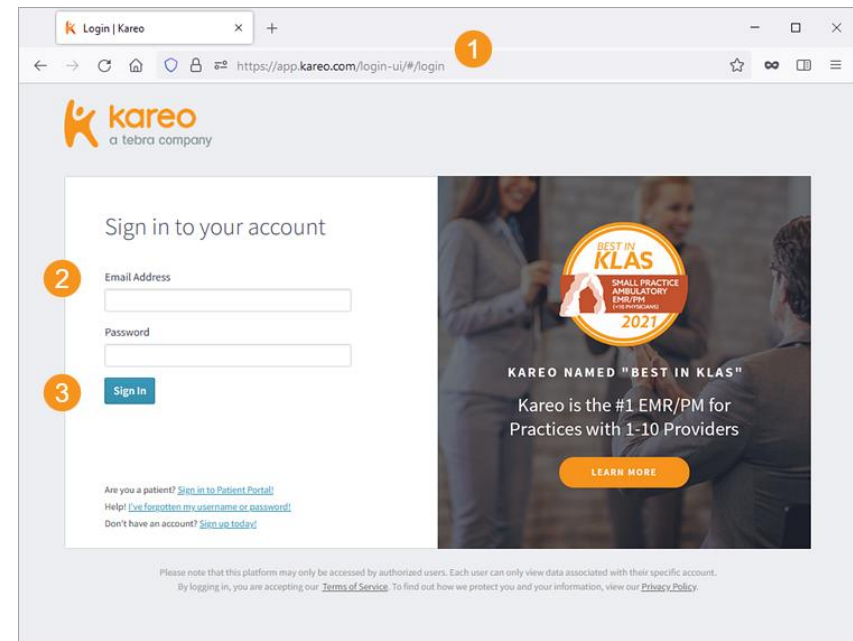
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# Access Kareo University

Log into the web platform to access Kareo University from the *Dashboard*.

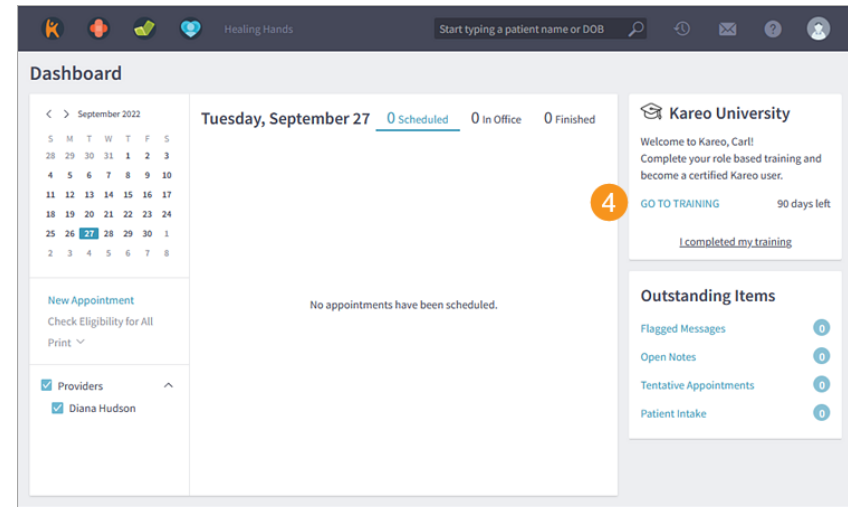
1. Open an internet browser, such as Google Chrome and Firefox. Then, type [app.kareo.com](https://app.kareo.com) in the top address bar and press **Enter** on your keyboard. The *Kareo* login page opens.  
 Tip: Bookmark the URL for easy access.
2. Enter the email address associated with your Kareo username and your password.
3. Click **Sign In**. The *Kareo Dashboard* page opens.



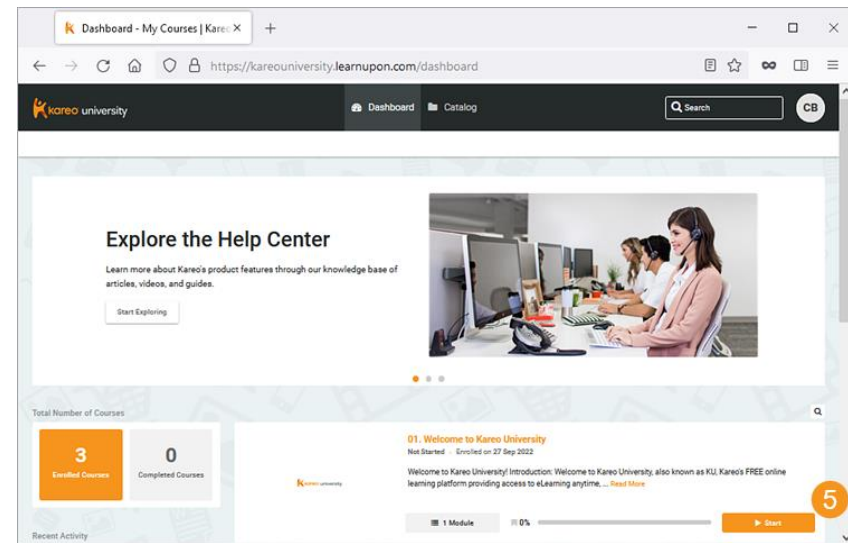
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## Access Kareo University, cont.

- Click **GO TO TRAINING** to access courses designed for your user role(s) and register for live trainings. The *Kareo University* dashboard opens in a new browser.



- Welcome to Kareo University:** Click **Start** to watch a quick video to learn how to navigate Kareo University and how to access additional resources.  
 ⓘ Note: It is recommended that all users complete this course.



# Assigned Courses

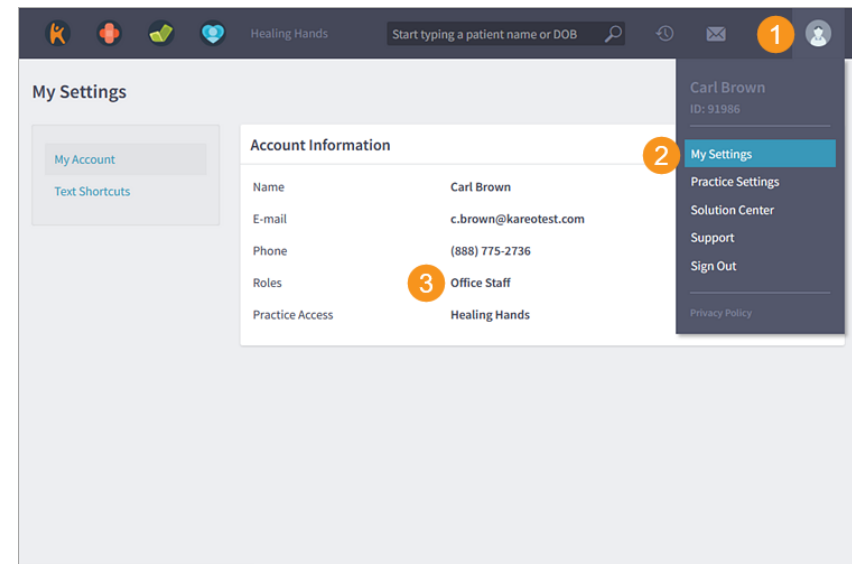
Courses in Kareo University are assigned to users based on their role(s) in Kareo. It is recommended that you complete the assigned role-based trainings to streamline your day-to-day workflows and become a certified Kareo user. Review this section to learn how to find which role(s) were assigned to you in Kareo and which courses you will need to complete based on your role(s).

In addition to the assigned courses, browse optional role-based trainings in the course catalog. Review [Additional Courses](#) to learn more.

## Find User Roles

Review the following instructions to determine which role the practice's System Administrator has assigned to you in Kareo.

1. Hover over the *User* icon.
2. Click on **My Settings**. The *My Settings* page opens.
3. **Roles**: Displays the role(s) assigned to your user. Courses in Kareo University are assigned to you based on these roles.  
Note:



## Assigned Courses by Role

Review the Kareo University courses assigned to each role: [System Administrator](#), [Office Staff](#), [Provider](#), [Clinical Assistant](#), or [Billor](#). If the role-based course assigned is not applicable to you, unenroll from the course. Review [Unenroll Course](#) for instructions to remove the course.

**i** Note: If you have multiple roles in Kareo, your assigned courses in Kareo University includes courses for all your roles.

### System Administrator

The following courses are assigned to users with a System Administrator role in Kareo.

Course	Description	Length
<b>Kareo Messages Training</b>	Learn how to navigate Kareo's Message Center to effectively communicate with your patients and staff members.	30 minutes
<b>Getting Started with Kareo - Admin Set Up Guide</b>	Learn how to configure practice settings.	90 minutes

### Office Staff

The following courses are assigned to users with an Office Staff role in Kareo.

Course	Description	Length
<b>Kareo Messages Training</b>	Learn how to navigate Kareo's Message Center to effectively communicate with your patients and staff members.	30 minutes
<b>Office Staff Training</b>	Learn how to manage patients, scheduling, reminders, secure messages, and documents.	90 minutes

## Provider

The following courses are assigned to users with a Provider role in Kareo.

Course	Description	Length
<b>Kareo Messages Training</b>	Learn how to navigate Kareo's Message Center to effectively communicate with your patients and staff members.	30 minutes
<b>Provider Training</b>	Learn how to document the patient's visit from beginning to end. ⓘ Note: This course is designed for medical providers. If applicable, mental health providers can unenroll from this course and enroll for the <b>Mental Health Provider Training</b> from the course catalog. Review the <a href="#">Unenroll Course</a> section for instructions to unenroll from the Provider Training course. Then, review the <a href="#">Additional Courses</a> section for instructions to enroll for the Mental Health Provider Training course.	2 hours
<b>Medication Management</b>	Learn how to recognize the basics of eRx and EPCS enrollment, prescribe medications, manage medications and supplies, and generate clinical reports. ⓘ Note: This course is designed for prescribing providers. If this course is not applicable, unenroll from this course. Review the <a href="#">Unenroll Course</a> section for instructions.	30 minutes

## Clinical Assistant

The following courses are assigned to users with a Clinical Assistant role in Kareo.

Course	Description	Length
<b>Kareo Messages Training</b>	Learn how to navigate Kareo's Message Center to effectively communicate with your patients and staff members.	30 minutes
<b>Clinical Assistant Training</b>	Learn how to obtain and record routine patient information in preparation for the provider.	60 minutes



<b>Medication Management</b>	<p>Learn how to recognize the basics of eRx and EPCS enrollment, prescribe medications, manage medications and supplies, and generate clinical reports.</p> <p><i>i</i> Note: This course is optional for Clinical Assistants to review a prescribing provider’s workflow. If this course is not applicable, unenroll from this course. Review the <a href="#">Unenroll Course</a> section for instructions.</p>	30 minutes
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## Biller

The following courses are assigned to users with a Biller role in Kareo.

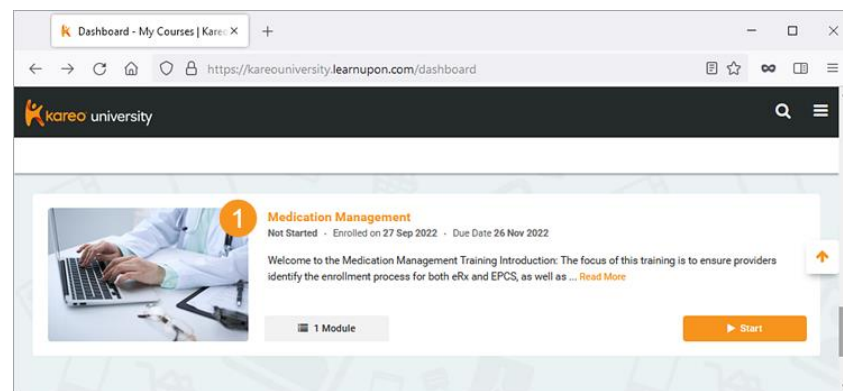
Course	Description	Length
<b>Kareo Messages Training</b>	Learn how to navigate Kareo's Message Center to effectively communicate with your patients and staff members.	30 minutes
<b>Biller Part 1 – Managing Patients Training</b>	Learn how to effectively manage patient records in Kareo’s Desktop Application (PM).	60 minutes
<b>Biller Part 2 – Entering and Submitting Charges Training</b>	Learn how to create and approve Encounters within Kareo’s Desktop Application (PM).	60 minutes
<b>Biller Part 3 – Managing Claims Training</b>	Learn how to effectively manage claims in Kareo’s Desktop Application (PM).	60 minutes
<b>Biller Part 4 – Payment Posting Training</b>	Learn how to effectively post insurance payments in Kareo’s Desktop Application (PM).	90 minutes
<b>Biller Part 5 – Patient Collections Training</b>	Learn how to effectively manage patient collections post patient visit in Kareo’s Desktop Application (PM).	60 minutes
<b>Biller Part 6 – Kareo Billing Reports Training</b>	Learn about Kareo’s standard reports and features in Kareo’s Desktop Application (PM).	60 minutes
<b>Kareo EDI Enrollment Training</b>	Learn how to enroll in Electronic Data Interchange (EDI) services with insurance companies in order to submit claims, perform real-time eligibility, and receive ERAs electronically.	30 minutes

## Unenroll Course

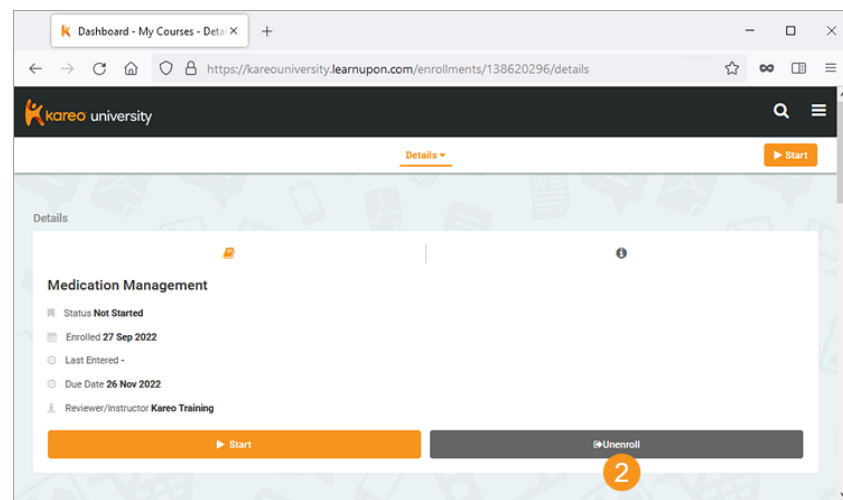
Courses in Kareo University are assigned to users based on their role(s) in Kareo. When the course is not applicable to your practice or workflow, unenroll from the course to remove it from the dashboard.

If necessary, browse the course catalog to view and enroll for course that apply to you. Review [Additional Courses](#) for instructions.

1. From the Kareo University Dashboard, click on the **course name**. The course details page opens.



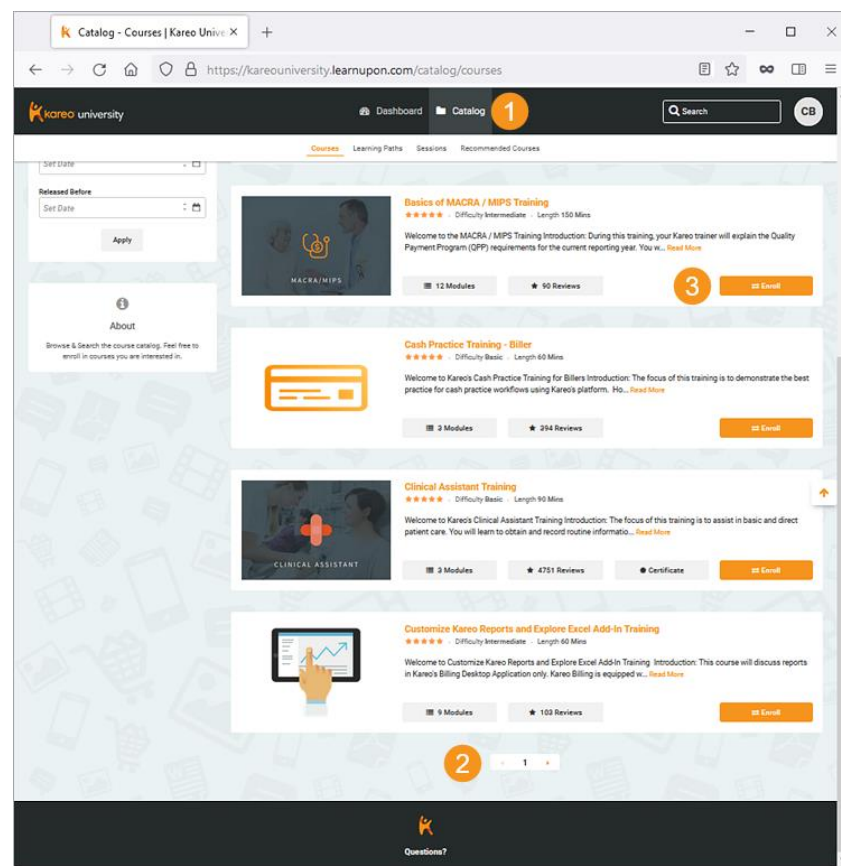
2. Click **Unenroll**. The *Are you sure?* pop-up window opens.
3. Click **Yes** to confirm. The course is removed from your dashboard.



# Additional Courses

Optionally, browse Kareo University's course catalog for additional role-based trainings such as: Kareo Telehealth Training, eLabs Training, Template Editor Training, and more.

1. Click **Catalog**. The *Catalog* page opens.
2. **Courses:** Review the optional courses. Click the **left or right** arrows to browse additional courses.
3. **Enroll:** Click to add the course to your *Kareo University Dashboard*. Once enrolled, complete the training at your own pace.



## Learn More

Review the [Kareo University](#) help article to review frequently asked questions. Additionally, access [helpme.kareo.com](https://helpme.kareo.com) to view help resources, monthly product release notes, help articles, guides, training videos, [support contact information](#), and more.



Kareo is the leading cloud-based complete medical technology platform purpose-built to meet the unique needs of independent practices in more than 45 specialties.

Today Kareo helps over 75,000 providers in all 50 states run more efficient and profitable practices, while delivering outstanding patient care. The Kareo technology platform is the first to help independent practices find more patients, manage their care with a fully certified and easy-to-use EHR, and get paid quickly all in one complete and integrated package.

Kareo has received extensive industry recognition, including the Deloitte Technology Fast 500, Inc. 5000, and Black Book's #1 Integrated EHR, Practice Management and Medical Billing vendor, as well as ranking at the top of the Leader Quadrant in the FrontRunners Software Analysis of EHR. Kareo's growth further demonstrates the expansion and vitality of the independent practice market in the U.S. With offices across the country, Kareo's mission is to help independent practices succeed in an ever-changing healthcare market. More information can be found at [www.kareo.com](http://www.kareo.com) or by calling 888-775-2736.