Managed Billing Front Office (Web)

Time: 60 minutes

Audience: Front Office Staff, Scheduler, Administrator

Training Policy: Due to the limited number of live sessions, if you are unable to attend, please cancel your registration at least 24 hours in advance. Registration for all sessions closes 24 hours before the start time. If no one shows up five minutes after the session starts, the class will be canceled and will need to be re-scheduled.

Here's What You'll Learn

Overview

Front Office training will demonstrate how to create and manage patient records, schedule patient appointments, and understand all aspects of checking in a patient, including collecting copays and printing patient balances.

Objectives

- Kareo Platform Overview
- Messaging Options
- Create Patient Record
- Manage Billing Profile
- Complete Calendar Settings
- Schedule Patient Appointments
- Patient Check In Process
- Access Resources for Additional Assistance

Outline

Introduction
- Training Overview
- Review Login Instructions

Home/ Agenda
- Explore Kareo Platform Functions
- Identify Modules
- Review User Icon and Kareo ID
- Agenda Overview

Messaging
- Message Settings
- Messaging Buckets
- Initiate New Message
- Contact Support

Patients
- Create Patient Record
  - Upload Photo
- Explore Demographics

- Additional Tabs

Account
- Create Cases (Insurance and Self Pay)
- Manage Payment Cards
- Create Alerts

Calendar
- Review Calendar Settings
- Schedule/Edit Patient Appointments

Check-In Process
- Check Eligibility
- Review Print Options
- Collect Copay
- Change Patient Status

Additional Resources
- Discover Solution Center
- Explore Help Center