Managed Billing Workflow (Web)

Time: 60 minutes

Audience: Administrators

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

Billing Workflow Training will demonstrate how to upload batch documents, locate and run on demand reports and manage billing tasks. You will learn how to visually track claims and customers not using an integrated EHR will learn how to use Kareo's Charge Capture.

Objectives

- Kareo Platform Functions
- Messaging Options
- Batch Document Instructions
- Manage Reports
- Navigate Billing Tasks Window
- Assign/Complete Tasks
- Navigate/Review Insurance Claim Window
- Utilize Charge Capture
- Access resources for additional assistance

Outline

Introduction

- Training Overview
- Review Login Instructions

Agenda

- Discover Platform Functions
- Identify Kareo Modules
- Explore Agenda
- Review User Icon & Locate Kareo ID

Messaging

- Review Message Settings
- Initiate New Message
- Contact Support

Documents

- Review Document Handout
- Demonstrate Naming Convention
- Upload Documents
- Examine Required Logs

Reports

- Access Reports
- Run On-Demand Reports
- Request Additional Subscribers

Billing Tasks Window

- Review Filters & Categories
- Identify Individual Tasks

Assigning Tasks

- View Task Details
- Review Instructions
- Start or Assign a Task

Complete Tasks

- Follow Assigned Instructions
- Attach Document
- Edit Charge
- Save and Complete
- Ask Kareo a Question

Navigate Insurance Collections

- Review Filters Statuses

Review Individual Claims

- Identify Practice Action Items
- View Tracking by Procedure
- Review Claim Stages
- Examine Claim Actions and Tasks

Patient Collections

- Review Filters and Statuses
- Examine Patient Balance
- Collect Payment
- View Account History
- Manage Patient Alerts

Charge Capture

- Explore Charge Capture
- Create a Charge
- Submit a Charge

Additional Resources

- Discover Solution Center
- Explore Help Center
- Review Resource Center