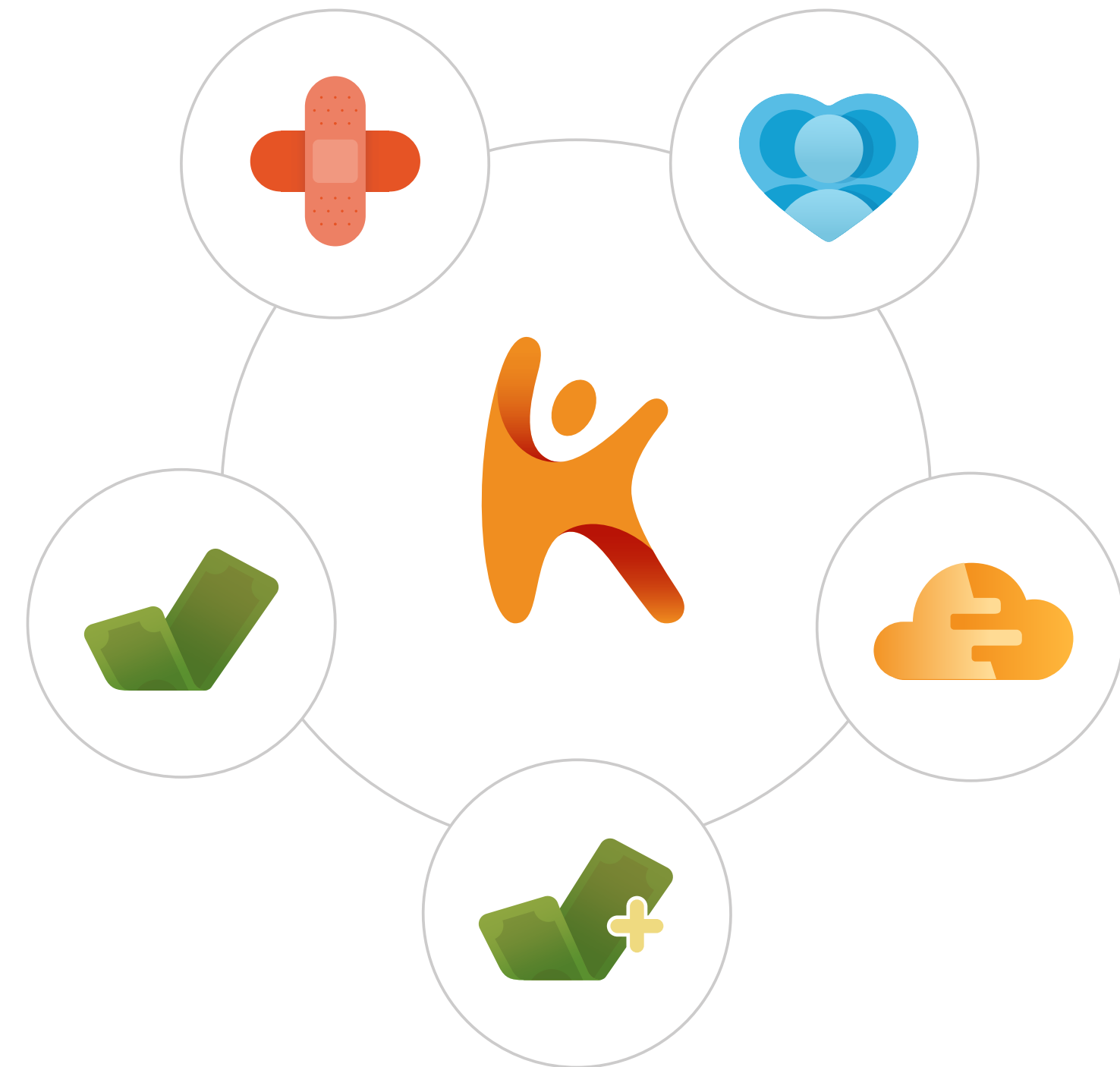




Onboarding Success Guide



Welcome to Kareo

What to expect:

Your new Kareo Success Coach is busy assembling your new medical billing team and creating your customer account based on the information provided in the Required Data Setup Form that you submitted to your Solutions Consultant with your signed contract.

You will soon be receiving a Welcome Call from your Success Coach.

Action:

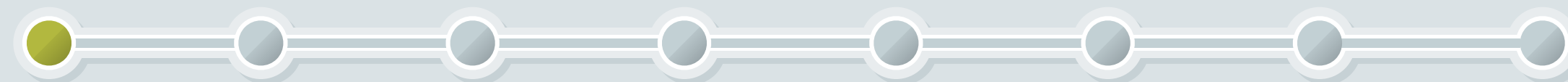
- Get Introduced to your Success Coach
- Gather any additional documents/information requested by your Success Coach

Kareo Setup



How we're helping:

- Your Success Coach is assembling your specialty-based medical billing team, setting up your account, and reviewing your information to ensure we have everything necessary to set up your medical billing account and begin your Enrollments.



Welcome Call

What to expect:

On your Welcome Call you will meet your new Success Coach and learn more about the Kareo Onboarding process.

Your Success Coach will identify additional information needed, outline the process we follow and the steps we will take to get your medical billing account up and running.

Necessary documentation includes:

- W-9
- Voided check
- Payer website logins

Review the Practice Setup Checklist for reference:

http://kareocustomertraining.s3.amazonaws.com/KMB/Roles_Responsibilities_Documents/CSC_Documents_Checklist.pdf

You will soon be receiving an invite to your next scheduled call – the Handoff Call.

Action:

- Review the Welcome Call Recap Email
- Review the Practice Setup Checklist
- Gather any additional documents/information requested by your Success Coach
- Accept the invite to the Handoff Call

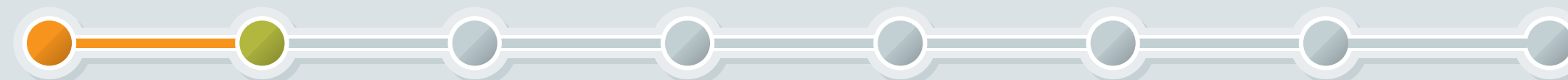
Kareo Setup



How we're helping:

- Your Success Coach will work with your specialized Billing Analyst to review all of your documents and information for completeness and accuracy so that your team can complete your account set up quickly and completely.

Your Success Coach is coordinating with your specialty-based billing team to prepare for the Handoff Call.



Handoff Call

What to expect:

During the 60 minute Handoff Call, you, your Success Coach, and your Solution Consultant will cover the following:

1. Kareo Contract Agreement and Terms
2. Your current business status
3. The Onboarding Process Overview: what to expect
4. The Practice Setup Checklist and any outstanding information needed
5. Your practice's training schedule
6. EHR integration
7. A technology preview: Log into the Kareo platform at app.kareo.com and review how to:
 - a. How to create user accounts
 - b. How to set up Stripe Patient Payments
 - c. Learn Basic Navigation of Admin settings

Action:

- Review the Handoff Call Recap Email
- Accept the invite to your next scheduled call - the Billing Rules Call
- Gather any additional documents/information requested by your Success Coach and your Billing Specialist
- Receive your training registration confirmation.

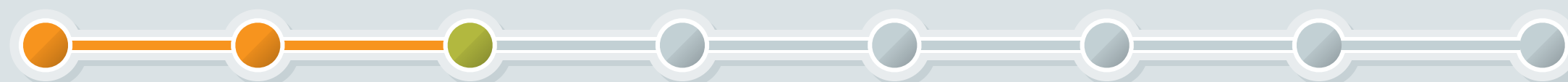
Kareo Setup



How we're helping:

- Your Success Coach is updating your account information, continuing your onboarding, enrollments, and setup, and coordinating and scheduling your group's technology and process training. The Success Coach will also begin any EHR integrations and data imports.

Your Success Coach will coordinate with your specialty-based billing team to prepare for the Billing Rules Call.



Billing Rules Call

What to expect:

You, your Success Coach and your Billing Analyst will have a 60-minute call for your billing rules. The Billing Rules Call will include an in-depth discussion around the specifics of your billing scenarios. Also, during this call we will review how you can best connect and communicate with your billing team on a regular basis.

The following information will be covered during this call:

- Credentialing
- Specialty specific rules
- Payer Requirements
- Provider Numbers to use
- Reporting
- Billing Tasks
- Fee Schedules
- Coding
- Charges
- Accounts Receivable

Action:

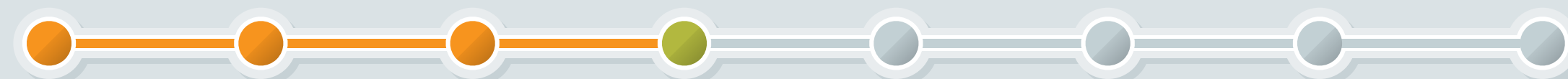
- Review the Billing Rules Call Recap Email
- Gather any additional documents/information requested by your Billing Analyst

Kareo Setup



How we're helping:

- Your Success Coach will configure your billing rules in your software and train your medical billing team on your account status and your billing rules. We will ensure your fee schedules, insurances, providers, practice, service location settings and information is populated correctly. Your Billing Analyst will complete a charge audit to ensure we are ready to begin submitting claims.



Training

What to expect:

The Kareo training team conducts two a live group sessions to help you understand best practices workflows and how to use the Kareo Software application.

Here's what you'll learn:

- Dashboard overview
- Messaging options
- Batch document instructions
- Manage reports
- Required logs
- Create patient record
- Complete calendar settings
- Schedule patient appointments
- Introduce EHR Admin settings
- EHR patient settings

Action:

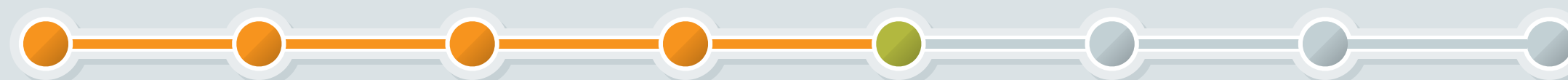
- Attend your two scheduled trainings
 1. Front Office Training
 2. Billing Workflow Training
- Review outlines here:
https://helpme.kareo.com/KMB/Kareo_Managed_Billing_Training

Kareo Setup



How we're helping:

- Your Success Coach will confirm your trainings are complete or reschedule you if you have any conflicts



First Claims

What to expect:

Your first milestone is your “go live” date.

Your Success Coach will contact you once we are ready to go live and start submitting claims

Your Success Coach will work with you to ensure the first set of charges are received properly

Your Success Coach will then schedule a call with you and your Billing Analyst one week after the go live date to ensure that everything is working properly to ensure a successful billing process, and to answer any questions. You will also meet your Advisor, who will become your strategic partner and main point of contact for day to day billing questions.

Action:

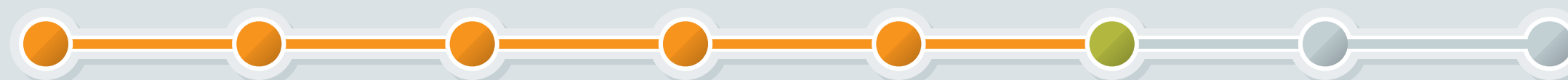
- Start submitting your charges
- Be sure to check and clear any billing tasks

Kareo Setup



How we're helping:

- Your Success Coach and Billing Analyst will be monitoring your first batch of charges to ensure they are properly received and submitted.



Payments/Reimbursements

What to expect:

- The second milestone in your onboarding process is receiving payments/ERAs and auto-posting payments
- Your Success Coach OR your Advisor/billing team will let you know if we have any issues during the payment posting process
- Once you go live, you will start receiving payments within one to two weeks

Action:

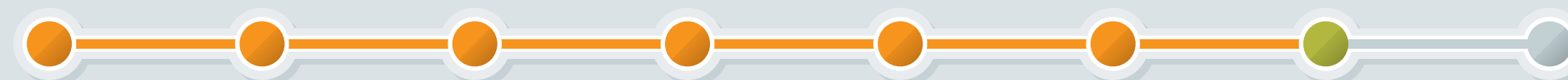
- Scan and send any paper EOBs to Kareo at least twice a week. Your Success Coach will work with you to identify best timelines and frequencies for you
- Collect patient responsible co-pays at time of service (also coinsurances and deductibles if/when possible)

Kareo Setup



How we're helping:

- Your Billing analyst conducts weekly charge audits of claim submissions and your Success Coach will schedule calls with you and your Advisor to review findings from the audits.



Graduation

What to expect:

The final milestone in the onboarding process is Graduation. This is when your organization is fully ramped up and successfully sending claims and receiving reimbursements.

You will receive a call and email from your Success Coach graduating you and transitioning you to your Billing Advisor.

Congratulations you are now making the most of your medical billing!

Action:

- Within the next week you will receive an onboarding experience survey. Please complete the survey so that we may continue to improve our processes.

Kareo Setup



How we're helping:

- Your Advisor will be monitoring your activity and reviewing reports that outline your progress.

