



Training 8: Practice Fusion & Kareo Integration

Time: 60 minutes

Audience: Kareo users using Practice Fusion EHR

Pre-requisite: Training 2

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 8 hours before the start-time. If no one shows up 5 minutes after the session starts, the class will be canceled and will need to be re-scheduled.*

Training 8 – Practice Fusion and Kareo will demonstrate the integration between both systems along with provide steps to immediately integrated your Practice Fusion account with Kareo. Upon completion of the *Practice Fusion and Kareo Integration* training you will be able to integrate your Practice Fusion account and begin to enter necessary information to ensure a smooth workflow.

Objectives

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- Outline the setup needed to integrate Practice Fusion with Kareo.
- Identify the information that will transmit between Practice Fusion and Kareo.
- Create and submit a bill from Practice Fusion.
- Detect common issues.

Outline

Integration Setup

- Define pre-requisite settings in Kareo
 - Practice Settings
 - Providers
 - Define Service Locations
 - Fee schedule
 - Integrate Practice Fusion and Kareo
- Access Help Center in the application
- Navigate resources in Help Center
- Explore Training opportunities
- Identify Customer Support options

Integrate Practice Fusion and Kareo

- Customize settings in Practice Fusion
 - Set User Permissions
 - Locating the Practice ID
 - Generate Payer List
 - Navigate Patient Tab
 - Create a Patient
 - Produce a Kareo Bill
- Troubleshoot common issues

Kareo Help & Support

- Kareo Help Center