

Time: 60 Minutes

Audience: System Administrator

Pre-requisite: None

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

During this training your Kareo Trainer will show you how to setup features and functionalities specific to the specialty of the practice. You will also learn how to complete calendar settings, setup patient communication options, and manage provider profile.

Objectives

- Navigate Kareo Agenda
- Explore My Settings
- Complete Practice Settings
- Access Additional Resources

Outline

Introduction

- Training Overview

Agenda

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

My Settings

- View My Account

Practice Settings

- Review Practice Information
- Create Insurance Companies & Plans
- Explore User Settings – Provider & Non-Provider accounts
- Add Service Locations
- Manage Provider Profiles
 - View Profile/Locate URL
 - Patient Access to Office Forms
- Configure Calendar Settings
 - Office Calendar Settings
 - Establish Provider Hours

- Review Patient Communications
 - Turn On Patient Appointment Reminders
 - Record Custom Greeting
 - View Sample Reminders
- Explore Payment Settings
 - Setup Patient Payments
- Review Misc.
 - Add/Manage Referring Physicians
 - Add/Manage Referral Sources

- Discuss Data Management
 - Import Demographics
 - Import/ Export Clinical Data
- View Kareo Menu
 - Security Policy
 - Legal Agreements

Additional Resources

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