

Time: 60 Minutes

Audience: Front Office Staff

Pre-requisite: Must have Kareo account access with User Login and Password

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 demonstrate best practices using Kareo Platform functions. You will learn how to save time communicating with patients with Kareo's automated appointment reminders. You will also be able to add patients, schedule patient appointments, create secure messages, successfully check-in patients for their appointments and upload documents.

Objectives

- Navigate Kareo Agenda
- Create Messages
- Manage Patients and Appointments
- Review Account Tab
- Check-In Patients
- Upload Documents
- Access Additional Resources

Outline

Introduction

- Training Overview

Agenda

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

Patients

- Create New Patient
- Quick Add Insurance
- Populate Additional Demographic Information
- Utilize Patient Portal Invite

Account

- Review/ Edit Patient Insurance Case
- Create Patient Self Pay Case
- Create Alert

Calendar

- Schedule Patient Appointments
- Edit Patient Appointments

Check - In Patients

- View Patient Record
- Collect Co-Payment
- Change Appointment Status

Documents

- Upload Documents
- Search Documents

Additional Resources

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