**Kareo Launch Protocol**

**Before seeing clients:**

1. Please **check client demographics** in client charts for accuracy, fill in missing info from OA that did not transfer, such as emergency contact, phone number, etc. Take this opportunity to verify accuracy with clients and update contact info. If you have not updated signatures in the past year, send electronic intake in Kareo and explain update needed.
2. Explain to the clients we now have a **patient portal** for secure communication, cash payments, etc and invite them under the demographics tab in their chart >Patient portal > click activate account.
3. **If insurance client**, go in their chart > left hand menu > account > Insurance + add New Insurance case (Beacon, scroll down to policy #1 and add Beacon as Plan name and Subscriber ID number and save). **Check eligibility** as usual through Beacon website and **record in the progress notes** under "insurance eligibility" section.
4. **If cash client,** go to account > Payment card and upload their credit card. Be sure to send the client the **credit card on file form** (while you schedule the appointment, or under the blue heart >intakes) to charge their card automatically. If a client does not pay, please reach out to Richard to send an invoice. The client can then pay by mailing a check, or by credit card through patient portal.
5. Remember to **create superbill and sign notes** in order to be paid for an insurance visit. Bill cash clients from the appointment card.
6. On your first superbill, **add favorites** to the list - ICD-10 codes you use, add a star. CPT codes, add to favorites **90791, 90837, T1014, Q3014**. Telehealth visits will have 3 codes, in-office visits will have one. Change **status to "Ready to submit" and save**. Then sign note.

**Kareo Launch Trainings next week - NEW TIMES**: Tuesday 11am and Friday 10am to go over a demo of this info and answer questions, you will receive a link via email from "Destiny Champion."