

Professional Practice



Rev 1/19/23 TG

Subscribed Reports

1. Go to <https://app.kareo.com/login-ui/#/login>
Login with your Username and Password.
Username: (your email address)
Password: _____

(The first time you login, you will be prompted to change your password and then login again)

A screenshot of the Kareo 'Change your password' screen. The header shows the Kareo logo. The main heading is 'Change your password'. Below it, a message states 'Your password has expired. Please create a new one.' There are two input fields: 'New Password' and 'Confirm New Password', both with masked characters and a copy icon. A blue 'Submit' button is at the bottom left. On the right, 'Password Requirements:' are listed: minimum length of 8 characters, contain alphabetic and numeric characters, contain special characters (!, @, #, \$, %, etc.), and contain upper and lowercase characters.

2. When you login, you will see your Dashboard Screen with a calendar on the left and a list of 'Outstanding Items' on the right.

A screenshot of the Kareo dashboard. The top navigation bar includes the Kareo logo, a user profile icon, and a search bar. The main content area is titled 'Dashboard' and features a calendar on the left for June 2021, showing the 7th as the current date. To the right of the calendar, it displays 'Monday, June 07' and summary statistics: 0 Scheduled, 0 In Office, and 0 Finished. On the far right, there is an 'Outstanding Items' section with three categories: 'Flagged Messages' (0), 'Tentative Appointments' (0), and 'Patient Intake' (0). A red arrow points to the 'Walking on Sunshine' logo in the top left corner.

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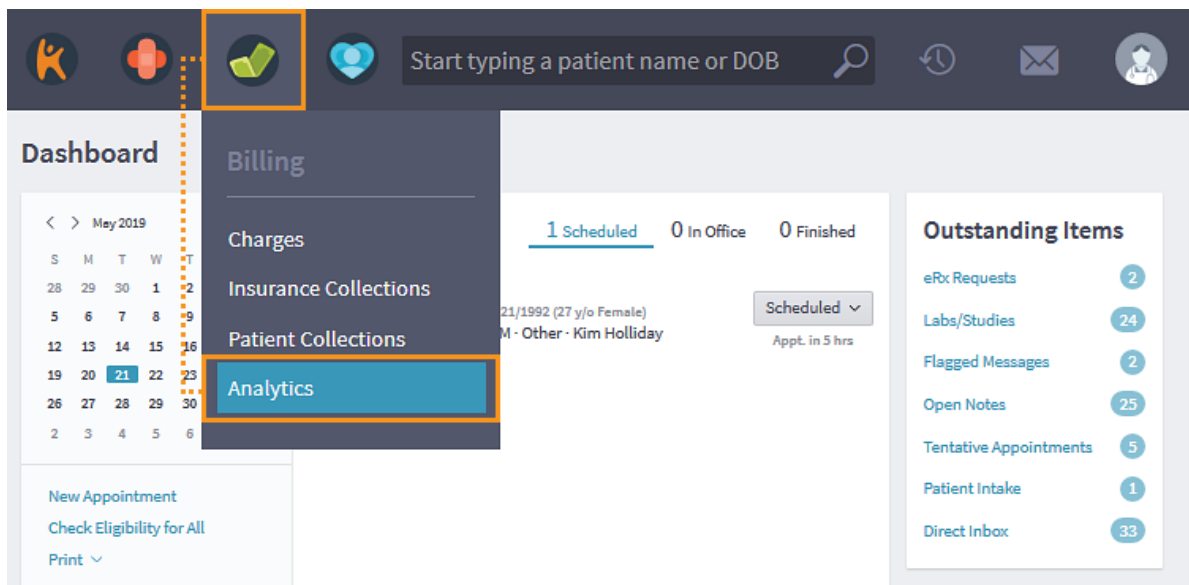
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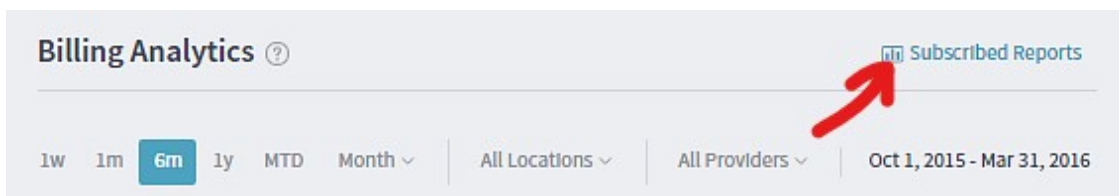


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3. Hover over the 'Billing' icon (green dollar ) and click "Analytics".



4. The billing analytics screens are a GREAT way to see the financial health and cash flow of your practice at a glance.
5. To retrieve your **Payments Detail report to accompany your invoice**, click on "Subscribed Reports" in the upper right.



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6. You should see a list of reports similar to the screen shot below:

A screenshot of the 'Reports' section in a software interface. At the top, there's a search bar with the text 'Start typing a patient name or DOB'. Below it, the 'Reports' section has a dropdown menu set to 'Subscribed Reports'. There are two tabs: 'Subscriptions' (active) and 'Delivered'. A table lists reports with columns for Name, Details, Frequency, and Owner. Two reports are visible: 'Key Indicators Detail' and 'Key Indicators Summary'. Each report has a 'Run Now' button on the right. The 'Key Indicators Detail' report has a 'View All' link in its details. The 'Key Indicators Summary' report also has a 'View All' link.

7. Click the **[Run Now]** button on the right, and the report will be generated and delivered to your inbox.
8. Click the Envelope Icon in the upper right section of the grey bar at the top of the screen, and click the first message in the list, where there will be a document to download.



9. I created and added several other reports in your list based on the inquiries that I frequently get from providers. Some reports will generate and deliver to your Kareo inbox on a regular schedule, and all are available any time with the **[Run Now]** button. In the future, the Payments Detail report will be automatically generated on the 28th of each month and will report data from the previous month.

10. **Notification in your Email Inbox.**

A screenshot of the top navigation bar of the Kareo system. It features a search bar with the text 'Start typing a patient name or DOB', a refresh icon, an envelope icon (highlighted with a red circle), and a user profile icon. Below the navigation bar, there are three buttons: 'See all Messages' (with a red arrow pointing to it), 'Mark All as Read', and 'New Message'.

To receive a notification in your email inbox when you have a report or message in your Kareo Message Inbox, open your

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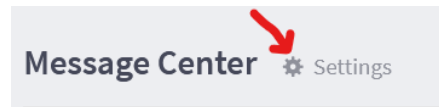
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Kareo Message Center by clicking the envelope icon, and then click the link to [See All Messages](#).

11. Click the grey Settings icon next to the “Message Center” title.



12. Select the types of notifications that you would like to receive in your email inbox from the list and click [Save].

A screenshot of a "Messages Settings" dialog box. The dialog has a title bar with "Messages Settings" and a close button (x). It contains two sections: "Patient Portal" and "Notifications". Under "Patient Portal", there is a checked checkbox and the text "I want Patient Portal messages and replies to show in my inbox." Under "Notifications", there is a checked checkbox and the text "I want to receive e-mail alerts every time someone messages me." At the bottom, there are two buttons: "Save" (highlighted in blue) and "Cancel".

13. If you select both, then you will receive an email with a link in your inbox whenever you have a report or message in your inbox.

If you have questions about reports or other parts of the Kareo Platform, you can contact our office or you can contact **Kareo at (888)775-2736** or by email at support@kareo.com

Thank you!

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