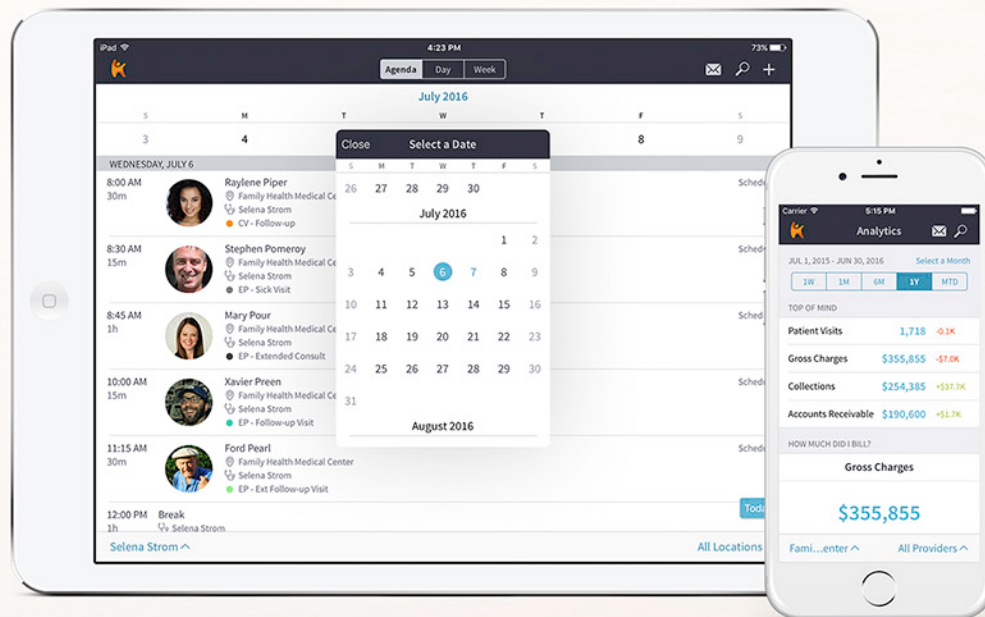


The only complete technology platform for your independent practice.

Learn how Kareo helps your practice thrive.



What's Inside

Who is Kareo?	3
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Kareo's Five Integrated Modules	5
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“We believe that independent practices are in the best position to provide the **personalized, results-oriented, and cost-effective care** that consumers demand and deserve.”

Dan Rodrigues, *Founder and CEO of Kareo*



Who is Kareo?

Kareo makes it easier and more rewarding for you to run an independent medical practice. We offer the only cloud-based, clinical and business management technology platform dedicated to serving the unique needs of independent practices. Our software helps you find and engage with patients, run a smarter business, provide better care, and get paid faster. More than 35,000 healthcare providers rely on Kareo with nearly 150,000 users logging in to our software every day.

How is Kareo Different?

Unlike other companies that built their offering for large medical groups or hospitals, Kareo is purpose-built for the work flows and unique needs of the independent practice.

The result is an affordably-priced platform without the bells and whistles that you don't need.

Kareo is Friendly, Flexible, and Transparent

We run our company based on business practices that are friendly, flexible, and transparent because we know you are relying on us to help you succeed.

As a Kareo customer, you'll feel appreciated and supported due to the many benefits including:

- Free onboarding including access to your own Success Coach
- No long-term contracts and flexibility to adjust your subscription without penalty
- A clear and simple pricing model that offers affordable ways to grow your practice
- Easy access to support via phone, chat, and email at no additional cost



BLACKBOOK #1

Integrated EHR, PM and RCM



MORE THAN 35,000 PROVIDERS

rely on Kareo to run a successful practice



MANAGING \$15 BILLION+

in annual collections



OVER 150,000 ACTIVE USERS

log in to Kareo every day

Introducing the Kareo Platform

For years, medical software played a mixed role for medical practices. It reduced complexity in some areas and added complexity in others. Kareo is changing this to help you succeed with helpful technology.

Kareo is the first and only technology platform built with the provider and the patient in mind, allowing you to efficiently and effectively manage all of the major functions of your practice.

Kareo is unlike any other software in the industry. It is the only fully integrated and complete, cloud-based platform that provides a seamless user experience.



Kareo's Five Integrated Modules

Kareo offers five separate but fully integrated modules designed to meet the unique needs of the independent practice.

KAREO MARKETING

With Kareo Marketing, you get automated marketing and front office tools to help build your brand online and connect with patients. We make it easy for patients to find you, choose you, promote you, and come back.

KAREO MARKETPLACE

Kareo Marketplace extends the value of your software. We partnered with some of the most innovative companies in the world and integrated these functions into Kareo. These include areas as clinical, billing, and business management



KAREO CLINICAL (EHR)

Kareo Clinical is bringing back “easy”. We know you’re a healthcare provider, not a technologist. Work faster with easy look ups and create favorites for things you do every day including problem codes, medications, and patient education.

KAREO BILLING (PM)

There’s no better or more relied upon software to support your in-house billing process and get you paid. Our web and mobile applications help your practice easily manage patients and the complications that come with billing insurance.

KAREO MANAGED BILLING (RCM)

Let our experts help you run a more successful practice while focusing more on patient care. We’ll identify and eliminate the root cause of mistakes so that you can get paid faster and improve your financial health.



KAREO MARKETING

Shine online, connect with patients

With Kareo Marketing, you get automated marketing and front office tools to help you build your brand online and connect with patients. We make it easy for patients to find you, choose you, promote you, and keep coming back. Kareo Marketing helps you attract new patients, manage your online presence and proactively engage existing patients.

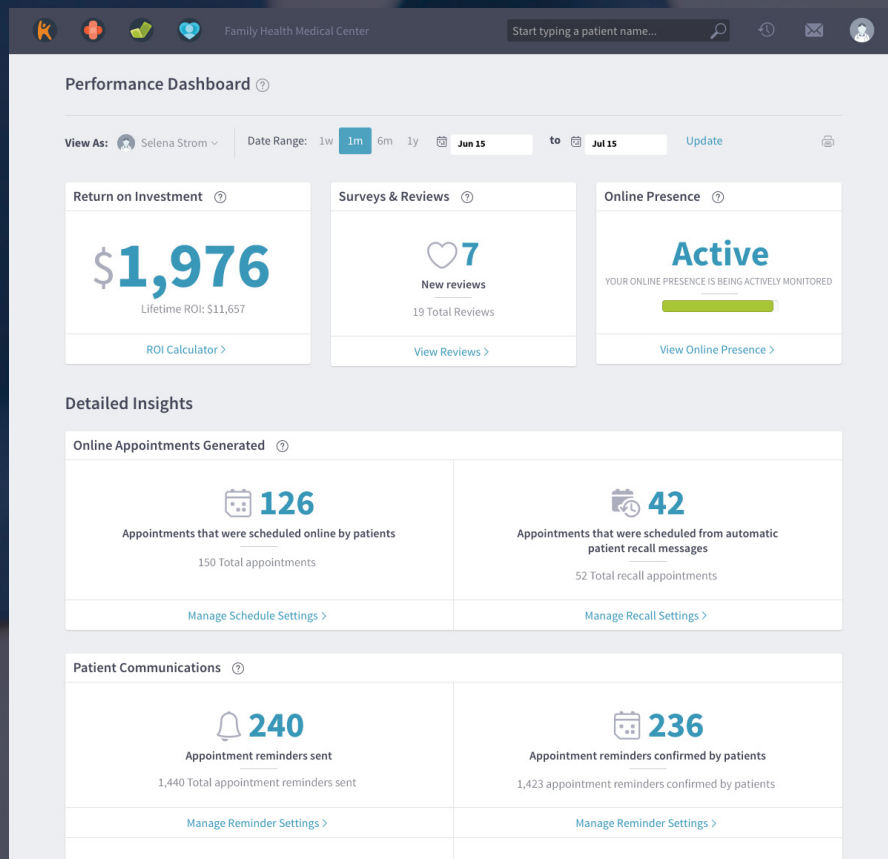
INCLUDED FUNCTIONS

- Appointment Reminders
- Online Scheduling
- Reputation Management
- Patient Surveys
- Online Provider Profile
- Practice Analytics



For a complete list of functions and features, see page 19





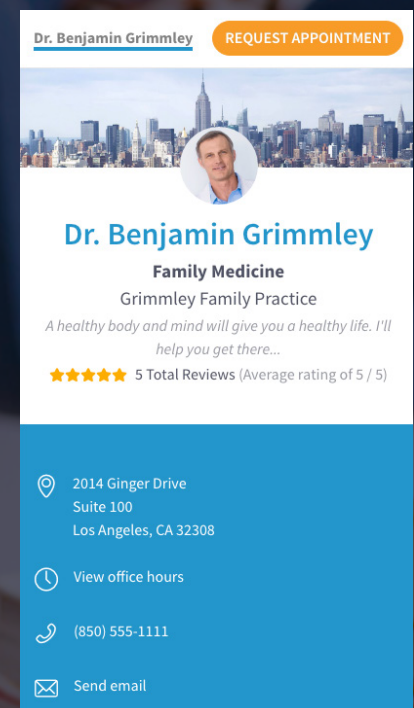
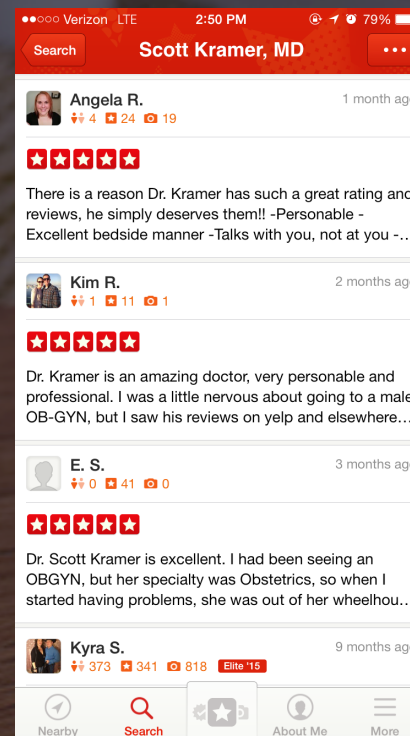
“I want to save time communicating with patients.”

You can simplify and automate many patient communications with tools like online scheduling, text and email reminders, and patient follow up surveys in Kareo Marketing.



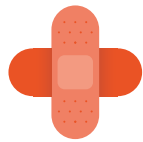
“I want to look good online.”

Kareo can help you update and manage online listings, increase search rankings with a free online provider profile, and drive positive patient reviews to multiple rating sites.



“I want to find more patients and keep the ones I have.”

Improve your online reputation and presence so more patients can find you. Then, use Kareo to keep them engaged with regular patient communications like re-care messages and satisfaction surveys.



KAREO CLINICAL

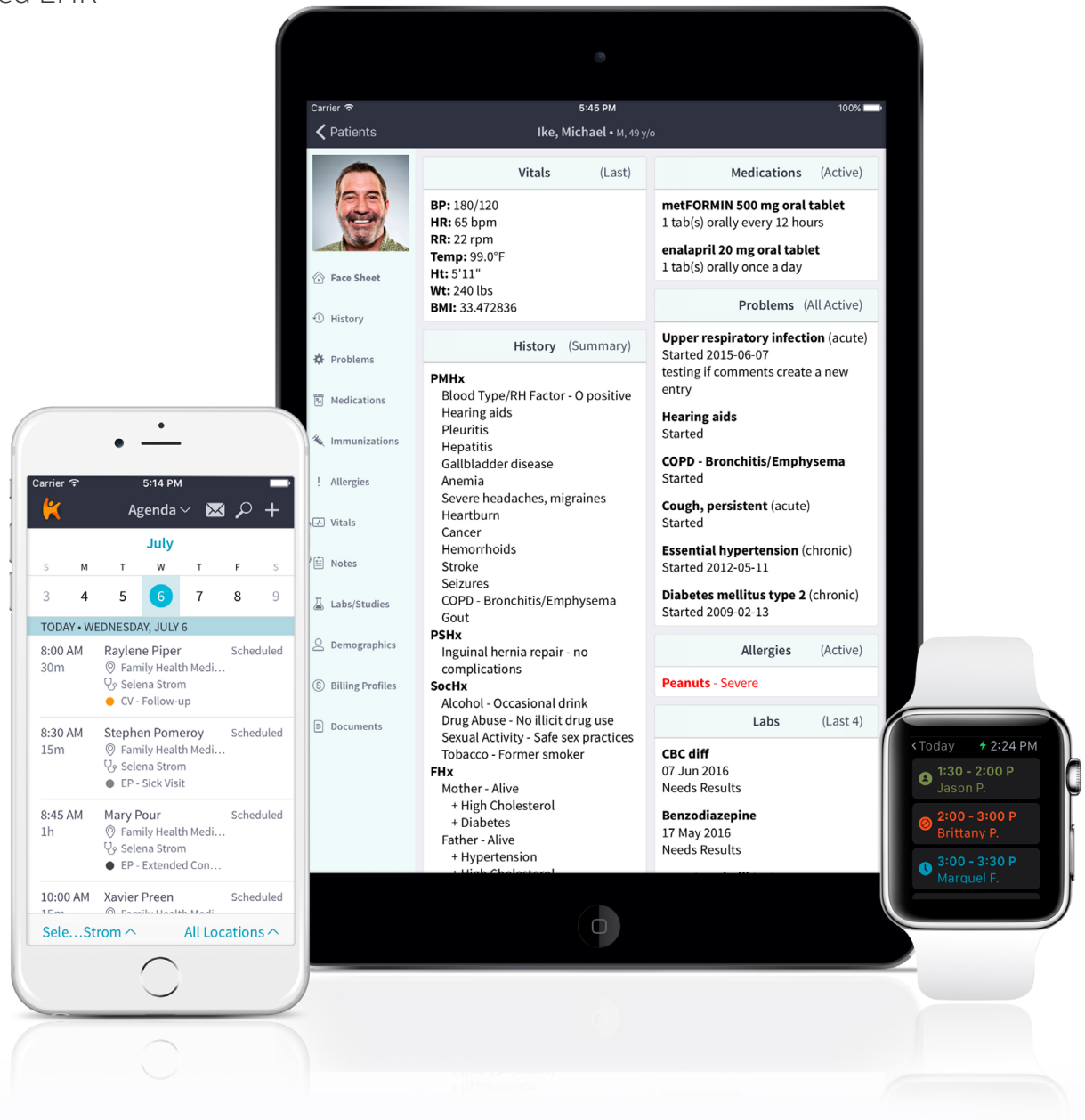
An easy to use and integrated EHR

Let us show you how easy it is to write notes and prescriptions, code encounters, and manage patients in our fully integrated, cloud-based EHR. Find information with easy look ups and create favorites for things you do every day—problem codes, medications, and patient education. Superbills can be created and sent in a few clicks!

INCLUDED FUNCTIONS

- Patient Charting
- ePrescribing
- Labs and Imaging
- Electronic Superbills
- Custom Mobile Apps
- Patient Statements
- Calendar and Scheduling
- Appointment Reminders

➞ For a complete list of functions and features, see page 19



“I want an EHR that is easy to learn and use every day.”

Kareo Clinical was designed with independent physicians in mind. It has the features you need to be successful and none of the unnecessary extras that can get in the way. And it's easy to use!

Carrier 4:27 PM
Chart Ike, Michael
 M, 49 y/o

Allergies: 4-Way Fast Acting nasal spray, Tylenol Caplet Extra Strength, 4-aminoquinoline

MEDICATIONS

Active

- 5-hydroxytryptophan 100 mg oral... 7/11/16
 apply sparingly cap(s) orally every afternoon
 1 capsule, 2 refill(s)
 Strom, Selena
- Lipitor 40 mg oral tablet 6/30/16
 1 tab(s) in each nostril 2 times a day
 30 tablet, 1 refill(s)
 Strom, Selena
- metFORMIN 500 mg oral tablet 4/13/16
 1 tab(s) orally every 12 hours
 180 tablet, 0 refill(s)
 Strom, Selena
- enalapril 20 mg oral tablet 1/15/15
 1 tab(s) orally once a day
 90 tablet, 3 refill(s)
 Strom, Selena

Inactive

Carrier 5:16 PM
Agenda

July 2016

S M T W T F S

3 4 5 6 7 8 9

TODAY • WEDNESDAY, JULY 6

- 8:00 AM 30m Raylene Piper Scheduled
 Family Health Medical Center
 Selena Strom
 CV - Follow-up
- 8:30 AM 15m Stephen Pomeroy Scheduled
 Family Health Medical Center
 Selena Strom
 EP - Sick Visit
- 8:45 AM 1h Mary Pour Scheduled
 Family Health Medical Center
 Selena Strom
 EP - Extended Consult
- 10:00 AM 15m Xavier Preen Scheduled
 Family Health Medical Center
 Selena Strom
 EP - Follow-up Visit
- 11:15 AM 20m Ford Pearl Scheduled
 Family Health Medical Center

Selena Strom ^ All Locations ^

“I want to connect with my patients more and deliver better care.”

The flexibility of Kareo means you can use the device and documentation style of your choice. Spend more time interacting with patients and less time worrying about technology.

“I want functions and features that work for my specialty and my practice.”

Not only is Kareo intuitive but it can easily be customized to your needs. Filter note types and templates to your specialty and set favorites and shortcuts to save time and focus on patients.

iPad 10:32 AM 21%
Agenda Day Week

July

	Sun 3	Mon 4	Tue 5	Wed 6	Thu 7	Fri 8	Sat 9
8 AM		Devin Padilla 8:00 - 8:30 Family Health M...		Raylene Piper 8:00 - 8:30 Family Health M...	John Adams 8:00 - 9:00 Family Health M...	Carol Preen 8:00 - 9:00 Family Health M...	
9 AM			Tom Paisley 8:30 - 9:30 Family Health M...	Stephen Pome... Mary Pour 8:45 - 9:45 Family Health M...	Alyson Paulson 9:00 - 10:00 Family Health M...		
10 AM		Brittany Proto 9:00 - 10:00 Family Health M...				Charlie Pridem...	
10:32					Jack Pitt 10:30 - 11:00 Family Health M...		
11 AM		Will Page...					
12 PM		Mike Frye 11:30 - 12:00 Capital Regional...	Steve... Mike Frye 11:30...	Ford Pearl 11:15 - 11:45 Family Health M...	Ford Pearl 11:15... Mike Frye 11:30...	Madison Pre... Mike Frye 11:30...	
1 PM		Break 12:00 - 1:00 Selena Strom	Break 12:00 - 1:00 Selena Strom	Break 12:00 - 1:00 Selena Strom	Break 12:00 - 1:00 Selena Strom	Break 12:00 - 1:00 Selena Strom	
				Micha... Jessie Pellegrino...	Raylene Piper 1:00 - 1:30 Family Health M...		



KAREO BILLING

Trusted, proven practice management technology

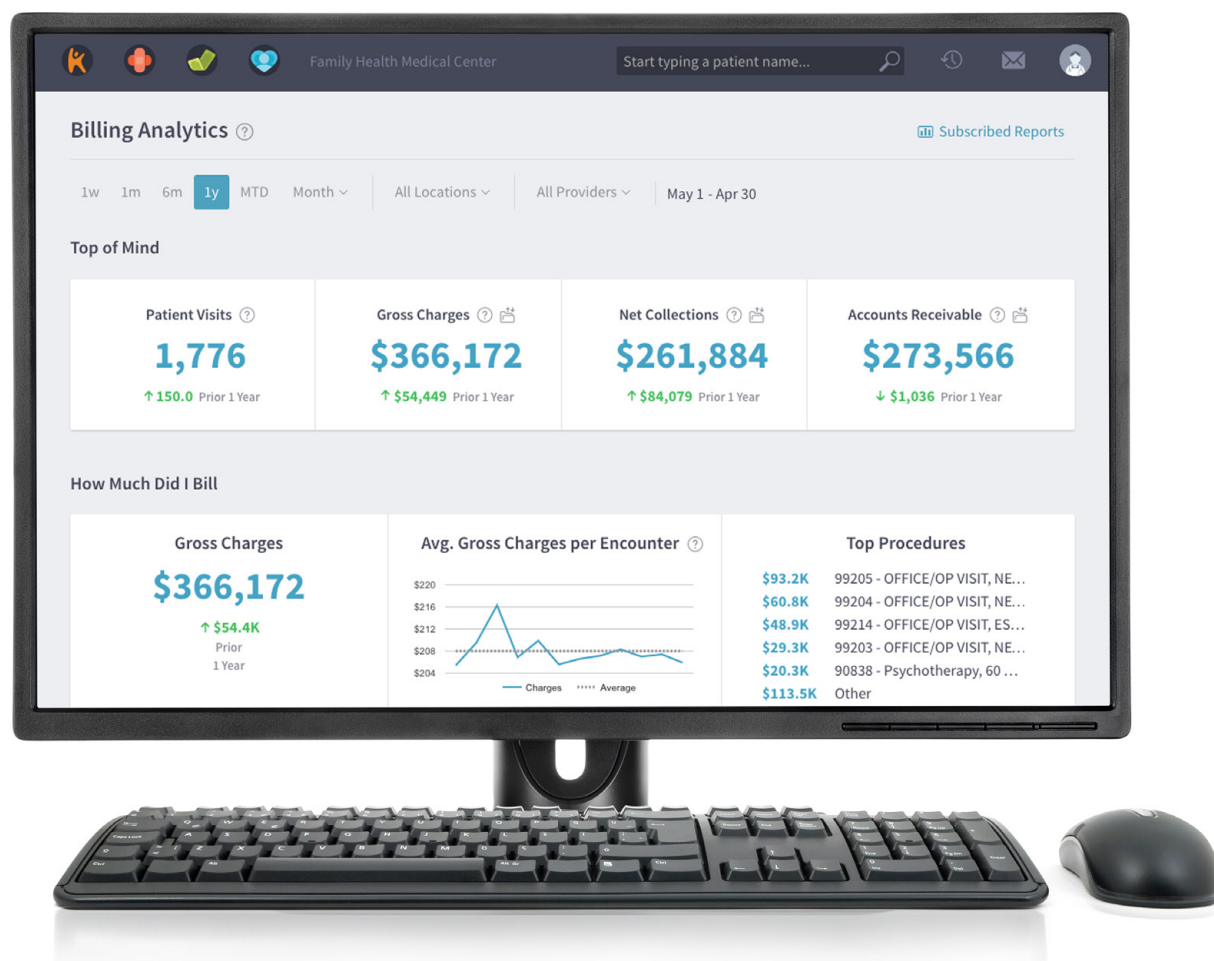
There's no better software to support your in-house billing process. Our web and mobile applications help you easily manage patients and the complications that come with billing insurance.

It allows your biller to use a robust desktop application that supports flexible workflows, A/R management, reporting and analytics. This gives you total visibility into your financial health.

INCLUDED FUNCTIONS

- Charge Capture
- A/R Management
- Patient Collections
- Billing Analytics
- Calendar and Scheduling
- Secure Messaging
- Billing Task Management

 For a complete list of functions and features, see page 19



Collect a payment

Courtney Overfelt
12121965
(904) 741-1117
1593 Whispering Pines Circle, Tallahassee, FL 32304

Is the patient in front of you?
Yes No [What's this?](#)

Payment Amount: \$0.00 waiting to be applied
\$75.99
Enter the payment amount here

☒ Add Payment Note

Payment Method

- ☒ Use New Credit Card

Name on Card

Card Number
XXXX XXXX XXXX XXXX
Expiration Date ____/____ CCV ____
☐ Save this card on file

☐ Cash
☐ Check

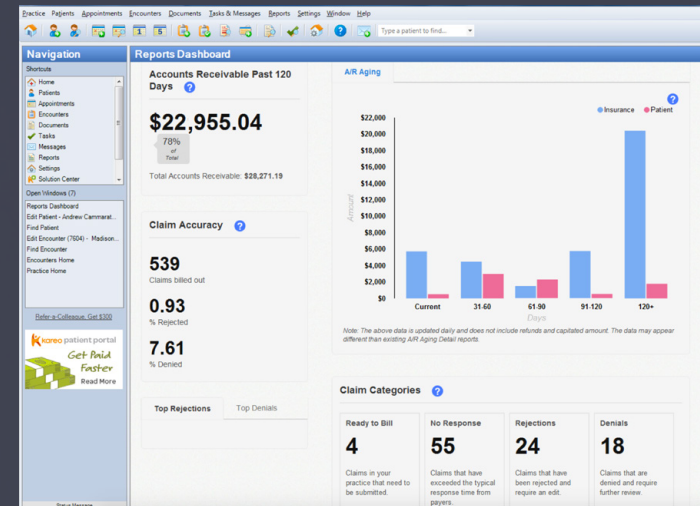
Total Account Balance
\$75.99

[Print](#)

[Finalize Payment](#) You will be able to review the payment before you submit

“I don’t really know if my collections are good or bad.”

With Kareo, all of your billing is processed electronically, and you can see how you’re doing in real time with the reporting dashboard. As a result, you get paid faster and more accurately.

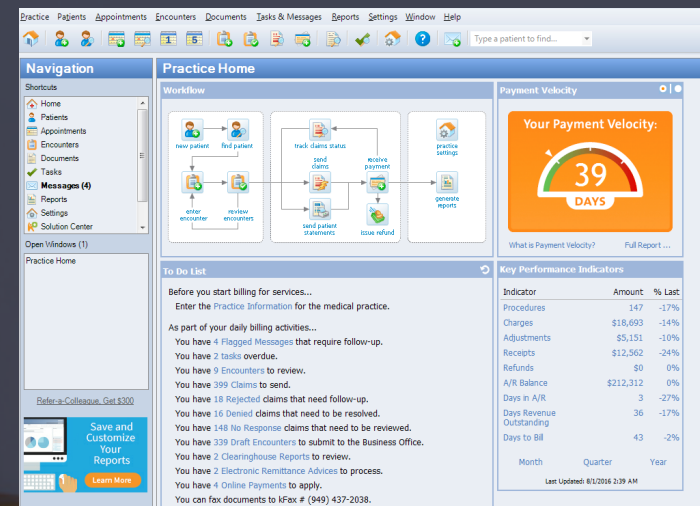


“Patient A/R is growing, and we need a better way to collect that money.”

Kareo offers end-to-end patient collections. The software includes the ability to verify eligibility at no extra cost, process credit cards and post those payments within Kareo, send electronic statements, and save credit cards on file.

“I need to help billers effectively manage their work flow and tasks”

Kareo provides a comprehensive dashboard that shows billers exactly what tasks need to be completed. Staff can set alerts for things like no-response claims to ensure nothing slips through, and you can collect every dollar.





KAREO MANAGED BILLING

Focus on patients, leave the billing to us

With Kareo, you can run a more successful practice while focusing on the health and experience of your patients. Collect faster payments with the expert help you need to maintain the financial health of your practice. Our team of experts and helpful, guiding technology enables easier intake, more accurate coding, and faster turnaround time on collections.

INCLUDED FUNCTIONS

- Expert Billing Team
- Real-Time Claims Tracking
- Patient Relations
- Billing Analytics
- Calendar and Scheduling
- Billing Task Management
- Secure Messaging

 For a complete list of functions and features, see page 19



"I don't have time or the expertise to do in-house billing anymore."

Kareo's specialty-trained teams are led by advisors with an average of 10 years of experience in your specialty. We can start billing right away using best practices learned from working with practices just like yours.

"I need a billing team that has deep expertise to help me get paid quickly."

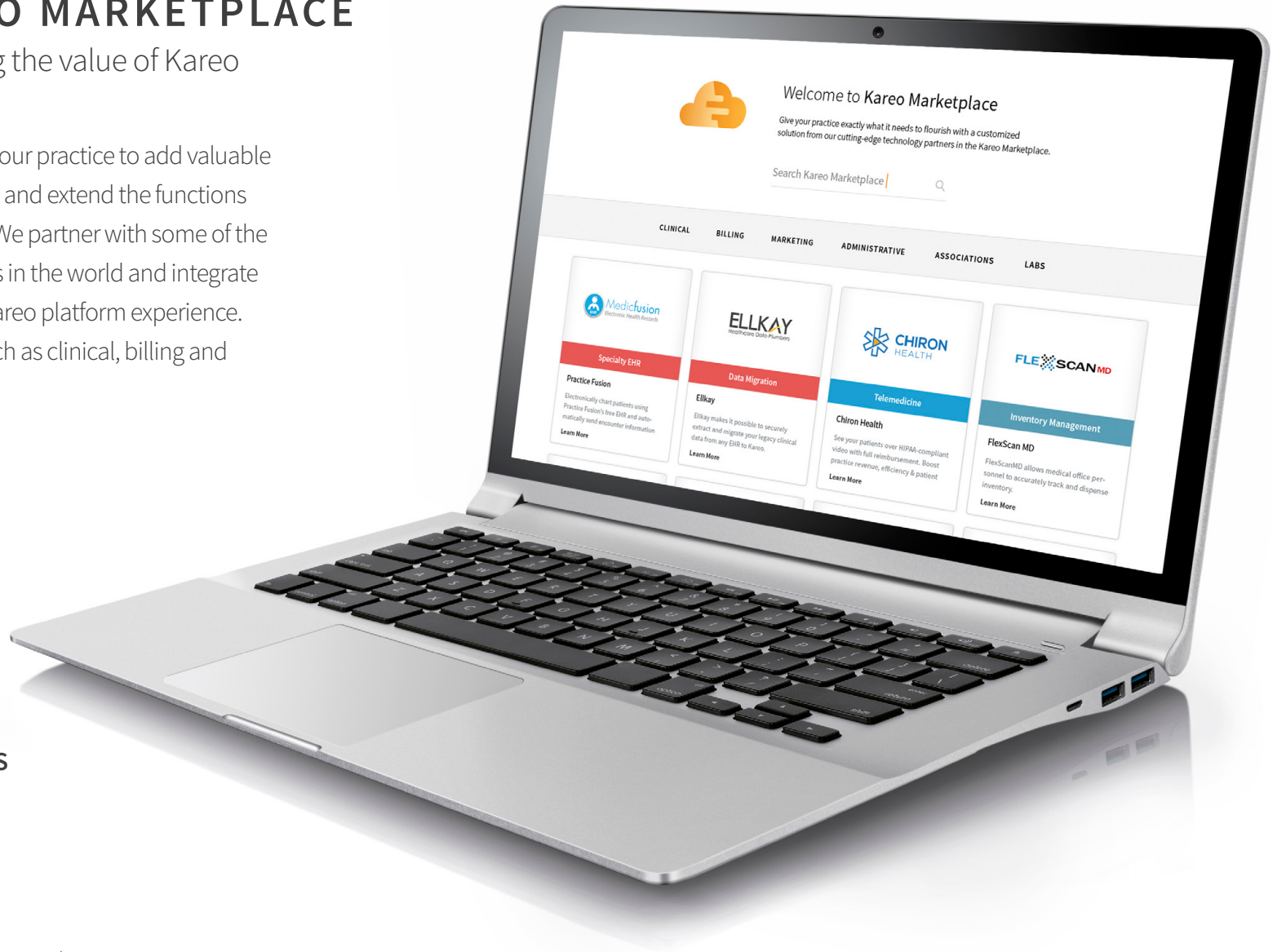
Kareo's team and technology are designed to put your practice on a path to success and ensure you get paid. Our expert team of billers will help establish clear best practices to maximize reimbursement.



KAREO MARKETPLACE

Extending the value of Kareo

Kareo Marketplace allows your practice to add valuable technology to complement and extend the functions already available in Kareo. We partner with some of the most innovative companies in the world and integrate these functions into your Kareo platform experience. These include functions such as clinical, billing and business management.



INCLUDED FUNCTIONS

- Clinical
- Billing
- Business Management



For a complete list of functions and features, see page 19

Our Marketplace Partners

Kareo partners with innovative companies to extend the value of our platform.
The result is a seamless and fully integrated system to help you succeed.

Clinical

- Specialized note types
- Telemedicine
- Digital imaging

Clinical partners include:



Billing

- Credit card payments
- Claim acceptance
- Workers compensation

Billing partners include:



Business Management

- Improve interoperability
- Manage practice inventory
- Back-up and store data

Business Management partners include:



For a complete list of available partners in Kareo Marketplace, visit: <http://kareo.com/marketplace>

The Results: A Positive Experience for Patients and Staff

FIND THE RIGHT PROVIDER ONLINE

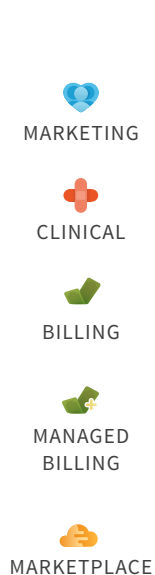
While patients still ask for referrals from family and friends, 84% now use online reviews to evaluate physicians.

GET A VISIT REMINDER

Patients want reminders, and your practice needs them. They can cut no shows by 30-50%. Offering options like text, email, and phone increases success.

PARTICIPATE IN CARE

9 out of 10 patients want shared decision-making with doctors. With a mobile EHR, you can use heads-up medicine to engage patients during the visit.



MAKE AN APPOINTMENT ANYTIME

Patients may not have time to call your office during business hours. Give patients the option to schedule online at a convenient time for them.

KNOW WHAT'S OWED

Confirm eligibility to ensure that you can collect co-pays and inform patients about what they will likely owe and the options to pay their bill.

CHECK OUT QUICKLY

You need to collect patient due balances and patients just want to get out the door. So offer to keep a credit card on file.

HAVE PRESCRIPTIONS READY TO GO

Electronic prescriptions reduce errors and ensure that medications are ready to pick up. So it's no wonder 92% of patients like the use of ePrescribing.



PAY BILLS ONLINE

Make it easy for patients to pay their bills by sending an electronic statement as soon as possible and offering a link to pay bills online.



STAY IN TOUCH

Patients want regular communication from you through email, text, and social media. You can also send a newsletter, blog, and share helpful posts on Facebook.



EASY ACCESS TO TEST RESULTS

Two-thirds of patients say a patient portal makes them more loyal to their provider. This offers easy access to lab results, medical records, and secure communications.



ASK FOR FEEDBACK

Patients want follow-up communications from providers and, as a result, rate their satisfaction significantly higher. Send a follow-up survey to patients asking for feedback.



SEND HELPFUL RE-CARE MESSAGES

Patients want to stay healthy and now you can help make that easier. Use re-care messages to remind patients to come in for timely care and follow ups.



Platform Functions

Purchase at least one Kareo module and receive the following platform functions at no additional charge:



ONLINE PROVIDER PROFILE

Establish a strong online presence with your Kareo provider profile. The profile is the easiest way to improve your Google search results and will help funnel patients to your practice.



PATIENT REGISTRATION

Make it easy for new patients to find and deliver completed registration paperwork. You can provide patients with immediate access to these forms, claiming back time for your front office staff.



SCHEDULING AND CALENDAR

Office staff can now schedule smarter. Set up and personalize your schedule, create scheduling rules, and track productivity. You can manage across the web, iPhone, iPad and Apple Watch.



APPOINTMENT REMINDERS

Reduce lost revenue from open schedule slots and costly patient no-shows. With Kareo, you can avoid reduced revenue, wasted front office resources while delivering better patient care and outcomes.



PATIENT PAYMENTS

Allow your patients to pay their bill online with secure credit card processing. You can also collect patient balances in-office and offer to store a patient's card on file for future use.



CRITICAL TASKS FOR STAFF

Get full visibility and streamline your day by managing your tasks in one, easy-to-use inbox. It couldn't be simpler! And with Kareo Mobile you can also complete tasks while on the go.



SECURE MESSAGING

Save time and track secure messages within your practice. Our built-in messaging allows you to communicate with your biller, patients and staff. And, it's HIPAA compliant giving you peace of mind.



REPORTS AND DASHBOARDS

Know where your practice stands and get a clear picture of your performance through built-in reporting. Kareo also offers easy to read dashboards, providing updates at a glance.

Module Functions and Features

In addition to the platform functions on page 18, below are the core functions and features for each module.

 KAREO MARKETING	 KAREO CLINICAL (EHR)	 KAREO BILLING (PM)	 KAREO MANAGED BILLING (RCM)	 KAREO MARKETPLACE
Online Scheduling • Book appointments online • Send automated reminders • Fill “open” or “cancelled” appointment slots • Free up front office staff	Patient Charting • Easy note creation • Over a dozen note types • Use templates and text shortcuts • Customize to your specialty	Charge Capture • Enter charges • Capture charges • Set up common codes • Improve claim accuracy	Expert Billing Team • Uses best practice approach • Has specialty training • Automates claims with billing rules • Tracks claims in real time • Handles denials and rejections • Manages patient collections • Communicates via secure messaging	Clinical • Get a broad set of specialized note types • Adopt telemedicine • Digital imaging • Get lab Integrations
Reputation Management • Send patient surveys • Share reviews on provider profile • Increase search engine traffic • Monitor online reviews	Certified ePrescribing • Improve prescription accuracy • Easily create drug favorites • Look up pharmacies • Create right from your patient’s chart	A/R Management • Submit insurance claims online • Scrub claims • Receive electronic payments • Resolve billing issues		Billing • Process credit card payments • Improve acceptance of claims • Handle workers comp needs • Better access to payer networks • Automate billing process
Patient Communications • Send appointment reminders • Send re-care reminders • Share important news with patients	Comprehensive Labs and Imaging Workflow • Assign lab and study orders • Submit labs electronically • Save frequently used tests • Share results with patients	Billing and Patient Collections • Track collection status • Use credit card on file • Process batch patient statements • View collection summaries	Charge Entry • Save favorite codes • Use charge capture • Access through web • Use built-in rules engine	Business Management • Improve interoperability • Manage practice inventory • Attract new patients • Connect with new patients • Back-up and store data
Practice Analytics • Calculate activity value • Track patient reviews • Know your online reputation • Track key statistics	Electronic Superbills • See your frequent codes • Drag and drop • Make notes and comments • Track status and easily send superbills	Billing Analytics and Performance Reporting • Understand practice financials • Measure performance • Customize reports • Maintain steady cash flow	Patient Relations • Customize schedule • Send appointment reminders • Use patient portal • Enable patient payments	
	Custom Mobile Apps • See your calendar • Easily write prescriptions • Access labs and test results • Send secure messages		Billing Analytics • Filter billing metrics and graphs • Scan your top level financials • Drill into collection details • Get real-time insights	

