Integrating Kareo PM and Practice Fusion EHR

Welcome to the Kareo guide to integrating Kareo's Practice Management (PM) system with Practice Fusion's electronic health record (EHR) system. The technology integration between Kareo and Practice Fusion currently supports a uni-directional data interface: When you enter certain information into Practice Fusion and submit an encounter, that information will automatically transfer into the Kareo system. Because this is uni-directional, note that information will not currently transfer from Kareo into Practice Fusion.

General information that will transfer from Practice Fusion into Kareo:

- Patient demographic data
- Insurance information
- Superbill

If any of the above is not set up in Kareo, an error message is sent back to Practice Fusion, shown on the superbill history. The information can be corrected in Kareo and the superbill resubmitted.

Integration Setup

## What You Need to Get Started

In order to establish an interface between your Kareo and Practice Fusion accounts, you will need the following:

- ❑ An active Kareo PM account with either the Plus, Complete or Max plan. Don't have an account? Sign up here.
- ❑ At least one practice set up in Kareo
- ❑ At least one provider set up in Kareo
- ❑ At least one service location set up in Kareo
- ❑ Your provider NPI number – the number must be the same in both Kareo and Practice Fusion
- ❑ Your Kareo Practice ID

▶ **To locate the Kareo Practice ID**

1. Log in to your Kareo account.

2. Click **Settings > Options > Integration Options** in the top menu.

3. On the Integration Options window, your ID is listed at "Kareo Practice ID."
   For example:
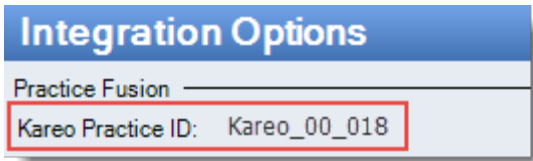
4. Write down the ID you see in your account, as you will need it when you submit an Integration Request.

Submit an Integration Request

To integrate your Kareo account with your Practice Fusion account, you will need to submit a request through Practice Fusion.

▶ **To submit an integration request**

1. Log in to Practice Fusion and select Dashboard in the left menu.

2. Select the Billing tile. The Billing dashboard opens.

3. Select the Existing billing system tile.

4. On the Billing Solutions window, select Kareo and add your account information. Note that the Service Location Name needs to match the "Internal Name" given to your Service Location in Kareo.

5. When finished, click **Submit**.
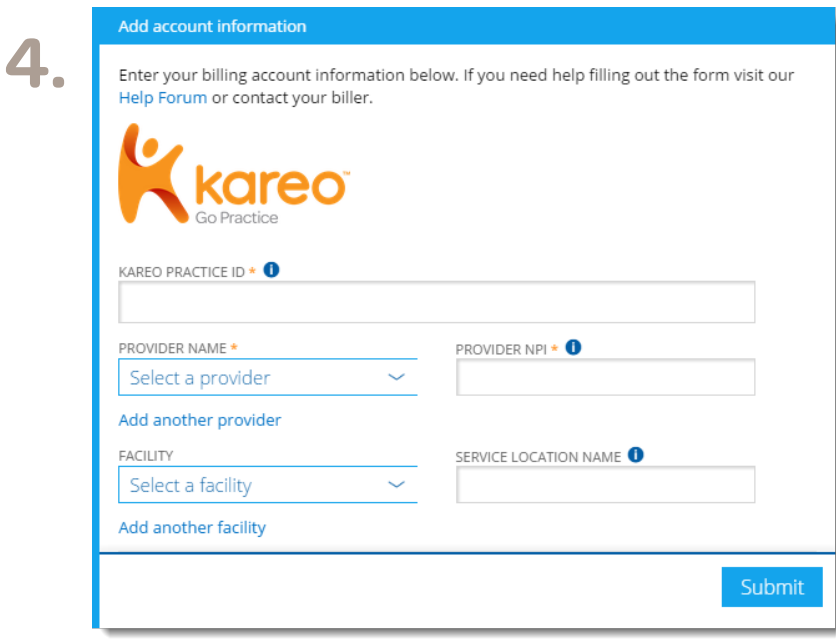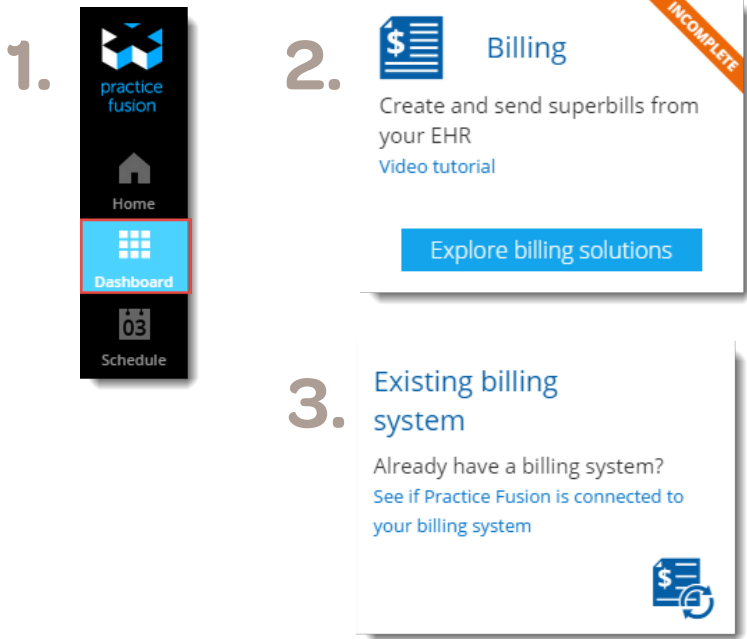
Add Custom Procedure Codes

In some instances you may need to add custom procedure codes specific to your practice. In order for the information to be sent properly from Practice Fusion to Kareo, custom codes must be set up in Kareo and match the information in Practice Fusion.

Note: After adding new custom codes, you may need to log out and back into Kareo and Practice Fusion to see new codes appear when submitting your next Superbill.

▶ **To add a custom procedure code in Kareo**

1. Log in to Kareo.

2. Click **Settings > Codes > Find Procedures** on the top menu. To avoid duplication, a best practice is to first search the database to see if the procedure code already exists in the system.

2. If the procedure code is not in the system, click **New** at the bottom.

3. Enter the following information.

    a. Procedure or Speed Code: Enter a 5-character (numbers and/or letters) code.

    b. Procedure Code (CPT): If a speed code was entered, enter the real 5-character procedure code in this field. If it's a custom CPT, check the "Custom Code" box.

    c. Official Name: Enter the official name of the procedure; avoid abbreviating procedure names when possible.

    d. TOS: Select the type of service (TOS) from the drop-down menu; these are industry classifications for various types of procedures.

4. Check the "Procedure is currently used" box.

5. When finished, click **Save**.

Patient Demographic Data

New patients entered in Practice Fusion are automatically created in Kareo when you submit the superbill within Practice Fusion. Note that if you update patient information in Kareo, it is not updated in Practice Fusion. Always use Practice Fusion as the system of record. The following new patient data is transferred:

- Patient Record Number
- Full Name
- Social Security Number
- Date of Birth
- Gender
- Contact Information
- Email
- Guarantor

Patients are matched between Practice Fusion and Kareo based on the following criteria:

- First Name
- Last Name
- Date of Birth
- Gender

Insurance Information and Cases

Insurance companies and plans are matched between Practice Fusion and Kareo by the company and plan names. The company and plan names must be exactly the same in both systems. If not, a new insurance company or plan is created in Kareo and some information must be entered manually in Kareo. We recommend that you confirm that all insurance company and plan names match in both systems.

Insurance Information

- If you select "Aetna" as the Payer on a patient record in Practice Fusion, that name must be exactly the same in Kareo in order for the record to get matched when an encounter is submitted.

- If you select "HMO - Aetna" as the Plan Name on a patient record in Practice Fusion, that name must be exactly the same in Kareo in order for the record to get matched when an encounter is submitted.

- If the payer or plan name in Practice Fusion does not match an insurance company or plan in Kareo, then a new insurance company or plan will be created in Kareo upon submission of an encounter from Practice Fusion. When this happens, note the following:

1. **Payer's Address:** The payer's address will not be transferred and you must manually enter it on the new insurance company or plan record created in Kareo prior to printing paper claims or submitting electronic claims for those encounters.
2. **Electronic Payer Connection:** The Electronic Payer Connection, which establishes the link between the insurance company and the clearinghouse/payer connection for electronic claims submission from Kareo, must be manually set for the new insurance company.
3. **Insurance Program:** The Insurance Program for the new insurance company in Kareo defaults to CI=Commercial which may not be correct. If it is different, you must manually select it.

- Since unmatched insurance companies and plans create new ones in Kareo, you can avoid duplicate insurance companies and plans by merging existing records with new ones. Always use the company insurance or plan name as it is in Practice Fusion.

Cases

- When you submit an encounter from Practice Fusion to Kareo for an existing patient that already has a case in Kareo, the systems will attempt to match the cases. Note that all policies within a case must match. For example, if a case has Primary Policy A and Secondary Policy B, both systems must have both policies on the case in order to prompt a match. A new patient case is created in Kareo when any of the following fields differ:

  Policy Number   Policy Start date   Policy End date

- Practice Fusion policy information will update in Kareo except for policy number and policy date range.

- Practic Fusion case information will <u>not</u> update in Kareo; it will only create new data in Kareo when the superbill is submitted. Updates must be done manually on an existing patient case in Kareo.

- When a case is created on the patient's record, it includes the name of the primary insurance and the date the case was created. You may wish to change the name of the new case created and/or change the Payer Scenario to reflect the type of billing situation for that patient.

Submit Superbills from Practice Fusion to Kareo

When you create and submit a superbill in Practice Fusion, the information is transferred to Kareo and ready for review and claim processing. The Superbill report in Practice Fusion provides a status update and any error messages regarding the transmission. Any failed superbills can be updated and resubmitted through Practice Fusion.

Submit Superbill

▶ **To submit a superbill from Practice Fusion**

1. At the bottom of the note in the Superbill section, click **Record**. Or, click **Actions** at the top right and select "Add superbill." The superbill is displayed on the right.

2. Complete all appropriate fields.

   Note: Legacy accounts will see two lists under Rendering Provider and Seen At Facility:

   a. Rendering Provider: Select from the "Billing system providers" (Kareo) list.

   b. Seen At Facility: Select from the "Billing system facilities" (Kareo) list.

3. When finished, select a superbill status:

   a. **Ready for biller:** Sends superbill to Kareo.

   b. **Save as draft:** Saves changes so that you can complete at a later time.

   c. **Archive:** Successfully sent superbills (typically should not be used).

4. In Kareo, you can find the superbill navigating to Encounters and then clicking the **Drafts** tab.

Notes

- Comments are transferred to the Kareo encounter under Medical Office Notes. Payment information (amount and reference number) is transferred to the Kareo encounter under Payment Amount.

- If a CPT code or Modifier exists in Practice Fusion but is nonexistent or inactive in Kareo, you will need to add it or reactivate it.

Superbill History

The View History button on the superbill displays processing messages from Kareo.
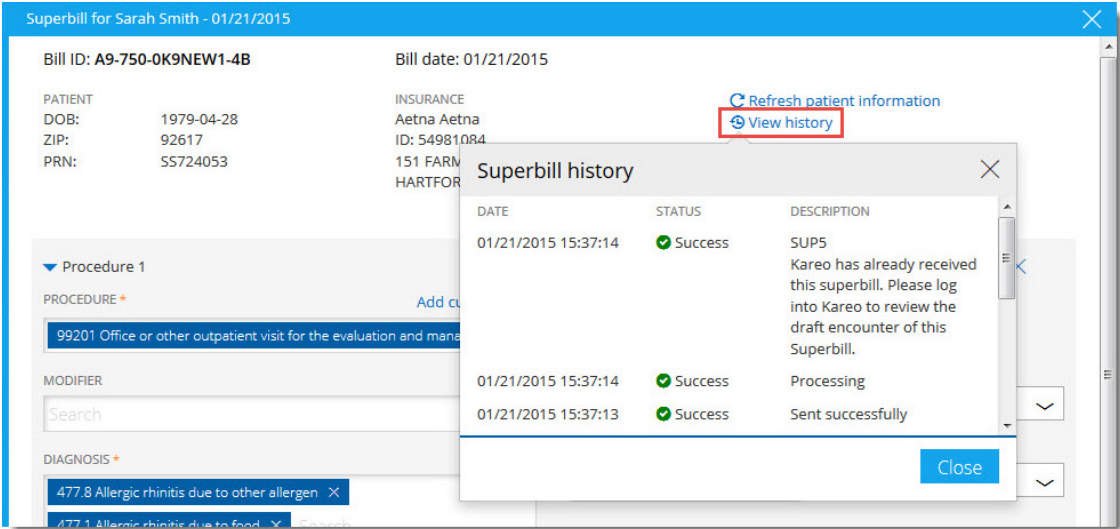
Billing Report

The Billing report provides information on submitted and pending Kareo superbills.

▶ **To view the Billilng report**

1. In Practice Fusion, click **Reports** on the left menu.

2. Click the Billing tab.

3. In the drop-down menu, select one of the following:

    a. **Archive:** Displays all successful, completed superbills.

    b. **Draft:** Displays pending, unsubmitted superbills.

    c. **Error:** Displays superbills that contain errors and require troubleshooting.

    d. **Ready for biller:** Sends the superbill and should always display (0) and be empty when the Kareo/Practice Fusion integration is turned on.

    You can click on any column header to sort the information.

Print Superbill

To print the superbill, click the **Print** button at the bottom of the superbill.

Data Fields Not Supported

Fields Not Supported in Kareo

Patient Demographics

- County
- Date of death
- Non-US addresses

Insurance Company and Plan Information

- Payment percentage
- Payment Coinsurance

Fields Not Supported in Practice Fusion

Patient Demographics

- Marital status
- Employment status
- Employer
- Referral Source

Encounter Information

- Authorizations
- Conditions
- Hospital dates
- Ambulance dates
- Line notes
- NDC code
- Custom Modifiers