

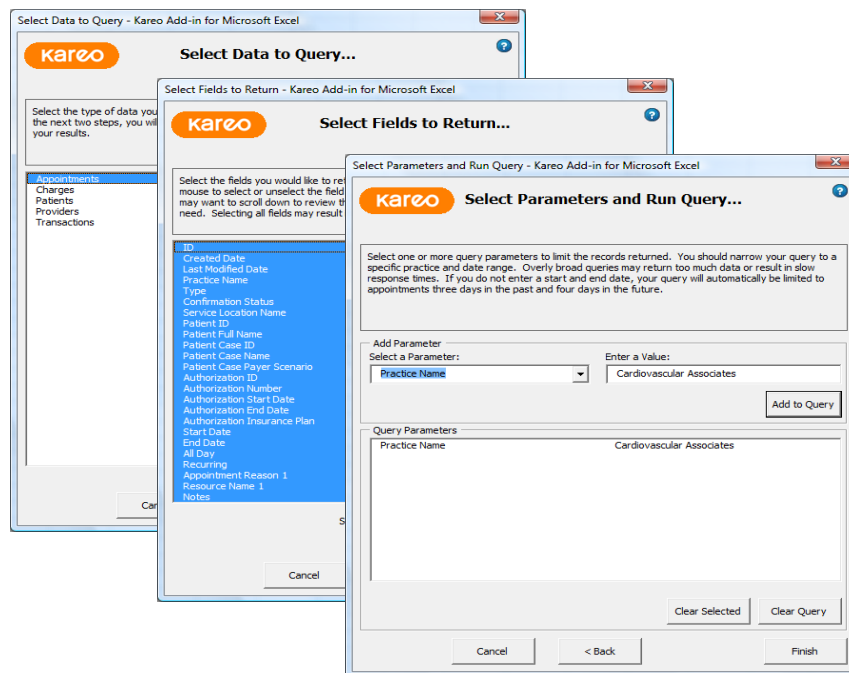
# Building Custom Reports

## Kareo Add-In for Microsoft Excel



Welcome to the Kareo feature guide on building custom reports using the Kareo Add-In for Microsoft Excel. This guide will show you how to install and use the Kareo Add-In for Microsoft Excel to retrieve data from the Kareo service and use the power of Microsoft Excel to analyze your data and build advanced reports.

The instructions in this guide provide a short introduction to using functions such as filtering, sorting, grouping, PivotTables, and Pivot Charts. We recommend the Microsoft Excel online help system to learn more about how you can use the powerful features of Microsoft Excel to analyze, summarize, report, and chart your Kareo data.



With the Kareo Add-In for Microsoft Excel, you'll be able to:

- Retrieve records from five different types of data including appointments, charges, patients, providers, and transactions
- Select fields to return from a list that includes all of the available fields for each type of data
- Enter query parameters to limit the data returned by date range or other custom criteria

Once your Kareo data is retrieved from Kareo and loaded into Excel, you'll be able to:

- Filter your data by advanced criteria
- Sort the rows of your data by any field
- Group and subtotal rows by any field
- Build advanced reports using PivotTables
- Create graphs to analyze your data
- Print your data in custom formats

## Install the Add-in

This section explains how to install the Kareo Add-in for Microsoft Excel and configure the Kareo security settings that are necessary to use this feature.

### Download the Add-In

▶ To download the Kareo Add-in for Microsoft Excel

1. Create a new folder on your PC: C:\Program Files\Kareo\Add-In\
2. Go to: <http://www.kareo.com/help/practice-management/downloads/add-in>
3. Click the download button for your version of Excel.
4. When the Windows dialog box appears, choose to save the file and navigate to the folder you created in Step 1.
5. Verify that the file “Kareo Add-in for Microsoft Excel.xla” has been saved to your PC.

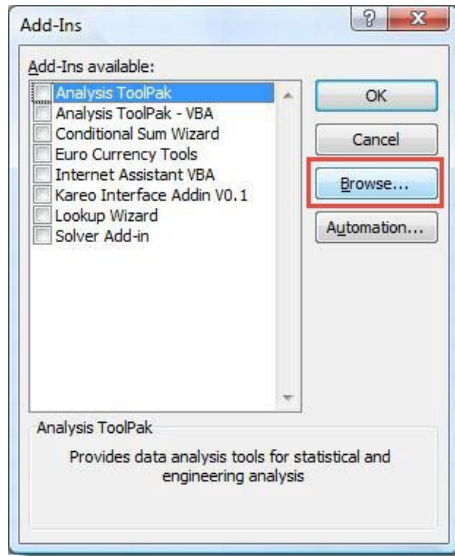
### Install the Add-In into Excel

▶ To install the Kareo Add-in into Excel

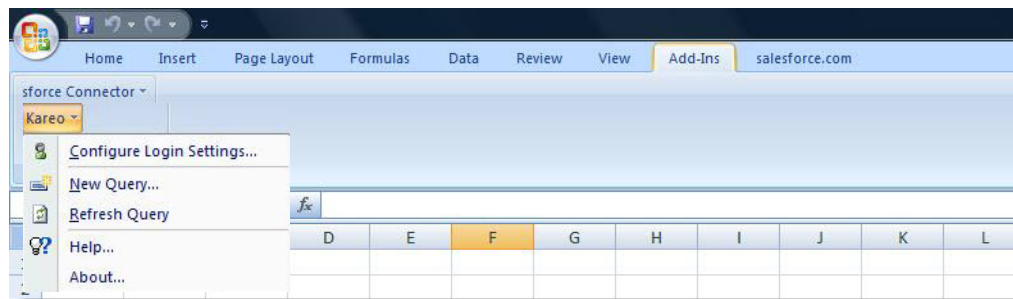
1. Open **Excel**.
2. Depending on which version of Excel you have installed, navigate to Options.
  - a. Excel 2007: Click the Office button in the top left, then Excel Options.
  - b. Excel 2010: Click the File tab, then Options.
3. In the Excel Options box, click **Add-Ins**.
4. On the Add-ins window, click the **Go** button at the bottom.



5. Click **Browse**.



6. Navigate to the folder you created.
7. Select the file named "Kareo Add-in for Microsoft Excel.xla."
8. When finished, verify that the Add-In has been installed in Excel:
- Open Excel and click the Add-Ins menu/tab at the top.
  - Look for the new Kareo button.



## Get Your Customer Key

Kareo requires that a special Customer Key be used as an added security precaution when you access your data outside the Kareo application. You must supply your Customer Key in addition to your login and password when using the Kareo Add-in for Microsoft Excel.

### ▶ To get your Customer Key

1. Log in to your Kareo account.
2. Click **Help > Get Customer Key**.

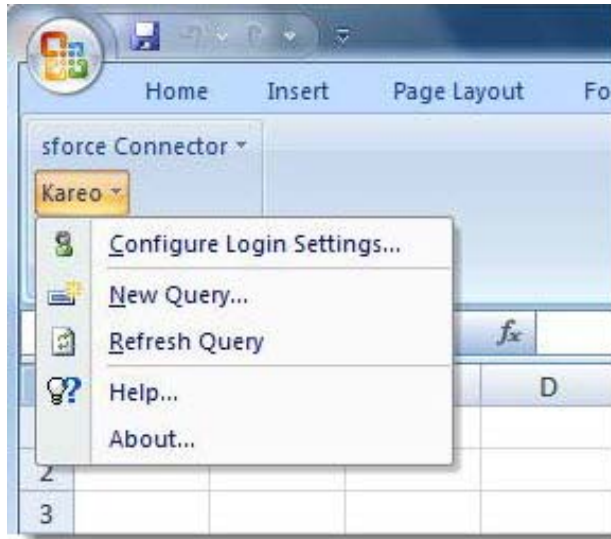
## Grant Permission to Access Data

Accessing data through the Kareo Add-In for Microsoft Excel requires certain permissions by your Kareo application administrator, as outlined below.

### ▶ To grant a user permission to access your Kareo data through the Kareo Add-in for Microsoft Excel

1. Log in to Kareo.
2. Click **Settings > User Accounts** in the top menu.
3. Locate the user and click on the name to open and edit permissions.
4. Click the Permissions tab.
5. Under Practice Permissions, scroll to **EHRs & API**, and check the box under Full Control.

## Using the Add-In with Kareo Data



The Kareo Add-in for Microsoft Excel enables you to build and execute custom requests for data from your Kareo account and load the results into Excel where the data can be reviewed and manipulated using the power of Excel. This section explains how to access the add-in and return data from Kareo into your spreadsheets.

### ▶ To access the Add-In

1. Open Excel.
2. Click the Add-Ins menu/tab at the top.
3. Click the **Kareo** button to access data functions.

## Configure Login Settings

Before you can use the Kareo Add-In for Microsoft Excel, you must configure your login settings.

### ▶ To configure login settings

1. Open Excel.
2. Click the Add-Ins menu/tab at the top.
3. Click the **Kareo** button and select Configure Login Settings.
4. On the Configure Login window, enter your Customer Key, login and password.

5. If you want the Add-In to remember your login for future sessions, check **Remember** next to each field.
6. Click the **Continue**.

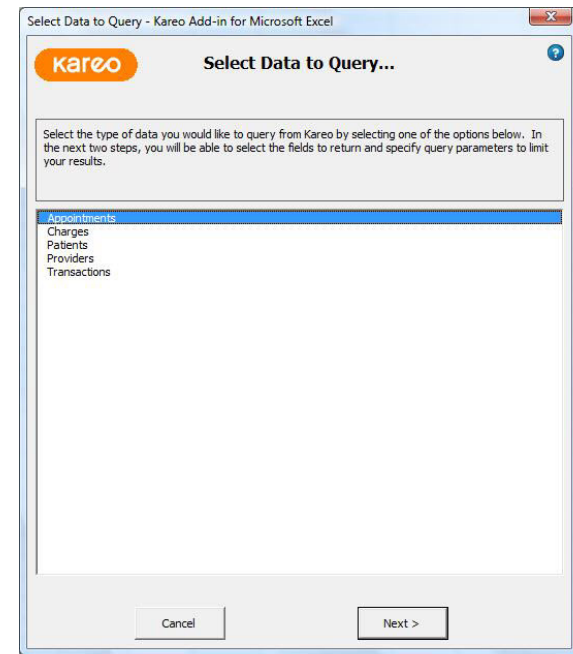


## Build a New Query

To retrieve data from Kareo into Excel, you must build and execute a new query.

### ▶ To build a new query

1. Open Excel.
2. Click the Add-Ins menu/tab at the top.
3. Click the **Kareo** button and select New Query.
4. On the Select Data to Query window, select the type of data you want to query.



5. Click **Next**.
6. On the **Select Fields to Return** window, click and hold the CTRL key on your keyboard and use your mouse to select or unselect one or more fields from the list.

#### Tips for Selecting Fields

Not all of the fields are selected by default, so you may want to scroll down to review the available fields. It is best to limit your query to the fields you need. Selecting all fields may result in slow response times.

7. Click **Next**.
8. On the **Select Parameters and Run Query** window, select a parameter from the drop-down menu, enter the value, and click Add to Query. Repeat as necessary to limit the records returned.

#### Tips for Selecting Parameters

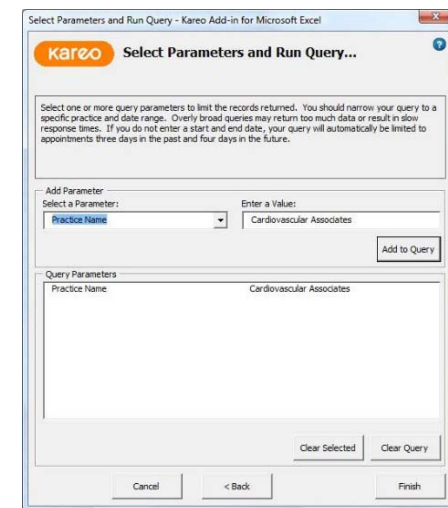
Use the query parameters to narrow your query to a specific practice, and if applicable, a specific date range. Overly broad queries may return too much data or result in slow response times.

9. Click **Finish** to execute your query.

It may take several minutes for the Kareo Add-In to return your data. While your query is in progress, status information will be displayed. If you want to cancel your query, click **CTRL + Pause/Break** on your keyboard.

When your data is returned, the Kareo Add-In will create two new worksheets in your spreadsheet:

- Data Worksheet – This worksheet includes your data organized into rows and columns and is named with a “\_Cmd1” suffix.
- Command Worksheet – This worksheet saves a copy of the query settings you entered and is named with a “\_Data1” suffix.





## Edit an Existing Query

After you build and execute a query, you can make changes to your query parameters and refresh your data without stepping through the full process for building a new query.

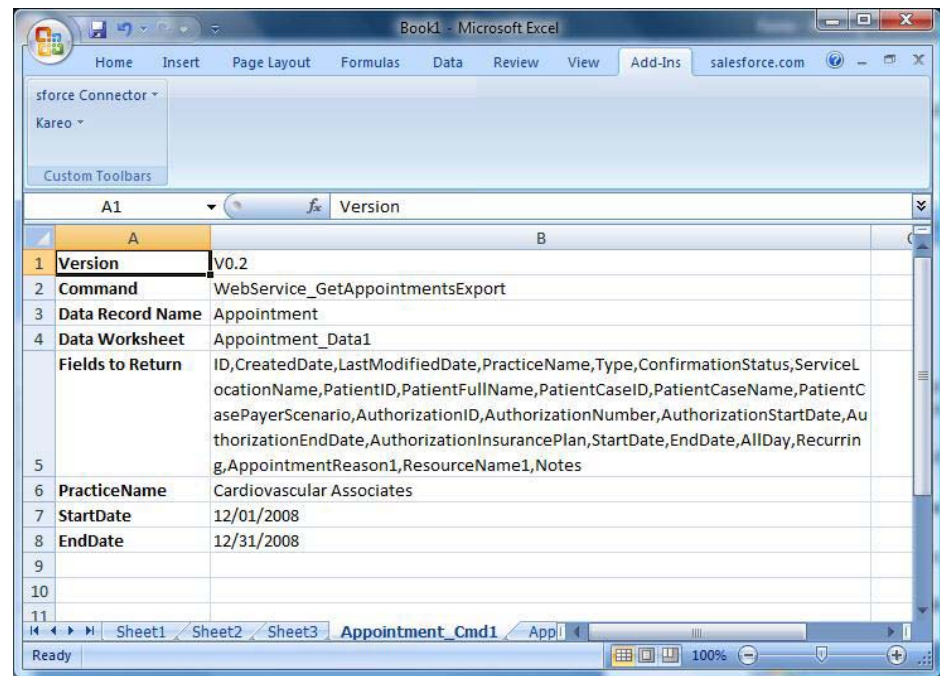
### ▶ To edit an existing query and refresh your data

1. Open Excel.
2. Open a previously saved Excel spreadsheet with your pre-existing query.
3. Go to the Command Worksheet associated with your previous query.
4. Select the cell to the right of the Fields to Return cell, and then add or remove the fields that will be included in your query.
5. Select the cell to the right of any one of your query parameters, and then change the value.
6. Click the Add-Ins menu/tab at the top.



Click the **Kareo** button and select “Refresh Query.”

The Kareo Add-In will re-execute your existing query with your new settings and update the Data Worksheet with the new data. It may take several minutes for the Kareo Add-In to return your data. While your query is in progress, status information will be displayed. If you want to cancel your query, click **CTRL + Pause/Break** on your keyboard.





## Using Excel to Analyze Your Data

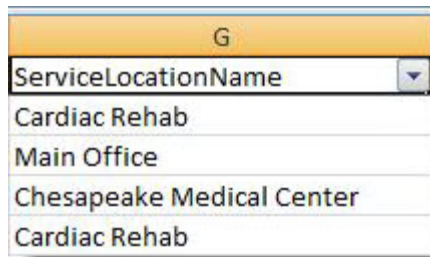
The Kareo Add-in for Microsoft Excel was built on top of Microsoft Excel so that you can query your data from Kareo and use the powerful data analysis, reporting, and graphing tools of Microsoft Excel to build advanced reports. This section highlights some of the powerful Microsoft Excel features you can use to analyze your Kareo data.

### Filter Data by Criteria

You can use Excel to filter the data in your Data Worksheet using advanced filtering techniques. By default, the Kareo Add-In for Microsoft Excel automatically enables filtering for every field returned from Kareo.

#### ▶ To filter your Kareo data using Excel

1. Open Excel.
2. Open a previously saved Excel spreadsheet with your pre-existing query results.
3. Go to the Data Worksheet associated with your previous query.
4. At the first row of the worksheet, click on the drop-down button within the field you want to filter.



5. On the filter drop-down menu, use one of the following techniques to filter your data:
  - Select Specific Values – Excel presents a list of all of the unique values that display in your data. Select or unselect one or more values by clicking the check boxes next to specific data values.

- Use Filter Rules – Excel also offers advanced filtering rules that vary by the type of data in each column. Click **Text Filters** to access and configure advanced rules, such as ranges for dates, greater or less than for numbers, or sub-string searches for text.

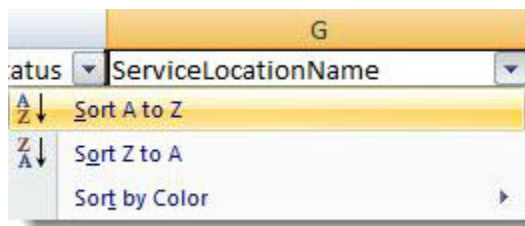
6. Click **OK** and your data will be filtered based upon the settings you entered.

## Sort Rows by Field

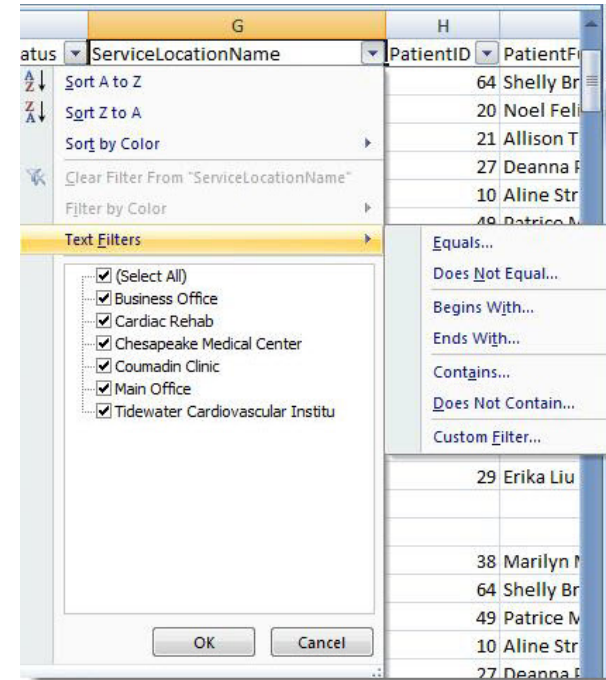
You can use Excel to sort the data by any field in your Data Worksheet. By default, the Kareo Add-In for Microsoft Excel automatically enables sorting for every field returned from the Kareo service.

### ▶ To sort your Kareo data using Excel

1. Open Excel.
2. Open a previously saved Excel spreadsheet with your pre-existing query results.
3. Go to the Data Worksheet associated with your previous query.
4. At the first row of the worksheet, click on the drop-down button within the field you want to sort.
5. On the sorting drop-down menu, select one of the sorting options presented.



6. Click **OK** and your data will be re-sorted based upon the settings you entered.

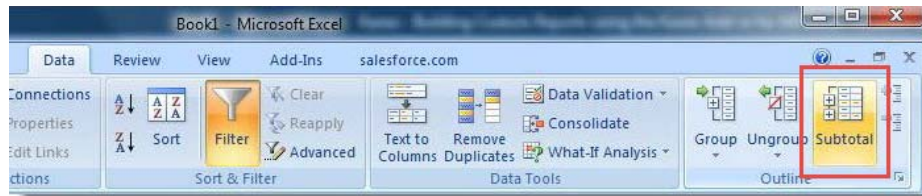


## Subtotal Rows by Field

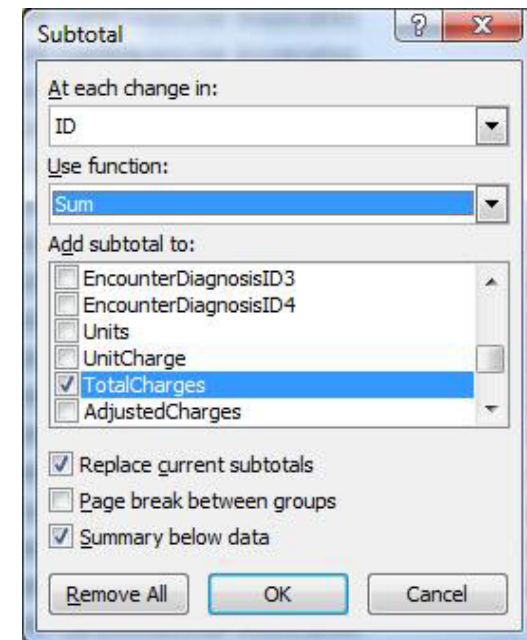
You can use Excel to group and subtotal the rows by any field in your Data Worksheet.

### ▶ To subtotal your Kareo data using Excel

1. Open Excel.
2. Open a previously saved Excel spreadsheet with your pre-existing query results.
3. Go to the Data Worksheet associated with your previous query.
4. Select the entire worksheet by selecting cell A1 and clicking **Ctrl + A** on your keyboard.
5. Click the Data menu/tab at the top.
6. Click the **Subtotal** button.



7. On the Subtotal window, select one of the fields in the Add subtotal to list.
8. Click **OK** and your data will be subtotal.



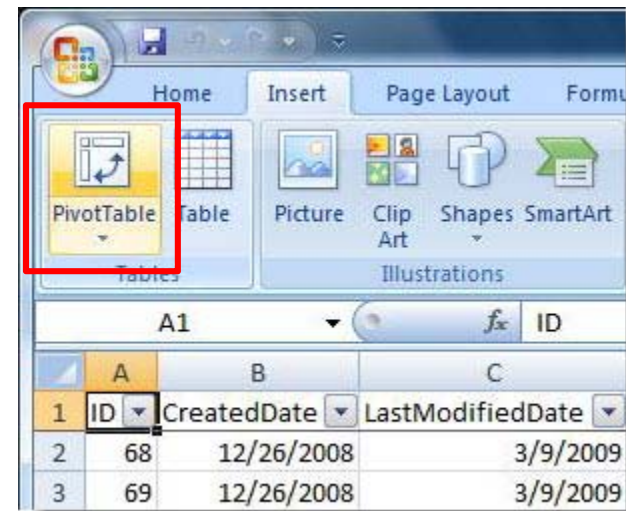
## Create Reports Using Pivot Tables

You can use Excel to create advanced reports with a feature known as PivotTables. A PivotTable is a powerful feature in Excel that enables you to quickly summarize large amounts of data. A PivotTable is especially designed for:

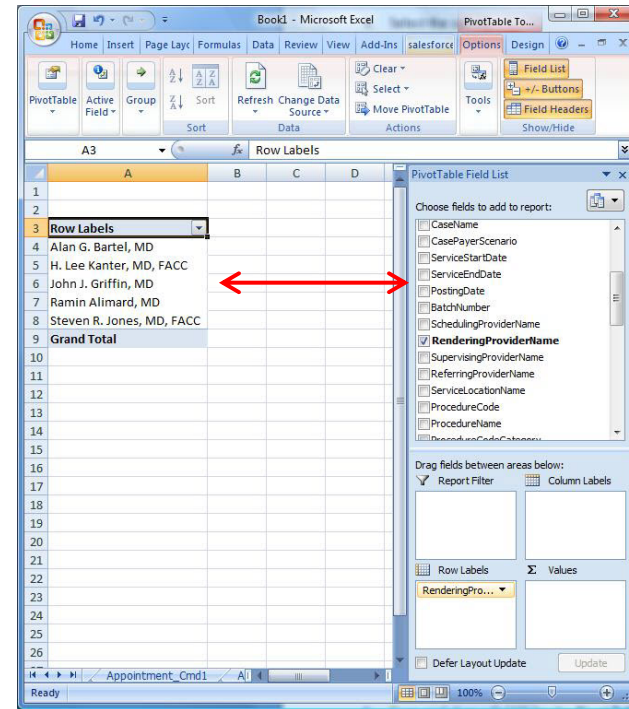
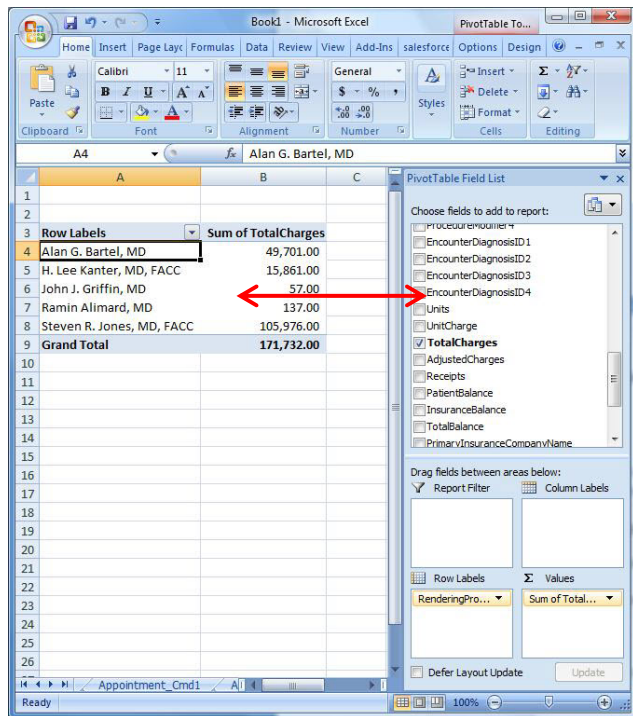
- Querying large amounts of data in many user-friendly ways.
- Subtotaling and aggregating numeric data, summarizing data by categories and subcategories, and creating custom calculations and formulas.
- Expanding and collapsing levels of data to focus your results, and drilling down to details from the summary data for areas of interest to you.
- Moving rows to columns or columns to rows (or "pivoting") to see different summaries of the source data.
- Filtering, sorting, grouping and conditionally formatting the most useful and interesting subset of data to enable you to focus on the information that you want.
- Presenting concise, attractive and annotated online or printed reports.

### ▶ To create a PivotTable from Kareo data using Excel

1. Open Excel.
2. Open a previously saved Excel spreadsheet with your pre-existing query results.
3. Go to the Data Worksheet associated with your previous query.
4. Select cell A1.
5. Click the Insert menu/tab at the top.
6. Click the **PivotTable** button. This creates a new worksheet and displays the PivotTable tools panel.



7. Drag and drop a field from the PivotTable Field List into the Row Labels list to group your report by the selected field.



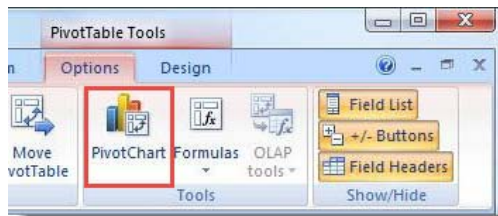
8. Drag and drop a field from the PivotTable Field List into the Values list to subtotal your report by the selected field.

## Create Charts Using Pivot Tables

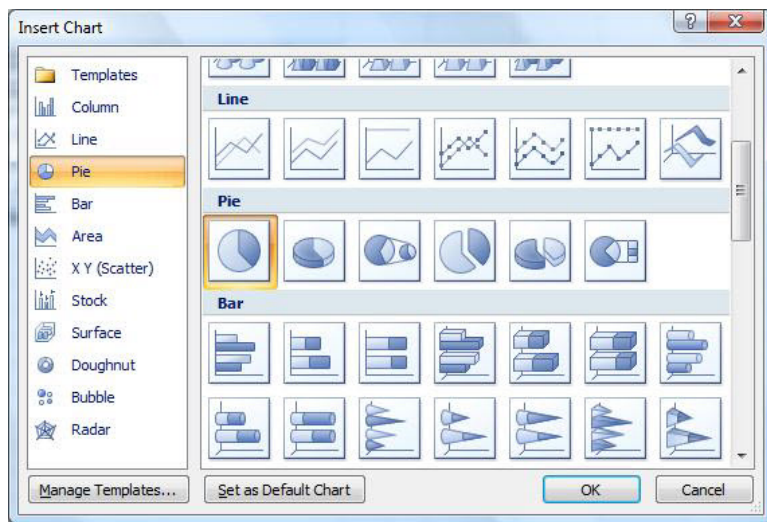
You can use Excel to create advanced graphs with a feature known as Pivot Charts. A Pivot Chart is a powerful feature in Excel that enables you to quickly visualize large amounts of data summarized in a PivotTable.

### ▶ To create a PivotChart from Kareo data using Excel

1. If you have not done so already, create a PivotTable by following the steps in section 4.4.
2. Click on one of the cells in the PivotTable to activate the PivotTable Tools menu.
3. Click the **PivotChart** button.

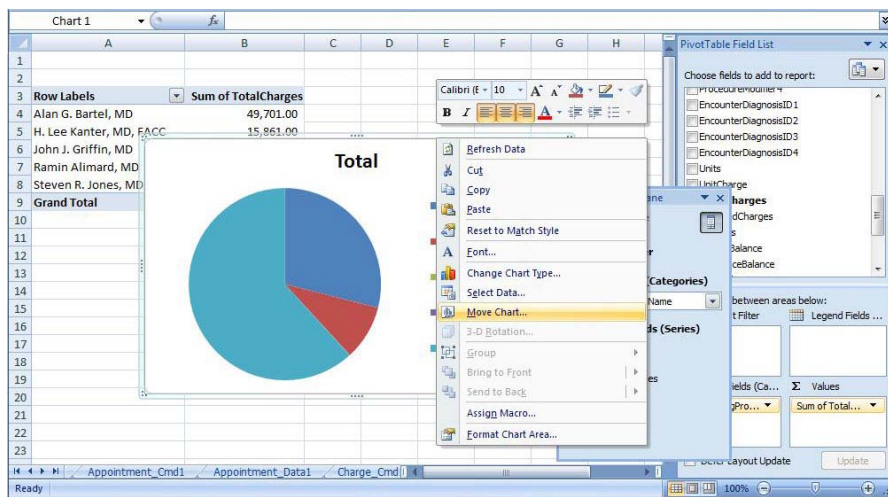


4. On the Insert Chart window, select the type of chart you would like to create.

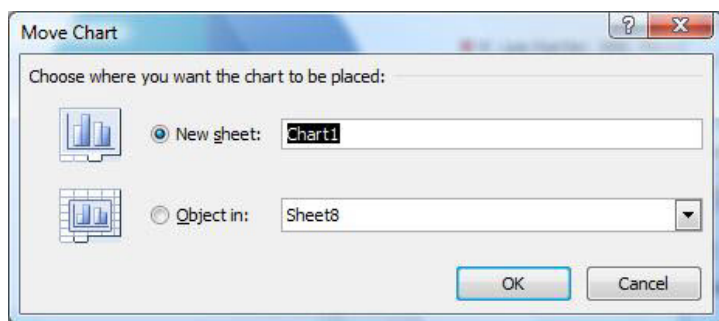




5. Click **OK**.
6. Select the chart, right-click, and select the Move Chart menu option.



7. Select the New sheet option, enter a name for your chart, and click **OK**.





## Understanding the Tables and Fields

The Kareo Add-in for Microsoft Excel enables you to query various types of data from the Kareo service. This topic provides a detailed definition of the tables and fields you can use.

### Appointments

The Appointment table is used to return appointment data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the appointment.	Appointment details	No	Yes
Created Date	The date the appointment was created.	n/a	Yes	Yes
Last Modified Date	The date the appointment was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this appointment.	Settings > Find Practice > Edit Practice	Yes	Yes
Type	The type of appointment; either "Patient" or "Other".	Appointment	Yes	Yes
Confirmation Status	The status of the appointment.	Appointment	Yes	Yes

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Service Location Name	The location of the appointment.	Appointment	Yes	Yes
Patient ID	The unique identifier for the patient related to this appointment.	Patient	Yes	Yes
Patient Full Name	The full name of the patient related to this appointment.	Appointment	Yes	Yes
Patient Case ID	The unique identifier for the case related to this appointment.	n/a	No	Yes
Patient Case Name	The name of the case related to this appointment.	Appointment	No	Yes
Patient Case Payer Scenario	The payer scenario for the case related to this appointment.	Patient > Case	Yes	Yes
Authorization ID	The unique identifier for the authorization related to this appointment.	n/a	No	Yes
Authorization Number	The authorization number related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Authorization Start Date	The authorization start date related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Authorization End Date	The authorization end date related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Authorization Insurance Plan	The insurance plan related to the authorization related to this appointment.	Patient > Case > Insurance Policy > Authorizations	No	Yes
Start Date	The start date and time of this appointment.	Appointment	Yes	Yes
End Date	The end date and time for this appointment.	Appointment	Yes	Yes
All Day	If this is an all day appointment, then true. Otherwise, false.	Appointment	No	Yes
Recurring	If this is a recurring appointment, then true. Otherwise, false.	Appointment	No	Yes
Appointment Reason 1	The first reason entered for this appointment.	Appointment	Yes	Yes

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Resource Name 1	The first provider or scheduling resource related to this appointment.	Appointment	Yes	Yes
Notes	The notes or comments related to this appointment.	Appointment	No	Yes
Practice ID	The unique identifier of the practice related to this appointment.	Settings > Find Practice > Edit Practice	No	No
Appointment Reason 2	The second reason entered for this appointment.	Appointment	No	No
Appointment Reason 3	The third reason entered for this appointment.	Appointment	No	No
Appointment Reason 4	The fourth reason entered for this appointment.	Appointment	No	No
Appointment Reason 5	The fifth reason entered for this appointment.	Appointment	No	No
Appointment Reason 6	The sixth reason entered for this appointment.	Appointment	No	No

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Appointment Reason 7	The seventh reason entered for this appointment.	Appointment	No	No
Appointment Reason 8	The eighth reason entered for this appointment.	Appointment	No	No
Appointment Reason 9	The ninth reason entered for this appointment.	Appointment	No	No
Appointment Reason 10	The tenth reason entered for this appointment.	Appointment	No	No
Resource Name 2	The second provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 3	The third provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 4	The fourth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 5	The fifth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 6	The sixth provider or scheduling resource related to this appointment.	Appointment	No	No

Appointments				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Resource Name 7	The seventh provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 8	The eighth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 9	The ninth provider or scheduling resource related to this appointment.	Appointment	No	No
Resource Name 10	The tenth provider or scheduling resource related to this appointment.	Appointment	No	No

## Charges

The Charges table is used to return charges / service line data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the claim.	Claim details	No	Yes
Created Date	The date the claim was created.	n/a	Yes	Yes
Last Modified Date	The date the claim was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this charge.	Encounter	Yes	Yes
Encounter ID	The unique identifier of the encounter related to this charge.	Encounter	No	Yes
Patient ID	The unique identifier of the patient related to this charge.	Encounter	No	Yes
Patient Name	The name of the patient related to this charge.	Encounter	Yes	Yes
Patient Date of Birth	The date of birth of the patient related to this charge.	Encounter	No	Yes



Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Case Name	The name of the case related to this charge.	Encounter	No	Yes
Case Payer Scenario	The payer scenario of the case related to this charge.	Patient > Case	Yes	Yes
Service Start Date	The service start date of this charge.	Encounter	Yes	Yes
Service End Date	The service end date of this charge.	Encounter	Yes	Yes
Posting Date	The posting date of the encounter related to this charge.	Encounter	Yes	Yes
Batch Number	The batch number associated with the encounter related to this charge.	Encounter	Yes	Yes
Scheduling Provider Name	The name of the scheduling provider related to this charge.	Encounter	Yes	Yes
Rendering Provider Name	The name of the rendering provider related to this charge.	Encounter	Yes	Yes
Supervising Provider Name	The name of the supervising provider related to this charge.	Encounter	No	Yes

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Referring Provider Name	The name of the referring physician related to this charge.	Encounter	Yes	Yes
Service Location Name	The name of the service location related to this charge.	Encounter	Yes	Yes
Procedure Code	The procedure code related to this charge.	Encounter	Yes	Yes
Procedure Name	The name of the procedure related to this charge.	Encounter	Yes	Yes
Procedure Code Category	The category of the procedure related to this charge.	Encounter	Yes	Yes
Procedure Modifier 1	The first modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 2	The second modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 3	The third modifier of the procedure related to this charge.	Encounter	No	Yes
Procedure Modifier 4	The fourth modifier of the procedure related to this charge.	Encounter	No	Yes

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Diagnosis Code 1	The first diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 2	The second diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 3	The third diagnosis code related to this charge.	Encounter	Yes	Yes
Diagnosis Code 4	The fourth diagnosis code related to this charge.	Encounter	Yes	Yes
Units	The number of units of the procedure related to this charge.	Encounter	No	Yes
Unit Charge	The unit charge of the procedure related to this charge.	Encounter	No	Yes
Total Charges	The total charges related to this charge.	Encounter	No	Yes
Adjusted Charges	The total charges minus all adjustments related to this charge.	Claim	No	Yes
Receipts	The total payments applied to this charge.	Claim	No	Yes
Patient Balance	The patient balance related to this charge.	Claim	No	Yes
Insurance Balance	The insurance balanced related to this charge.	Claim	No	Yes

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Total Balance	The total balance related to this charge.	Claim	No	Yes
Primary Insurance Billed Company Name	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Primary Insurance Billed Plan Name	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Secondary Insurance Billed Company Name	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter.	Encounter	No	Yes
Secondary Insurance Billed Plan Name	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is	Encounter	No	Yes

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
	associated with the secondary insurance policy on the case associated with the encounter.			
Billed To	The party that was last billed for this charge.	Claim	Yes	Yes
Status	The status of this charge.	Claim	Yes	Yes
Practice ID	The unique identifier associated with the practice related to this charge.	Settings > Company > Find Practice	No	No
Appointment ID	The unique identifier associated with the appointment related to this charge.	Encounter	No	No
Scheduling Provider ID	The unique identifier associated with the scheduling provider related to this charge.	Settings > Providers	No	No
Rendering Provider ID	The unique identifier associated with the rendering provider related to this charge.	Settings > Providers	No	No
Supervising Provider ID	The unique identifier associated with the supervising provider related to this charge.	Settings > Providers	No	No
Referring Provider ID	The unique identifier associated with the referring provider related to this charge.	Settings > Referring Physicians	No	No
Copay Amount	The amount of the copay related to this charge.	Encounter	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Copay Method	The copay payment method related to this charge.	Encounter	No	No
Copay Category	The copay payment category related to this charge.	Encounter	No	No
Copay Reference	The copay reference number related to this charge.	Encounter	No	No
Minutes	The minutes related to this charge.	Encounter	No	No
Line Note	The line note related to this charge.	Encounter	No	No
Ref Code	The reference code related to this charge.	Encounter	No	No
Type of Service	The type of service insurance code related to this charge.	Encounter	No	No
Hospitalization Start Date	The hospitalization start date related to this charge.	Encounter	No	No
Hospitalization End Date	The hospitalization end date related to this charge.	Encounter	No	No
Local Use Box 10d	The local use box 10d custom insurance field related to this charge.	Encounter	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Local Use Box 19	The local use box 19 custom insurance field related to this charge.	Encounter	No	No
Do Not Send Claim Electronically	True if the claim should not be sent electronically. False otherwise.	Encounter	No	No
Do Not Send Electronically to Secondary	True if the claim should not be sent electronically to the secondary insurance. False otherwise.	Encounter	No	No
E-Claim Note Type	The line note related to this charge.	Encounter	No	No
E-Claim Note	The line note related to this charge.	Encounter	No	No
Service Location ID	The unique identifier of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Billing Name	The billing name of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Place of Service Code	The place of service insurance code related to this charge.	Settings > Service Locations	No	No



Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Service Location Place of Service Name	The name of the place of service insurance code related to this charge.	Settings > Service Locations	No	No
Service Location Address Line1	The first address line of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Address Line2	The second address line of the service location related to this charge.	Settings > Service Locations	No	No
Service Location City	The city of the service location related to this charge.	Settings > Service Locations	No	No
Service Location State	The state of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Country	The country of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Zip Code	The zip code of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Phone	The phone number of the service location related to this charge.	Settings > Service Locations	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Service Location Phone Ext	The phone number extension of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Fax	The fax number of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Fax Ext	The fax number extension of the service location related to this charge.	Settings > Service Locations	No	No
Service Location NPI	The national provider identifier of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Facility ID Type	The facility ID type of the service location related to this charge.	Settings > Service Locations	No	No
Service Location Facility ID	The facility ID of the service location related to this charge.	Settings > Service Locations	No	No
Service Location CLIA Number	The CLIA number of the service location related to this charge.	Settings > Service Locations	No	No
Allowed Amount	The allowed amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Expected Amount	The expected reimbursement amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts	No	No
Primary Insurance Address Line1	The first address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Address Line2	The second address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance City	The city of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance State	The state of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Country	The country of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Zip Code	The zip code of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Primary Insurance Batch ID	The unique identifier of the billing batch associated with the primary insurance policy on the case related to this charge.	n/a	No	No
Primary Insurance First Bill Date	The date the charge was first billed to the primary insurance policy on the case related to this charge.	Case	No	No
Primary Insurance Last Bill Date	The date the charge was last billed to the primary insurance policy on the case related to this charge.	Case	No	No
Primary Insurance Payment ID	The unique identifier of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Posting Date	The posting date of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Adjudication Date	The adjudication date of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Ref	The reference number of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Method Desc	The payment method of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment Category Desc	The category of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Allowed	The allowed amount of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance	The amount of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Contract Adjustment				
Primary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Secondary Adjustment Reason	The reason of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Payment	The payment posted from the primary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Deductible	The deductible posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Coinsurance	The coinsurance posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Primary Insurance Copay	The copay posted from the primary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Address Line1	The first address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Address Line2	The second address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance City	The city of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance State	The state of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No



Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Country	The country of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Zip Code	The zip code of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Batch ID	The unique identifier of the billing batch associated with the secondary insurance policy on the case related to this charge.	n/a	No	No
Secondary Insurance First Bill Date	The date the charge was first billed to the secondary insurance policy on the case related to this charge.	Case	No	No
Secondary Insurance Last Bill Date	The date the charge was last billed to the secondary insurance policy on the case related to this charge.	Case	No	No
Secondary Insurance Payment ID	The unique identifier of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Payment Posting Date	The posting date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Adjudication Date	The adjudication date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Ref	The reference number of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Method Desc	The payment method of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Payment Category Desc	The category of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Allowed	The allowed amount of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Contract Adjustment	The amount of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Secondary Adjustment Reason	The reason of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Payment	The payment posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Deductible	The deductible posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Coinsurance	The coinsurance posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Secondary Insurance Copay	The copay posted from the secondary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Company Name	The first address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Plan Name	The second address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Address Line1	The city of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Tertiary Insurance Address Line2	The state of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance City	The country of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance State	The zip code of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy	No	No
Tertiary Insurance Country	The unique identifier of the billing batch associated with the tertiary insurance policy on the case related to this charge.	n/a	No	No
Tertiary Insurance Zip Code	The date the charge was first billed to the tertiary insurance policy on the case related to this charge.	Case	No	No
Tertiary Insurance Batch ID	The date the charge was last billed to the tertiary insurance policy on the case related to this charge.	Case	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Tertiary Insurance Payment ID	The unique identifier of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Posting Date	The posting date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Adjudication Date	The adjudication date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Ref	The reference number of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Payment Method Desc	The payment method of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance	The category of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Payment Category Desc				
Tertiary Insurance Allowed	The allowed amount of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Contract Adjustment	The amount of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Contract Adjustment Reason	The reason of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Secondary Adjustment	The amount of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Secondary	The reason of the secondary contract adjustment of the payment posted from the	Payment	No	No

Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Adjustment Reason	tertiary insurance policy on the case related to this charge.			
Tertiary Insurance Payment	The payment posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Deductible	The deductible posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Coinsurance	The coinsurance posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Tertiary Insurance Copay	The copay posted from the tertiary insurance policy on the case related to this charge.	Payment	No	No
Patient Batch ID	The batch number associated with the patient payment related to this charge.	Payment	No	No
Patient First Bill Date	The date the patient was first billed for this charge.	Claim	No	No
Patient Last Bill Date	The date the patient was last billed for this charge.	Claim	No	No



Charges				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Patient Payment Ref	The reference code related to the patient payment posted for this charge.	Payment	No	No
Patient Payment ID	The unique identifier of the patient payment posted for this charge.	Payment	No	No
Patient Payment Posting Date	The posting date of the patient payment posted for this charge.	Payment	No	No
Patient Payment Method Desc	The payment method of the patient payment posted for this charge.	Payment	No	No
Patient Payment Category Desc	The category of the patient payment posted for this charge.	Payment	No	No
Patient Payment Amount	The amount of the patient payment posted for this charge.	Payment	No	No
Other Adjustment	The type of other adjustment associated with the patient payment posted for this charge.	Payment	No	No

## Patients

The Patients table is used to return patient data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the patient.	Patient details	No	Yes
Created Date	The date the patient was created.	n/a	Yes	Yes
Last Modified Date	The date the patient was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this patient.	Patient	Yes	Yes
Full Name	The full name of the patient.	Patient	Yes	Yes
Prefix	The prefix of the patient.	Patient	No	Yes
First Name	The first name of the patient.	Patient	No	Yes
Middle Name	The middle name of the patient.	Patient	No	Yes
Last Name	The last name of the patient.	Patient	No	Yes
Suffix	The suffix of the patient.	Patient	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Social Security Number	The social security number of the patient.	Patient	No	Yes
Date of Birth	The date of birth of the patient.	Patient	Yes	Yes
Age	The age of the patient.	Patient	No	Yes
Gender	The gender of the patient.	Patient	Yes	Yes
Medical Record Number	The medical record number for the patient.	Patient	No	Yes
Marital Status	The marital status of the patient.	Patient	No	Yes
Employment Status	The employment status of the patient.	Patient	No	Yes
Employer Name	The name of the employer related to this patient.	Patient	No	Yes
Referral Source	The referral source of the patient.	Patient	Yes	Yes
Address Line1	The first address line of the patient.	Patient	No	Yes
Address Line2	The second address line of the patient.	Patient	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
City	The city of the patient.	Patient	No	Yes
State	The state of the patient.	Patient	No	Yes
Country	The country of the patient (if different than the U.S.).	Patient	No	Yes
Zip Code	The zip code of the patient.	Patient	No	Yes
Home Phone	The home phone number of the patient.	Patient	No	Yes
Home Phone Ext	The home phone number extension of the patient.	Patient	No	Yes
Work Phone	The work phone number of the patient.	Patient	No	Yes
Work Phone Ext	The work phone number extension of the patient.	Patient	No	Yes
Mobile Phone	The mobile phone number of the patient.	Patient	No	Yes
Mobile Phone Ext	The mobile phone number extension of the patient.	Patient	No	Yes
Email Address	The email address of the patient.	Patient	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Practice ID	The unique identifier for the practice related to this patient.	Patient	No	No
Default Rendering Provider Full Name	The name of the default rendering provider related to this patient.	Patient	Yes	No
Default Rendering Provider ID	The unique identifier of the default rendering provider related to this patient.	Settings > Providers	No	No
Primary Care Physician Full Name	The name of the primary care physician related to this patient.	Patient	Yes	No
Primary Care Physician ID	The unique identifier of the primary care physician related to this patient.	Settings > Referring Physicians	No	No
Referring Provider Full Name	The name of the referring provider related to this patient.	Patient	Yes	No
Referring Provider ID	The unique identifier of the referring provider related to this patient.	Settings > Referring Physicians	No	No
Default Service Location ID	The unique identifier of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name	The name of the default service location related to this patient.	Patient	Yes	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Service Location Name Address Line1	The first address line of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Address Line2	The second address line of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name City	The city of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name State	The state of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Country	The country of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Name Zip Code	The zip code of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Billing Name	The billing name of the default service location related to this patient.	Settings > Service Locations	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Service Location Phone	The phone number of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Phone Ext	The phone number extension of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Fax Phone	The fax number of the default service location related to this patient.	Settings > Service Locations	No	No
Default Service Location Fax Phone Ext	The fax number extension of the default service location related to this patient.	Settings > Service Locations	No	No
Guarantor Different Than Patient	The type of guarantor if different than the patient.	Patient	No	No
Guarantor Prefix	The prefix of the guarantor if different than the patient.	Patient	No	No
Guarantor First Name	The first name of the guarantor if different than the patient.	Patient	No	No
Guarantor Middle Name	The middle name of the guarantor if different than the patient.	Patient	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Guarantor Last Name	The last name of the guarantor if different than the patient.	Patient	No	No
Guarantor Suffix	The suffix of the guarantor if different than the patient.	Patient	No	No
Most Recent Note 1 User	The user associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 1 Date	The date associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 1 Message	The message associated with the first most recent note related to this patient.	Patient	No	No
Most Recent Note 2 User	The user associated with the second most recent note related to this patient.	Patient	No	No
Most Recent Note 2 Date	The date associated with the second most recent note related to this patient.	Patient	No	No
Most Recent Note 2 Message	The message associated with the second most recent note related to this patient.	Patient	No	No
Most Recent Note 3 User	The user associated with the third most recent note related to this patient.	Patient	No	No



Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Most Recent Note 3 Date	The date associated with the third most recent note related to this patient.	Patient	No	No
Most Recent Note 3 Message	The message associated with the third most recent note related to this patient.	Patient	No	No
Most Recent Note 4 User	The user associated with the fourth most recent note related to this patient.	Patient	No	No
Most Recent Note 4 Date	The date associated with the fourth most recent note related to this patient.	Patient	No	No
Most Recent Note 4 Message	The message associated with the fourth most recent note related to this patient.	Patient	No	No
Default Case ID	The unique identifier of the default case related to this patient.	n/a	No	No
Default Case Name	The name of the default case related to this patient.	Patient	No	No
Default Case Description	The description of the default case related to this patient.	Patient > Case	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Case Referring Provider ID	The unique identifier of the referring provider associated with the default case related to this patient.	Settings > Referring Physicians	No	No
Default Case Referring Provider Full Name	The name of the referring provider associated with the default case related to this patient.	Patient > Case	No	No
Default Case Send Patient Statements	If patient statements should be sent for charges under the default case related to this patient, then true. Otherwise, false.	Patient > Case	No	No
Default Case Payer Scenario	The payer scenario of the default case related to this patient.	Patient > Case	Yes	No
Default Case Condition Related To Auto Accident	If the default case for this patient is related to an auto-accident, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Auto Accident State	The state of the auto accident for the default case related to this patient.	Patient > Case	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Case Condition Related To Employment	If the default case for this patient is related to employment, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Pregnancy	If the default case for this patient is related to pregnancy, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Abuse	If the default case for this patient is related to abuse then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Other	If the default case for this patient is related to other, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To EPSDT	If the default case for this patient is related to EPSDT, then true. Otherwise, false.	Patient > Case	No	No
Default Case Condition Related To Family Planning	If the default case for this patient is related to family planning, then true. Otherwise, false.	Patient > Case	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Case Condition Related To Emergency	If the default case for this patient is related to an emergency, then true. Otherwise, false.	Patient > Case	No	No
Default Case Dates Injury Start Date	The start date of the injury of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Injury End Date	The end date of the injury of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Same or Similar Illness Start Date	The start date of the same or similar illness of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Same or Similar Illness End Date	The end date of the same or similar illness of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Unable to Work Start Date	The start date the patient was unable to work for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Unable to Work End Date	The end date the patient was unable to work for the default case related to this patient.	Patient > Case	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Case Dates Related Disability Start Date	The start date of a disability for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Disability End Date	The end date of a disability for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Hospitalization Start Date	The start date of a hospitalization for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Related Hospitalization End Date	The end date of a hospitalization for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last Menstrual Period Date	The last menstrual period of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last Seen Date	The date the patient was last seen for the default case related to this patient.	Patient > Case	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Default Case Dates Referral Date	The referral date for the default case related to this patient.	Patient > Case	No	No
Default Case Dates Acute Manifestation Date	The acute manifestation date of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Last X-Ray Date	The last x-ray date of the default case related to this patient.	Patient > Case	No	No
Default Case Dates Accident Date	The accident date of the default case related to this patient.	Patient > Case	No	No
Primary Insurance Policy Company ID	The unique identifier of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Company Name	The name of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Primary Insurance Policy Plan ID	The unique identifier of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Plan Name	The name of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Primary Insurance Policy Plan Address Line1	The first address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Address Line2	The second address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan City	The city of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan State	The state of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Plan Country	The country of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Plan Zip Code	The zip code of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Full Name	The adjuster name with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Phone Number	The adjuster phone number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Phone Number Ext	The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Fax Number	The adjuster fax number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Adjuster Fax Number Ext	The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No



Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Number	The policy number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Group Number	The group number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Copay	The copay associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Deductible	The deductible associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Effective Start Date	The effective start date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Effective End Date	The effective end date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Patient Relationship To Insured	The patient relationship to the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Full Name	The full name of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Address Line1	The first address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Address Line2	The second address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured City	The city of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured State	The state of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Insured Country	The country of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Zip Code	The zip code of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured ID Number	The ID number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Social Security Number	The social security number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Date of Birth	The date of birth of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Primary Insurance Policy Insured Gender	The gender of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Primary Insurance Policy Notes	The notes on the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Company ID	The unique identifier of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Company Name	The name of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Secondary Insurance Policy Plan ID	The unique identifier of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Name	The name of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	Yes	No
Secondary Insurance Policy Plan Address Line1	The first address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Policy Plan Address Line2	The second address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan City	The city of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan State	The state of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Country	The country of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Plan Zip Code	The zip code of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Full Name	The adjuster name with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Policy Adjuster Phone Number	The adjuster phone number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Phone Number Ext	The adjuster phone number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Fax Number	The adjuster fax number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Adjuster Fax Number Ext	The adjuster fax number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Number	The policy number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Policy Group Number	The group number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Copay	The copay associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Deductible	The deductible associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Effective Start Date	The effective start date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Effective End Date	The effective end date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Patient Relationship To Insured	The patient relationship to the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Policy Insured Full Name	The full name of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Address Line1	The first address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Address Line2	The second address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured City	The city of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured State	The state of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Country	The country of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No



Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Secondary Insurance Policy Insured Zip Code	The zip code of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured ID Number	The ID number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Social Security Number	The social security number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Date of Birth	The date of birth of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Insured Gender	The gender of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No
Secondary Insurance Policy Notes	The notes on the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Authorization 1 Number	The authorization number associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Insurance Plan Name	The insurance plan name associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Number Of Visits	The number of visits authorized with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Number Of Visits Used	The number of visits used for the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Full Name	The insurance contact name associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Phone	The insurance contact phone number associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Contact Phone Ext	The insurance contact phone number extension associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Authorization 1 Notes	The authorization notes associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 Start Date	The start date associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 1 End Date	The end date associated with the first authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number	The authorization number associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Ins Plan Name	The insurance plan name associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number Of Visits	The number of visits authorized with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Number Of Visits Used	The number of visits used for the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Contact Full name	The insurance contact name associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Authorization 2 Contact Phone	The insurance contact phone number associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Contact Phone Ext	The insurance contact phone number extension associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Notes	The authorization notes associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 Start Date	The start date associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 2 End Date	The end date associated with the second authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Number	The authorization number associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Ins Plan Name	The insurance plan name associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Number Of Visits	The number of visits authorized with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Authorization 3 Number Of Visits Used	The number of visits used for the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Full name	The insurance contact name associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Phone	The insurance contact phone number associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Contact Phone Ext	The insurance contact phone number extension associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Notes	The authorization notes associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 Start Date	The start date associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Authorization 3 End Date	The end date associated with the third authorization entered for this patient.	Patient > Case > Authorizations	No	No
Alert Message	The alert message related to this patient.	Patient > Alerts	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Alert Show When Displaying Patient Details	True if the alert message related to this patient should show when displaying patient details. False otherwise.	Patient > Alerts	No	No
Alert Show When Scheduling Appointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	Patient > Alerts	No	No
Alert Show When Entering Encounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	Patient > Alerts	No	No
Alert Show When Viewing Claim Details	True if the alert message related to this patient should show when viewing claim details. False otherwise.	Patient > Alerts	No	No
Alert Show When Posting Payments	True if the alert message related to this patient should show when posting payments. False otherwise.	Patient > Alerts	No	No
Alert Show When Preparing Patient Statements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	Patient > Alerts	No	No
Collection Category Name	The name of the collection category related to this patient.	Patient > Account	Yes	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Statement Note	The last statement note posted to this patient's account.	Patient > Account	No	No
Last Diagnosis	The last diagnosis entered for this patient.	Patient > Account	No	No
Last Appointment Date	The last appointment scheduled for this patient.	Patient > Account	No	No
Last Encounter Date	The service date of the last encounter entered for this patient.	Patient > Account	Yes	No
Last Statement Date	The date of the last patient statement sent to this patient.	Patient > Account	No	No
Last Payment Date	The posting date of the last payment received from this patient.	Patient > Account	No	No
Charges	The total charges entered for this patient.	Patient > Account	No	No
Adjustments	The total adjustments entered for this patient.	Patient > Account	No	No
Insurance Payments	The total insurance payments posted for this patient.	Patient > Account	No	No
Patient Payments	The total patient payments posted for this patient.	Patient > Account	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Insurance Balance	The insurance balance pending on charges associated with this patient.	Patient > Account	No	No
Patient Balance	The patient balance on charges assigned to this patient.	Patient > Account	No	No
Total Balance	The total balance related to this patient.	Patient > Account	No	No



## Providers

The Provider table is used to return provider and referring provider data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the provider.	Provider details	No	Yes
Created Date	The date the provider was created.	n/a	Yes	Yes
Last Modified Date	The date the provider was last modified.	n/a	Yes	Yes
Practice Name	The name of the practice related to this provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes
Type	Either "Normal Provider" or "Referring Provider".	Settings > Providers or Settings > Referring Physicians	Yes	Yes
Full Name	The full name of the provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Prefix	The prefix of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
First Name	The first name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Middle Name	The middle name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Last Name	The last name of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Suffix	The suffix of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Degree	The degree of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Social Security Number	The social security number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
National Provider Identifier	The national provider identifier (NPI) of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Specialty Name	The specialty name associated with the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Billing Type	The type of provider for Kareo billing purposes.	Settings > Providers or Settings > Referring Physicians	No	Yes
Active	True if the provider is active. False otherwise.	Settings > Providers or Settings > Referring Physicians	No	Yes
Department Name	The department name related to this provider.	Settings > Providers or Settings > Referring Physicians	Yes	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Encounter Form Name	The name of the encounter form related to this provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Address Line1	The first address line of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Address Line2	The second address line of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
City	The city of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
State	The state of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Country	The country of the provider (if different than the U.S.).	Settings > Providers or Settings > Referring Physicians	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Zip Code	The zip code of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Email Address	The email address of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Home Phone	The home phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Home Phone Ext	The home phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Work Phone	The work phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Work Phone Ext	The work phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Mobile Phone	The mobile phone number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Mobile Phone Ext	The mobile phone number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Pager	The pager number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Pager Ext	The pager number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Fax	The fax number of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Fax Ext	The fax number extension of the provider.	Settings > Providers or Settings > Referring Physicians	No	Yes

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Notes	The notes related to this provider.	Settings > Providers or Settings > Referring Physicians	No	Yes
Practice ID	The unique identifier of the practice related to this provider.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Active	True if the provider performance email reports are active for this provider. False otherwise.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Scope	The information presented on the provider performance email reports: Provider, Practice, or Both.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Frequency	The frequency with which the provider performance email reports are sent to this provider.	Settings > Providers or Settings > Referring Physicians	No	No
Provider Performance Report Delay	The delay in days for the provider performance email reports from the end of a period.	Settings > Providers or Settings > Referring Physicians	No	No

Patients				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Provider Performance Report CC Email Recipients	The email address of any recipients that should receive the provider performance email reports in addition to the provider.	Settings > Providers or Settings > Referring Physicians	No	No

## Transactions

The Transactions table is used to return financial transaction data from the Kareo service. Below is a list of available fields along with their detailed data definitions.

Transactions				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
ID	The unique identifier of the transaction.	n/a	No	Yes
Last Modified Date	The date the transaction was last modified.	Varies by transaction	Yes	Yes
Practice Name	The name of the practice related to this transaction.	Varies by transaction	Yes	Yes



Transactions				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Transaction Date	The date the transaction was entered by the user.	Varies by transaction	Yes	Yes
Posting Date	The posting date of the transaction as specified by the user.	Varies by transaction	Yes	Yes
Service Date	The service date of the transaction, if applicable.	Varies by transaction	Yes	Yes
Type	The type of transaction.	Varies by transaction	Yes	Yes
Patient ID	The unique identifier of the patient related to this transaction, if applicable.	Varies by transaction	No	Yes
Patient Full Name	The full name of the patient related to this transaction, if applicable.	Varies by transaction	No	Yes
Payer Type	The payer type related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Insurance Order	The order of the insurance related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Insurance ID	The unique identifier of the insurance related to this transaction, if applicable.	Varies by transaction	No	Yes

Transactions				
Field Name	Description	Where in Kareo	Query Parameter	Selected by Default
Insurance Company Name	The name of the insurance company related to this transaction, if applicable.	Varies by transaction	No	Yes
Insurance Plan Name	The name of the insurance plan related to this transaction, if applicable.	Varies by transaction	No	Yes
Procedure Code	The procedure code related to this transaction, if applicable.	Varies by transaction	Yes	Yes
Description	The description of this transaction.	Varies by transaction	No	Yes
Amount	The amount of this transaction, if applicable.	Varies by transaction	No	Yes
Practice ID	The unique identifier of the practice related to this transaction.	Varies by transaction	No	No