# Table of Contents

1. Kareo EHR Adoption Overview ................................................................. 1
2. Implementation Checklist ......................................................................... 2
3. Support ........................................................................................................ 3
4. EHR Orientation ......................................................................................... 4
5. EHR Training .............................................................................................. 5
   5.1 Training 10 – EHR Administrator ....................................................... 5
   5.2 Training 13 – EHR Clinical Staff ....................................................... 5
   5.3 Training 14 – EHR Provider .............................................................. 5
   5.4 Training 15 – EHR Template Editor ................................................ 5
   5.5 Training 16 – EHR iPad ................................................................... 5
   5.6 Training 17 – EHR Meaningful Use ................................................ 5
6. Meaningful Use ......................................................................................... 6
7. Launch ........................................................................................................ 7
8. Appendix ..................................................................................................... 8
   8.1 Chart Conversion Strategy ............................................................... 8
   8.2 Patient Communication Tips ............................................................ 9
1. **Kareo EHR Adoption Overview**

**Keys to Success**

Your decision to adopt the Kareo EHR is integral to your goals for providing the best patient care, increasing patient safety and satisfaction and, at the same time, enhancing practice revenue. Kareo EHR’s commitment is to partner with you on the path to EHR success.

Adopting an EHR is a substantial undertaking — it is very important for every provider and staff member in your practice to know this and to understand the reasons for EHR adoption. Together we will strive to create a positive and productive experience before, during, and after your EHR launch. By laying a solid foundation for accomplishing a smooth transition we can achieve:

- A faster learning curve
- Minimal workflow disruption and less overall impact to office productivity
- Greater understanding of the benefits of an EHR
- Comprehensive use of the system
- Capability to achieve Meaningful Use measures

**Laying the Foundation**

The most important part of the EHR adoption process is for the practice to prepare for the EHR implementation. Initially your practice will need to:

- **Assess:** Expect to spend several hours with your team evaluating your current practice workflows and readiness for the transition. This includes defining each staff member’s role and responsibilities, outlining the practice’s day-to-day operations and activity, and communicating why the change is needed at all levels of the practice. You can use the [Kareo EHR Workflow Assessment](#) to help evaluate your office’s workflow changes.

- **Revise:** Your current workflows will change in the course of adopting an EHR. Your implementation team's efforts to understand how your practice operates (current workflows) will enable you to successfully create your new EHR workflows.

  You will also need to make some key decisions about the functionality of your EHR. We will provide you guidance and suggestions on the following decisions:

  - Chart Conversion and Document Management Strategy
  - Lab Interface Plan
  - Meaningful Use Qualification Plan
  - Patient Communication Plan

- **Learn:** Kareo EHR will deliver a training curriculum for your providers, super users and staff that best meets the needs of your office. Plan on 2-5 hours of training for each individual in your office, depending on the individual’s role and prior experience.

**Launch**

You’ve planned, prepared and trained your practice for Launch. Now you can maximize every value of Kareo EHR and qualify for the Meaningful Use incentive payments.
2. Implementation Checklist

**Complete Practice Setup**
- Navigate the Admin Tab
- Take *Training to: EHR Administrator*

**Upload Patient Demographics**
- Import Patient Demographic Data
- Add New Patients Manually

**Complete ePrescribe Enrollment**
- Log in to Kareo EHR and click the green *ePrescribe* button at the top. An enrollment wizard quickly and easily takes you through the steps, and we handle the rest!
- eprescribe a Medication in the EHR

**Complete eLab Enrollment**
- Fill out the *lab enrollment request form*
- Navigate Lab Orders and Results in the EHR

**Register for EHR Training Sessions**
- EHR Administrator
- EHR Front Office Staff
- EHR/Practice Management Front Office Staff
- EHR Clinical Staff
- EHR Provider
- EHR Template Editor
- EHR iPad
- Meaningful Use

**Review Kareo’s Meaningful Use Resources**
- Qualification Plan
- EHR Relevant Fields in Kareo
- Progress Checklist

**Launch**
- Congratulations, you are up and running!
3. Support

Kareo EHR offers comprehensive training and support to assist you with a successful EHR implementation. Your Customer Success Coach (CSC) will provide personalized, one-on-one support throughout your onboarding process and make sure you successfully complete each setup milestone.

Live training enables you to see Kareo EHR functionality and best practices first hand, as well as have the opportunity to ask expert trainers questions. Our video library and how-to articles can be accessed at any time, therefore, if you can’t make one of the training sessions, or need to review information, information is available online at our Help Center 24/7.
4. EHR Orientation

The EHR Front Office Staff training provides a general overview of the Kareo EHR as well as how to register and schedule patients, update patient demographics, and perform tasks such as messaging.

Register for one of the following:

- Training 11 – EHR and Practice Management for Office Staff Orientation: [Register here](#)
- Training 12 – EHR Only for Office Staff Orientation: [Register here](#)
5. EHR Training

5.1 Training 10 – EHR Administrator
This training covers everything a Kareo EHR administrator needs to know about the Admin tab features such as how to update practice information, user roles and system preferences. In addition, this session presents the My Settings features for building a medication favorites list and reviewing system templates.
Training 10 – EHR Administrator: Register here

5.2 Training 13 – EHR Clinical Staff
In this training, clinical staff will learn how to enter vitals and update clinical information such as allergies and medications. Also covered is how to room patients and begin a visit note, as well as perform tasks such as messaging.
Training 13 – EHR Clinical Staff: Register here

5.3 Training 14 – EHR Provider
In this training, providers will be given an overview of Kareo EHR and learn how to work with the patient’s chart to add past medical history and document patient visits. In addition, providers will learn how to create internal messages, ePrescribe and respond to Rx renewal requests, as well as order labs and imaging studies.
Training 14 – EHR Provider: Register here

5.4 Training 15 – EHR Template Editor
In this one-on-one training, you will learn the basics of working with the Template Editor, including editing existing templates and creating custom versions of existing templates.
Training 15 - Template Editor: Register here

5.5 Training 16 – EHR iPad
In this training session, providers will learn the basics of using the iPad, including how to write ePrescriptions and chart notes.
Training 16 - EHR iPad: Register here

5.6 Training 17 – EHR Meaningful Use
Webinar 17A: Meaningful Use Stage 1 Program Overview, register here
  - Covers eligibility, registration and program timelines
Webinar 17B: Meaningful Use Stage 1 Measures in Kareo, register here
  - Covers how to use Kareo to meet each program measure
6. **Meaningful Use**

Certified EHR technology used in a meaningful way is one piece of a broader Health Information Technology infrastructure intended to reform the health care system and improve health care quality, efficiency, and patient safety. Under the HITECH Act, the Medicare EHR incentive programs provide incentive payments to eligible professionals (EPs) that are meaningful users of certified EHRs. The Medicaid EHR incentive program provides incentives payments to eligible professionals for efforts to adopt, implement or upgrade certified EHR technology.

Provider registration and the attestation reporting process for both the Medicare and Medicaid programs occurs on the CMS website using the [Medicare & Medicaid EHR Incentive Program Registration & Attestation System](#).

Providers are encouraged to register for the Medicare and Medicaid EHR Incentive Program(s) as soon as possible to avoid payment delays. Please note that not all states have launched a Medicaid EHR Incentive Program yet, and you should check your state’s status at [Medicaid State information](#).

Below are step-by-step guides to help you register for EHR Incentive Programs. Choose the guide that fits your needs:

- [Medicare Electronic Health Record (EHR) Incentive Program Registration User Guide for Eligible Professionals (Medicare)](#)
- [Medicaid Electronic Health Record (EHR) Incentive Program Registration User Guide for Eligible Professionals (Medicaid)](#)

Kareo EHR is committed to making you successful in Meaningful Use. We offer the following training session and encourage you to attend:

- [Training 17A – Meaningful Use Stage 1 Program Overview: Register here](#)
- [Training 17B- Meaningful Use Stage 1 Measures in Kareo: Register here](#)
7. **Launch**

Congratulations, you are up and running! Now that you have completed all implementation milestones and training, you can focus on providing the best patient care and maximizing every value of Kareo EHR.

We’ll always be here to help answer questions along the way! Our Support Team is happy to assist you and can be contacted through the various channels:

- **Phone:** 888-775-2736, option 3
- **EHR Live Chat:** [http://www.kareo.com/chat](http://www.kareo.com/chat)
- **EHR Email:** support@kareo.com
8. Appendix

8.1 Chart Conversion Strategy

You're ready to take on an EHR implementation BUT you've got this big hurdle in your way...a room full of patient charts. Converting paper charts is a costly process, no matter how you approach it.

Clinical data conversion strategy

The essential questions in determining an approach for getting clinical data from the paper chart into the electronic record are:

- What will be converted from the paper chart to the EHR?
- Who will complete the conversion work?
- What is the timing of the chart-to-EHR work?

Abstract and enter specific data discretely

Think about what you use in the chart most of the time. What do you typically look at with every visit? The facesheet with the patient's problem list, medications, and preventive screenings is most likely the first glance as the chart opens. This becomes the checklist of data to enter into your EHR. Use discrete data entry for information that will be used for follow-up care, comparison across patient encounters or report generation. As a general guideline, include pieces of information that you will want to easily access and compare over several patient visits, such as past procedures or surgeries, or preventive screenings. Enter information that you will re-use, like reissuing a medication for a patient.

Specific data in the chart that would be most useful to the provider when documenting the patient visit and can be reasonably captured and entered into discrete fields in the EHR by the clinical support staff is as follows:

- Medications
- Allergies
- Diagnoses/problems (ongoing, not acute/inactive) – these must be coded (ICD-9) to prepare for proper billing and abstraction for qualifying of HITECH Meaningful Use incentive funds.
- Procedures/surgeries (which procedure and date) and health maintenance screenings and dates (just the specific procedure/surgery, not the result/op report).

Abstract these key components from the paper chart, use the mouse/keyboard (not scanning) to get them into the EHR and successfully transition into go-live.

Clinical staff can interpret the chart

Because clinical data is being abstracted, the work should be performed by clinical staff that can interpret the chart and understand the data that is being abstracted and entered into the EHR. It will require a significant workload which means that the practice will need to supplement existing staff.

For the typical primary care practice, it will take a full year to complete your chart conversion, less for many specialty practices. Be prepared by informing and educating everyone in the practice about the work involved. Be sure to provide enough workstations and space for the chart abstraction to occur. Best practice
is to convert the charts for patient scheduled approximately two weeks in advance. If the practice adds patients onto the schedule within a day of the visit, establish a procedure to convert the chart within a day of the patient’s visit.

Be sure to clearly label the chart that has been converted to the EHR so that the next time the patient comes in, the staff knows it has been converted. For example, stamp the outside (front and back) of the chart with a large, red letter “E” to identify that it is now electronic and nothing new should be filed in the chart.

Be prepared for the work effort
The rewards will be great, but that first year will require great effort. Create a game plan for climbing over your chart hurdle and achieving success with your EHR implementation.

8.2 Patient Communication Tips
Engage your patients in the EHR implementation. Patients are often happy to learn that their providers will have quick access to their records for phone call support as well as remotely for after-hours needs. It is also helpful to introduce the change to patients by announcing the EHR implementation plans and ongoing transition efforts.

Practices have used various methods to communicate to their patients. In the office setting, practices have posted flyers and/or distributed pamphlets, newsletters, and announcement cards. In addition to in-office tools, use your practice website and patient statements to introduce the new EHR. One pediatric practice used a birth announcement as a model and created a simple postcard to introduce their “new addition”. Get creative and have fun.

Sample announcement (for any medium)
“Our practice is transitioning to an electronic health record (EHR). Once we have fully converted all our patient records to the EHR, we anticipate improving our responsiveness to your phone calls and increasing our operational efficiency to better serve your needs. During our transition, you may be asked to verify your medical history and personal information so that we can be assured of maintaining accurate and comprehensive records. We are excited about the EHR and being able to provide fast, up-to-date access to your health information when you need it and when we need it to help you. We look forward to working together with you for your health!”

Social Media
Using social media to post updates on the EHR implementation is another method that can actively engage patients following the practice on Facebook or Twitter, or perhaps your own blog. Because the nature of the web is one of the most current news, you will want to update your message frequently. An advance plan for a series of posts to span the first six weeks of your EHR implementation will make it easy to keep patients engaged even when you are at your busiest in the EHR transition. Take photos of providers and nurses using the EHR to post too.
Sample posts for your blog, Twitter and/or Facebook:

1. *The new equipment for our EHR is being installed. The nurses love using the computer to capture patients’ vital signs.*
2. *Our initial EHR training has gone well with everyone online.*
3. *It’s our first day using the new EHR during patient visits. Sending prescriptions electronically has been a big benefit for our patients. We had a phone call from a patient at her pharmacy because she was so appreciative that the medication was ready when she arrived.*
4. *Doctor came in today and told us how wonderful it was to access her patient’s information when she took a call late in the night.*