

# Integrating Kareo PM and WebPT EHR



Welcome to the user guide for integrating Kareo Practice Management with WebPT,<sup>TM</sup> an electronic health record system (EHR). The technology integration between Kareo PM and WebPT currently supports a uni-directional data interface: When you enter certain information into WebPT and submit a Daily Note, that information will automatically transfer into the Kareo PM system. Because this is uni-directional, note that information will not currently transfer from Kareo PM into WebPT.

General information that will transfer from WebPT into Kareo PM:

- Patient information
- Case information
- Referring Physician
- Insurance information
- Daily Note information



To see details on what information gets mapped to Kareo PM, please see the table on [Information Mapping](#).



**If you are new to WebPT, a WebPT representative will contact you to conduct training.**

## Integration Setup: Current Kareo PM and WebPT Users

In order to establish an interface between Kareo PM and WebPT, you must have certain information mapped between WebPT and Kareo PM; a WebPT Member Representative will assist you.

**Note:** This process can take up to two weeks depending on the number of patients, cases, etc.

For integration to occur, the following information will need to be mapped from WebPT to Kareo PM:

- Patients
- Providers
- Referring Physicians
- Insurance Companies and Plans
- Cases

### ▶ To map existing information from WebPT into Kareo PM

1. Contact your WebPT Onboarding Specialist: 1-866-221-1870.



## Integration Setup: New Users

In order to establish an interface between Kareo PM and WebPT, you will first need both a Kareo PM and a WebPT account. Once you have set up and configured those accounts, WebPT will run a data check to confirm that all the necessary information matches.

To get started, you will need to complete the following:

- Activate a WebPT EHR account.
- Add physician information within WebPT.
- Activate a Kareo PM account.
- Set up at least one practice in Kareo PM: Using the New Practice Setup Wizard, this will include setting up providers, insurances, and service locations, all of which are necessary for the integration.
- Set up a fee schedule in Kareo PM.

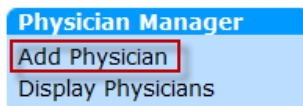
### Activate a WebPT EHR Account

If you do not have a WebPT EHR account, you can sign up by visiting [www.webpt.com](http://www.webpt.com) or call 1-866-221-1870.

### Add Referring Physicians in WebPT

#### ▶ To add a referring physician

1. When you add a referring physician in WebPT, it will carry over into Kareo PM when the first Daily Note is finalized referencing the referring physician.  
**Important:** Do not “Quick Add” referring physicians to avoid sending incomplete information to Kareo PM.
2. Under Physician Manager in the left menu, click **Add Physician**.



3. In the Dr Type drop-down menu, select the type of physician.
4. Complete the physician general information.
5. Click **Add Physician**.

## Activate a Kareo PM Account

If you don't have a Kareo PM account, you can sign up through the Kareo PM website: [www.kareo.com](http://www.kareo.com).

### To install the application

1. Go to <http://www.kareo.com/support/download-kareo>.
2. Review the Setup Instructions.
3. Click **Download Kareo Now** and follow the installation prompts.
4. In order to log in to the software, you will need a user name and password:
  - **Individual users:** Contact your Kareo PM application administrator. The Kareo PM application administrator is the person within your business office who is responsible for setting up and managing the application for the company and all its client practices.
  - **Kareo PM application administrators:** Refer to your confirmation email or contact Kareo Customer Support ([support@kareo.com](mailto:support@kareo.com)).

## Set Up a Practice in Kareo PM

If you have not configured at least one practice within Kareo PM, you will need to do so prior to integrating with WebPT. The New Practice Setup Wizard will guide you to complete all necessary data fields for correctly setting up a practice.

**Important:** In order for the systems to integrate properly, you must enter the provider names in Kareo PM exactly as you entered them in WebPT.

### ▶ To launch the setup wizard

1. In Kareo on the Settings menu, click **Company > New Practice**. The setup wizard will launch.
2. In the setup wizard, you will want to complete the following:
  - Practice information
  - Locations
  - Providers
  - Insurance

## Set Up a Fee Schedule in Kareo PM

You can set up a fee schedule in Kareo PM manually or by importing your fee schedule from another system.

### ▶ To set up a fee schedule

1. In Kareo, click **Settings > Contracts & Fees**.
2. On the Standard Fees tab, click **Add New Standard Fee Schedule**.  
See [Add Fee Schedule](#) for more information.

## Manage Patient Information

New patients entered in WebPT are transferred into Kareo PM automatically after you save the patient record. When adding a new patient you will also add at least one case. General patient information that gets transferred into Kareo PM:

- Full name
- Social Security Number
- Date of birth
- Gender
- Marital Status
- Address
- Contact Information
- Service Location

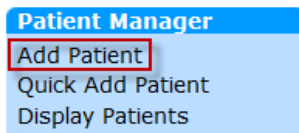


### Patient Information in WebPT

▶ To add a new patient in WebPT

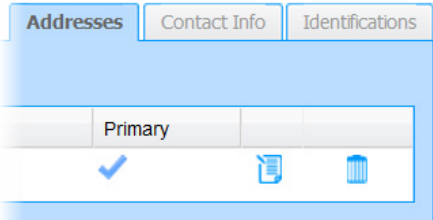
1. In WebPT, under Patient Manager in the left menu, click **Add Patient**.

**Important:** Do not “Quick Add” new patients to avoid sending incomplete information to Kareo PM.



2. Complete the patient general information.
3. Click **Add Address** to enter patient address.

4. In the Add Address box, there are two additional tabs on the right:

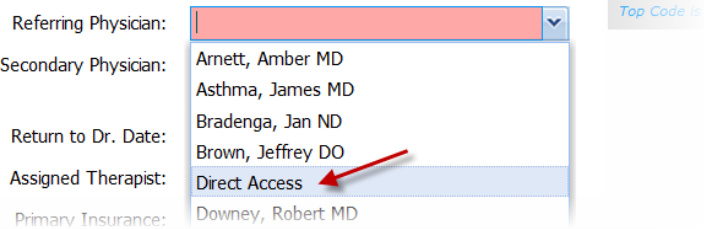


- Contact Info (required): Enter patient phone or email address
- Identifications (optional): Enter social security number

5. Click **Add Insurance** to enter insurance plan information.

6. Click **Add Case** to enter a case for the patient. The following information is required when creating each case:

- Case Title
- Diagnosis Code
- Related Cause
- Referring Physician  
If there is no referring physician, select Direct Access in the drop-down menu.
- Assigned Therapist
- Primary Insurance. If there is a secondary insurance, it must be added to the case or it will not transfer to Kareo PM. If patient is self pay, select Self Pay as the primary insurance.

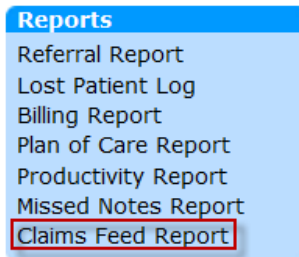


**Note:** You can require an authorization which will transfer into Kareo PM.

7. Click **Save Patient**. Patient case will appear in Kareo PM within 3-5 minutes.

▶ **To verify transmission from WebPT into Kareo PM**

1. Under Reports in the left menu, click **Claims Feed Report**.



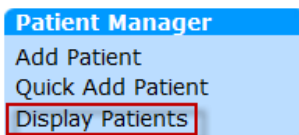
2. Under Reconciliation Mode, choose Transmission in the drop-down menu.
3. Click **Generate Claims Feed Report** to refresh the screen. The Status column will indicate when the transmission is successful or if corrections need to be made:
  - Initiated: The record is submitted for transmission
  - NOT RE-BILLED: Addendum that was finalized and not re-billed.
  - Transmission Successful: The record has been transmitted to Kareo PM
  - Validation Failed: The record has errors and was not transmitted. Click **Validation Failed** to view errors. See [How Edits to Daily Notes in WebPT Affect Encounters in Kareo PM](#) to add an Addendum.

▶ **To edit patient information in WebPT**


When you make changes to patient information, updates will be sent to Kareo PM.

**Note:** You should not make changes within the patient record in Kareo PM.

1. Under Patient Manager in the left menu, click **Display Patients**.



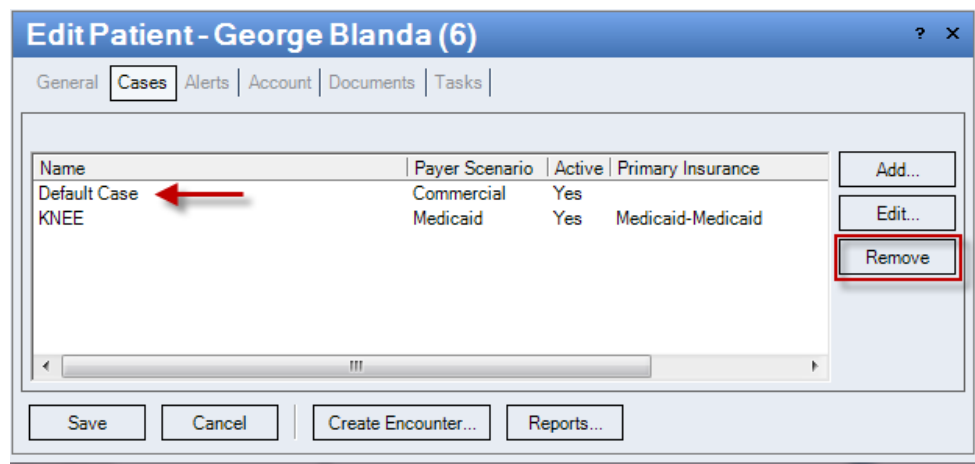


2. Click a patient's name. The patient record will open.
3. Click **Patient Info** at the top.
4. To the right of each item, click the Edit icon  to make changes.
5. Click Save Patient.

## Patient Information in Kareo PM

### ▶ To view patient information in Kareo PM

1. In Kareo PM, click **Patients** in the left menu.
2. Once you find the patient record, double-click to open it. Patient information from WebPT is located under the General tab.
3. Under the Cases tab you will see a "Default Case" listed each time you create a new patient in WebPT. This is a "dummy" case and can be deleted. Click on "Default Case" to highlight it. Click **Remove** on the right of the window.



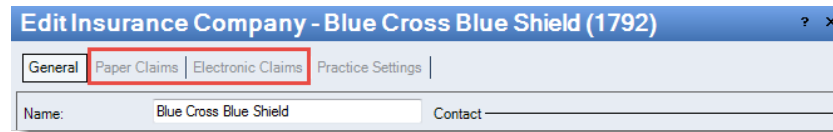
## Manage Insurance Information

After integration is turned on, each time you enter a new insurance company in WebPT, it will transfer into Kareo PM when you reference that insurance company in a patient record. When the insurance company transfers into Kareo PM, you must configure the claim settings for it in order to process a claim.

**Note:** It is not recommended to merge insurance plans within Kareo PM; this can adversely affect the insurance information mapping between WebPT and Kareo PM. If you think you need to merge plans, contact Kareo Support first.

### ▶ To configure claim settings in Kareo PM

1. In Kareo PM, click **Settings > Insurance > Insurance Companies** in the left menu.
2. Once you find the insurance company, double-click to open it.
3. Click the Paper Claims and Electronic Claims tabs to select the claim settings.



For more information on configuring claim settings, see Kareo's online help articles [Paper Claims Settings](#) and [Electronic Claims Settings](#), or attend [Webinar 3 – Entering Patients and Insurances](#).

## Copays

A copay can be entered directly into WebPT which is then transferred as an unapplied payment into Kareo PM once the Daily Note has been finalized. In order for the copay to transfer into Kareo PM:

- The copay must be entered prior to the Daily Note being finalized. It will not carry over on an addendum.
- The copay must be entered on the correct case.
- The copay must be marked "Paid."

Note that the copay displays in Kareo PM as an unapplied amount. See [View Cases and Encounters in Kareo](#).

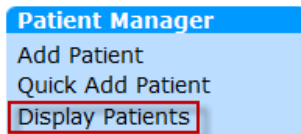
## Encounters (Daily Notes) and Cases

Encounters in Kareo PM are called Daily Notes in WebPT. The first patient visit requires an Initial Examination to be completed in WebPT. When a Daily Note is finalized, the information will transfer into Kareo PM as an encounter.

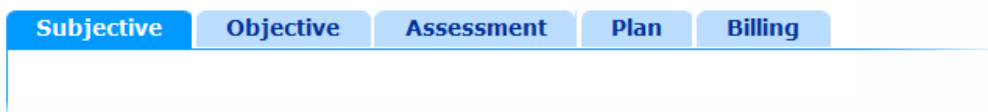
### Enter an Initial Examination or Daily Note

#### ▶ To enter an Initial Examination in WebPT

1. In WebPT, under Patient Manager in the left menu, click **Display Patients**.



2. When you've found the patient, click the name to open the record.
3. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create an Initial Examination.
4. Click **Add Initial Examination** on the right side of the window.
5. Complete the fields in each section, starting with the Subjective tab. Click **Next** at the bottom of the window to move to the next tab.

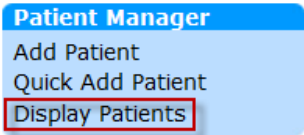


**Note:** If you would like to review your entries, click a tab to jump to that section. Any time you want to exit out of the Initial Examination, click **Save as Draft** on the right.

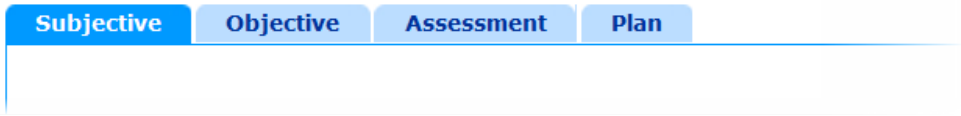
6. You have a choice to add a Daily Note after completing the Initial Examination or creating it at a later time:
  - Click **Next** to add a Daily Note. On the Billing tab, check "Include Daily Note with this Initial Examination."
  - Click **Finalize Initial Examination** to complete it without creating a Daily Note.

▶ **To enter a Daily Note**

- 1. Under Patient Manager in the left menu, click **Display Patients**.



- 2. When you've found the patient, click the name to open the record.
- 3. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create a Daily Note.
- 4. Click **Add Daily Note** on the right side of the window.
- 5. Complete the fields in each section, starting with the Subjective tab. Click **Next** at the bottom of the window to move to the next tab. Billing information is completed on the Objective tab.



**Note:** If you would like to review your entries, click a tab to jump to that section. Anytime you want to exit out of the Daily Note, click **Save as Draft** on the right.

- 6. When all information is complete, click **Finalize Daily Note**. You can verify transmission into Kareo PM by viewing the Claims Feed Report.

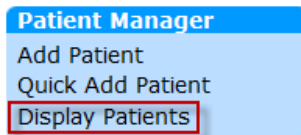
## How Edits to Daily Notes in WebPT Affect Encounters in Kareo PM

When you finalize a Daily Note, it creates a PDF document in WebPT and that Daily Note gets transferred into Kareo PM as an encounter. If you make any changes to patient information, insurance or (remove) a Daily Note, it does not update the encounter in Kareo PM. Therefore, when you make those changes in WebPT, you must then delete the incorrect encounter within Kareo PM.

### ▶ To make edits by adding an Addendum

Any changes you make that will affect the Daily Note need to be added as an Addendum in WebPT. WebPT sends an updated encounter to Kareo PM only when **Finalize and Rebill Daily Note** is selected. You must then delete the incorrect encounter in Kareo PM.

1. Under Patient Manager in the left menu, click **Display Patients**.



2. When you've found the patient, click the name to open the record.
3. Case tabs are located on the right near the top of the window. Click the case tab for which you want to create an Addendum.
4. In the drop-down menu to the right of the Daily Note, select **Add Addendum**.
5. Make the changes.
6. Finalize the addendum:
  - **Finalize Daily Note:** Click if the changes were made to the note only.
  - **Finalize & Rebill Daily Note:** Click if changes were made to the Objective tab (which affects billing).

Preview Daily Note

Finalize Daily Note

Finalize & Rebill Daily Note

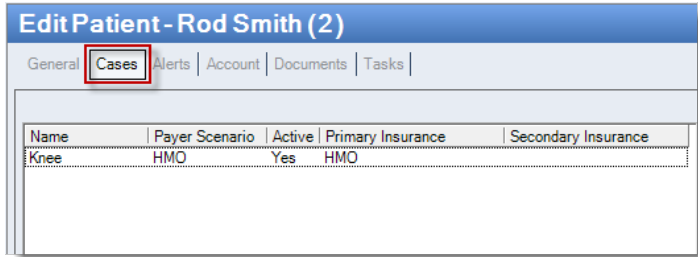
- 7. When you finalize the Addendum, a new (updated) encounter is sent to Kareo PM.
- 8. In Kareo PM, locate the incorrect encounter and delete it.

**Note:** If the encounter has already been submitted to the insurance company, you will need to call the insurance company, prior to submitting the updated claim, and instruct them not to process the original claim to avoid errors or duplication.

### View Cases and Encounters in Kareo PM

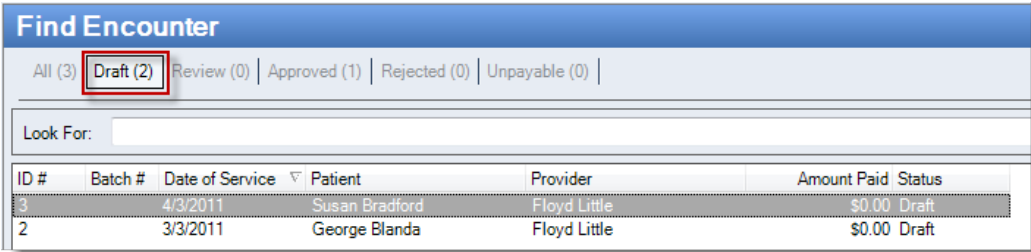
**To view a case in Kareo PM**

- 1. In Kareo PM, click **Patients** in the left menu.
- 2. Once you find the patient record, double-click to open it. Cases from WebPT are located under the Cases tab and will only appear once a Daily Note has been finalized in WebPT.



**To view an encounter in Kareo PM**

- 1. Click **Encounters > Encounters** in the left menu.
- 2. Cases are located under the Draft tab.
- 3. Once you find the encounter, double-click to open it. Encounters will only appear once a Daily Note has been finalized in WebPT.
- 4. If you are satisfied with the information, click **Approve** on the bottom of the window.



## Information Mapping

Information transferred into Kareo PM is dependent upon the information you enter into WebPT.

Patient	Case	Encounter
<ul style="list-style-type: none"> <li>AddressLine1</li> </ul>	<ul style="list-style-type: none"> <li>Authorizations</li> </ul>	<ul style="list-style-type: none"> <li>DiagnosisCode</li> </ul>
<ul style="list-style-type: none"> <li>AddressLine2</li> </ul>	<ul style="list-style-type: none"> <li>AuthorizationID</li> </ul>	<ul style="list-style-type: none"> <li>AuthorizationNumber</li> </ul>
<ul style="list-style-type: none"> <li>City</li> </ul>	<ul style="list-style-type: none"> <li>EndDate</li> </ul>	<ul style="list-style-type: none"> <li>Case</li> </ul>
<ul style="list-style-type: none"> <li>Country</li> </ul>	<ul style="list-style-type: none"> <li>InsurancePlanID</li> </ul>	<ul style="list-style-type: none"> <li>CaseID</li> </ul>
<ul style="list-style-type: none"> <li>DateofBirth</li> </ul>	<ul style="list-style-type: none"> <li>InsurancePlanName</li> </ul>	<ul style="list-style-type: none"> <li>CaseName</li> </ul>
<ul style="list-style-type: none"> <li>EmailAddress</li> </ul>	<ul style="list-style-type: none"> <li>Number</li> </ul>	<ul style="list-style-type: none"> <li>EncounterStatus</li> </ul>
<ul style="list-style-type: none"> <li>Employer</li> </ul>	<ul style="list-style-type: none"> <li>NumberOfVisits</li> </ul>	<ul style="list-style-type: none"> <li>Patient</li> </ul>
<ul style="list-style-type: none"> <li>EmploymentStatus</li> </ul>	<ul style="list-style-type: none"> <li>StartDate</li> </ul>	<ul style="list-style-type: none"> <li>FirstName</li> </ul>
<ul style="list-style-type: none"> <li>EmploymentStatus</li> </ul>	<ul style="list-style-type: none"> <li>InsurancePolicyAuthorizationUpdateReq</li> </ul>	<ul style="list-style-type: none"> <li>LastName</li> </ul>
<ul style="list-style-type: none"> <li>Employer</li> </ul>	<ul style="list-style-type: none"> <li>InsurancePolicyAuthorizationUpdateReq</li> </ul>	<ul style="list-style-type: none"> <li>PatientID</li> </ul>
<ul style="list-style-type: none"> <li>FirstName</li> </ul>	<ul style="list-style-type: none"> <li>CaseID</li> </ul>	<ul style="list-style-type: none"> <li>PostDate</li> </ul>
<ul style="list-style-type: none"> <li>Gender</li> </ul>	<ul style="list-style-type: none"> <li>CaseName</li> </ul>	<ul style="list-style-type: none"> <li>PracticeName</li> </ul>

Patient	Case	Encounter
• HomePhone	• RelatedToAutoAccident	• ReferringProvider
• HomePhoneExt	• RelatedToOther	• FirstName
• LastName	• AccidentDate	• LastName
• MaritalStatus	• InjuryStartDate	• MiddleName
• MiddleName	• PayerScenario	• RenderingProvider
• MobilePhone	• Policies	• FirstName
• MobilePhoneExt	• Active	• LastName
• Practice	• AddressLine1	• MiddleName
• PracticeName	• AddressLine2	• Prefix
• Practice	• City	• Suffix
• Prefix	• CompanyName	• SupervisingProvider
• SocialSecurityNumber	• Copay	• FirstName
• State	• Copay	• LastName
• Suffix	• Country	• MiddleName
• WorkPhone	• InsurancePolicyID	• Prefix



Patient	Case	Encounter
<ul style="list-style-type: none"> <li>• WorkPhoneExt</li> </ul>	<ul style="list-style-type: none"> <li>• Insured</li> </ul>	<ul style="list-style-type: none"> <li>• Suffix</li> </ul>
<ul style="list-style-type: none"> <li>• ZipCode</li> </ul>	<ul style="list-style-type: none"> <li>• AddressLine1</li> </ul>	<ul style="list-style-type: none"> <li>• ServiceEndDate</li> </ul>
<ul style="list-style-type: none"> <li>• DefaultServiceLocation</li> </ul>	<ul style="list-style-type: none"> <li>• AddressLine2</li> </ul>	<ul style="list-style-type: none"> <li>• ServiceLines</li> </ul>
<ul style="list-style-type: none"> <li>• AddressLine1</li> </ul>	<ul style="list-style-type: none"> <li>• City</li> </ul>	<ul style="list-style-type: none"> <li>• ProcedureCode</li> </ul>
<ul style="list-style-type: none"> <li>• AddressLine2</li> </ul>	<ul style="list-style-type: none"> <li>• Country</li> </ul>	<ul style="list-style-type: none"> <li>• ProcedureModifier1</li> </ul>
<ul style="list-style-type: none"> <li>• BillingName</li> </ul>	<ul style="list-style-type: none"> <li>• DateofBirth</li> </ul>	<ul style="list-style-type: none"> <li>• ProcedureModifier2</li> </ul>
<ul style="list-style-type: none"> <li>• City</li> </ul>	<ul style="list-style-type: none"> <li>• Employer</li> </ul>	<ul style="list-style-type: none"> <li>• ProcedureModifier3</li> </ul>
<ul style="list-style-type: none"> <li>• Country</li> </ul>	<ul style="list-style-type: none"> <li>• FirstName</li> </ul>	<ul style="list-style-type: none"> <li>• ServiceStartDate</li> </ul>
<ul style="list-style-type: none"> <li>• FaxPhone</li> </ul>	<ul style="list-style-type: none"> <li>• Gender</li> </ul>	<ul style="list-style-type: none"> <li>• Units</li> </ul>
<ul style="list-style-type: none"> <li>• LocationName</li> </ul>	<ul style="list-style-type: none"> <li>• LastName</li> </ul>	<ul style="list-style-type: none"> <li>• LocationName</li> </ul>
<ul style="list-style-type: none"> <li>• NPI</li> </ul>	<ul style="list-style-type: none"> <li>• PatientRelationshipToInsured</li> </ul>	
<ul style="list-style-type: none"> <li>• Phone</li> </ul>	<ul style="list-style-type: none"> <li>• PolicyThroughEmployer</li> </ul>	
<ul style="list-style-type: none"> <li>• State</li> </ul>	<ul style="list-style-type: none"> <li>• SocialSecurityNumber</li> </ul>	
<ul style="list-style-type: none"> <li>• ZipCode</li> </ul>	<ul style="list-style-type: none"> <li>• State</li> </ul>	
	<ul style="list-style-type: none"> <li>• ZipCode</li> </ul>	

Patient	Case	Encounter
	<ul style="list-style-type: none"><li data-bbox="758 337 909 363">• Insured</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 415 894 441">• PlanID</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 493 947 519">• PlanName</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 571 1087 597">• PolicyGroupNumber</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 649 999 675">• PolicyNumber</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 727 972 753">• Precedence</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 805 877 831">• State</li></ul>	
	<ul style="list-style-type: none"><li data-bbox="758 883 926 909">• ZipCode</li></ul>	