

Your Kareo Success Team



SUCCESS COACH

- ✓ Main Point of Contact
- ✓ Account Manager for first 90-Days
- ✓ Owns overall success of your transition to Kareo



TRAINING SPECIALIST

- ✓ Kareo Product Expert
- ✓ Conduct Customer Training
- ✓ Provides Product Reference Materials & User Guides



ENROLLMENT SPECIALIST

- ✓ Assist with processing of payer enrollment submission (Billing)
- ✓ Assist with setup of eRx and eLabs (Clinical)
- ✓ Provides follow up and status updates from insurance company and clearinghouse