

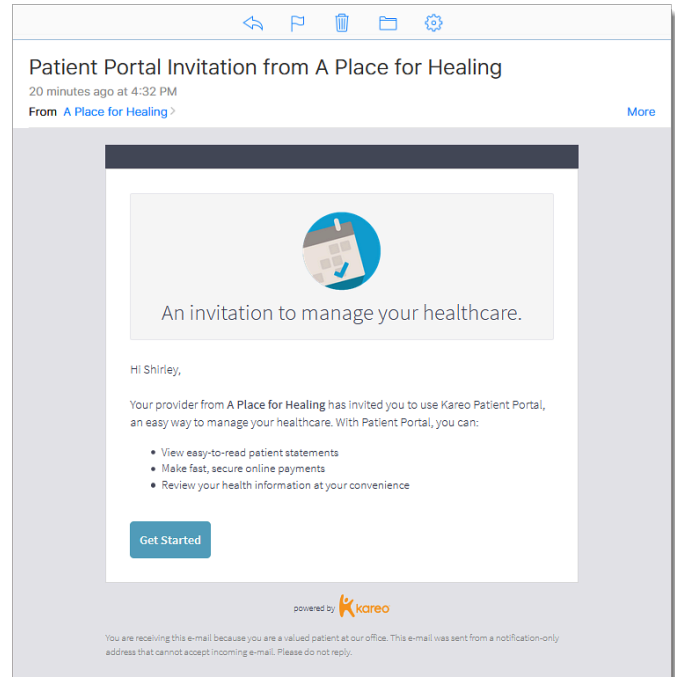
## Patient Experience: Patient Portal

The *Patient Portal* is an easy way for patients to view their health record online. Patients can review their problems, allergies, medications, eLab results, vitals, shared treatment plans, and make an online payment. They can also message their providers and authorize access for a guest to view their account.

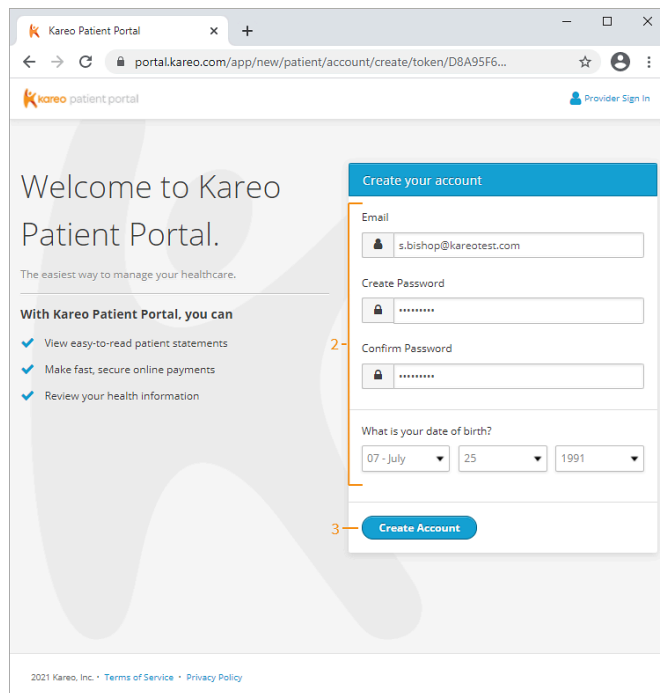
### Activate Patient Portal

After the practice [invites the patient](#) to the *Patient Portal*, the patient receives an email invitation to activate their account.

1. In the email invitation, the patient clicks **Get Started**. The [Patient Portal](#) create account page opens.



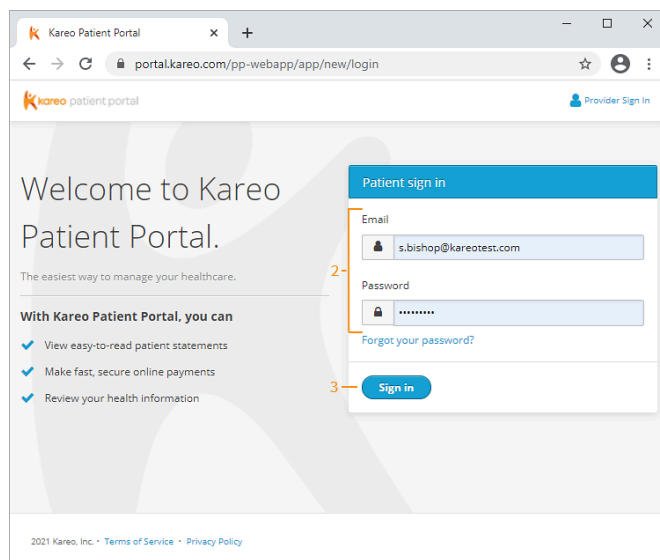
- The patient creates a *Password* and enters their *Date of Birth*.  
Note: The *Email* is auto-populated from the email invitation.
- Patient clicks **Create Account**. The account is created and the [Patient Portal dashboard](#) opens.



## Access Patient Portal

After the account is activated, patients can log into the *Patient Portal* anytime through their mobile device or computer.

- The patient opens [portal.kareo.com](https://portal.kareo.com) in a web browser. The *Patient Portal* page opens.
- Patient enters their *Email* and *Password*.
- Patient clicks **Sign in**. The *Dashboard* opens.



## Navigate Dashboard

- a. **Top Menu:** Click to access the *Dashboard, Health Records, Documents, Messages, Payments, or Itemized Receipt*. Click on the *Patient Name* to access [My Account](#) or to log out.
- b. **Health Records:** Click **View Health Records** to review health information such as: eLab results, vitals, medications, problems, and allergies.
- c. **Documents:** Click **View Documents** to review shared documents such as treatment plans or patient education. A notification displays when a treatment plan signature is requested by the provider.
- d. **Messages:** Click **View Messages** to send and receive messages secure with the provider. A notification displays when a new message is received.
- e. **Payments:** If applicable, click to make an online payment, view the bill, or view previous portal payments.  
*Note:* Practice must be [Stripe activated](#) for patients to access this section.
- f. **Itemized Charge Receipt:** If applicable, click to view and download itemized receipts for their visits.  
*Note:* Practice must enable the [Receipt on Patient Portal setting](#), for patients to access this section.
- g. **About you:** Patient details on file with the practice.
- h. **About your practice:** The practice address and contact information.

The screenshot displays the Kareo Patient Portal dashboard for a user named Shirley Bishop. The top navigation bar includes links for Dashboard, Health Records, Documents, Messages, Payments, Itemized Receipt, and the user's name. The main content area is divided into several sections:

- Health Records:** A blue header section with a sub-header "Health Records". Below it, a message states "With Kareo Patient Portal, you can view your health information." and a button labeled "View Health Records" with a right-pointing arrow and the letter 'b' next to it.
- Documents:** A blue header section with a sub-header "Documents". Below it, a message states "View documents shared with you by your provider." and a notification "Signature needed on Treatment Plan" with a red exclamation mark icon. A button labeled "View Documents" with a right-pointing arrow and the letter 'c' next to it is present.
- Messages:** A blue header section with a sub-header "Messages". Below it, a notification "New Message!" with a red exclamation mark icon. A message states "Send and receive secure messages with your provider. We back Kareo Patient Portal with the latest and greatest security measures." and a button labeled "View Messages" with a right-pointing arrow and the letter 'd' next to it.
- Payments:** A blue header section with a sub-header "Payments". Below it, a notification "\$175.00 Current Balance" with a red exclamation mark icon. A button labeled "Make a Payment" with a right-pointing arrow and the letter 'e' next to it is present.
- Itemized Charge Receipt:** A blue header section with a sub-header "Itemized Charge Receipt". Below it, a message states "View and download the Itemized Charge Receipts of your practice visits." and a button labeled "View Receipts" with a right-pointing arrow and the letter 'f' next to it.

On the right side of the dashboard, there are two sections:

- About you:** A section containing patient details: Name (Shirley Bishop), Date of Birth (07/25/1991), and Contact (68 Bluebird Lane, Irvine, CA 92612, (714) 111-2707). A right-pointing arrow and the letter 'g' are next to this section.
- About your practice:** A section containing practice details: Practice Name (A Place for Healing), Practice Contact (3323 Michelson Dr, Irvine, 926123230, (888) 775-2736). A right-pointing arrow and the letter 'h' are next to this section.

At the bottom of the page, there is a footer with the text "2021 Kareo, Inc. · Terms of Service · Privacy Policy".



## Navigate Health Records

- Actions:** Click to [view](#), [download](#), [send by direct message](#), or [email](#) the summary of care.
- Labs & Studies:** Displays recent [eLab orders](#) and applicable notes. Click **View All** to display all labs. Click on the lab to view results and provider comments.
- Vitals:** Displays [recorded vitals](#).
- Medications:** Displays [active medications](#).
- Problems:** Displays [active problems](#).
- Allergies:** Displays [active allergies](#).

**Kareo patient portal** | Dashboard | Health Records | Documents | Messages | Payments | Shirley Bishop

### Shirley Bishop's Health Records

This record contains your latest health information.

**Labs & Studies** (dropdown menu open)

- View Health Records
- Download Health Record
- Send to New Doctor
- E-mail Health Record

Lab Name	Date	Result
Glucose	02/17/2021	
Lipid Panel	02/17/2021	
Hemoglobin A1c	02/17/2021	Normal results
CBC/D/Pt	02/17/2021	-
Lipid Panel	12/18/2020	-

**Vitals**

Date	BP	HR	Temp	RR	Ht	Wt	BMI	SpO2	Inhaled Oxygen
02/05/2021	120.0 / 80.0	88.0 bpm	97.9 F	17.0 rpm	5' 5"	115 lbs	19.14	--	--
09/22/2020	120.0 / 84.0	85.0 bpm	98.4 F	18.0 rpm	5' 5"	140 lbs	23.3	--	--
08/20/2020	117.0 / 74.0	85.0 bpm	98.7 F	--	5' 5"	118 lbs	19.64	--	--
03/11/2020	120.0 / 80.0	90.0 bpm	97.9 F	--	5' 5"	120 lbs	19.97	--	--

**Medications**

- Augmentin 875 mg-125 mg tablet**
  - Status: Active
  - Frequency: 1 tab(s) twice a day
  - Start Date: 02/05/2021
  - Prescribed by: Diana Hudson

**Problems**

- Dry cough (finding)**
  - Status: Active
  - Start Date: 08/10/2020
- Other acute sinusitis**
  - Status: Active
  - Start Date: 02/05/2021

**Allergies**

- peanut allergen extract**
  - Status: Active
  - Type: DRUG
  - Reaction: Hives
  - Severity: Moderate

**Care Team**

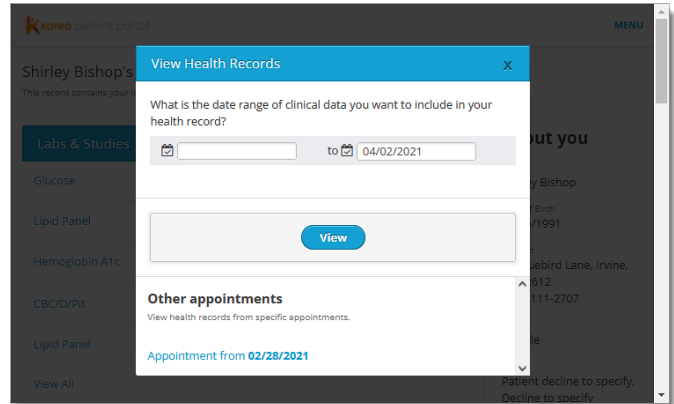
- Practice: A Place for Healing**
  - Contact: 3923 Michelson Dr, Irvine, 92613-2320, (888) 775-2735

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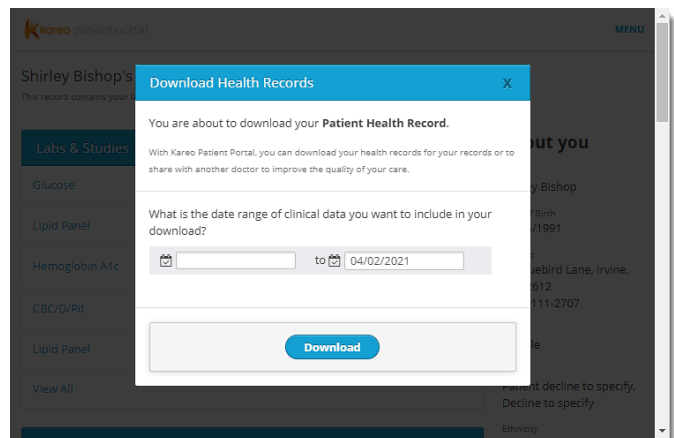
## View Health Record

1. Click **Action** and select *View Health Record*. The *View Health Records* pop-up window opens.
2. View all health records or by specific appointments:
  - To view all health records, select the date range. Then, click **View**. The summary of care opens in a new browser.
  - To view health records from specific appointments, click the Appointment Date. The summary of care opens in a new browser.



## Download Health Record

1. Click **Action** and select *Download Health Record*. The *Download Health Records* pop-up window opens.
2. Select the date range.
3. Click **Download**. A zip file is saved containing the XML files.



## Send to New Doctor

Patient must have the provider's direct message address to use this feature.

1. Click **Action** and select *Send to New Doctor*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's direct message address and optionally add comments.
4. Click **Transmit Record** when finished.

Shirley Bishop's  
This record contains your

**Transmit to Doctor**

You are about to transmit your **Patient Health Record**.  
With Kareo Patient Portal, you can securely transmit your health records to another doctor to improve the quality of your care.

What is the date range of clinical data you want to include in your health record transmission?  
to 04/02/2021

What is the direct message address of the doctor you want to transmit your health record to?

Any comments for the doctor?

Files: patient\_health\_record.xml, cdda-html.xml, patient\_health\_record.html

**Transmit Record** Cancel

Date	BP
02/05/2021	120.0 80.0
09/22/2020	120.0 84.0
08/20/2020	117.0 74.0
03/11/2020	120.0 80.0

## E-mail Health Record

1. Click **Action** and select *E-Mail Health Record*. The *Transmit to Doctor* pop-up window opens.
2. Select the date range.
3. Enter the provider's email address and optionally add comments.
4. Click **Transmit Record** when finished.

Shirley Bishop's  
This record contains your

**Transmit to Doctor**

You are about to transmit your **Patient Health Record**.  
With Kareo Patient Portal, you can securely transmit your health records to another doctor to improve the quality of your care.

What is the date range of clinical data you want to include in your health record transmission?  
to 04/02/2021

What is the email address of the doctor you want to transmit your health record to?

Any comments for the doctor?

Files: patient\_health\_record.xml, cdda-html.xml, patient\_health\_record.html

**Transmit Record** Cancel

Date	BP
02/05/2021	120.0 80.0
09/22/2020	120.0 84.0
08/20/2020	117.0 74.0
03/11/2020	120.0 80.0



## Navigate Documents

- Documents:** Displays treatment plans that [requires a signature](#) by the patient and [shared treatment plans](#). Click to view details and optionally download.
- Patient Education:** Displays [sent patient educations](#). Click **Download** to save the file.

Date Shared	Name	From	
04/01/2021	Treatment Plan (Start Date: 04/12/2021)	Diana Hudson	<a href="#">Signature Requested</a>
12/17/2020	Treatment Plan (Start Date: 12/20/2020)	Diana Hudson	<a href="#">View</a>
02/26/2020	Treatment Plan (Start Date: 03/14/2020)	Diana Hudson	<a href="#">View</a>

Date Shared	Name	From	
02/11/2021	Sinusitis: Care Instructions	Diana Hudson	<a href="#">Download</a>
02/11/2021	Soy Allergy: Care Instructions	Diana Hudson	<a href="#">Download</a>
02/11/2021	Learning About Food Allergies	Diana Hudson	<a href="#">Download</a>

## Navigate Messages

- New Message:** Send new secure message to the provider.
- Inbox:** Displays [messages sent by the provider](#).
- Sent Messages:** Displays message sent to the provider.

**New Message** Diana Hudson Lab results available 3/11/21 3:44 PM

**Inbox**

**Sent Messages**

## Send New Message

- Click **New Message**. The *New Message* page opens.
- Compose message:**
  - Select a provider from the *To* drop-down.
  - Enter the *Subject* and *Message* to the provider.
  - Optionally, attach an image or document (not to exceed 10MB).
- Click **Send Secure Message** when finished. The message display in the provider's [Message Center](#).

**To** Diana Hudson

**Subject** Need Refill

**Message** Hi Dr. Hudson.  
Could you call the pharmacy to approve a refill request?  
927 characters left.

**Attachments** Drop documents here, or [browse for files](#)

**Send Secure Message**



## Navigate Payments

Practice must be [Stripe activated](#) for patients to access this section.

- Current Balance:** Displays the current patient balance. Click [Make a Payment](#) to pay the balance online or click [View your Bill](#) to see the breakdown of the bill or the print the statement.
- Previous Portal Payments:** Displays previous payments made through the *Patient Portal*. Click **View previous payments** to see additional payments.

Kareo patient portal | Dashboard | Health Records | Documents | Messages | Payments | Shirley Bishop

### Payments

**Current Balances** →

**A Place For Healing**  
After insurance, you owe **\$175.00** based on **2 visits**.

[Make a Payment](#) [View your Bill](#)

**Previous Portal Payments** →

**03/01/2021**  
\$25.00  
A Place of Healing

[View Previous Payments](#)

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## View Bill

- Click **View your Bill**. The *Your Bill Details* page opens.
- Print Statement:** Click to print the details of the page.
- Review the breakdown:
  - Click **View Details** to display which code(s) was billed for the specific visit and the breakdown of applicable insurance payments and adjustments.
  - Review total insurance payment, patient payment, and adjustments.
- Payment:** Review the patient balance. Click **Pay this amount** at the top of the page or **Pay Now** at the bottom of the page to [make a payment](#).

Kareo patient portal | Dashboard | Health Records | Documents | Messages | Payments | Shirley Bishop

### A Place For Healing

Questions about your bill? Call (888) 775-2736

#### Your Bill Details

Your total responsibility is **\$175.00**  
Pay this amount → [Print Statement](#)

Here's the breakdown

<b>What was charged</b>	\$300.00
Your visit on 04/01/2021 - <a href="#">View Details</a>	\$100.00
Your visit on 03/29/2021 - <a href="#">Hide Details</a>	\$200.00
Your Doctor for this visit <b>Diana Hudson</b>	
Office Or Other Outpatient Visit For The Evaluation And Management Of A New Patient, Which Requires A Medically Appropriate History And/Or Examination And Straightforward Medical Decision Making, When Using Time For Code Selection, 15-29 Minutes Of Total Time Is Spent On The Date Of The Encounter.	\$200.00
✓ Insurance Payment from Aetna	-\$75.00
✓ Adjustment from Practice	-\$25.00
<b>Your total responsibility for this visit</b>	<b>\$100.00</b>
<b>What insurance has paid</b>	-\$75.00
<b>What you've already paid</b>	-\$25.00
<b>What was adjusted</b>	-\$25.00
<b>What you owe</b>	<b>\$175.00</b>

[Pay Now](#) [Back](#)

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## Make Payment

1. Click **Make a Payment**. The *Make a Payment* page opens.
2. The patient clicks to select the payment amount to pay.  
*Note:* The patient can click **I want to see my statement before I pay** to [view their statement](#) first.
  - "Pay full Amount" to pay the total amount owed.
  - "Pay other amount" to enter a different payment amount.
3. *Payment Method:*
  - If the patient has Apple Pay, Google Pay, or Microsoft Pay set up, click the icon to process the payment.
  - To use a [saved patient payment card](#), select "Use a saved credit card". If there are multiple cards on file, click the drop-down to select the desired card.
  - To manually enter a new card, select "Use a new credit card". Then, populate the *Name on Card*, *Card Number*, *Expiration Date*, and three-digit CVV code.
4. Click **Submit Payment**. The *Payment Successful* page opens with a receipt and the option to print.

A Place for Healing Bill · \$175.00

### Make a Payment

**Payment Amount**

Pay full Amount (\$175.00)

Pay other amount

[I want to see my statement before I pay →](#)

**Choose payment method**

Apple Pay

Use a saved credit card

Visa ending in 8880

Use a new credit card

**Submit Payment** [- Back](#)

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## Navigate Itemized Charge Receipt

Practice must enable the [Receipt on Patient Portal setting](#), for patients to access this section.

1. *Filter:* By default, all receipts from the last year to current date displays. To change the filters, click the *Provider*, *Start Date*, or *End Date* drop-down.
  - To reset the filters, click **Clear filters**.
2. *Download:* Click the **download** icon on a listed visit to generate a PDF of the itemized receipt.
3. *Print:* Use the "Select all" master checkbox or click to select specific visits. Then, click to expand the *Print* options and select to generate a PDF with separate itemized receipts for each visit or to combine all visits in a single itemized receipt when

Shirley Bishop's Itemized Charge Receipts

This record contains your latest itemized charge receipts.

1

Provider: All providers | Start Date: 02/21/2022 | End Date: mm/dd/yyyy | Clear filters

Provider	Date	Amount	Download
<input type="checkbox"/> Diana Hudson 02/11/2023	02/11/2023	\$200	
<input type="checkbox"/> Diana Hudson 01/07/2023	01/07/2023	\$100	
<input type="checkbox"/> Diana Hudson 06/17/2022	06/17/2022	\$100	
<input type="checkbox"/> Diana Hudson 03/01/2022	03/01/2022	\$100	

2

3

Print

Separate receipts

Combine all in a single receipt

< 1 of 1 >

**About you**

Name: Shirley Bishop  
Date of Birth: 07/25/1991  
Contact: 68 Bluebird Lane, Irvine, CA 92612 (888) 775-3726

**About your practice**

Practice Name: A Place for Healing  
Practice Contact: 3323 Michelson Dr Irvine, 92612 (888) 775-2736

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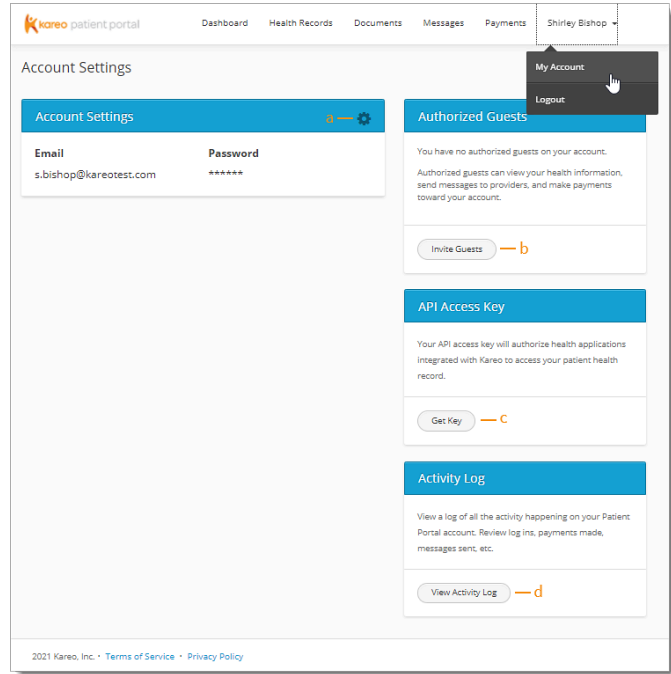


applicable.

**Note:** Only visits for the same practice and service location can be combined in a single receipt.

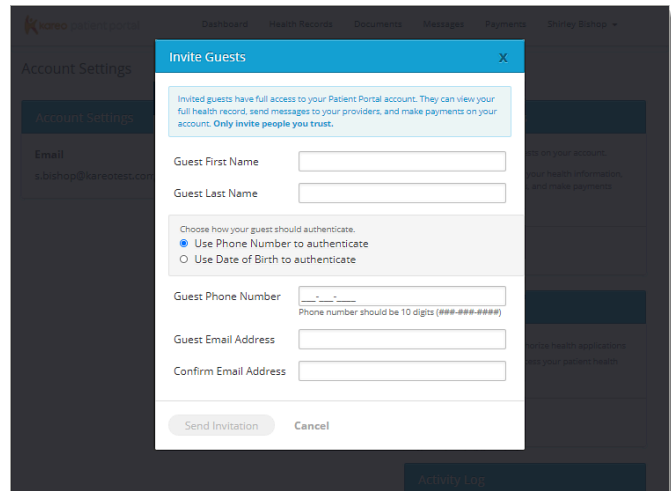
## Navigate My Account

- a. **Account Settings:** Displays the email address associated to the account. Click the **settings** icon to reset the password.
- b. **Authorized Guests:** Click **Invite Guests** to allow authorized users to view the patient's health information, send messages, and make payments. To deny access to an authorized guest, click **Revoke** next to the guest's name.  
**Note:** Authorized users do not have access to the **Account Settings** or **Authorized Guests** sections.
- c. **API Access Key:** Click **Get Key** to generate the API access key that authorizes health applications to integrate with Tebra to access the patient's health record. To deny the generated API key, click **Revoke**. Then, click **Revoke Access** on the confirmation pop-up window.
- d. **Activity Log:** Click **View Activity Log** to review log ins, payments made, messages sent, and more.



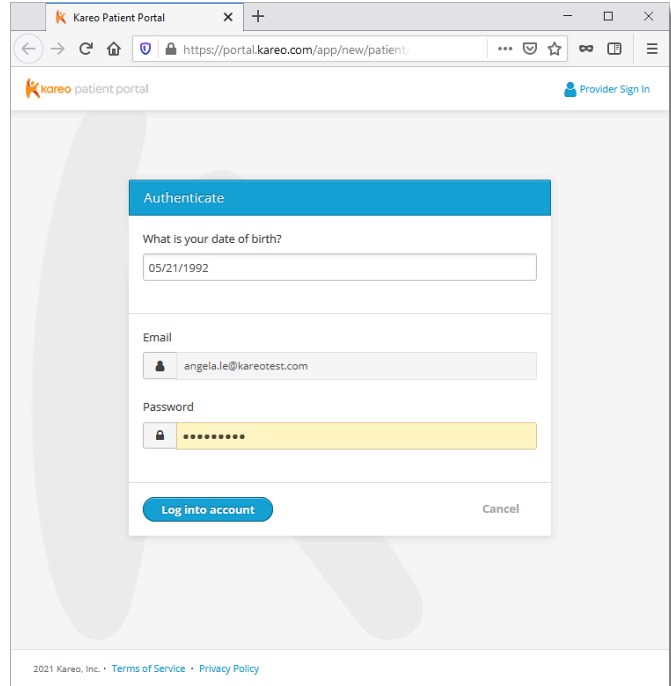
## Invite Guests

1. Click **Invite Guests**. The **Invite Guest** pop-up window opens.
2. Enter the **Guest First and Last Name**.
3. Select how the guest authenticates.
4. Enter the **Guest Phone Number or Date of Birth** and **Email Address**.
5. Click **Send Invitation**. The confirmation pop-up window opens and an email invitation is sent to the invited guest.
6. Continue to add additional guests or click **I'm done** to close the pop-window.

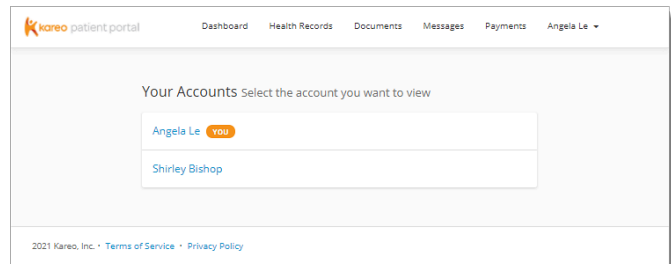


## Invited Guest: Authenticate and Access Account

1. The guest receives an email invitation and click **Get Started**. The *Authenticate* page opens in a new browser.
2. The guest enters their phone number or date of birth for authentication and clicks **Log into account**. The *Your Accounts* page opens.
  - If the guest does not have a *Patient Portal* account, create a password. Then, click **Create Account**. The *Your Accounts* page opens.



3. Select an account to view.
  - If the guest has not been [invited to the Patient Portal](#) by a provider or practice, their name will not display on the list.



## Invited Guest: Switch Users

There are multiple ways a guest can switch between users.

*Note:* If the guest has not been [invited to the Patient Portal](#) by a provider or practice, they will not have access to the options below.

- a. Click the **drop-down** to select a user.
- b. Click **Back to my account** to view their health information.
- c. Click **Patient Name** and select *Switch Users* to open the *Your Accounts* page.

